

# **Gadget Server**

Version 1.1

User's Guide



Document Revision Date: Jan. 27, 2011

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FatWire Gadget Server User's Guide Document Revision Date: Jan. 27, 2011

Product Version: Version 1.1

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### **About This Guide**

This guide describes FatWire Gadget Server, an application designed to display gadgets that deliver website content. It begins with an overview of Gadget Server, moves on to describe the process of enabling gadgets on your content management sites, and shows you how to display those gadgets on web pages.

#### Who Should Use This Guide?

This guide is written for FatWire Gadget Server general administrators, site administrators, and designers. It is assumed that these users have a comprehensive knowledge of their company's site requirements and a basic understanding about gadgets and gadget descriptor XML. All Gadget Server users should also have experience working with the FatWire Content Server Advanced interface and must be familiar with modifying page templates and publishing pages.

#### **Terms and Definitions**

The following terms are used throughout this guide. Italicized terms are also defined in this section.

- **Gadget** refers to a remote piece of functionality that is defined by a gadget descriptor XML file and delivers dynamic content from one website to another.
- **Dashboard** refers to Gadget Server's container interface, which is used to deliver and display multiple gadgets to site visitors. The dashboard displays the *dashboard panel* where selected gadgets are displayed at full size, and a toolbar that opens a *dashboard customization workspace* which is used to personalize the dashboard panel. The workspace presents gadgets as thumbnails, which users and visitors can expand and place on the dashboard panel. The workspace also provides options for modifying dashboard layout and color scheme. The dashboard is available from the *Gadget Server User interface*.
- The **dashboard panel** refers to the space that displays the gadgets users and visitors select from the *dashboard customization workspace*. The gadgets are displayed at full size. The dashboard panel can be configured via the toolbar options to display gadgets in a preferred layout and color scheme.

- The **dashboard customization workspace** refers to the workspace that opens above the dashboard panel when you click one of the toolbar options on the dashboard. The option you select determines the panel that is displayed:
  - The **gadget selection panel** presents gadgets as thumbnail images, which users and website visitors can select and display as full-size gadgets on the dashboard panel.
  - The **layout panel** enables users and website visitors to reposition the gadgets that are displayed on the dashboard panel and adjust their width.
  - The **theme panel** enables users and website visitors to customize the color scheme of the dashboard panel.
- **Dashboard widget tag** refers to the *deployment* tag that is configured with default settings for the dashboard. Administrators and designers deploy this tag on web pages to display the default dashboard to visitors and provide them with personalization tools for their dashboard instances.
- Single gadget widget tag refers to the *deployment* tag that is configured with the settings of a single gadget. In the "Single Gadget Deployment" screen, administrators and designers choose the gadget they wish to deploy from the "Gadget" menu and then deploy the selected gadget's tag on web pages to display an individual instance of that gadget to visitors.
- Gadget with OAuth support refers to a gadget that uses the OAuth protocol for visitor authentication. When Gadget Server is synchronized with the gadget's OAuth Service Provider (which can either be Gadget Server or a third-party website), the gadget can retrieve an authenticated visitor's identity and grant the visitor access to her personalized data from the gadget's OAuth Service Provider. To synchronize a gadget's OAuth Service Provider with Gadget Server, the following information is required:
  - Consumer Key Also known as an API key, this is a value used by the gadget to identify itself to the OAuth Service Provider.
  - Consumer Signature Method The type of digital signature algorithm used to sign requests secured with OAuth (HMAC-SHA1 or RSA-SHA1). The signature process encodes the *consumer key* and *secret* into a verifiable value. This prevents unauthorized parties from using the gadget-specific *consumer key* and *secret* to access a visitor's protected resources.
  - Consumer Secret A secret used by the gadget to establish ownership of the consumer key to the OAuth Service Provider.
- **Deployment** refers to the process of inserting a single gadget's widget tag or the dashboard's widget tag into a page template, and then publishing the page to the website.
- General administrator refers to a user who has administrative privileges to the entire Web Experience Management (WEM) Framework. These users can enable and manage the *Global Gadget Catalog interface* by assigning the Gadget Server application to the site specified in the {cs\_site} variable during the Gadget Server installation process. They can also enable the *Gadget Server User interface* by assigning the Gadget Server application to sites other than the site on which the *Global Gadget Catalog interface* is enabled.

- **Site administrator** refers to a user who is an administrator of her assigned content management site and its applications, including Gadget Server. These users have permissions to all *Gadget Server User interface* functions. However, their main purpose is to manage the CM site's gadgets in the *site gadget catalog*.
- **Designer** refers to a user with privileges to manage the appearance of the default dashboard and deploy the dashboard widget tag and single gadget widget tags on web pages.
- **Site visitor** refers to any visitor of the website.
  - **Authenticated visitor** refers to a site visitor with login credentials to the website. Each authenticated visitor has her own modifiable instance of the dashboard on the website. Preferences set by authenticated visitors are automatically saved.
  - **Anonymous visitor** refers to a site visitor who does not have login credentials to the website. These visitors are able to view and temporarily personalize their instances of the dashboard and the instances of individually deployed gadgets.
- CM site refers to a content management site.
- {cs\_site} The site where the Global Gadget Catalog interface is enabled. This site is specified during the Gadget Server installation process. For more information, see the Gadget Server Installation Guide.
- Global Gadget Catalog interface refers to the Gadget Server application that runs on the site specified in the {cs\_site} variable during Gadget Server's installation process. This interface provides general administrators with the *global gadget catalog*.
- Gadget Server User interface refers to the Gadget Server application that runs on a site other than the site on which the Global Gadget Catalog interface is enabled. This interface provides a site's administrators and designers with a *site gadget catalog*, a dashboard, "Permissions" and "Settings" screens, a single gadget *deployment* screen, and a dashboard *deployment* screen.
- The **global gadget catalog** is managed by general administrators. The global gadget catalog is the central repository for storing gadgets and distributing the gadgets to various sites. When gadgets are registered to the global gadget catalog, they can be enabled on CM sites via *site gadget catalogs*, provided by the Gadget Server application running on those sites. (Gadgets can also be registered directly to a site gadget catalog.)
- A **site gadget catalog** is specific to the site on which the Gadget Server User interface is enabled. It is provided by the Gadget Server User interface for the purpose of storing the site's gadgets and making them available on the *dashboard* and for single gadget deployment. A site gadget catalog, its dashboard, and its "Single Gadget Deployment" screen are dynamically associated. Site gadget catalogs are managed by site administrators.
- **Gadget Descriptor URL** refers to the URL of a gadget's descriptor XML file. The file contains the code responsible for rendering the gadget.
- Registering gadgets refers to specifying their metadata and descriptor URLs in the Global Gadget Catalog interface or a Gadget Server User interface.
- **Enabling gadgets** refers to making gadgets that are registered with the *global gadget* catalog available on site gadget catalogs.

### Chapter 1

# **Introducing FatWire Gadget Server**

This chapter provides an overview of the FatWire Gadget Server application. It also provides information about the roles that can be assigned to Gadget Server users to grant them permissions to Gadget Server interface functions.

This chapter contains the following sections:

- Overview
- Gadget Catalogs
- Gadget Sources
- Gadgets with OAuth Support
- Gadget Registration and Deployment
- Gadget Server Interfaces
- Gadget Server Roles and Permissions

### **Overview**

Gadgets are remote pieces of functionality that deliver dynamic content, such as news feeds and articles from one website to another. FatWire Gadget Server is a gadget container application that runs on the FatWire Web Experience Management (WEM) Framework. Gadget Server enables you to deploy to your website individual gadgets (Figure 1) and/or a dashboard containing one or more gadgets (Figures 2 – 5).

Each visitor is provided with her own instance of a gadget and/or dashboard. The visitor can edit her gadgets' settings (if available) and customize the dashboard. If the gadget is configured with OAuth support and the visitor is authenticated, Gadget Server can retrieve the visitor's personalized data and/or deliver the gadget's personalization functionality from the gadget's OAuth Service Provider.

Figure 1: Deployed gadget

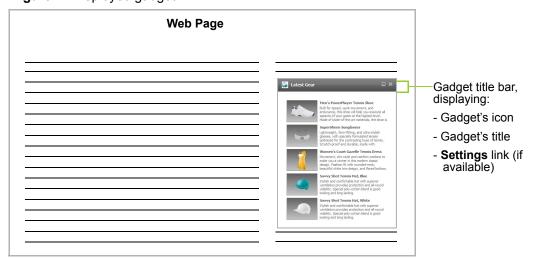
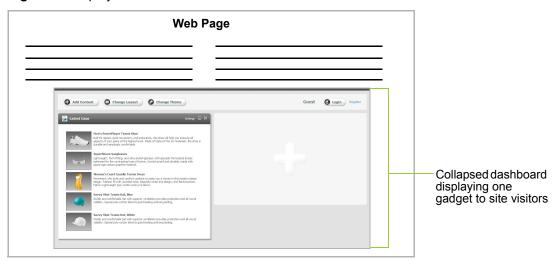


Figure 2: Deployed dashboard



The dashboard has a customization workspace with three types of collapsible panels: gadget selection panel (Figure 3), gadget layout panel (Figure 4), and color theme panel (Figure 5).

