

A User's Guide to Plone

Thomas Lotze, Jan Ulrich Hasecke

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Foreword

This book is a natural expression of the Plone content management system (CMS). The goal is simple: make the day-to-day user productive in authoring and editing web pages with Plone. Lots of software projects pay lip service to this challenging task; Plone actually delivers. The Plone CMS, and this book in particular, is committed to empowering the everyday user.

Perhaps this vision sounds utopian, but I've personally witnessed how the efforts of all kinds of people can coalesce around a single idea. Plone was created by two people who never met physically until a year after working on the project. That led to a Plone conference in my hometown of New Orleans and several initiatives, including major work on accessibility and a demonstration of how Plone helps the visually-impaired become productive. Mind blowing. In a blink of an eye, the torch has been handed down to new developers who are continuously adding improvements and new features. The goal has always remained the same: make the daily user's job easier and (hopefully) not leave any category of users behind.

This book is an extension of the Plone community. In addition to helping Plone users become more productive, it serves an important advocacy function. When a book is shared among people within an organization, that benefits the recipient as well as the purchaser. This chain of sharing may inspire others to contribute to the Plone community in new and unanticipated ways. Wouldn't it be wonderful (for example) if the next person reading this book decided to translate it into Braille or discover some way to broaden Plone's appeal? Participation is the guiding force behind the writing of this book and behind the open source movement as a whole.

Alan Runyan (Co-founder of Plone), April 2008

Preface

Over the course of our work on projects at gocept, we have seen the importance of having a comprehensive user's guide when introducing new software systems. That is especially true when dealing with open source software such as Plone.

This book has arisen out of the desire not only to document our own content management solutions but also to support the Plone open source project with an easily accessible user documentation.

Although Plone websites are usually customized to suit the special needs of the organizations using them, the basic functions and operational concepts of Plone remain fundamental to every site. It is for that reason that we have produced a handbook for the basic system that deals with the software's fundamental similarities.

This book aims at reaching users who work on Plone websites as authors or editors. It should also serve as an educational tool and an aid for teachers, with the tutorial sections providing a solid basis for introducing new users to working with Plone.

In this edition, we have updated the book for use with Plone 3.1, revised much of the language, and structured its content in a more comprehensible way.

We hope that the present book will facilitate simplified training and proficient handling of this content management system for both present and future Plone users, as well as encouraging and promoting the wider employment of Plone.

Thomas Lotze und Jan Ulrich Hasecke, July 2008

About this book

Reference

This book was written in reference to Plone 3.1.7. It describes Plone from the point of view of an end-user and is thus aimed at reaching authors and editors of Plone websites. The book is structured in a way that promotes its use as an educational tool; take note, however, of the licensing agreements to which this book is subject, as described in more detail in the following.

The appendix provides administrators with instructions on how to configure a Plone installation so that all of the functions described in this book can be properly auditioned.

For administrators and programmers who want to inform themselves about installation, adaptation, and development of Plone, we recommend books such as “Professional Plone Development” by Martin Aspeli.

Information, Comments and Questions

You can find the electronic edition of this book on the Internet at:

<http://www.plonebook.info/>

On this website, you will find older and possibly newer versions of this book, editions in other languages, and a description of the licensing restrictions as well as other information.

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About this book

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Please address any questions concerning these or related issues to the aforementioned e-mail address.

Improvements to Plone Included in Version 3

- Items retain previous revisions: instead of an undo function, each item now retains a history of all its previous versions.
- The workflows have been more flexibly designed, and the partitioning of permissions has become more articulately structured.
- In place of the Author's Page, each user is provided with a personal dashboard and a profile page.
- AJAX functions have been incorporated for allowing items to be edited directly within their view displays, and for presenting forms such as the edit page in a more comprehensive manner, among other things.
- New possibilities for registration have been added, allowing it to transpire with the help of an activation e-mail.
- It is now possible to log in to the website using OpenID.
- The navigation portlet can be more freely configured.
- An RSS feed portlet has been added.
- Pages have been furnished with a new presentation mode based on S5.
- In Plone 3.1, the static text portlet has been added.

Acknowledgments

This book would not exist without Plone. We thank the many people who have developed Plone and its underlying software - CMF and Zope - for their long years of hard work.

