

Quick Start Guide

Ametys 4

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Welcome to Ametys

For more than 10 years, Ametys solutions have been meeting the digital challenges of the public sector with performance and innovation.

This guide introduces you to the Ametys application and allows you to quickly get to grips with the tool.

Detailed documentation of Ametys is [available online](https://wiki.ametys.org/display/AMETYS40FR/Documentation+Ametys).

You will find exhaustive information on all the features of the application, as well as more technical documentation on the administration, operation and customization of the application.

What is Ametys?

Ametys is an open source web content management platform developed in Java. At the heart of Ametys is a generic kernel where content is stored and served, on which a wide variety of functional modules are implemented to deploy customizable logics.

Ametys has two components:

* **The back office** is in a way the black box of the site, it is the part allowing the administration, management and editing of the site
* **The front office** is the visible part of the website accessible to all visitors

Ametys is composed of the following layers:

* an HTTP server (Apache HTTPD)
* a J2EE servlet engine (Apache Tomcat)
* a workflow module (OSWorkflow)
* a JCR implementation for content storage (Apache Jackrabbit)
* SQL database (MySQL, Oracle, Derby)
* a search and indexing engine (Apache Solr)
* a CMIS protocol for interfacing with an EDM
* The ExtJS framework for developing rich web applications

About Ametys 4

Ametys 4 is the latest major release of the open source content management tool. The new version features a new, sleeker and "flat" design with minimalist icons. This new look simplifies the use of the application and offers a more user-friendly and airy rendering.

Ametys 4 provides new features that help you be more productive:

* Multitask, use multiple tools at once
* Your Ametys experience becomes more personal: profile, history and real-time notifications
* Never lose your data again, your session is backed up automatically
* Search based on multiple criteria: content types, latest contributors, and more.

For more information, see [Welcome to Ametys 4](http://www.ametys.org/community/en/hot-topics/ametys-news/ametys-4-new-release-available.html)

Installation de l’application

Ametys is available for download on [the website](http://www.ametys.org/community/en/download/ametys-portal.html). Two versions are freely available: the demo app and the deployment app.

Both versions are free and complete.

The demo application is pre-configured and contains a sample dataset so that you can try out the tool with a test graphic charter and predefined content. The deployment application is identical to the demo version, but it does not contain any data.

Once you have downloaded the version of your choice, run the corresponding file and follow the step-by-step installation process.

Your first steps

|  |
| --- |
| **IMPORTANT**  To access the app, make sure you have the following information:   * **The URL of the back-office** that allows the editing of the site. If you are installing the demo version, log in to http://localhost:8080/cms * **The URL of the front office** that allows you to consult the site. If you are installing the demo version, log in to http://localhost:8080 * **Your username and password**. If you are installing the demo version, use the admin /**admin credentials** |

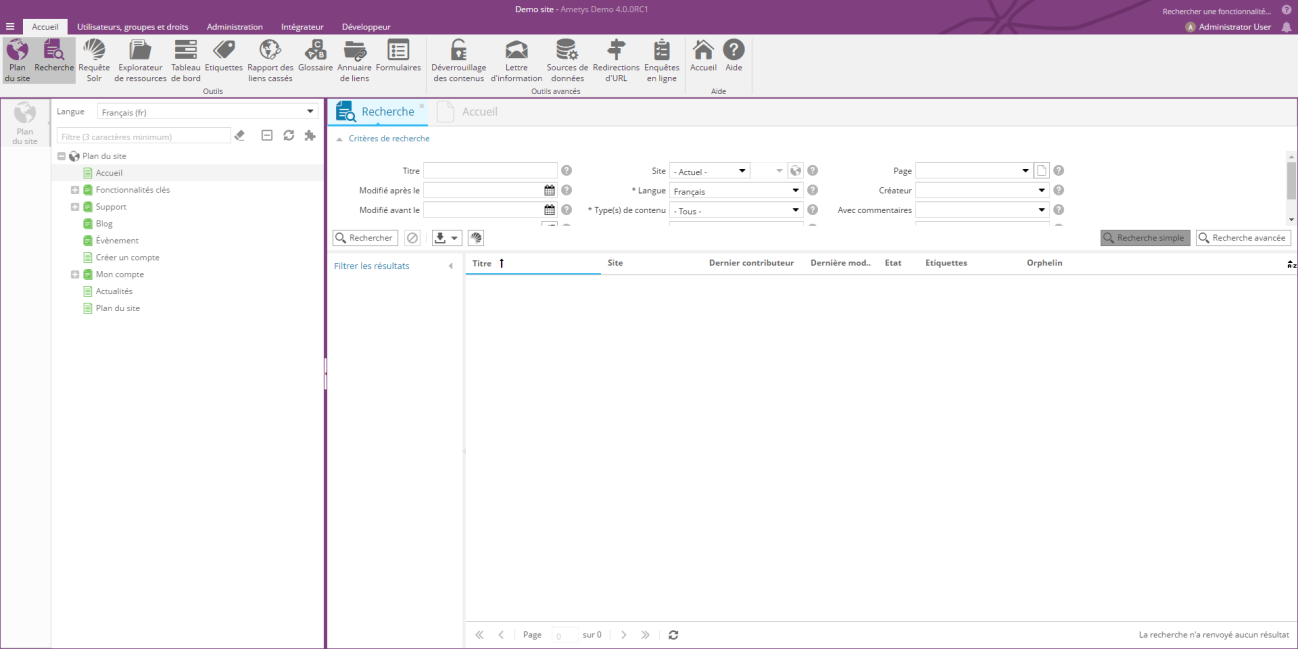
Once the app is installed, start the app using the shortcut ametys_16px.pngcreated on your desktop or in your menu.

You can now launch the browser of your choice and enter the URL of the back office. Fill in the login credentials, click on the *Log in* button, you are now in the back office.

|  |  |
| --- | --- |
| Image search result for "warning icon" | When your app is multi-site, a screen is displayed listing the available websites. Select the site of your choice to open its back office. |

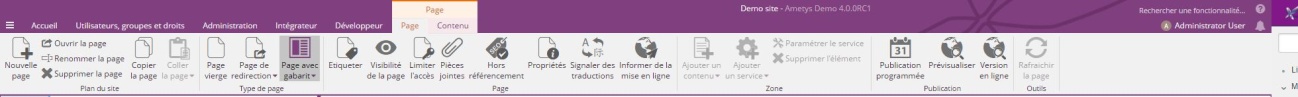
Discover your interface

Once the connection is established, the back-office interface is displayed for the first time.