Figure 3: Expanded dashboard displaying the gadget selection panel

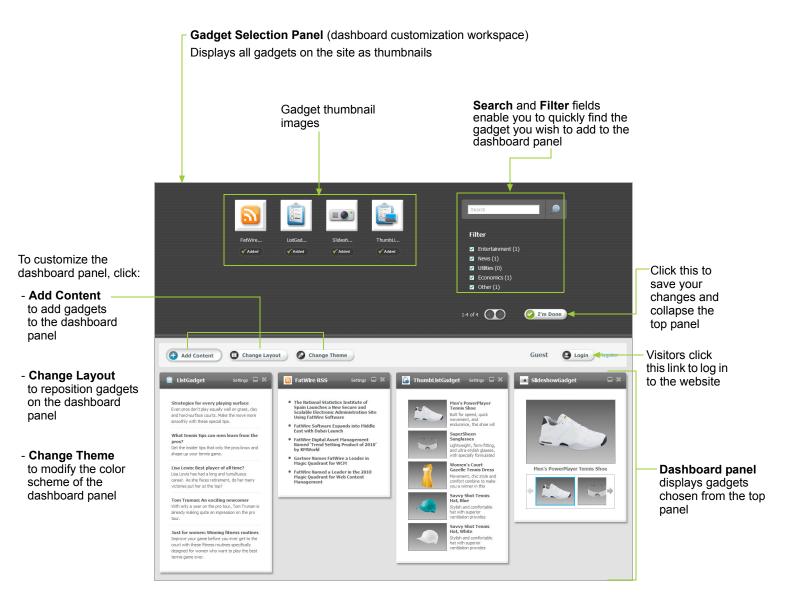


Figure 4: Expanded dashboard displaying the gadget layout panel

Gadget Layout Panel (dashboard customization workspace)
Displays all available gadget layout options

Selected layout applied to the dashboard panel

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Customization workspace

Selected layout applied to the dashboard panel

Customization workspace

Customizat

Figure 5: Expanded dashboard displaying the color theme panel

Color Theme Panel (dashboard customization workspace)
Displays all available color options

Selected color scheme applied to the dashboard panel

Was provided to the dashboard panel

Company

Add Control

Add Cont

### **Gadget Catalogs**

Gadgets can be deployed only when they are registered to a site gadget catalog, either directly or from the global gadget catalog. The catalogs are provided in Gadget Server's interfaces – the Global Gadget Catalog interface and the Gadget Server User interface:

- The global gadget catalog is available only from the Global Gadget Catalog interface. The Global Gadget Catalog interface is enabled when Gadget Server is assigned to the site specified as {cs site}.
  - The global gadget catalog is used to distribute gadgets to as many site catalogs as necessary. Which in turn makes the gadgets available for single and dashboard deployment. For example, registering a gadget to the global gadget catalog makes that gadget available for administrators to enable it on multiple site gadget catalogs, without registering the gadget separately on each desired site gadget catalog.
- Site gadget catalogs are local and specific to each site on which the User interface is enabled. The User interface is enabled when Gadget Server is assigned to sites other than the site on which the Global Gadget Catalog interface is enabled. Along with the site gadget catalog, the User interface features the dashboard (Figures 3 5), the "Permissions" and "Settings" screens, and screens for single gadget and dashboard deployment.

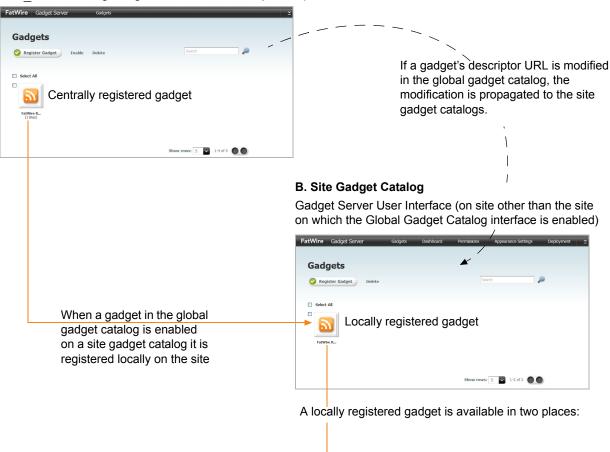
The dashboard and the single gadget deployment screen are dynamically associated with the site gadget catalog. As shown in Figure 6B, registering a gadget to the catalog makes that gadget available for individual deployment and places that gadget on the dashboard, as a thumbnail image on the selection panel. (Selecting the thumbnail on the gadget selection panel expands the gadget and places it on the dashboard panel.) The site gadget catalog stores gadgets' metadata. If modifications are made to the metadata, they are propagated to individually deployed gadgets and to the gadgets' instances on the dashboard.

Figure 6 summarizes the process of how administrators make gadgets available for single and dashboard deployment. Gadgets can be registered to the site gadget catalog either directly (from the User interface) or from the global gadget catalog (in the Global Gadget Catalog interface).

Figure 6: Making gadgets available for single and dashboard deployment

#### A. Global Gadget Catalog

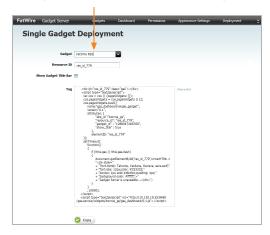
Global Gadget Catalog Interface (on the site specified as {cs site} during Gadget Server's installation process)



On the gadget selection panel, as a thumbnail for dashboard deployment



In the "Gadget" menu of the "Single Gadget Deployment" screen for individual deployment



### **Gadget Sources**

Gadgets are defined by descriptor XML files, which contain the gadgets' logic and data. The source of each XML file is a URL that we call the Gadget Descriptor URL (served by the gadget provider).

Gadgets can be obtained from third-party sources (such as iGoogle), or they can be created in Content Server's Advanced interface. Gadget Server's dashboard supports the following content types for gadgets: text/html, text/xml, and application/xml.

Gadgets must be registered to a site gadget catalog, either directly or from the global gadget catalog, if they are to be made available on the Gadget Server User interface, and from there deployed to the website. When registering a gadget, you specify the URL of the gadget's descriptor XML:

- For third-party gadgets, you can obtain the URL by viewing the gadget's source code and noting its URL in the address bar.
- For CS-Based gadgets, you can obtain the URL of the gadget's descriptor XML by
  previewing the CS-Based Gadget asset, using the ListSiteGadgets template.
  This template is provided with the sample gadgets that were created by FatWire for
  Gadget Server.

### **Gadgets with OAuth Support**

Gadgets with OAuth support enable visitors to access certain types of personalized data (usually private data that can be accessed only with the visitor's authorized credentials) from the gadget's **OAuth Service Provider**. An OAuth Service Provider is the website on which the gadget and the visitor's personalized data is hosted.

Gadgets with OAuth support contain an OAuth section in their descriptor XML. This OAuth section specifies the gadget's OAuth Service Provider. The OAuth section of a gadget's descriptor XML looks similar to the following code snippet taken from the ModulePrefs section of the sample List Gadget's descriptor XML:

Gadgets with OAuth support can securely retrieve a visitor's identity to grant that visitor access to her personalized data, without storing any of the visitor's data or credentials on Gadget Server. Instead, Gadget Server is used as a proxy to transfer requests between the gadget and the gadget's OAuth Service provider:

- If you deployed a CS-Based gadget with OAuth support, the gadget can obtain a given visitor's session directly from the dashboard's visitor session bar (if the visitor is authenticated and the gadget's OAuth Service Provider is Gadget Server).
- If the gadget (CS-Based or third-party) or the visitor's personalized data is hosted on a third-party OAuth Service Provider, the visitor must log in to the third-party website. Usually a "Login" link is displayed inside the gadget's content. When the visitor clicks the link, a "Login" form for the gadget's OAuth Service Provider is displayed in a pop-up window.

Once the OAuth Service Provider validates the visitor's credentials, Gadget Server delivers the visitor's personalized data to the gadget. The gadget, in turn, displays that data to the visitor.

#### Note

All requests that Gadget Server transfers between the gadget and the gadget's OAuth Service Provider are secured with a gadget specific consumer key, consumer signature method, and consumer secret. This information is required when registering an OAuth-enabled gadget, whose OAuth Service Provider is a third-party website, to the global or a site gadget catalog. For more information, see Chapter 4, "Registering Gadgets."

Figure 7, on page 17 illustrates the process of how a gadget retrieves a visitor's personalized data, without storing any of the visitor's information on Gadget Server.

6. The gadget receives the OAuth session token and displays the requested data to the visitor. 2. The gadget makes a request to the User Service to authenticate the visitor and load the visitors personalized data. Gadget Server 5. Once the visitor is 3. Gadget Server authenticated, the proxies the request OAuth session starts to the User Service and the User to obtain an OAuth 1. Visitor clicks the "Login" link to make a request Service serves the session token. requested data to for her personalized Gadget Server. data. User Service (OAuth Service Provider) 4. The User Service display the log in form to the visitor in a pop-up window. This form shows the authorization URL where the visitor's credentials and personalized data are stored.

The visitor provides her user name and password which the User Service then validates.

Figure 7: Personalized data retrieval as seen in the sample List Gadget



### **Gadget Registration and Deployment**

Figure 8 provides a closer look at the process of registering a gadget in the global gadget catalog, enabling that gadget on a site gadget catalog, and deploying that gadget either individually, or on the dashboard.



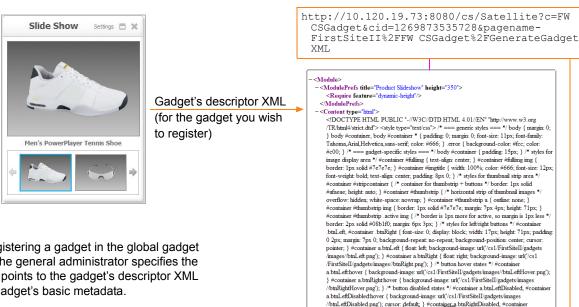
#### **Deploying and Updating Gadgets**

To deploy gadgets, you can either insert the dashboard widget tag or the widget tag for a single gadget into a page's template and then publish that page.

Once the dashboard or the individual gadget instance is deployed, any modifications made to the gadget's metadata or the dashboard from the site's Gadget Server User interface are dynamically updated to the website. Therefore, you do not need to re-deploy the gadget instance or dashboard, unless you want to display the gadget or dashboard on other pages of the website.

Figure 8: Basic details for registering and deploying a gadget (continued on pages 20 and 21)

A gadget is defined by an XML file (gadget descriptor file) responsible for rendering the gadget.



When registering a gadget in the global gadget catalog, the general administrator specifies the URL that points to the gadget's descriptor XML and the gadget's basic metadata.