In addition, we would not have been able to write this book without the help of many others. We would like especially to thank Benjamin Erfurth, Volker Bachschneider, Anne Schneider, Simon Havlik, Nathan Moore, Robert Nagle, and our colleagues at gocept, with a special thanks to Andrea Glodek, for their experienced support.

Furthermore, we would like to thank the Potsdam Institute for Climate Impact Research (PIK), which made possible the availability of an English version for the previous edition of this book, and Enfold Systems, Inc. for their support in allowing for an English version of this edition.

1 Introduction – What is Content Management?

This chapter will provide you with an overview of what a content management system (CMS) is and how Plone carries out CMS tasks.

“Content management” describes the process of organizing content, specifically in dealing with electronically generated documents. This can include text documents, as well as images, sounds, e-mails, databases, or event announcements. As a rule, it concerns all types of information which can be saved onto a computer.

Thanks to the prevalence of computers and data networks, especially the Internet, most information is available digitally in many companies and other institutions today. A content management system allows groups of people to manage shared information together. A CMS is most commonly used in creating an intranet or in establishing a presence on the Web. In so doing, both highly customized or more general application solutions are available. For example, a customized CMS might be specialized in organizing files and customer data, whereas a general application CMS can be used in the widest variety of applications.

Plone is a general application type of CMS. Because It can be customized to fit the special needs of various organizations, however, it is an exceptional tool for use in many different areas of application.

In addition to providing storage for files, a CMS offers users a wide variety of further advantages.

1 Introduction - What is Content Management?

Freedom and Independence

- Data is available around the clock. You are free at any time to access statistics, reports or files, without depending on the presence of coworkers or availability of a given department.
- Documents are automatically processed and available for review in a variety of formats. These include PDF files, formats used by applications such as OpenOffice.org, Word, Excel, and many other file formats.
- A CMS makes content more accessible for users with physical disadvantages. A blind person, for example, can make use of a Braille display or screen reader in accessing text documents. In addition, adherence to standards such as “WAI-AAA” (see <http://www.w3.org/WAI/>) ensures that CMS user interfaces are appropriate for people with special needs.
- Documents are easy to search through. Various text formats, events, images and other data are all automatically included in the search results. Full-text and fuzzy searches increase the quality of results.
- You are not required to work from any one specific location. You are just as free to access a CMS using the computer at your place of work as you are using your laptop, a mobile phone, or a PDA.

Reliability

- With a CMS, documents are organized centrally, “at a single place.” This allows you to avoid circulation of various or even conflicting copies of a single document, increasing the reliability of the content offered.
- So that it can be systematically categorized, content is saved in a CMS together with metadata. In this sense, a CMS can be thought of as being a well-sorted filing cabinet.

- Workflows used in a CMS allow you to automate the preparation and release of content in accordance with the guidelines and principles of your organization. They also allow the proper individuals to retain the most current and reliable information.
- A CMS makes it possible to remove content from public parts of a website while retaining them within the site's private archives. This reduces the danger of accidentally deleting information which is still needed.

Collaboration

- With a CMS, several people are able to work together simultaneously - for example, on a single website. Resources such as images used on a certain page may also be used by someone else for another purpose. Automated overview lists display newly created items or remind users about events.
- Using standard formats, a CMS can integrate information taken from other systems. It can consolidate news and events from a press agency, for example, and prepare it for presentation to the user.
- Content in a CMS can be developed and published by an editorial board but also by single users. It is often the case that a CMS contains areas in which content matter is subjected to formal review, in addition to freer areas in which no such auditing is required.
- Users can be assigned certain functions within a CMS according to their responsibilities and areas of work. They may be authors, responsible for the creation of content, or editors, who are authorized to review and release information. A user might be an editor in his own area of work while only being authorized as an author or even to view public information in others.

Assigning functions enhances security, eases the organization of workflows, and facilitates communication between the appropriate responsible parties.

1 Introduction - What is Content Management?

Security

- Through using security guidelines in managing content, a CMS ensures on multiple levels that documents can only be created, edited, released, archived, or viewed by users who are authorized to do so.
- Because workflows in a CMS can be adapted to meet company specific demands, they can be integrated seamlessly with the existing workflow of a company.
- Clearly defined security guidelines within the various areas of a CMS allow for flexible and secure handling of confidential data.