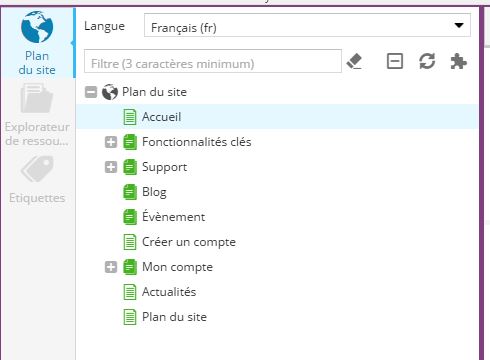


The back office is made up of three main areas:

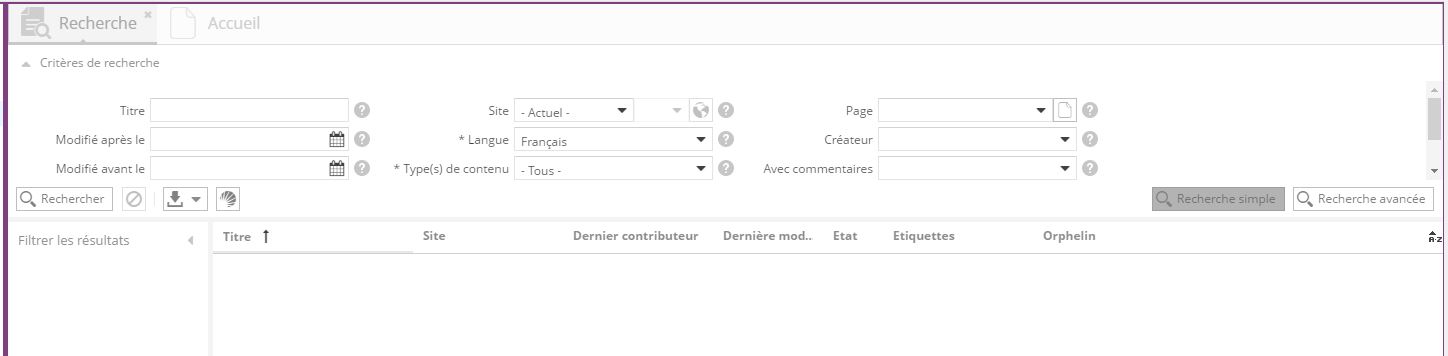
* **The ribbon**: this is the control tool area, it is composed of tabs and buttons and updates automatically according to the tools opened.



* **The side area**: this area allows you to manipulate certain predefined tools such as the sitemap, the resource explorer, the history of a content, etc.

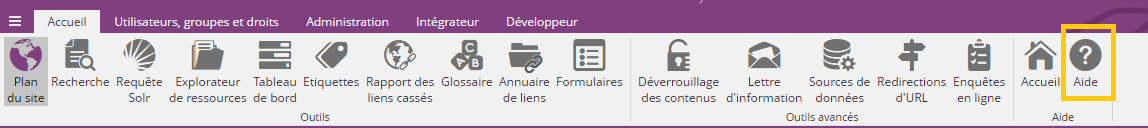


* **The central area**: this is the main work area that allows the display of pages, content but also tools such as search, dashboard, help, etc. Each type of component is represented by colored tabs: blue for tools, red for pages, green for content.



Help and Support

A help tool connected to the application's online documentation is available from the ribbon.



All Ametys screens have a helper tool, at the very top right of your interface,  where you can search for information about the feature of your choice.

The dynamic tool suggests the actions associated with the functionality you are looking for, and allows you to perform the desired action in one click.

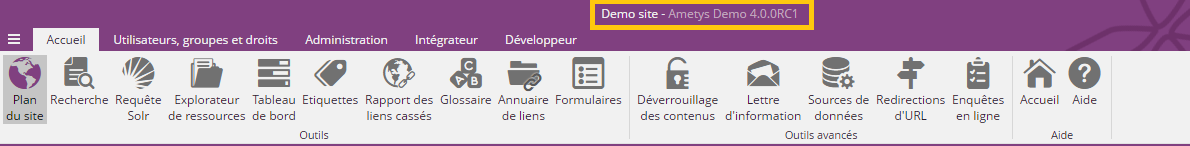
The tool lists the possible actions according to the context, the functionalities not applicable to the context are grayed out.

This guide introduces some of the main features that come with Ametys. For more information, see [the online documentation](https://wiki.ametys.org/display/AMETYS40FR/Documentation+Ametys).

We welcome your feedback regarding your experience with Ametys. Sending feedback is very simple, complete [**the online questionnaire in less than 1 minute.**](http://www.ametys.org/fr/divers/votre-avis-nous-interesse.html)

Version and updates

The version number of your app is displayed at the very top of your interface, next to the name of the managed website.



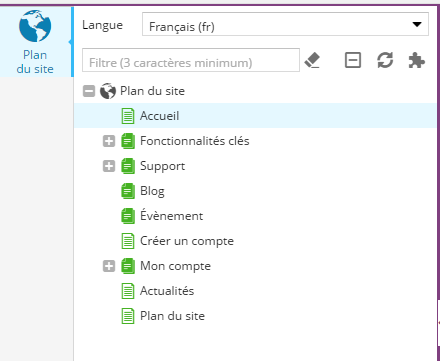
For full help and support, including information about our solutions and services, you can [contact us on our website](http://www.ametys.org/fr/societe/contactez-nous.html), we will be happy to arrange a presentation remotely or at your premises.

Essential features

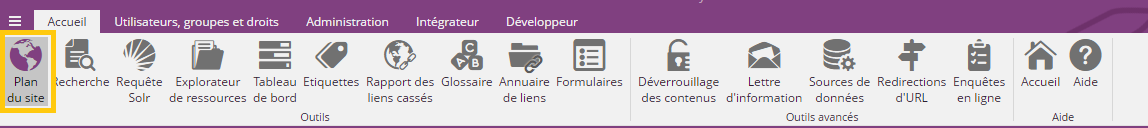
The site tree

The tree structure allows you to have a global vision of the website. It presents all the pages of the site in sections and defines the different levels of navigation.

The **Site Map** tool allows you to visualize the tree. This is a central part of the Ametys interface.



The site map is displayed automatically when connecting to the side area. If it is not displayed, you can select it from the ribbon, **Home** tab, Site Map **button**.



Page icons and decorators inform you about the nature of the pages. You can define your pages as main topics or subtopics using labels.

|  |  |
| --- | --- |
|  | Main online section |
|  | Online sub-section |
|  | Page with one or more online content and/or services |
|  | Redirect page |

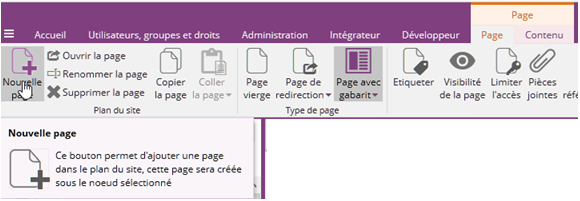
For more information about the tree, see the Managing [the Site Map documentation](https://wiki.ametys.org/display/AMETYS40FR/Gestion+du+plan+du+site)

Create a page

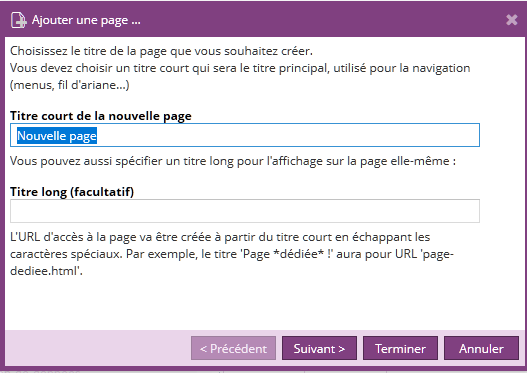
To create a new page, follow these steps:

**1.** Choose the location of your new page in the tree view, e.g. a level 1 page usually corresponds to a main topic, a level 2 page corresponds to a subtopic.