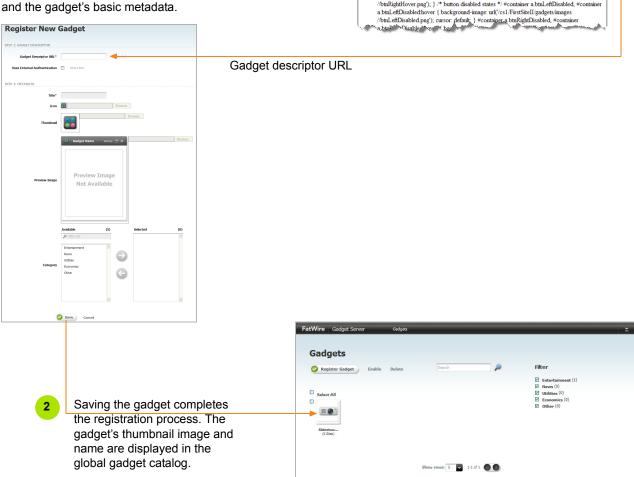


Figure 6: Basic details for registering and deploying a gadget (continued from page 19)

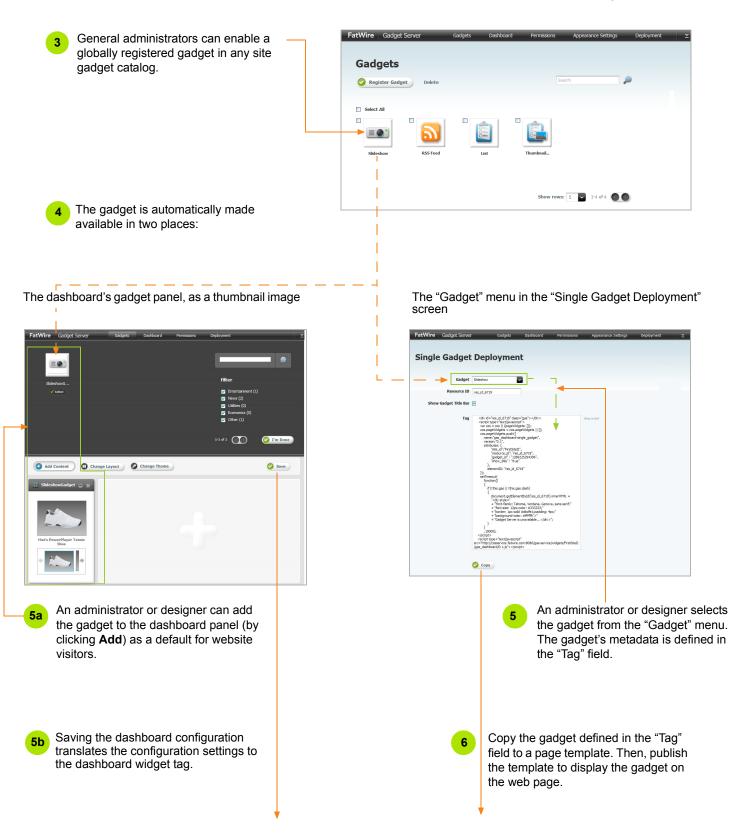
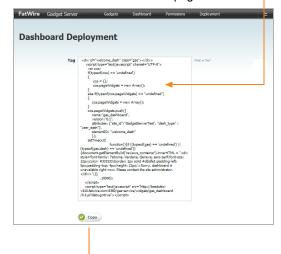


Figure 6: Basic details for registering and deploying a gadget (continued from page 20)

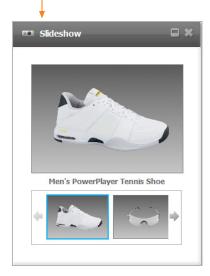
6 Copy the dashboard defined in the "Tag" field to a page template. Then, publish the template to display the dashboard on the web page.



Modifications made to the dashboard are dynamically updated on the deployed dashboard.



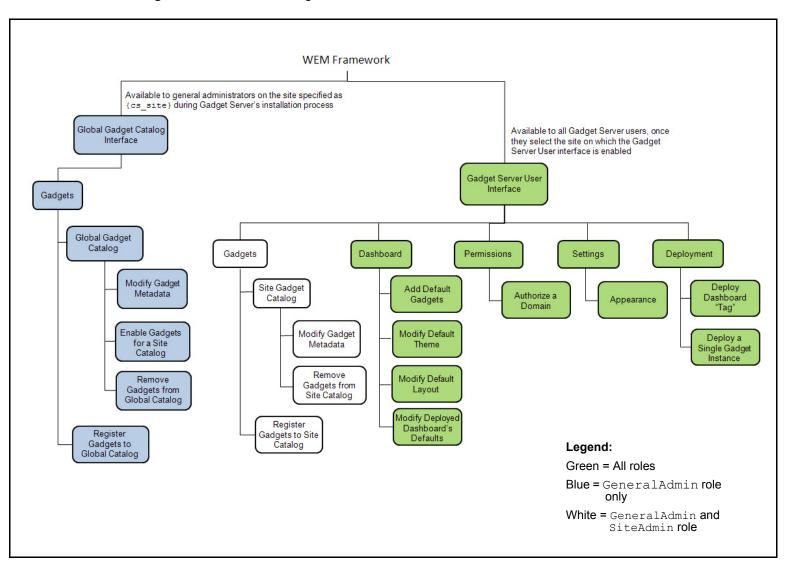
Modifications made to the gadget's metadata in the site gadget catalog are dynamically updated on the deployed gadget.



### **Gadget Server Interfaces**

The Gadget Server application provides two types of interfaces: the Global Gadget Catalog interface and the Gadget Server User interface. The Global Gadget Catalog interface is displayed when Gadget Server is assigned to the site specified as {cs\_site} during Gadget Server's installation process. The Gadget Server User interface is displayed when Gadget Server is assigned to a site other than the site on which the Global Gadget Catalog interface is enabled. Figure 7 illustrates the functions associated with each type of Gadget Server interface and identifies roles that have permissions to those interface functions.

Figure 7: Overview of Gadget Server's Interfaces



# **Gadget Server Roles and Permissions**

Once the Gadget Server application is installed on the WEM Framework and assigned to the site specified as {cs\_site}, and at least one other CM site, general administrators can assign selected users roles to work in the application. The roles are GeneralAdmin, SiteAdmin, and Designer.

Certain permissions are shared by the roles, as indicated in Table 1. For example, all Gadget Server users are able to add default gadgets to the dashboard panel.

**Table 1:** Gadget Server roles and permissions

Permissions	Gadget Server Roles			For Information,
remissions	GeneralAdmin	SiteAdmin	Designer	See
Enable the Global Gadget Catalog Interface	<b>√</b>			"Enabling the Global Gadget Catalog Interface," on page 26
Enable a Gadget Server User Interface	<b>√</b>	<b>√</b>		"Enabling the Gadget Server User Interface for Existing Site Users," on page 27
Register Gadgets to the Global Gadget Catalog	✓			"Registering Gadgets to the Global Gadget Catalog," on page 36
Register Gadgets to a Site Gadget Catalog	<b>√</b>	<b>√</b>		"Registering Gadgets to a Site Gadget Catalog," on page 40
Remove Gadgets from the Global Gadget Catalog	<b>✓</b>			"Deleting Gadgets from the Global or Site
Remove Gadgets from a Site Gadget Catalog	<b>√</b>	✓		Gadget Catalog," on page 41
Enable Gadgets for a Site Gadget Catalog	<b>√</b>			"Enabling Gadgets from the Global Gadget Catalog," on page 44
Modify Gadget Metadata	<b>√</b>	✓		"Modifying a Gadget's Metadata," on page 46
Add Gadgets to the Dashboard as Defaults	<b>√</b>	<b>√</b>	✓	"Adding or Removing Default Dashboard Gadgets," on page 51
Modify the Dashboard's Default Layout	<b>√</b>	<b>√</b>	<b>√</b>	"Modifying the Default Layout of the Dashboard," on page 52

Table 1: Gadget Server roles and permissions

Permissions	Gadget Server Roles			For Information,	
i eiiiissioiis	GeneralAdmin	SiteAdmin	Designer	See	
Modify the Dashboard's Default Color Theme	<b>√</b>	<b>√</b>	<b>√</b>	"Modifying the Default Color Theme of the Dashboard," on page 53	
Authorize a Domain	<b>√</b>	✓	<b>√</b>	"Authorizing the Gadgets' Domain," on page 54	
Configure Appearance Settings for Gadget Server	<b>√</b>	✓	✓	"Configuring Gadget Server Appearance Settings," on page 55	
Deploy the Dashboard "Tag"	<b>√</b>	<b>√</b>	✓	"Deploying the Dashboard Widget Tag," on page 56	
Deploy an Individual Gadget's "Tag"	<b>√</b>	✓	✓	"Deploying a Single Gadget," on page 60	
Modify the Deployed Dashboard's Defaults	<b>√</b>	✓	<b>√</b>	"Modifying the Deployed Dashboard," on page 61	

#### GeneralAdmin

Users assigned the GeneralAdmin role are administrators of the entire WEM Framework. These users can enable and manage the Global Gadget Catalog interface on the site specified as {cs\_site}. They can also enable the Gadget Server User interface on sites other than the site on which the Global Gadget Catalog interface is enabled. These users manage the global gadget catalog, which is contained in the Global Gadget Catalog interface.

#### SiteAdmin

Users assigned the SiteAdmin role are administrators of their assigned content management sites and its applications, including Gadget Server. These users have permissions to all Gadget Server User interface functions. However, their main purpose is to manage the CM site's gadgets in the site gadget catalog.

#### Designer

Users assigned the Designer role are able to manage the appearance of the default dashboard and deploy the dashboard widget tag and single gadget widget tags on web pages.

### Chapter 2

# **Enabling the Gadget Server Interfaces**

Gadget Server supplies two interfaces – the Global Gadget Catalog interface and the Gadget Server User interface. This chapter provides information about enabling the Global Gadget Catalog interface (on the site specified as {cs\_site} during the Gadget Server installation process). It also provides information and instructions about enabling the User interface (on sites other than the site on which the Global Gadget Catalog interface is enabled).

This chapter contains the following sections:

- Enabling the Global Gadget Catalog Interface
- Enabling the Gadget Server User Interface for Existing Site Users

### **Enabling the Global Gadget Catalog Interface**

The Global Gadget Catalog interface provides general administrators with the global gadget catalog. Gadgets registered to this catalog can be enabled on any site gadget catalog.

To enable the Global Gadget Catalog interface, a general administrator must assign the Gadget Server application to the CM site specified as {cs\_site}. For instructions about enabling the Global Gadget Catalog interface, see the *Gadget Server Installation Guide*.

#### Note

The site on which the Global Gadget Catalog interface will be enabled must exist on Content Server's delivery system. For information about mirroring a site, see the *Content Server Administrator's Guide*.

For instructions on logging in to the Global Gadget Catalog interface, see Chapter 3, "Getting Started."

### **Enabling the Gadget Server User Interface**

The Gadget Server User interface is enabled by administrators assigning Gadget Server to sites other than the site on which the Global Gadget Catalog interface is enabled. A site's Gadget Server User interface provides administrators with a site gadget catalog. It also provides all users assigned the GeneralAdmin, SiteAdmin, or Designer role with the site gadget catalog's associated dashboard, the "Permissions" and "Settings" screens, and the screens for single gadget and dashboard deployment.

The site gadget catalog is used to register gadgets directly to the site and to contain gadgets that were enabled from the global gadget catalog. The dashboard and its deployment screen are used to display multiple gadgets to website visitors, and the single gadget deployment screen is used to display a single instance of a gadget to visitors.

#### **Note**

The site on which you wish to enable the Gadget Server User interface must exist on the Content Server delivery system. For information about mirroring a site, see the *Content Server Administrator's Guide*.

### **Enabling the Gadget Server User Interface for Existing Site Users**

To enable site users to access the Gadget Server User interface on their site, you must assign them at least one of the roles assigned to the Gadget Server application. The roles are GeneralAdmin, SiteAdmin, or Designer.