Part I

Tutorial

2 The Basics of Plone

This chapter will provide you with the background knowledge that is needed for following the tutorials to come.

2.1 Content Items

When using a Plone website for the first time, it will remind you of an ordinary website. Its individual pages offer both editorial content as well as access to a variety of functions.

When navigating through a Plone website, it is important to understand that the visible pages are not actually the primary elements from which the website is comprised. Instead, these serve merely as “windows” through which content can be viewed; content units viewed in this way create the core of the website and are the key to orientation. These content units are called “items.”

In thinking about items in Plone and what they are, it may be helpful to imagine a department store filled with a wide variety of items for sale. Similarly, Plone offers a wide assortment of items which serve various purposes. When working with Plone, therefore, you should keep in mind that you will actually be viewing, editing, or sorting items as opposed to Web pages.

2.1.1 Item Types

As suggested above, there are various types of items in Plone. Each item type constitutes the designated use for the item and its characteristics.

2 The Basics of Plone

Plone recognizes the following built-in types of items:

- Pages
- News items and events
- Images and files
- Links and favorites
- Folders and collections

Each of these item types are specialized in carrying out various tasks; their individual characteristics are described in more detail in Chapter 5 on page 73.

Among the various items offered in Plone, folders and collections play a unique role. Folders group items from a Plone website together, whereas collections consolidate related items from multiple folders. Using folders and collections, you can structure your content and retain overview when working with more extensive websites.

2.1.2 Metadata

Plone makes it possible for users to handle hundreds or even thousands of content items with ease. In order to assist in keeping things organized with such large amounts of items, each item is equipped with information which facilitates cataloging and locating single items within a large archive.

This information is called “metadata,” or entries which describe other data (such as an image item). Included among the entries are the title of an item, the name of its author, and its creation date as well as copyright information.

Metadata is used not only in Plone but has been used for Web pages for a long time. Within this context, a standard was developed which defines the minimum of information to be included in a given item’s metadata. This standard has been named after its place of origin as “Dublin Core.”

Plone items can save many of the entries requested by Dublin Core. When creating an item, you will be asked to give a title and a short description; further entries such as keywords can be made at a later time. A complete overview of Dublin Core can be found at (<http://dublincore.org/documents/dcmi-terms/>).

2.2 Displays

Another term that will appear regularly among the information to follow is the content item “display.” What is meant by this term? Let us return to our department-store analogy for assistance in better understanding this. Imagine that once you have purchased an item – a radio, for example – you can then view that item from various perspectives. Looking at the front of the radio will show you which channel has been selected. When looking at the back side, you will be able to see what kind of cable connections the radio supports. On the other hand, you can also simply listen to music from out of the radio’s speakers. Finally, you can also unscrew the radio in order to modify the electronic parts from which it is built. The different displays of an item in Plone work in much the same way: the CMS provides you with a certain screen display of a given item depending on whether you want to view, add, edit, or move the item from place to place within the website you are working on.

For each item, Plone can produce a number of screen displays, each serving a different purpose. In addition to the display of content which can be viewed by any visitor to the site, for example, there are also display views which are meant solely for authors and editors. Whenever you access an item, you will be doing this using a certain display. Just as you can only see which channel your radio is tuned to from a frontal viewpoint, you can only view the content of an item through its view display. Another display allows you to edit the item, whereas yet another provides you with the ability to define which users on your website will be allowed to access that item. The various

2 The Basics of Plone

displays provided by Plone for each content item are described in Chapter 5 on page 73.

2.3 Users

Different types of users have widely varying interests when using content management systems. Unregistered users visit CMS-generated websites to view the public content displayed there and make use of the public access functions offered. Authors contribute to the site's content, whereas editors are responsible for the publication of items.

So that Plone can offer each person the appropriate information and access options, users must first be made known to the website. That means that people need to be registered as users so that they are able to identify themselves to the system. The latter is done by entering a user name and a personal password.

As a registered user, you receive, among other things, more access capability to certain items. That can result in your being offered more screen displays of those items. Furthermore, there are a number of portlets which can be customized to fit your personal needs and are reserved for registered users only.

At the same time, differentiation between users and the observation of access privileges allows you to protect private information and limit user access to certain areas.

If your website has been configured accordingly, you will also be provided with a personal folder. You are free to add, delete, and edit subfolders and other items there as you please.