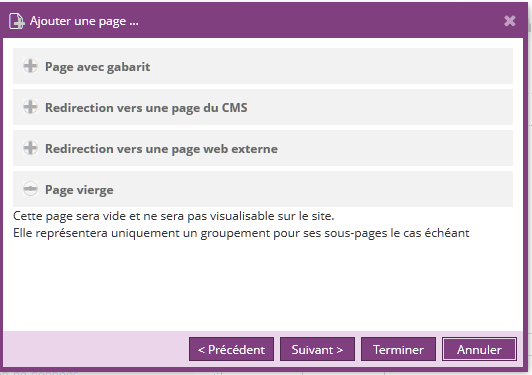
**2.** Click the **New Page button**  on the **Page** tab. This opens a dialog box dedicated to page creation.



**3.** Choose a short title, this is used for the URL of the page. You can either click Next to expand the Setup Wizard that allows you to choose the layout of the page, or click **Finish** to immediately create a new blank page.



**4.** Follow the settings steps in the wizard, you can click on Finish at any time to validate the creation of the page at the step of your choice.

There are three types of pages:

**Page with template** for inserting content and/or services.

**Redirect page** to make a redirect to another page. The redirect page can be an external page (http://....) or an internal page (i.e. a page managed by Ametys).

**Blank** or blank page that will not be displayed on the site.

To go further in page management, see the online documentation:

* [Create a page](https://wiki.ametys.org/display/AMETYS40FR/Creer+une+page)
* [Localize a page](https://wiki.ametys.org/display/AMETYS40FR/Trouver%2C+localiser+une+page)
* [Move a page](https://wiki.ametys.org/display/AMETYS40FR/Deplacer+une+page)
* [Rename a page](https://wiki.ametys.org/display/AMETYS40FR/Renommer+une+page)
* [Hide Page](https://wiki.ametys.org/display/AMETYS40FR/Cacher+une+page)

Add content to a page

In Ametys, content is composed of a list of fields to be filled in, there are natively several types of content: article, news, photo gallery, FAQ, etc.

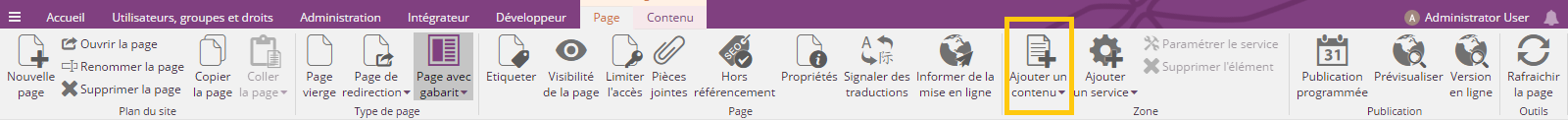
To add content to your page, follow these steps:

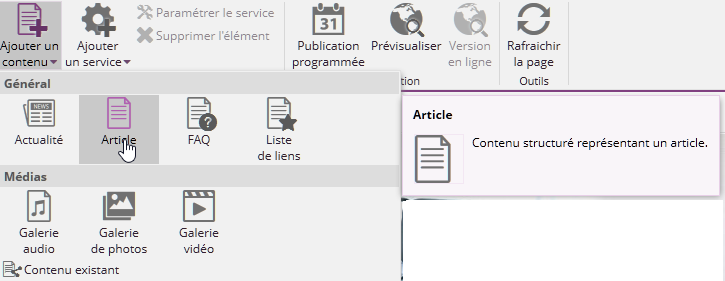
**1.** Make sure your page is a **Template Page**.

**2.** Select the area where you want to add content

|  |  |
| --- | --- |
| **Selected Area** | https://wiki.ametys.org/download/attachments/32670608/tirets-zone-delimitee.png?version=1&modificationDate=1462783454000&api=v2 |
| **Unselected area** | https://wiki.ametys.org/download/attachments/32670608/tirets-zone-non-delimitee.png?version=1&modificationDate=1462783454000&api=v2 |