#### To enable the Gadget Server User interface for existing site users

- 1. If the site on which you wish to enable the Gadget Server User interface does not exist on the Content Server delivery system, mirror it (for instructions, see the *Content Server Administrator's Guide*).
- **2.** Log in to the WEM Framework as a general or site administrator.
- 3. Select the AdminSite, and the WEM Admin application icon.



- **4.** In the "Sites" screen, mouse over a site (other than the site on which the Global Gadget Catalog interface is enabled) on which you wish to enable the Gadget Server User interface, and click **Manage Site Apps**.
- 5. In the "Manage Site Apps" screen, click Assign Apps.
- **6.** In the "Select Apps for Site" form, select the **Gadget Server** application from the "Available" list box and move it to the "Selected" list box.
- 7. Click Continue.
- 8. In the "Assign Roles to App" form, select the **GeneralAdmin**, **SiteAdmin**, and **Designer** roles from the "Available" list box, and move them to the "Selected" list box
- **9.** Click **Save and Close**. The Gadget Server User interface is now available to the site users assigned one of the roles assigned to Gadget Server (GeneralAdmin, SiteAdmin, and Designer).

#### **10.** Next steps:

- If you want to assign users roles to work in the site's Gadget Server User interface, see Enabling the Gadget Server User Interface for New Users.
- If you want to register gadgets directly to the site's gadget catalog, see Chapter 3, "Getting Started" for instructions on logging in to the site's Gadget Server User interface.

#### **Enabling the Gadget Server User Interface for New Users**

To enable new users to access a site's Gadget Server User interface, you must assign the users to the site and then assign them at least one of the roles assigned to the Gadget Server application. The roles are GeneralAdmin, SiteAdmin, and Designer. For detailed information about the roles assigned to Gadget Server, see "Gadget Server Roles and Permissions," on page 23.

#### To enable the Gadget Server User interface for new users

- 1. Log in to the WEM Framework as a general or site administrator, access the **AdminSite**, and select the **WEM Admin** application icon.
- 2. In the "Sites" screen, mouse over the site on which you enabled the Gadget Server User interface, and click **Manage Site Users**.



- 3. In the "Manage Site Users" screen, click Assign Users.
- **4.** In the "Select Users for Site" form, select the users you wish to assign to the site from the "Available" list box, and move them to the "Selected" list box.
- 5. Click Continue.
- **6.** In the "Assign Roles to User" form, select either the **GeneralAdmin**, **SiteAdmin**, or **Designer** role from the "Available" list box, and move the role(s) to the "Selected" list box. (For more information about the roles, see Table 1, on page 23.)
  - Selecting GeneralAmin or SiteAdmin gives the user(s) administrative access to
    the site's Gadget Server User interface, and all the other applications assigned to
    that site.

#### Note

The General Admin role's main purpose is to give users access to the Global Gadget Catalog interface. However, the user must be assigned to the site on which the Global Gadget Catalog interface is enabled to gain access. For more information, see the *Gadget Server Installation Guide*.

- Selecting Designer gives the user(s) access to the site's Gadget Server User interface, and enables the user(s) to manage and deploy the site's gadgets and dashboard.

#### 7. Click Save and Close.

The users you assigned to the site are able to access the Gadget Server User interface on that site. For instructions on logging in to a Gadget Server User interface, see Chapter 3, "Getting Started."

### Chapter 3

# **Getting Started**

This chapter provides instructions for logging in to the Gadget Server interfaces.

This chapter includes the following sections:

- Logging In
- Sample Gadgets
- Next Steps

### Logging In

The Gadget Server application is associated with the WEM Framework. The Global Gadget Catalog interface can be accessed by general administrators when they log in to the site on which this interface is enabled. When assigned to sites other than the site on which the Global Gadget Catalog interface is enabled, Gadget Server displays its User interface to site users with role GeneralAdmin, SiteAdmin, or Designer.

#### To log in to the Global Gadget Catalog interface or the Gadget Server User interface

1. Access the WEM Framework at the following URL:

http://<server>:<port>/<application context>/login

where <server> is the host name or IP address of the server running the WEM Framework, <port> is the port number of the Content Server application, and <application context> is the name of the web application that was deployed on the server.

2. Access the Gadget Server application by logging in to the WEM Framework. Log in credentials are case-sensitive.

In this guide we are using the default login credentials of a general administrator:

Username - fwadmin

Password - xceladmin



- 3. Click Login.
- **4.** If you are logging in for the first time, or logging in to a site you have never accessed before, the following screen is rendered:



- To access the Global Gadget Catalog interface, select the site on which it was enabled, and then click the **Gadget Server** icon.



- To access the Gadget Server User interface, select the desired site on which it was enabled, and then click the **Gadget Server** icon.

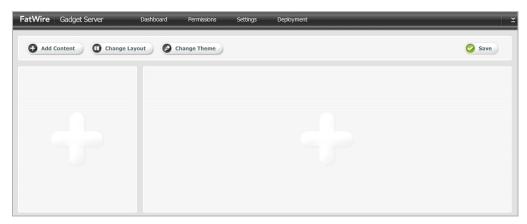


- **5.** Your interface is one of the following:
  - If you logged in to the site on which the Global Gadget Catalog interface is enabled, the global gadget catalog is displayed. If no gadgets were registered, you see the following screen:



The Global Gadget Catalog interface contains the global gadget catalog, where general administrators can first register gadgets (CS-based or third-party), and then enable them on any site gadget catalog.

- If you logged in to a site on which the Gadget Server User interface is enabled, one of two screens will be displayed to you depending on your assigned role:
  - If you are assigned the Designer role, the dashboard configuration screen is displayed. If no gadgets were registered to the site gadget catalog, you will see the following screen:



- If you are assigned the GeneralAdmin or SiteAdmin role, the site gadget catalog is displayed. If no gadgets were registered to the site gadget catalog, you will see the following screen:



The Gadget Server User interface contains the site gadget catalog, dashboard, "Permissions" and "Settings" screens, dashboard deployment tag, and single gadget deployment tags for the site to which you logged in. Your access to these screens depends on your assigned role.

### **Sample Gadgets**

In this guide we assume that the Gadget Server Samples Module was installed on the FirstSite II sample site of your Content Server system. Installing the sample module:

- Installs the FW\_CSGadget (CS-Based Gadget) asset type, from which sample and custom gadgets are created.
- Enables the FW\_CSGadget (CS-Based Gadget) asset type on FirstSite II.
- Installs sample gadgets on FirstSite II (see Table 2).
- Installs assets that provide content for the sample gadgets.
- Provides templates that render the gadgets. These templates (Table 3) are required for all gadgets (sample and custom).

Table 2: Sample CS-Based Gadgets

Sample CS-Based Gadget	Description
ListGadget	Displays a list of articles on the FirstSite II sample site. This gadget supports OAuth, which means a visitor can authorize the gadget to retrieve her personalized data (in this case, the visitor's user name and profile picture) from the gadget's OAuth Service Provider (which is Gadget Server in this example).
RSSGadget	Displays a list of entries from an RSS feed.
SlideshowGadget	Displays a list of Product images in a slideshow format.
ThumbListGadget	Displays a list of products with thumbnail images.

Table 3: The Templates

Templates	Description
ListSiteGadgets	Lists URLs of the gadget descriptor XML files.
GenerateGadgetXML	Starts the process of rendering a gadget's descriptor XML.

More information about the Gadget Server Samples Module is available in the *Gadget Server Developer's Guide*.

### **Next Steps**

Now that you are familiar with the Gadget Server interfaces, you can start registering the sample gadgets and third-party gadgets to the global gadget catalog or site gadget catalogs, depending on your assigned role(s). For information and instructions about registering gadgets, see Chapter 4, "Registering Gadgets."

### Chapter 4

# **Registering Gadgets**

This chapter contains instructions on registering gadgets to the global gadget catalog and site gadget catalogs. It also contains instructions on removing gadgets from the catalogs.

This chapter contains the following sections:

- Registering Gadgets to the Global Gadget Catalog
- Registering Gadgets to a Site Gadget Catalog
- Deleting Gadgets from the Global or Site Gadget Catalog

### Registering Gadgets to the Global Gadget Catalog

When Gadget Server is assigned to the site specified as {cs\_site}, it displays the Global Gadget Catalog interface. This interface consists of the global gadget catalog, which is the main repository for your company's gadgets and provides a way for general administrators to distribute gadgets to site gadget catalogs. Once gadgets are enabled on a site gadget catalog, they are made available for single gadget deployment and they are placed on the catalog's associated dashboard, as thumbnails on the gadget selection panel.

#### To register a gadget with the global gadget catalog

- 1. Log in to the WEM Framework as a general administrator.
- **2.** Access the site on which the Global Gadget Catalog interface is enabled, and select the **Gadget Server** icon.

The "Gadgets" screen opens:



**3.** In the "Gadgets" screen, click **Register Gadget**.



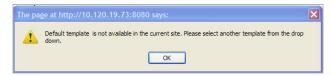
### The "Register New Gadget" screen opens:

- **4.** In the "Gadget Descriptor" section of the registration form, fill in the following fields:
  - **a.** In the "Gadget Descriptor URL" field, enter the URL of the gadget's descriptor XML, which contains the gadget's attributes and specifies the source of content.

### Locate and specify the gadget's descriptor URL

- If you are registering a third-party gadget, view the gadget's XML descriptor, copy its URL, and paste the URL into the "Gadget Descriptor URL" field.
- If you are registering a CS-Based Gadget asset, follow the steps below to render a list of CS-Based Gadget asset descriptor URLs:
  - 1) Access the Content Server Advanced interface.
  - 2) Select the site where CS-Based Gadget assets are available (FirstSite II by default).
  - **3)** Locate the gadget you wish to register:
    - a) In the button bar, click **Search**.
    - b) In the "Search" list, select Find CS-Based Gadget.
    - c) Click Search.
    - d) Select any given CS-Based Gadget asset.

**4)** In the gadget's "Inspect" form, click **Preview**. The following message is displayed:



- 5) Click OK.
- 6) In the "Template" field, select ListSiteGadgets.
- 7) The descriptor URLs for all CS-Based Gadget assets are listed in the preview screen. Copy the descriptor URL of the gadget you wish to register, and paste the URL into the "Gadget Descriptor URL" field.

Gadget Server processes the gadget descriptor URL to ensure the gadget is valid. Once the gadget is validated, Gadget Server dynamically extracts the gadget's default metadata (if available) and populates the fields in the "Metadata" section with the extracted data.

- **b.** If you are registering a CS-Based gadget with OAuth support, and the gadget uses Gadget Server as its OAuth Service Provider, then the gadget's consumer key, signature method, and secret are already known to Gadget Server. Therefore, the synchronization between the gadget and Gadget Server is automatic. Continue with step 5.
- **c.** If you are registering an OAuth-enabled gadget whose OAuth Service Provider is a third-party website, the **Uses External Authentication** check box is automatically selected and the "Gadget OAuth Credentials" section is displayed.