3 Appearance of the Plone Interface

This chapter will acquaint you with the Plone interface, making it easier to follow the Plone tutorials to come.

Start your Web browser and call up your website. Your site's administrator can provide you with the address of your website.

You will now see the Plone interface as it is presented to visitors who are not logged in (see Figure 3.1 on the following page). Every page on the website follows this same basic layout. The following diagram outlines the main elements of a Plone page:

1. Page Head
2. Content area
3. One or two sidebars
4. Page Footer

These elements are described in more detail in the different sections of this chapter.

3 Appearance of the Plone Interface

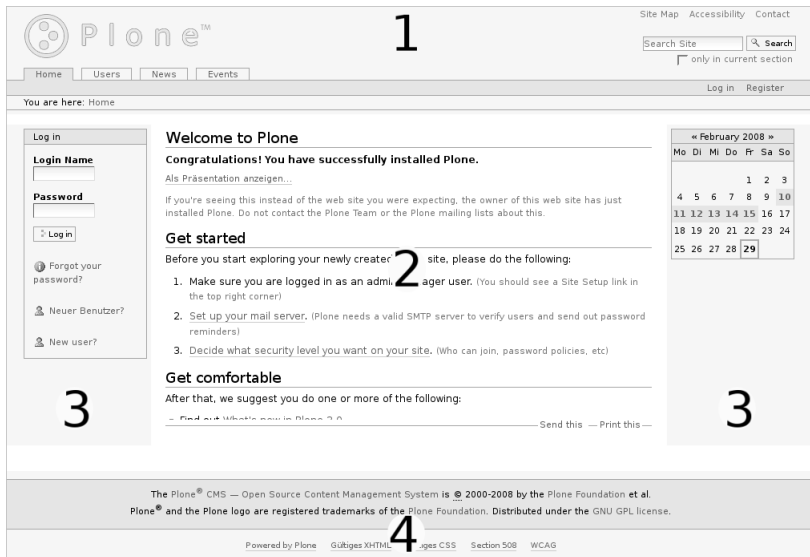


Figure 3.1: Plone interface for visitors who are not logged in. The main elements are the head (1), the content area (2), the sidebars (3), and the footer (4).

3.1 The Page Head



Figure 3.2: The head of a Plone page. It contains a logo (A), a few links (B), the search field (C), and the navigation bar (D).

3.1 The Page Head

Figure 3.2 illustrates the individual parts of the head of a given page on the website. These include the following four elements:

- A. Logo
- B. Links in the head of the page
- C. Search field
- D. Navigation bar

The logo in the upper left-hand corner of the page is usually customized by the operating party. Until that is done, the Plone logo (as illustrated in the figure) will appear by default.

To the upper right, there are links which lead you to the site map, to the accessibility page, and to a contact form.

Directly below these, you will find the search field. If you enter a keyword or search term into the field and activate the search button, a full-text search will be performed either throughout the entire website or within the current area, as determined by you. If Javascript is activated in your Web browser, search results will be displayed immediately, even while you are typing the search terms.

3 Appearance of the Plone Interface

The navigation bar is made up of three parts:

1. Main navigation tabs
2. Personal bar
3. Breadcrumb menu

The main navigation tabs serve as links which allow you to quickly access important areas of the website from any given page. These areas usually include folders placed at the uppermost levels of your website.

The personal bar to the right within the colored task bar contains links and information concerning the current user - yourself. If you have not yet logged in, the bar will provide links to a log-in page and possibly to a registration form (if you have not yet registered).

On the breadcrumb menu (directory path listed beneath the main navigation tabs and to the left), you can trace your whereabouts in the website at any time, following the path through the order of folders which has led you from the home page all the way to your current position and the currently shown item. Each step serves as a link referring to a folder traversed along the way.

3.2 The Content Area

Plone can portray each item in your portal using various screen displays. These displays make up each page's content area. If you are visiting your website using the address obtained from your administrator, you will see a display of the home page which more or less simply displays the content of the home page.

3.3 The Sidebars

To the left and right of the content area, sidebars may appear. They incorporate operational elements and other additional information. Each of these two areas can also contain multiple portlets. If a sidebar does not contain any portlets, or if the portlets do not contain any content, the sidebar will be hidden from view.