**3.** Click the **Add Content button**  on the **Page tab**

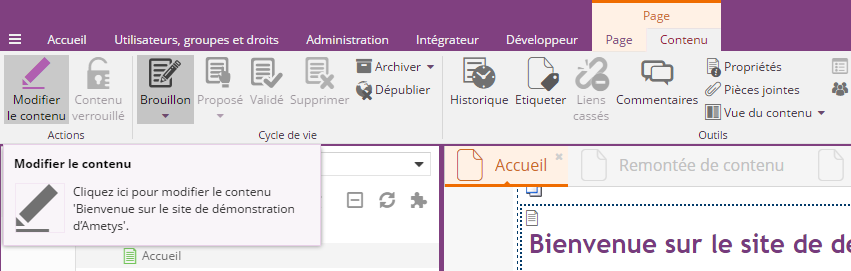




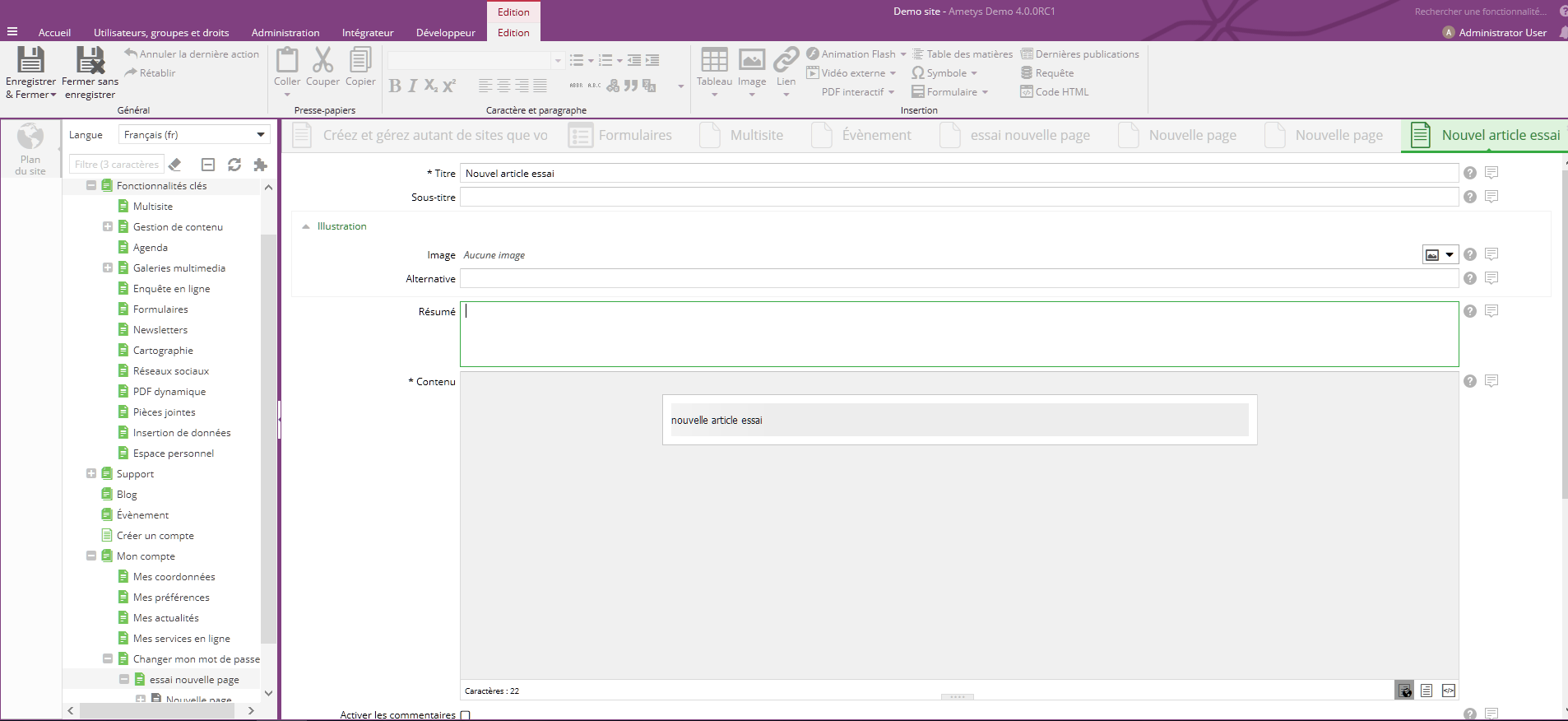
|  |  |
| --- | --- |
| Image search result for "warning icon" | You can add multiple content and/or services within the same area. Select a non-empty area and add your content. The latter will appear under the content already existing in the area. |

Edit content

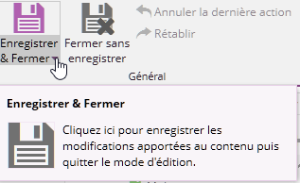
The online editor allows you to edit your content. It can be accessed by clicking the **Edit Content button**  on the **Content tab**.



After you open the online editor, your ribbon updates with new buttons. The central area displays all the fields in your content that you can fill in.



Once the fields are completed, you can save your content by clicking the **Save & Close button**  on the ribbon.



For more information about online editing, see the [Online Editor documentation](https://wiki.ametys.org/display/AMETYS40FR/Editeur+en+ligne)

Tagging, tagging content

A tag is a tag that you can assign to a piece of content or a page. Labels have several possible uses:

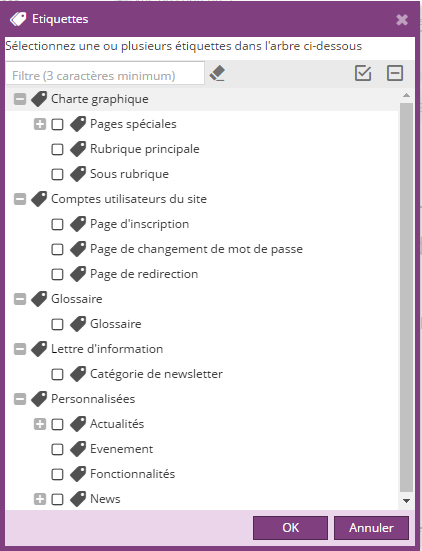
* **Charter labels**: these are defined with the graphic charter, they allow you to rebuild menus or position pages in specific locations.
* **Personalized labels**: you can create your own labels to use them in a department, for example you can sort your content by theme.

To label content, follow these steps:

**1.** Select the content you want to tag

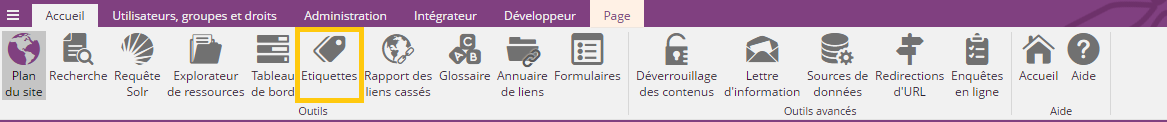
**2.** Click the **Label button**  on the Content tab

**3.** Once the dialog box appears, check the labels of your choice



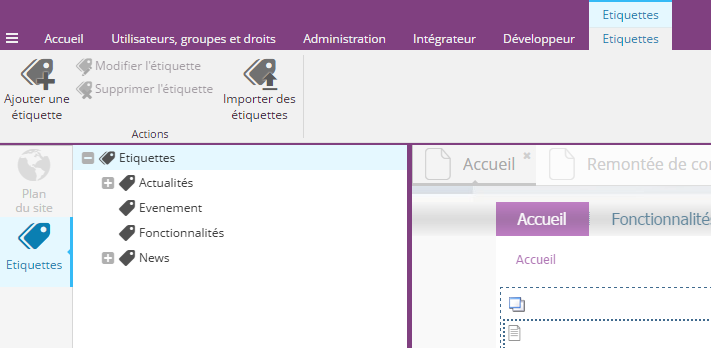
To create a new custom label, follow these step-by-step steps:

**1.** Click the **Labels** button on the **Home tab**



**2.** Select the location of your new label

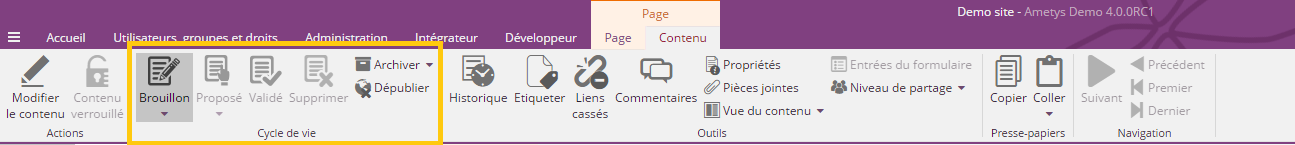
**3.** Click the **Add Label button**  on the **Labels tab**



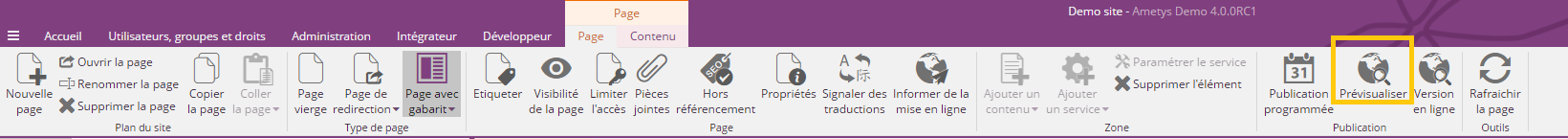
For more information, see the Labels online documentation

Check, preview content

All newly created content is in the Draft state. As soon as you edit content, it is back in the draft state. The status of a piece of content can be viewed in the **Content tab**.