#### Synchronize the third-party gadget with Gadget Server

- 1) Open another browser and access the gadget's OAuth Service Provider.
- 2) Register Gadget Server with the gadget's OAuth Service Provider. You will either have to provide information about Gadget Server's domain and/or the callback URL to Gadget Server (for example, <GadgetServer URL>/ gadgets/ouathcallback).
  - The OAuth Service Provider supplies you with a consumer key, secret, and signature method specific to the gadget you are registering. The key and secret are used to sign every request made to the OAuth Service Provider's API.
- **3)** Re-open the browser running Gadget Server. In the "Register New Gadget" form, navigate to the "Gadget OAuth Credentials" section and fill in the following fields:
  - Consumer key Also known as an API key, this is a value used by the gadget to identify itself to the OAuth Service Provider.
  - Consumer signature method The type of digital signature algorithm used to sign requests secured with OAuth (HMAC-SHA1 or RSA-SHA1). The signature process encodes the *consumer key* and *secret* into a verifiable value. This prevents unauthorized parties from using the gadget-specific *consumer key* and *secret* to access a visitor's protected resources.

- Consumer secret – A secret used by the gadget to establish ownership of the consumer key to the OAuth Service Provider.

When a visitor makes a request for her personalized data, this information is used by Gadget Server, instead of the visitor's actual password and user name, to access the requested data from the gadget's OAuth Service Provider.

- **5.** In the "Metadata" section, do the following:
  - **Title** Enter a name for the gadget. This name will be displayed under the gadget's thumbnail image in the global gadget catalog (and site gadget catalogs).
  - Icon Click Browse to select an icon image. This image will be displayed on the
    gadget's title bar when the gadget is displayed on a site gadget catalog's
    associated dashboard panel. If no image is selected, the following default image is
    displayed:



Thumbnail – Click Browse to select a thumbnail image. This image will be displayed in the global gadget catalog. If the gadget is enabled on a site gadget catalog, the image is also displayed on that catalog and its associated dashboard's gadget selection panel. If no image is selected, the following default image is displayed:



- **Preview Image** – Click **Browse** to select the gadget's preview image, which will be displayed when a user clicks the gadget's thumbnail on a dashboard's gadget selection panel. If no preview image is selected, clicking the gadget's thumbnail displays the following image:



- Category – Selecting a category enables users and visitors to filter gadgets by category in the gadget catalogs and the dashboard's gadget selection panel. If no category is selected, then "Other" is assigned by default. The default categories are Entertainment, News, Utilities, Economics, and Other.

**6.** Click **Save**. The gadget's name and thumbnail image are now displayed in the global gadget catalog.



**7.** Enable the gadget on a site gadget catalog. For instructions, see Chapter 5, "Managing Gadgets."

# Registering Gadgets to a Site Gadget Catalog

When Gadget Server is assigned to a site other than the site on which the Global Gadget Catalog interface is enabled, it displays the Gadget Server User interface, which provides that site with a site gadget catalog. Gadgets registered to a site gadget catalog are made available for single gadget deployment, and placed on the dashboard (as thumbnail images on the gadget selection panel) for dashboard deployment.

### To register a gadget to a site gadget catalog

- 1. Log in to the WEM Framework as a general or site administrator.
- 2. Access the desired site on which the Gadget Server User interface is enabled, and click the Gadget Server icon.

The "Gadgets" screen opens:



3. Register the gadget to the site gadget catalog. For instructions, see steps 3-5 (starting on page 36).

#### 4. Click Save.

The gadget is enabled in the site gadget catalog. The gadget's name is now listed in the "Single Gadget Deployment" screen's "Gadget" field, and the gadget's name and thumbnail are displayed in the site gadget catalog and placed on the associated dashboard's gadget selection panel.

**5.** Deploy the gadget either as a single instance or on the dashboard. For instructions on deploying gadgets, see Chapter 6, "Managing and Deploying Gadgets."

# Deleting Gadgets from the Global or Site Gadget Catalog

Only general administrators can delete gadgets from the global gadget catalog, ensuring that those gadgets cannot be enabled on any site gadget catalogs. If the gadgets were *previously* enabled on site gadget catalogs, they are not deleted from those catalogs.

General and site administrators can delete gadgets from a site gadget catalog. Because the site gadget catalog, "Single Gadget Deployment" screen, and dashboard are associated, when gadgets are deleted from a site gadget catalog, those gadgets are no longer available for single deployment and they are removed from the dashboard's gadget selection panel (but not from the dashboard panel, in case they are used by site visitors).

#### To delete gadgets from the global gadget catalog

- 1. Log in to the WEM Framework as a general administrator.
- 2. Access the site on which the Global Gadget Catalog interface is enabled, and click the Gadget Server icon.
- **3.** In the "Gadgets" screen, select the check boxes of the gadgets you wish to delete from the global gadget catalog, and click **Delete**.
- **4.** In the dialog box, click **OK**.

The gadgets are deleted from the global gadget catalog. However, the gadgets are not removed from the site gadget catalogs on which they were previously enabled.

### To delete gadgets from a site gadget catalog

- 1. Log in to the WEM Framework as a general or site administrator.
- 2. Access the desired site on which the Gadget Server User interface is enabled, and click the Gadget Server icon.
- **3.** In the "Gadgets" screen, select the check boxes of the gadgets you wish to delete from the site gadget catalog, and click **Delete**.
- **4.** In the dialog box, click **OK**.

The gadgets are deleted from the site gadget catalog, the "Single Gadget Deployment" screen, and the dashboard's gadget selection panel.

- If the gadgets were registered with the global gadget catalog, they are still available from that catalog.
- If a gadget was deployed individually on a web page, you must remove that gadget's widget tag from the page template. Otherwise, the gadget remains on the web page displaying the message "The gadget is unavailable" to site visitors.

- If the gadgets are displayed on a visitor's dashboard panel, they will remain on the panel until the visitor removes them. Once removed, the gadgets are no longer available to the visitor.

# Chapter 5

# **Managing Gadgets**

This chapter is for general and site administrators. It contains information and instructions about enabling globally registered gadgets on site gadget catalogs. This chapter also contains instructions on modifying a gadget's metadata, such as name and preview image.

This chapter contains the following sections:

- Enabling Gadgets from the Global Gadget Catalog
- Modifying a Gadget's Metadata

# **Enabling Gadgets from the Global Gadget Catalog**

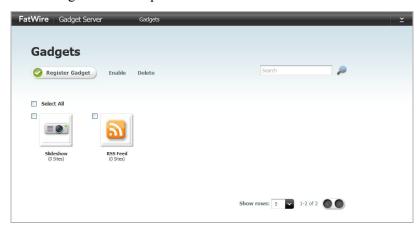
Gadgets that are registered in the global gadget catalog can be enabled on as many site gadget catalogs as necessary. A site gadget catalog has an associated "Single Gadget Deployment" screen and a dashboard. This means that any gadget listed in the given site gadget catalog is automatically:

- Available for individual deployment from the "Single Gadget Deployment" screen.
- Placed on the dashboard, as a thumbnail on the gadget selection panel.

### To enable a globally registered gadget

- 1. Log in to the WEM Framework as a general administrator.
- 2. Access the site on which the Global Gadget Catalog interface is enabled, and click the Gadget Server icon.

The "Gadgets" screen opens:

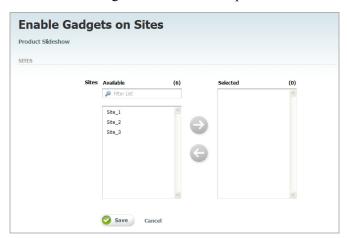


**3.** Select the check box(es) of the gadget(s) you wish to enable on one or more site gadget catalogs, and click **Enable**.

#### **Note**

If gadgets are not displayed in your interface, register the gadgets. For instructions, see "Registering Gadgets to the Global Gadget Catalog," on page 36.

The "Enable Gadgets on Sites" form opens:



**4.** From the "Available" list box, select the site(s) on which to enable the gadgets and move the site(s) to the "Selected" list box.

#### Note

If sites are not displayed in your interface, it means that the Gadget Server User interface is not assigned to any sites. For instructions on assigning the interface, see "Enabling the Gadget Server User Interface for Existing Site Users," on page 27.

**5.** Click **Save**. The gadgets are enabled in the selected site gadget catalog(s), as shown by the site indicator below the gadget's thumbnail:



Site indicator showing that the gadget has been enabled on one site gadget catalog

The gadgets are now available for individual deployment in the site gadget catalogs' associated "Single Gadget Deployment" screens. The gadgets are also placed in the site gadget catalogs' associated dashboards, as thumbnails on the gadget selection panel.

#### Note

A gadget cannot be enabled more than once on a given site gadget catalog.

# Modifying a Gadget's Metadata

A gadget's metadata can be modified from the global gadget catalog or a site gadget catalog. The metadata of a gadget includes its name, descriptor URL, thumbnail, preview, and icon images, and its assigned filter category.

This section contains the following topics:

- Modifying a Gadget's Metadata in the Global Gadget Catalog
- Modifying a Gadget's Metadata in a Site Gadget Catalog

### Modifying a Gadget's Metadata in the Global Gadget Catalog

General administrators are the only users who can modify a gadget's metadata in the global gadget catalog. Only modifications to the descriptor URL are propagated to gadgets that are registered to the site gadget catalogs.

### To modify a gadget's metadata in the global gadget catalog

- 1. Log in to the WEM Framework as a general administrator.
- 2. Access the site on which the Global Gadget Catalog interface is enabled, and click the Gadget Server icon.
- **3.** In the "Gadgets" screen, click the thumbnail of the gadget whose metadata you wish to modify.

The "Edit Gadget" screen opens:



**4.** In the "Edit Gadget" screen, make the desired changes to the gadget's metadata, and click **Save**.

The changes you make to the gadget's metadata are applied to the instance of the gadget in the global gadget catalog. Changes to the descriptor URL are propagated to the site gadget catalogs.

### Modifying a Gadget's Metadata in a Site Gadget Catalog

General and site administrators can modify a gadget's metadata in a site gadget catalog. The modifications affect only the gadget in that catalog. They are propagated from the site gadget catalog to the dashboard, the "Single Gadget Deployment" screen, and anywhere the gadget is deployed.

### To modify a gadget's metadata on a site gadget catalog

- 1. Log in to the WEM Framework as a general or site administrator.
- 2. Access the desired site on which the Gadget Server User interface is enabled, and click the **Gadget Server** icon.
- **3.** In the "Gadgets" screen, click the thumbnail image of the gadget whose metadata you wish to modify.
- **4.** In the "Edit Gadget" screen, make the desired changes to the gadget's metadata, and click **Save**.