On the home page, you will find two different portlets: the log-in portlet, and the calendar.

The log-in portlet (just as with the registration form) contains fields for entering your user name and password. In the event that you should have forgotten the latter, you have the option here (and on the registration form as well) to request a new password. From this portlet, you can also access the registration form using the “registration form” link.

The calendar portlet on the right-hand side displays the current date and the day of the week. When browsing through past or future months, you may come across dates which have been highlighted in blue and set in bold type. This would mean that an event has been recorded for that day in Plone. If you hold the mouse cursor over that day, more detailed information about the event will appear.

3.4 The Page Footer

The footer of each page on the website contains copyright information about Plone as well as references to the Internet standards to which Plone adheres.

4 Working with Plone

The following tutorials will guide you step by step through the basics of using Plone. As each tutorial is built upon the other, these will provide you with the tools you need to better understand the reference part of this book.

If you would like to follow the tutorials by experimenting with your own Plone website, you can learn how to configure a site for doing so in Appendix A on page 207. As most likely is the case, however, you will be working on a website which your system administrator has already appropriately configured.

You will notice that the text and illustrations in this book are taken from an example website and deal with seminars offered by an imaginary firm. On this website, there is a “Seminars” folder containing a good deal of content. The content on your website will, of course, reflect what has already been added by the site’s administrator and will differ in many cases from that referenced in this book. For the sake of clarity, this book does not take any such discrepancies into account.

Be sure to activate Javascript in your Web browser’s settings before beginning with the tutorials. Otherwise, not all of the features offered by Plone will be completely functional.

4.1 A Quick Tour

In the first tutorial, you will become familiar with basic tasks such as logging in, signing out, and navigating your way around a Plone website.

4 Working with Plone

Start by going to your website. You can find out your Internet address by asking your site's administrator. In your Web browser, you will now see the home page, which was briefly described in Chapter 3 on page 33.

4.1.1 The Website Before Logging In

Until you have logged in to the website, it will appear as it does to all other visitors. You will only be able to work as an author or editor (with access to the appropriate information and tools) after you have logged in with a user name and password.

Before logging in, take some time to become acquainted with your website from the point of view of a visitor.

- Follow the links on the main navigation tabs to view the news and event summaries.
- Take a look at the registration form, which you can reach using the link on the personal bar.
- Use the links to the upper-right of the page to reach the site map, the accessibility settings, and the contact form.

4.1.2 Registering and Activating a User Account

It is possible that your administrator has already registered you as a user on your website. In that case, you will have received an e-mail in which you are asked to activate your user access. To do this, you need to follow the link provided in the e-mail and then enter your password on the website which is called up (see Figure 4.1 on the opposite page).

Your password must contain at least five characters. Choose a password which you can easily remember but which is not too obvious.

Set your password

Please fill out the form below to set your password.

New Password

My user name is
Enter your user name for verification.

New password
Enter your new password. Minimum 5 characters.

Confirm password
Re-enter the password. Make sure the passwords are identical.

Figure 4.1: The form for choosing a password

Because it will not be readable, you will need to enter it twice in order to rule out any typos.

If activation was successful, you can skip the next section about the registration form and are free to log in. Otherwise, you will need to register yourself as a user of the website. Depending on the configuration of the website, links to the registration form may appear on the personal bar, in the log-in portlet, and on the log-in page.

The Registration Form

On the registration form (see Figure 4.2 on the next page), Plone asks for the information it needs to register you as a user. The form will be configured in different ways depending on your website's configuration settings. The following information, however, will always be requested:

- First and last name
- User name

4 Working with Plone

Registration Form

Personal Details

Full Name
Enter full name, eg. John Smith.

User Name *
Enter a user name, usually something like 'jsmith'. No spaces or special characters. Usernames and passwords are case sensitive, make sure the caps lock key is not enabled. This is the name used to log in.

E-mail *
Enter an email address. This is necessary in case the password is lost. We respect your privacy, and will not give the address away to any third parties or expose it anywhere.

A URL will be generated and e-mailed to you; follow the link to reach a page where you can change your password and complete the registration process.

Figure 4.2: The registration form for new users

- E-mail address

Your first and last name will be used, for example, to list you as the author of the items you create. You still need a user name, however, with which you can log in to the website. Try to choose a short and succinct name which you will easily be able to remember. You should also avoid using characters which you might not find on every keyboard, such as accents.