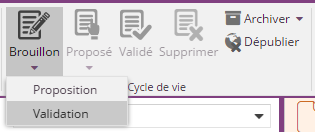


Once your content has been edited, and tagged if necessary, you can check the page before publishing it. All you have to do is click on the **Preview button**  on the **Page tab**.



The page will appear in a new tab and you can review your content before it goes live.

To publish your page, you need **to Validate** the content.



To learn more about uploading content, see the [Lifecycle documentation](https://wiki.ametys.org/display/AMETYS40FR/Cycle+de+vie)

Add Smart Objects to a Page

You can add media or interactive objects to your pages in two ways:

* **Add objects directly to content** with the online editor
* **Add customizable services** to your pages

Methods of integration

The table below summarizes the different insertion modes available for different object types.

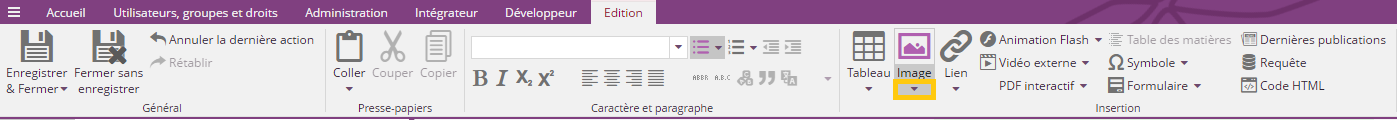
|  |  |
| --- | --- |
| Item Type | Mode d’insertion |
| Documents | In content, online editor    With a |
| Forms | In content, online editor |
| Footage | In content, online editor    With a |
| Videos | In content, online editor |

Insert images

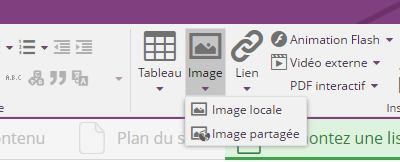
To add an image to your content, follow these steps:

**1.** Position your cursor in the text box of your rich field, where you want the image to appear

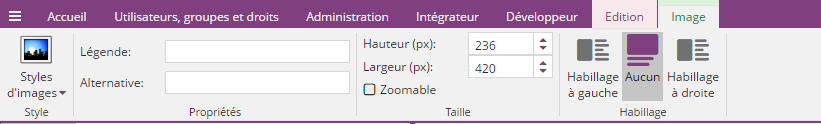
**2.** Click the arrow below the **Image** button on the **Edit tab**



**3.** If you want to add an image from your hard drive, select the **Local Image** option. If you want to insert an image from the Resource Explorer, select the **Shared Image option**



**4.** Once the image type is selected, a new Image tab appears. Use this tab to change the image display in your content: caption, text alternative, alignment, etc.



Add services

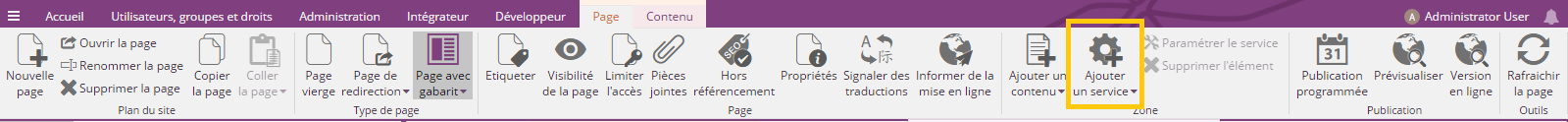
In Ametys, services are dynamic elements that cannot be edited. You can add or edit a service using a list of settings.

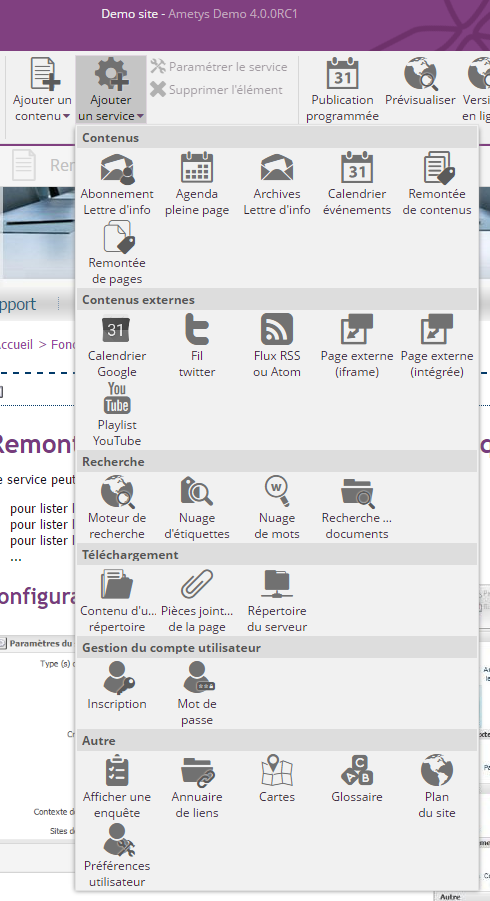
To add a service to your page, follow these steps:

**1.** Make sure your page is a **Template Page**.

**2.** Select the area in which you want to add a service

**3.** Click the **Add Service button**  on the **Page tab**





For more information about the services available, see the [Services documentation](https://wiki.ametys.org/display/AMETYS40FR/Services)

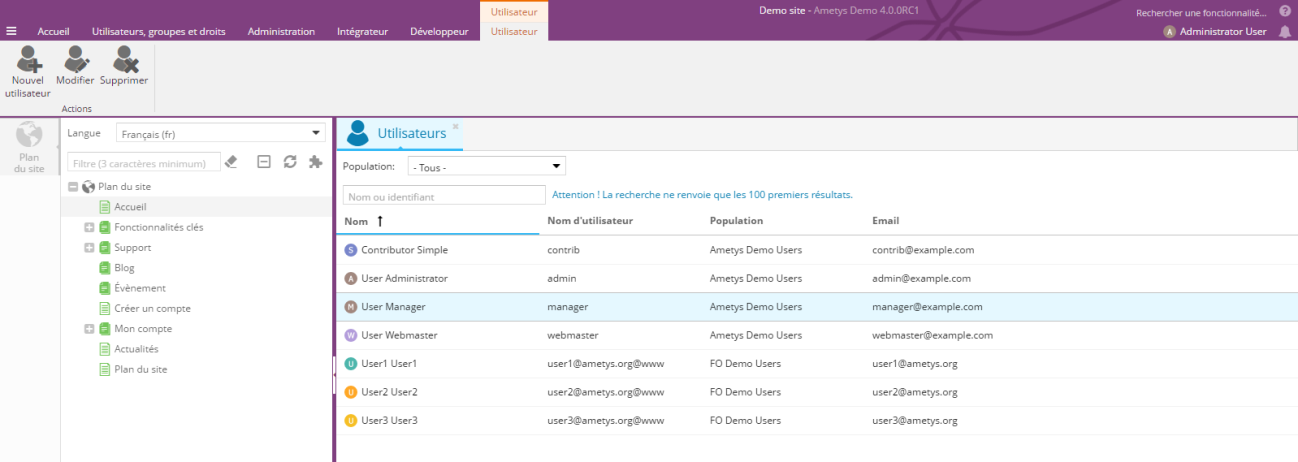
Users, Groups and Rights

With the **Users, Groups, and Rights** tab of the ribbon, you can manage the app's users and their associated rights.

|  |
| --- |
| **IMPORTANT**  Rights management is usually left to the primary administrator of the site. Advanced rights management is possible with Ametys (rights to resources, to content, to specific features such as tags, aliases, etc.).  Each **user** has rights through the assignment of a **profile**, i.e. a set of rights. This profile is applicable to a **context**, i.e. specific content types or nominative web pages. |

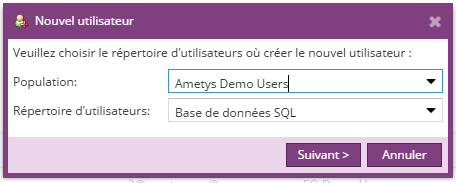
Add users

To add new users, go to the **User tab**.