The changes you make to the gadget's metadata take affect in the site gadget catalog, the "Single Gadget Deployment" screen, the dashboard, and anywhere the gadget is deployed (individually and on the dashboard).

# Chapter 6

# **Managing and Deploying Gadgets**

This chapter is for administrators and designers, and contains the following sections:

- Configuring Dashboard Defaults
- Authorizing the Gadgets' Domain
- Configuring Gadget Server Appearance Settings
- Deploying the Dashboard Widget Tag
- Deploying a Single Gadget
- Modifying the Deployed Dashboard

# **Configuring Dashboard Defaults**

The dashboard is a gadget container. The dashboard can be configured to display selected gadgets in a preferred layout and/or color theme. The configurations you apply to the dashboard are considered to be defaults. Site visitors who access a deployed dashboard are given their own instance of the dashboard, which they can personalize by modifying its appearance.

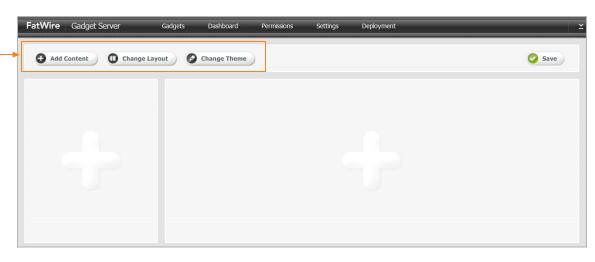
#### Note

When a gadget is enabled on a site gadget catalog, its thumbnail is placed on the dashboard, on the gadget selection panel. If your dashboard is empty, see Chapter 4, "Registering Gadgets" and Chapter 5, "Managing Gadgets."

#### To access the dashboard

- **1.** Log in to the WEM Framework as a general administrator, site administrator, or designer.
- **2.** Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
- **3.** In the menu bar, select **Dashboard**. The dashboard opens:

Gadget selection toolbar enables you to modify the appearance of the default dashboard as it will be displayed to website visitors.



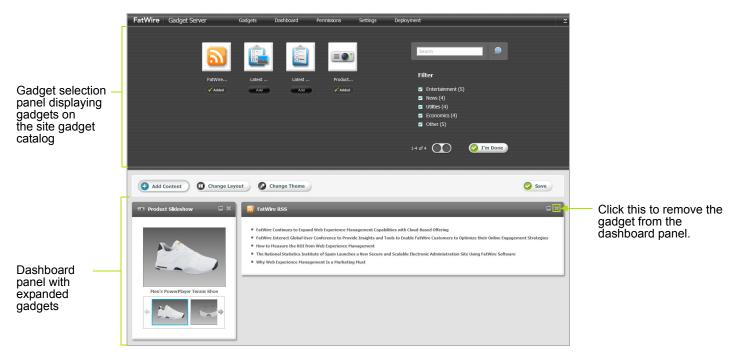
The following configuration options are available to you:

- Adding or Removing Default Dashboard Gadgets
- Modifying the Default Layout of the Dashboard
- Modifying the Default Color Theme of the Dashboard

### **Adding or Removing Default Dashboard Gadgets**

You can display gadgets at full size by adding them to the dashboard panel, from the gadget selection panel. If you remove a gadget from the dashboard panel, its thumbnail remains on the gadget selection panel. When a dashboard is deployed, its set of gadgets is fixed for site visitors until you modify the set. Although site visitors cannot add their own gadgets or delete the gadgets you have selected for them, they can display the gadgets at full size or only as thumbnails by adding them to or removing them from the dashboard panel.

Figure 8: The dashboard's gadget selection panel
To access this panel, select Gadget Server > Dashboard > Add Content



#### To access the dashboard

**1.** Access the Gadget Server User interface, and select **Dashboard** (detailed steps on page 50).

#### To add gadgets to the dashboard panel

- **2.** Click the dashboard's **Add Content** button.
- **3.** In the gadget selection panel, navigate to the gadget you wish to add to the dashboard panel:
  - **a.** (Optional) If you want to preview how the gadget's content will be displayed to website visitors before you add it, click the gadget's thumbnail image.
  - b. Click Add.
- **4.** Click **I'm Done**. The gadget selection panel closes and the gadget is displayed on the dashboard panel.
- **5.** (Optional) To move the gadget to another position on the dashboard panel, click its title bar and drag the gadget to the desired slot.

**6.** Click **Save** to propagate your configurations to the dashboard widget tag.

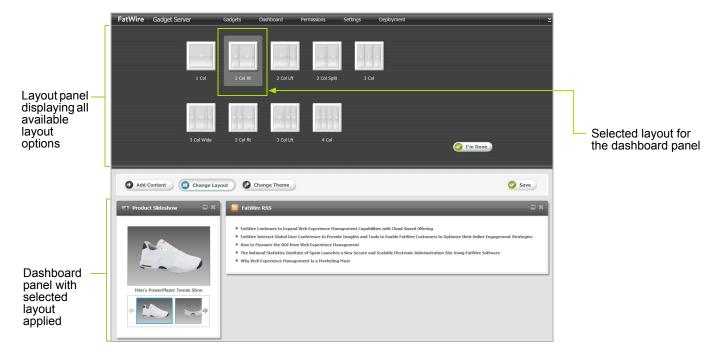
### To remove a gadget from the dashboard panel

- 7. In the dashboard panel, navigate to the gadget you wish to remove as a default, and click the X (located in the gadget's title bar) to remove the gadget.
  - The gadget is removed from the dashboard panel, but it is still accessible from the gadget selection panel, via its thumbnail.
- **8.** Click **Save** to propagate your configurations to the dashboard widget tag.

### Modifying the Default Layout of the Dashboard

Gadgets on the dashboard panel can be arranged in one of many layouts.

Figure 9: The dashboard's layout panel
To access this panel, select Gadget Server > Dashboard > Change Layout



#### To access the dashboard

1. Access the Gadget Server User interface, and select **Dashboard** (detailed steps on page 50).

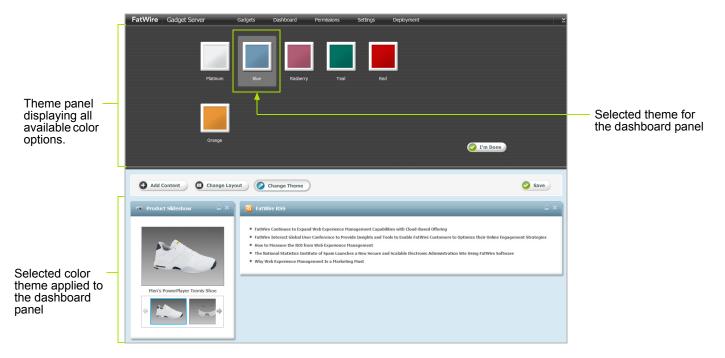
#### To modify the default layout of the dashboard

- **2.** Click the dashboard's **Change Layout** button.
- **3.** In the layout panel, select the desired default layout for the dashboard panel.
- 4. Click I'm Done.
  - The gadget selection panel closes, and the selected layout is applied to the dashboard panel
- **5.** Click **Save** to propagate your configurations to the dashboard widget tag.

### Modifying the Default Color Theme of the Dashboard

Modifying the dashboard's theme changes the dashboard's color scheme.

Figure 10: The dashboard's theme panel
To access this panel, select Gadget Server > Dashboard > Change Theme



#### To access the dashboard

**1.** Access the Gadget Server User interface, and select **Dashboard** (detailed steps on page 50).

### To modify the color theme of the dashboard panel

- **2.** Click the dashboard's **Change Theme** button.
- **3.** In the theme panel, select the desired color scheme for the dashboard panel.
- 4. Click I'm Done.

The theme panel closes, and the selected color is applied to the dashboard panel.

**5.** Click **Save** to propagate your configurations to the dashboard widget tag.

### **Authorizing the Gadgets' Domain**

Authorizing a domain enables you to specify the domain on which the gadgets' widget tags and the dashboard's widget tag can be deployed. This restricts the usage of the tags to only the domain you authorize.

#### To authorize a domain

- 1. Log in to the WEM Framework with administrator or designer credentials.
- 2. Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
- 3. In the menu bar, click **Permissions > Authorized Domain**.



**4.** In the "Domain URL" field, enter the domain name of the website on which you wish to display gadgets (either individually or on the dashboard). For example:

mycompany.com or mysite.mycompany.com

5. Click Save.

Gadget widget tags and the dashboard widget tag can be deployed on only the domain you specified. If a site visitor views the source code of your company's site and attempts to copy the deployed widget tags to their own site, the deployment will fail.

# **Configuring Gadget Server Appearance Settings**

Configuring Gadget Server appearance settings enables you to control the appearance of the Gadget Server User interface, the dashboard, and the single gadget widget tags.

### To configure gadget appearance settings

- 1. Log in to the WEM Framework with administrator or designer credentials.
- **2.** Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
- 3. In the menu bar, click **Settings > Appearance**.



- **4.** Fill in the following fields:
  - **Language** Specify the language in which the dashboard and individually deployed gadgets will be displayed. The only available option is **English**.
  - **Skin** Select **Default** to use the default appearance of the Gadget Server User interface. Select **Custom** to upload your own CSS file.
  - **Upload Custom CSS** If you selected the **Custom** option in the "Skin" field, use the **Browse** button the select a cascading style sheet that will control the appearance of the Gadget Server User interface (for example, the text fonts), the dashboard, and the single gadget widget tags (for example, the header, background images, and so on).
- 5. Click Save.

### **Deploying the Dashboard Widget Tag**

Deploying the dashboard's widget tag to a web page renders the dashboard on that page. The tag specifies the dashboard's current gadgets, layout, color theme, appearance settings, and authorized domain (if any).

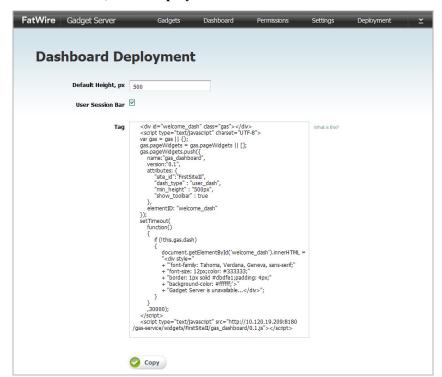
When the dashboard widget tag is deployed, visitors who access the dashboard are given their own instances of the dashboard. Each visitor can then personalize her own instance in the same way that Gadget Server users configure the dashboard (as shown in "Configuring Dashboard Defaults," on page 50).