The e-mail address you enter here will be used, for example, to send you your activation e-mail. In the event that you have forgotten your password, you can also use this address to have a new activation e-mail sent to you. It is a good idea, therefore, to enter a valid e-mail address.

Depending on the configuration settings for your website, the registration form might already contain the entry-field for your password. If that is the case, you are free to log in immediately after completing registration without waiting to receive an activation e-mail. Aside from that, there may also be an entry-field in which you can specify that you would like to have your password sent to you by e-mail.

Entry-fields which are demarcated by a small red square must be filled in. The remaining fields may be left empty. Once you have

entered all the required information, activate the “register” button in order to send off the form.

4.1.3 Logging In

As soon as user access for you has been set up and activated, you can log in to the website either using the log-in link found on the personal bar or by using the site’s log-in portlet.

- Enter your user name and password into the entry boxes.
- Activate the “Log in” button.

If the log-in was successful, you will end up on the same page you had been on before. This is true regardless of whether you used the log-in page or the log-in portlet when logging in.

Log-in Errors

If you have made a typing mistake in entering your user name or password, Plone will inform you that the log-in has failed. Try repeating the process again making sure to use the correct information. If you have forgotten your password, you can request a new one to be sent to your e-mail address.

- In the log-in portlet, follow the “Forgot your password?” link next to the entry-fields for your name and password. This will take you to a form titled “Lost Password.”
- Enter your user name into the form’s field.
- Activate the “Start password reset” button.
- Check your e-mails. You should have received a new message containing a link.
- If you follow the link in your e-mail, it will take you to a form in which you can specify a new password.

4 Working with Plone

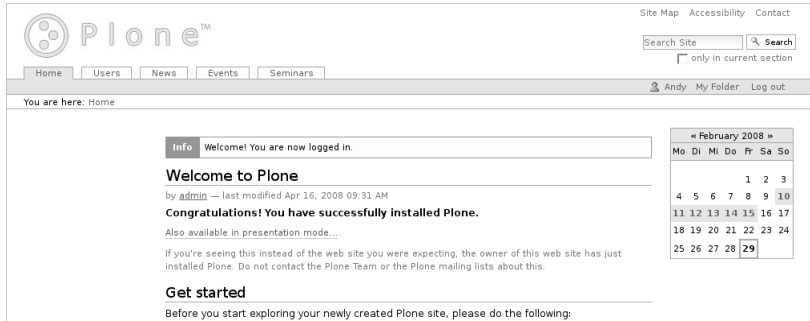


Figure 4.3: The Plone interface after logging in

- For security reasons, the link will only be valid for a limited amount of time. If this time period has already elapsed, simply follow the same procedure again.

This will entail a similar procedure to the one you followed when activating your user account. If you do not receive any reply from the Web server, get in touch with your site's administrator.

4.1.4 The Website after Logging In

After logging in, you will be taken back to the last page visited. A few things will have changed, however (see Figure 4.3).

Status Message

At the top of the content area, you will see a beige frame containing a status message. This confirms that you are logged in. The message will disappear after you leave the page. While working with Plone, status messages such as this will appear frequently, giving notice as to the success or failure of the task to have been carried out.

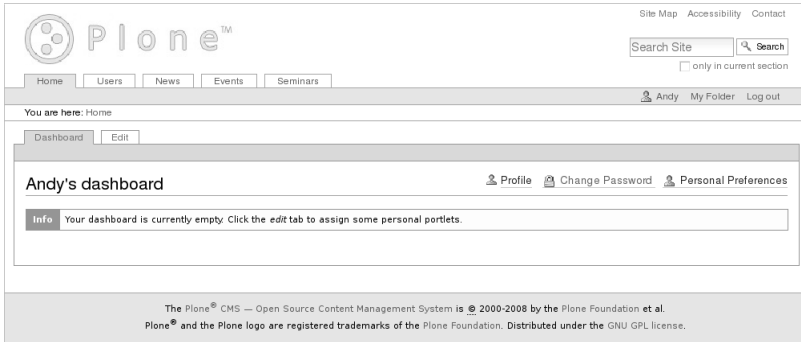


Figure 4.4: A personal dashboard

The Personal Bar

The personal bar now offers a few personalized entries.