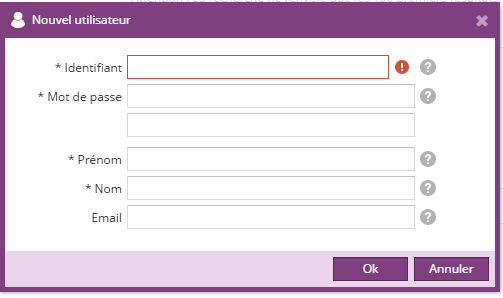


**1.** Click the **New User button**  on the **User tab**

**2.** Select the type of user you want to create, this is the population. For example, you can create a site-side user, i.e. a user with login access to dedicated pages on your website.



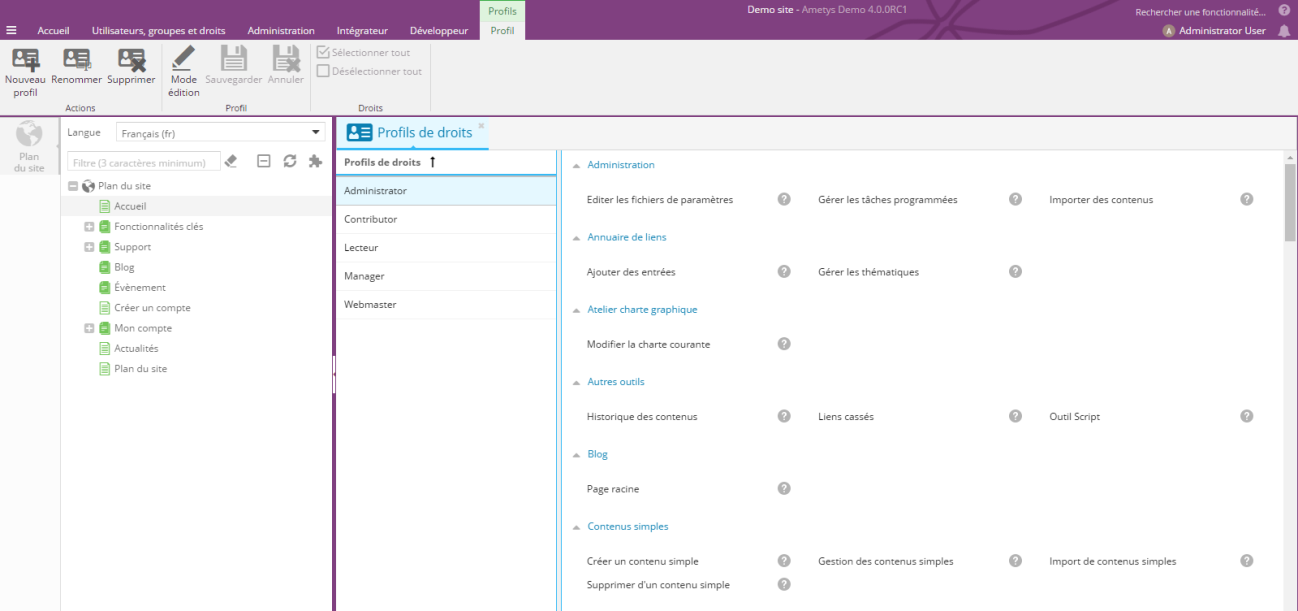
**3.** Fill in the fields and click Ok to complete the creation



|  |  |
| --- | --- |
| Image search result for "warning icon" | When you need to manage a large number of users and set up fine-grained rights management, it is customary to use **user groups**. You will be able to easily assign one or more profiles to a user group. |

Create a Rights Profile

By selecting the **Rights Profile** button on the **Users, Groups and Rights tab**, you will be taken to a new menu dedicated to managing profiles.

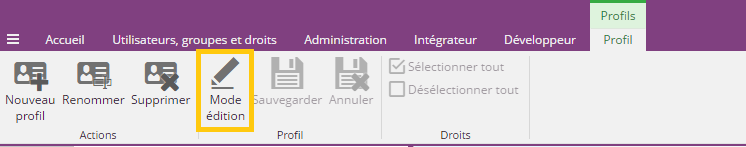


To create a new profile, follow these steps:

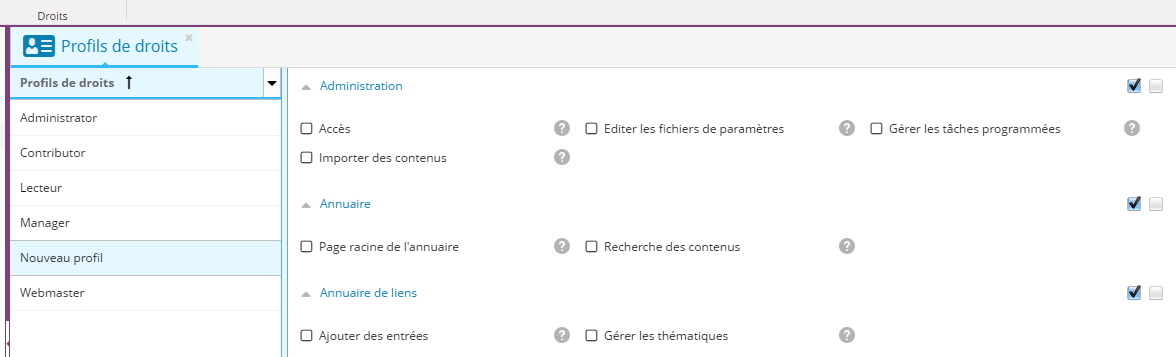
**1.** Click the **New Profile** button on the **Profile tab**

**2.** Fill in the name of the profile you want to create

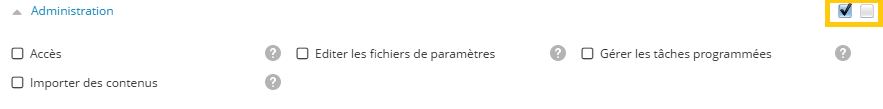
**3.** Click on the **Edit Mode** button on the **Profile tab**



**4.** Check or uncheck the rights you want to assign to the profile from the list provided. Rights are grouped by category.