#### **Note**

To deploy the dashboard widget tag to a page template, you will access the Content Server Advanced interface (CS ADV). Ensure the Advanced interface is assigned to the same site as the Gadget Server User interface.

### To deploy the dashboard widget tag

- 1. Copy the dashboard widget tag in Gadget Server's "Dashboard Deployment" screen:
  - **a.** Log in to the WEM Framework with administrator or designer credentials.
  - **b.** Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
  - **c.** In the menu bar, select **Deployment > Dashboard**.



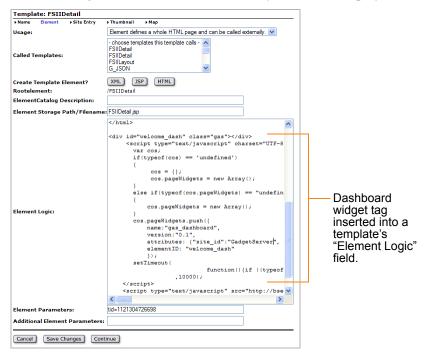
- **d.** In the "Dashboard Deployment" screen, fill in the following fields:
  - **Default Height, px** Specify the height (in pixels) in which to display the dashboard on the website. 500 pixels is the minimum height that can be specified to render the dashboard properly on a web page.
  - User Session Bar Specify whether or not this gadget will display a "Login" link to site visitors. For example, if your site already has a dedicated user session bar, you can hide the dashboard's user session bar by selecting the check box.
- e. Click Copy.
- **2.** Access Content Server's Advanced interface, and insert the tag into the desired page template:

#### Note

The dashboard widget tag can be inserted into any page template. However, the dashboard requires a minimum page width of 980 pixels to render properly. Therefore, the template should only call the site's header and footer, and not a side navigation.

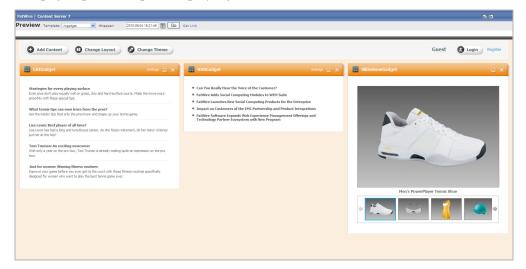
- **a.** In the menu bar, mouse over the down-arrow icon, located at the extreme right of the screen, to render the applications bar.
- **b.** In the applications bar, click the **CS ADV** icon to open the Content Server Advanced interface.
- **c.** Locate the page template into which you wish to insert the dashboard's widget tag:
  - 1) From the start menu options, click **Search**.
  - 2) In the "Search" results list, select Find Template.
  - 3) In the "Search for Templates" form, click **Search**.
  - 4) In the "List of Templates" screen, select the template into which you wish to insert the dashboard widget tag.
- d. In the template's "Inspect" form, click Edit.

**e.** In the template's "Element" screen, insert (**Ctrl+v**) the widget tag into the "Element Logic" field in the exact location you want to display the dashboard.



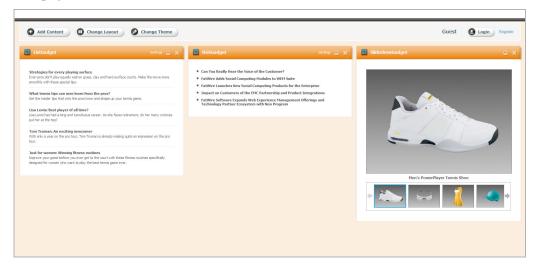
- f. Click Save Changes.
- **3.** Preview the dashboard widget to ensure it is properly rendered on the page:
  - **a.** Locate the page that is rendered by the template containing the dashboard's widget tag.
  - **b.** In the page's "Inspect" form, click **Preview**.

    The page's preview opens displaying the dashboard:



- **4.** Publish the template (for instructions, see the *Content Server Administrator's Guide*).
- **5.** Access the website to view the dashboard on the page.

The dashboard you deployed should look similar to the dashboard rendered on the web page shown below:



For instructions on customizing the dashboard on the website, see Chapter 7, "Testing Deployed Gadgets.

# **Deploying a Single Gadget**

Deploying a gadget's widget tag to a web page renders the gadget on that page. The tag specifies the gadget's metadata, appearance settings, and authorized domain (if any).

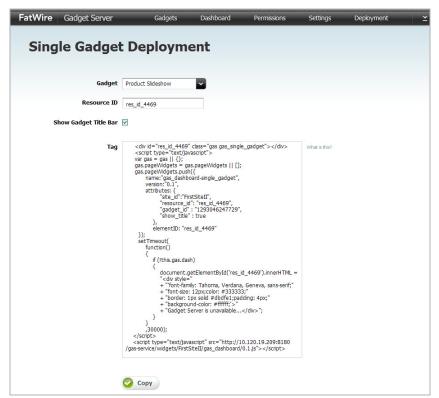
When a gadget's widget tag is deployed, if the gadget's settings can be modified, any visitor can modify them. If the gadget supports OAuth and the visitor using the gadget is authenticated, the gadget can retrieve the visitor's personalized data and/or deliver personalization functionality from the website that hosts the gadget.

#### Note

To deploy an individual gadget to a page template, you will access the Content Server Advanced interface (**CS ADV**). Ensure the Advanced interface is assigned to the same site as the Gadget Server User interface.

### To deploy a single gadget's widget tag

- 1. Copy the desired gadget's widget tag in Gadget Server's "Single Gadget Deployment" screen:
  - **a.** Log in to the WEM Framework with administrator or designer credentials.
  - **b.** Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
  - **c.** In the menu bar, select **Deployment > Single Gadget**.



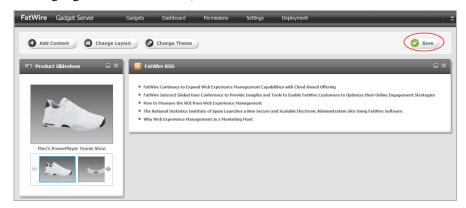
- **d.** In the "Single Gadget Deployment" screen, fill in the following fields:
  - Gadget Select the gadget whose widget tag you wish to deploy to a page template.
  - **Resource ID** Specify a unique identifier for this particular gadget instance. The resource ID you assign to the gadget becomes the gadget's unique identifier on the website. If you want to deploy the same gadget with different settings on the same site, assign the gadget a different resource ID.
  - **Show Gadget Title Bar** Specify whether this gadget will display a title bar along with its content.
- e. Click Copy.
- 2. Access Content Server's Advanced interface, and insert the tag into the desired page template. Preview how the gadget will be displayed on the website, publish the template, and access the website to view the gadget on the page. For instructions, see steps 2 5 in the "Deploying the Dashboard Widget Tag" section.

# **Modifying the Deployed Dashboard**

If you modify the appearance of the dashboard after its deployment, your changes are automatically propagated to the dashboards of new visitors and anonymous visitors who have reset their browsers. Because authenticated visitors can save their personal settings, their dashboards remain unaffected by your changes.

#### To modify the deployed dashboard's defaults

- **1.** Log in to the WEM Framework as a general administrator, site administrator, or designer.
- **2.** Access the desired site on which the Gadget Server User interface is enabled, and select the **Gadget Server** icon.
- 3. In the menu bar, select **Dashboard**.
- **4.** Make the necessary changes to the dashboard's default gadgets, layout, and color theme. For instructions about modifying the dashboard's defaults, see "Configuring Dashboard Defaults," on page 50.
- **5.** In the gadget selection toolbar, click **Save**.



The modifications you made are automatically propagated to the dashboards of new visitors and anonymous visitors who have reset their browsers.

Modifying the Deployed Dashboard

# Chapter 7

# **Testing Deployed Gadgets**

This section provides information and instructions on working with the deployed dashboard and individual gadgets as a website visitor (authenticated and anonymous).

This chapter contains the following sections:

- Sample Dashboard Deployed on a Website
- Working with the Dashboard as a Visitor
- Sample Gadget Deployed on a Website

### Sample Dashboard Deployed on a Website

The dashboard is a container for the gadgets enabled in a given site gadget catalog. A site gadget catalog and dashboard on the same instance of the Gadget Server User interface share a dynamic relationship, meaning any gadget enabled in the site's gadget catalog is automatically made available on the dashboard's gadget selection panel. When the dashboard is deployed to a web page, the gadgets, layout, and theme that were configured for the dashboard panel are displayed as defaults to visitors (as shown in Figure 11).

The deployed dashboard can be personalized, meaning visitors (authenticated and anonymous) can modify their own instances of the dashboard to display their preferred gadgets, layout, and color theme. Changes made by authenticated visitors are automatically saved. Changes made by guests persist only for the duration of the session. For information about personalizing the dashboard, see "Working with the Dashboard as a Visitor," on page 65.

Figure 11: Sample dashboard panel deployed on a web page



### Working with the Dashboard as a Visitor

All visitors can personalize the default dashboard panel to display the gadgets, layout, and color theme they prefer. The changes made by an anonymous visitor are saved to that visitor's browser. These changes are temporary, and when the visitor resets her browser the dashboard returns to its default appearance. Authenticated visitors have their own instance of the dashboard. When an authenticated visitor modifies the dashboard panel's appearance, the changes are saved to the Gadget Server's server.

This section contains the following topics:

- Logging in to the Website
- Personalizing the Dashboard
- Modifying a Gadget's Visitor Preferences

### Logging in to the Website

When you log in to the website, you are presented with your own customizable instance of the dashboard.

### To log in to the website

- 1. Access the web page on which the dashboard is deployed.
- 2. Click Login.

The log in screen opens above the dashboard panel:



- **3.** Fill in the "Username" and "Password" fields. **Log in credentials are case-sensitive**.
- 4. Click Login.

Your own instance of the dashboard is displayed.



### Personalizing the Dashboard

Your options for personalizing the dashboard panel are the following:

- Adding (or Removing) Gadgets to (from) the Dashboard Panel
- Modifying the Layout of the Dashboard
- Modifying the Color Theme of the Dashboard

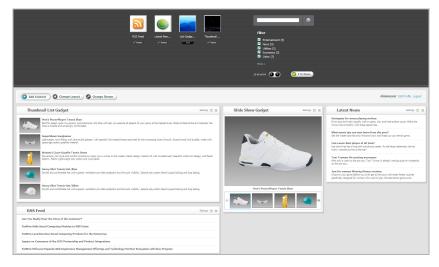
# Adding (or Removing) Gadgets to (from) the Dashboard Panel

The gadget selection panel contains all the available gadgets, as thumbnails, that visitors can add to the dashboard panel. Adding gadgets to the dashboard panel configures the dashboard to display the content of those gadgets. If a visitor removes a gadget from the dashboard panel, that gadget will still be available from the dashboard's gadget selection panel, as a thumbnail.