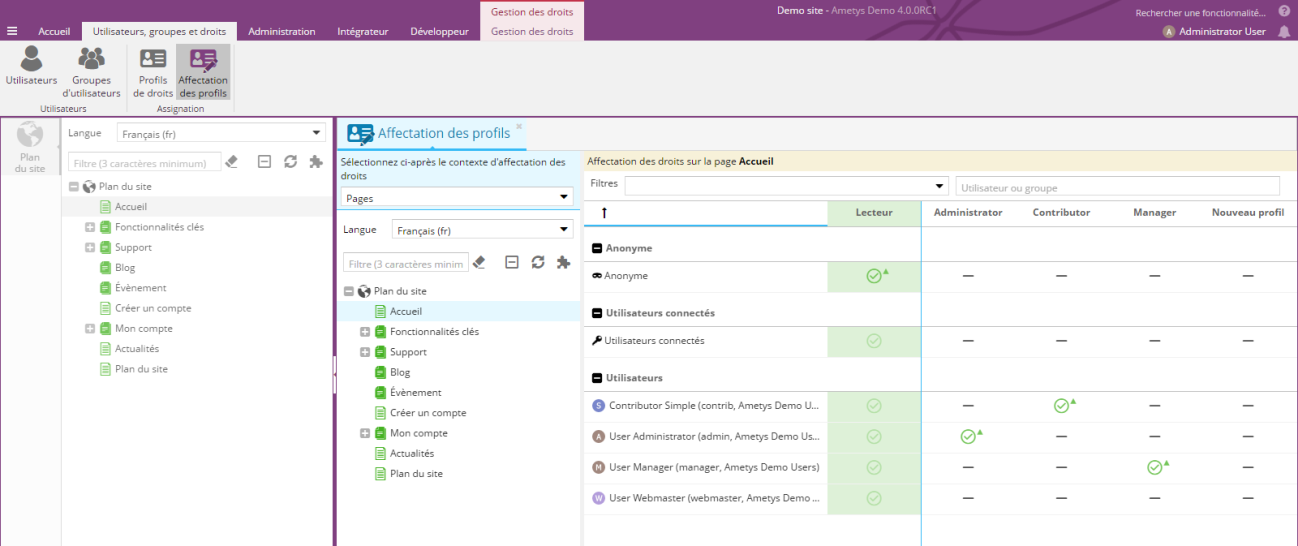
You can quickly select or deselect all the rights in a category by using the buttons to the right of the categories



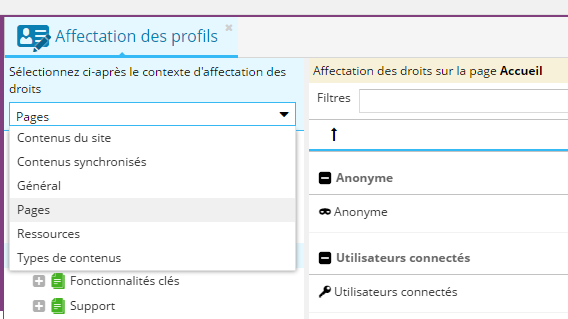
**5.** Once the changes are made, click on the **Save button**  on the **Profile tab**

Assign or modify rights

Selecting the **Profile Assignment button**  on the **Users, Groups, and Rights** tab will take you to a new menu dedicated to assigning rights.



**1.** Select the context in which the rights are assigned. These can be resources, pages on your site, types of content, and more.



**2.** Click on the icon  to assign the user(s) or user group(s) to the desired profile. The icon  indicates that the user or group of users has the associated rights.

To learn more about rights management, see the online documentation [Users, Groups, and Rights](https://wiki.ametys.org/display/AMETYS40FR/Utilisateurs%2C+groupes+et+droits).

Try some advanced features

All the features of the app are presented in the [online documentation](https://wiki.ametys.org/display/AMETYS40FR/Documentation+Ametys). This guide introduces three popular advanced features in this section.

Create a form

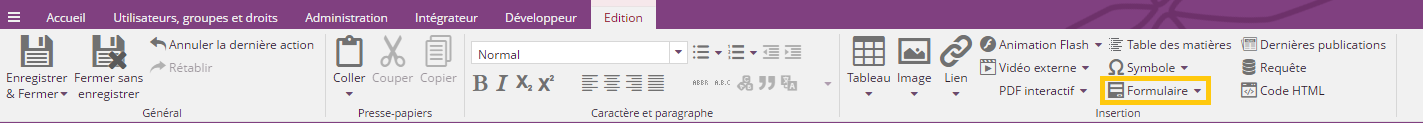
You can create and manage forms, such as contact forms, very easily with Ametys.

To create a new form, follow these steps:

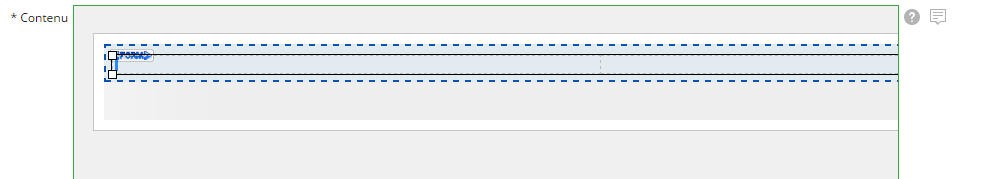
**1.** Create new content or edit existing content

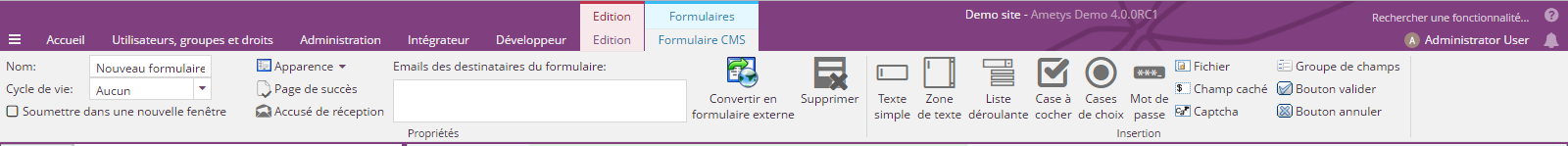
**2.** Position your cursor in the text box of your rich field, where you want to add your form

**3.** Click the **Form button**  on the **Edit tab.** If you click on the arrow below the Form label, a menu allows you to choose between adding a CMS form, fully managed with the application, or adding a form to an external site.

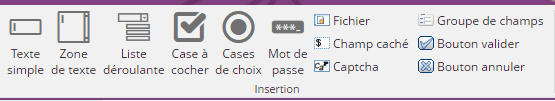


**4.** The form is represented in the editor.

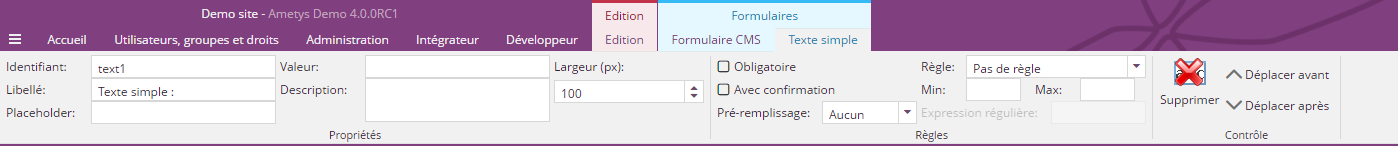
**5.** Use the **Form** tab on the ribbon to add your form fields



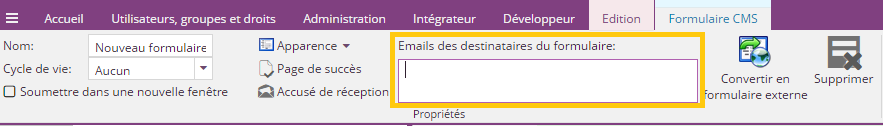
**6.** Click on the type of fields you want to add to your form: plain text, text box, drop-down list, etc.



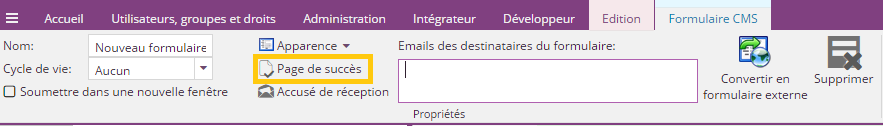
**7.** Each type of field gives access to a new setup tab in the ribbon



**8.** Once you have completed the fields as you wish, add the email address(es) of the recipients of the form. These people will receive the data sent by visitors.



**9.** Click the **Success Page** button to choose a page in your tree to which the visitor is redirected after submitting the form. By default, a non-navigation page is automatically generated.



**10.** Click the **Save & Close** button to save your content

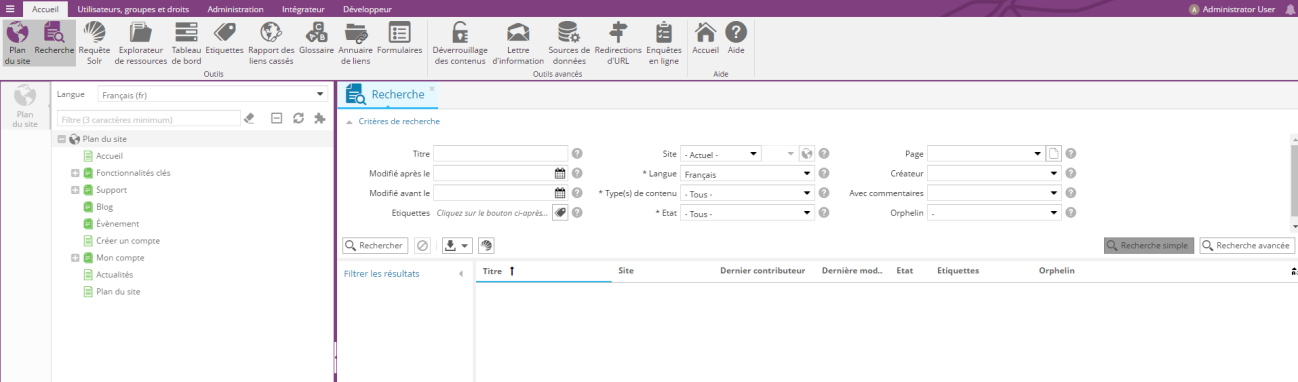
|  |  |
| --- | --- |
| Image search result for "warning icon" | Ametys allows you to view and export the data sent by visitors from the **Forms button**  on the **Home tab**.    The interface presents all the forms managed with Ametys on the site. |

For more information about forms, see the Editing [Forms](https://wiki.ametys.org/display/AMETYS40FR/Edition+des+formulaires) and [Forms documentation.](https://wiki.ametys.org/display/AMETYS40FR/Formulaires)

Search for content in the back office

You can use the **Search** tool on the **Home** tab to search for content in Ametys.

This tool is widely used to find content based on multiple criteria such as labels, type of content, modification date, content status, etc.



You can export your search in CSV or XML format by clicking on the 

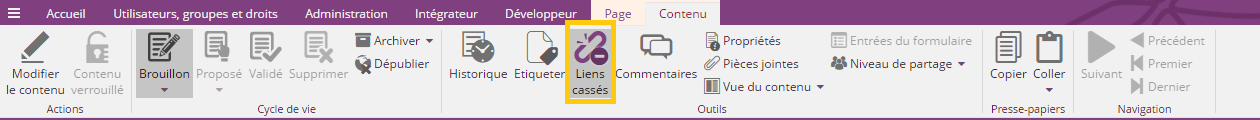
Repair broken links

Ametys natively provides tools to detect and manage broken links throughout the site. You can initiate a manual check on specific content and/or set up an automatic check every night with an email report if broken links are detected.

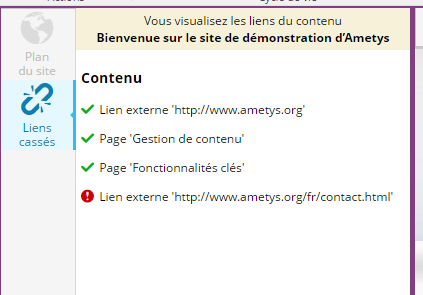
To initiate a manual check on content:

**1.** Select the content of your choice

**2.** The **Broken Links** button on the **Content** tab is automatically highlighted if broken links are detected

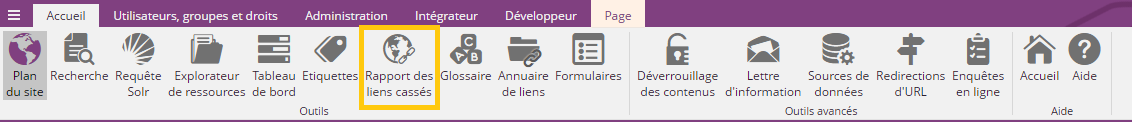


3. Click the **Broken Links** button on the **Content tab**, the tool will appear in the side area to present the links of the content



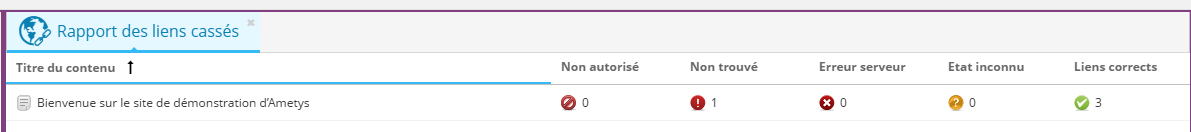
To run a review of all site content and view broken link reports, follow these steps:

**1.** Click the **Broken Links Report button**  on the **Home tab**



**2.**  Click the **Start Verification** button on the **Broken Links** tab. The verification may take several minutes, confirm the start of the operation.

**3.** The report is displayed in the central area



To learn more about this feature, see the Broken [Links documentation](https://wiki.ametys.org/pages/viewpage.action?pageId=36274364)