### To add gadgets to the dashboard panel

- 1. Access the web page on which the dashboard is deployed.
- 2. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard. If you are an anonymous visitor, skip to step 3.
- 3. Click Add Content.

The gadget selection panel opens above the dashboard panel:



- **4.** In the gadget selection panel, navigate to the gadget whose content you wish to display on the dashboard panel:
  - **a.** (Optional) To preview the gadget's content before adding it to the dashboard panel, click the gadget's thumbnail image.
  - **b.** Click **Add**.
- 5. Click I'm Done.

The gadget selection panel closes, and the added gadget's content is displayed on the dashboard panel.

**6.** (Optional) To reposition a gadget on the dashboard panel, click the gadget's title bar and drag it to the desired slot on the dashboard panel.

### To remove a gadget from the dashboard panel

- 1. Access the web page on which the dashboard is deployed.
- 2. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard. If you are an anonymous visitor, skip to step 3.
- **3.** In the dashboard panel, navigate to the gadget whose content you do not wish to display, and click the **X** icon (located in the title bar of the gadget you wish to remove).

The gadget is removed from the dashboard panel, but is still accessible to the visitor from the selection panel.

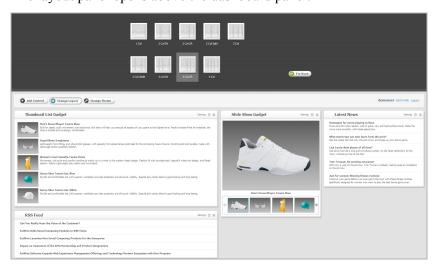
### Modifying the Layout of the Dashboard

The layout panel enables visitors to reposition the gadgets that are displayed on the dashboard panel.

#### To modify the layout of the dashboard

- 1. Access the web page on which the dashboard was deployed.
- 2. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard. If you are an anonymous visitor, skip to step 3.
- 3. Click Change Layout.

The layout panel opens above the dashboard panel:



- **4.** In the layout panel, select the layout you wish to apply to the dashboard panel.
- 5. Click I'm Done.

The layout you selected is applied to the dashboard panel.

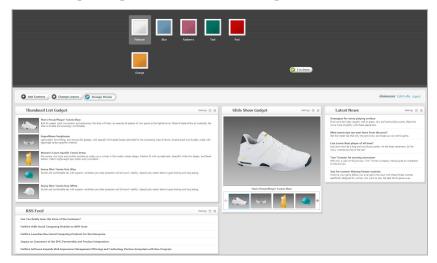
### Modifying the Color Theme of the Dashboard

Visitors can manage the color scheme of the dashboard panel background and gadget title bars with the color options available from the dashboard's theme panel.

### To modify the color theme of the dashboard

- 1. Access the web page on which the dashboard was deployed.
- 2. If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard. If you are an anonymous visitor, skip to step 3.
- 3. Click Change Theme.

The theme panel opens above the dashboard panel:



- **4.** In the theme panel, select the color you wish to apply to the dashboard panel.
- 5. Click I'm Done.

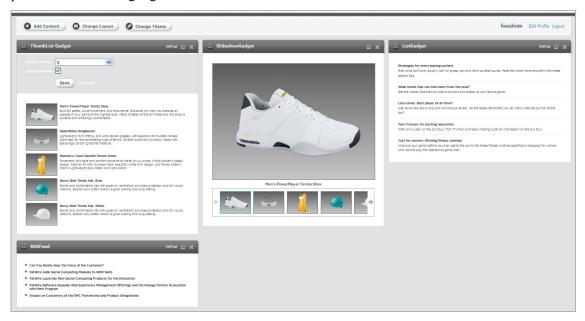
The color you selected is applied to the dashboard panel's background and the gadget title bars.

### Modifying a Gadget's Visitor Preferences

Certain gadgets, depending on how the gadget was developed, provide visitors with a "Settings" option for editing visitor preferences. For example, a weather gadget may provide visitors with a locale option so the gadget will display the weather forecast for the location the visitor specifies.

#### To modify a gadget's visitor preferences

- 1. Access the web page on which the dashboard was deployed.
- **2.** If you are an authenticated visitor, log in to the website with your assigned credentials to access your own instance of the dashboard. If you are an anonymous visitor, skip to step 3.
- **3.** In the dashboard panel, navigate to the desired gadget and select the **Settings** option on the gadget's title bar. If the gadget does not have a **Settings** option, then the visitor preferences for that gadget are not modifiable.

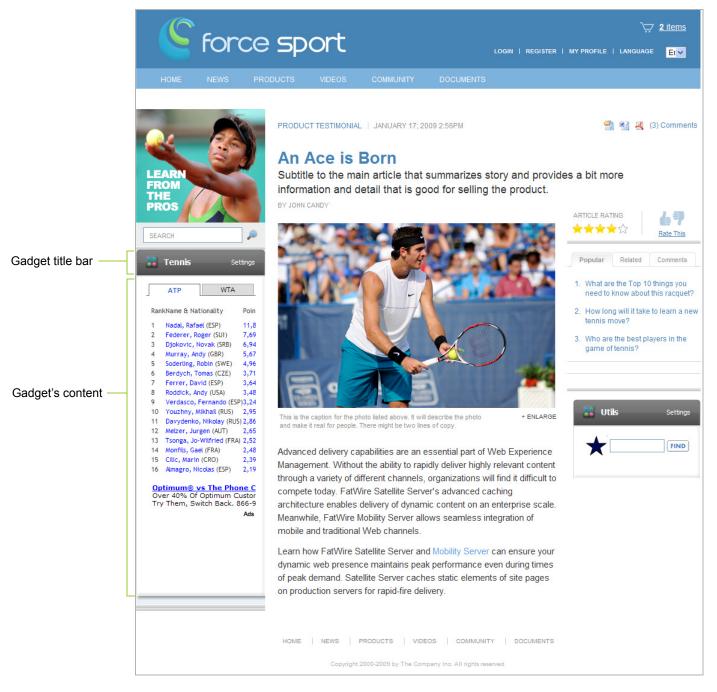


- **4.** Select the desired preferences for the gadget. For example, the "ThumbList" gadget enables visitors to select the number of items that will be rendered in its list.
- **5.** Click **Save**, to save your preferences.

# Sample Gadget Deployed on a Website

All gadgets that are enabled on a given site catalog can be deployed individually on web pages to display the gadget's content to visitors. This is because a site gadget catalog and the "Single Gadget Deployment" screen share a dynamic relationship on the same instance of the Gadget Server User interface. When the gadget is deployed it displays the current settings and metadata configured for it in the Gadget Server User interface. Figure 12 shows two gadgets deployed individually on a sample web page.

Figure 12: Individually deployed gadgets on a web page



### Working with a Single Gadget as a Visitor

Individually deployed gadgets are displayed to all visitors (authenticated and anonymous). Certain gadgets enable visitors to modify the gadget's settings, and other gadgets support OAuth which enables the gadget to retrieve an authenticated visitors personalized information and/or delivers the gadget's personalization functionality to the visitor from the gadget's OAuth Service Provider.

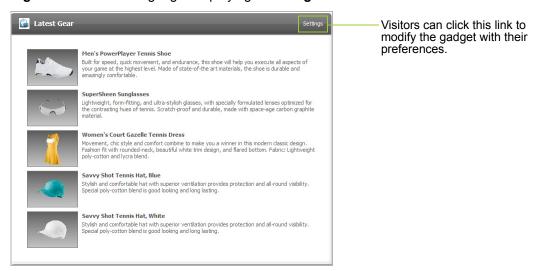
This section contains the following:

- Modifying an Individually Deployed Gadget's Settings
- Personalizing a Gadget with OAuth Support

### Modifying an Individually Deployed Gadget's Settings

All visitors can personalize the visitor preferences of a given gadget (depending on how the gadget was developed). For example, the sample ThumbList gadget's **Settings** link enables visitors to display or hide the thumbnail images of the products listed in the content of the gadget. It also enables visitors to specify the amount of products the gadget displays at one time.

Figure 13: ThumbList gadget displaying a Settings link



For instructions about working with a gadget whose settings can be modified, see "Modifying a Gadget's Visitor Preferences," on page 69.

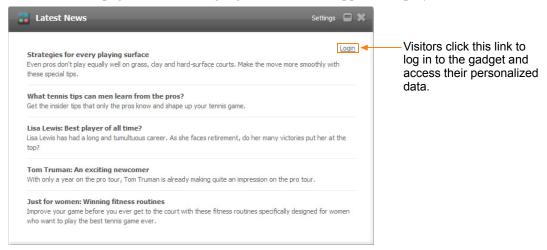
### Personalizing a Gadget with OAuth Support

Certain gadgets support OAuth, which enables a visitor to log in to the gadget and access certain data stored on the gadget's OAuth Service Provider. Gadgets with OAuth support use an access token to obtain a visitor's personalized data from their OAuth Service Provider. This access token is stored on Gadget Server, instead of the visitor's credentials.

In this example, the sample List Gadget supports OAuth. When a visitor logs, the gadget displays that visitor's profile picture and user name.

### To personalize a gadget with OAuth support

1. Access the web page on which the gadget with OAuth support is deployed.



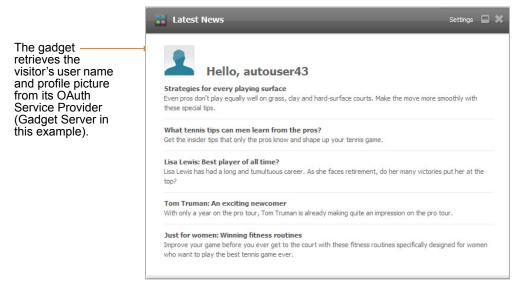
- **2.** Navigate to the gadget and access your personalized data:
  - If the gadget's OAuth Service Provider is Gadget Server, the gadget obtains your credentials from the dashboard's visitor session bar. If there is no visitor session bar, continue to step 3.
  - If the gadget's OAuth Service Provider is a third-party web service, continue to step 3.
- Click Login.

A pop-up window opens displaying the log in form of the gadget's OAuth Service Provider (Gadget Server in this example):



**4.** Log in with your assigned credentials, either for Gadget Server or the third-party web service to which the gadget is connected (for example *Google* or *Twitter*).

Your personalized data is displayed inside the gadget.



The gadget's OAuth session is associated with an access token which the gadget uses to retrieve the visitor's personalized data. Gadget Server maintains this access token, so the next time the visitor accesses the web page, the gadget displays her personalized data without the visitor having to log in to the gadget again.

Working with a Single Gadget as a Visitor