- The first entry is your name. This also serves as a link to your own personal page, or “Dashboard.”
- Next to your name is the “My Folder” link. You can use this to move to your personal folder (if your administrator has provided for this).
- To the far right, you will find a menu item for logging out.

4.1.5 Your Dashboard

Follow the link with your name on the personal bar to your dashboard. You will now see an empty page with a frame around it to which tabs are connected (see Figure 4.4). Each tab denotes a different display of your dashboard page. You will then notice that, along with the “Dashboard” view display, there is a display called “Edit,” in which you can edit the content of your dashboard.

Portlets

After moving to the edit display, you will have the ability to add portlets to your personal dashboard page. For that purpose, your page is divided into four columns. In each of these, you will find a selection menu called “Add portlet.”

- Select the “Recent items” portlet option on the menu. This will take you to an editing form titled “Add recent portlet.” If Javascript has not been switched on, you will additionally need to activate the “Add portlet” button.
- In the editing form for the portlet, you can determine the number of items which are to be listed in the portlet. The default setting provides for five items to be listed. Change this number and save your entry.
- You will now arrive back at the edit display of your dashboard page. In the designated column, you will now find a new portlet. The small red “x” next to the portlet’s heading allows you to delete the portlet from your dashboard.
- Open up the “Dashboard” display to view the results.
- You will now see a portlet on your dashboard titled “Current changes.”

For a detailed list of portlets that can be added to your dashboard, see Section 7.2.4 on page 161.

Personal Preferences

Follow the “Personal Preferences” link on your dashboard. Take a look at what information about you is stored by the website, and which settings you can adjust to customize its look and behavior to your needs.

In the “Content editor” field, be sure to select Kupu. If you need to change this setting, remember to save the form. The tutorials in this book assume that Kupu has been set as your default editor.

Profile

Now go back to your dashboard page and follow the “Profile” link. Your profile provides other users with personal information about you. Notice which information is displayed. Now move to the edit display of your profile using the tabs. You will find that you have been taken back to the same personal preferences entry form you had visited before. Notice that not all of the personal information and settings from this form are published on your profile page.

4.1.6 Logging Out

At this point, we are ending our first tour through the website. Log out from the portal at the end of your working session.

- Follow the “Log out” link on the personal bar.

You will then receive a confirmation saying that you have logged out of Plone. The personal bar will now appear exactly as it did before logging in, and the website will appear once more as it does to all visitors.

4.2 Working with Pages

In this tutorial, you will learn how to add, edit, and delete a page on the website.

4.2.1 Adding a Page

In the following sections of this book, we are assuming that your site’s administrator has set up a folder named “Seminars” on your website. This folder is for your use in working through the following tutorials. You can reach it using the main navigation tabs.

4 Working with Plone

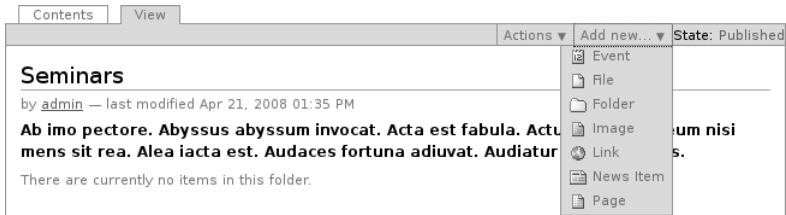


Figure 4.5: Menu for adding items

- Go to the “Seminars” folder by following the “Seminars” link on the main navigation tabs.

You will notice that the view display of the folder is framed with a green outline to which tabs and drop-down lists are attached. Using the tabs, you can move to the edit display of the folder, for example. Underneath the item display tabs, you will find the “Add new...” menu (see Figure 4.5).

- Open up the “Add new...” menu and select “Page.”

You will now see the editing form for the new page (see Figure 4.6 on the opposite page).

If Javascript has been deactivated, you will first be taken to a page which asks you to decide which item type should be added (see Figure 6.2 on page 119). Select the “Page” type and activate the “Add” button.

4.2.2 Editing a Page

The editing form is subdivided into five components:

- Default
- Categorization
- Dates
- Ownership

4.2 Working with Pages

Add Page
A page in the site. Can contain rich text.

Default | Categorization | Dates | Ownership | Settings

Title *

Description
A short summary of the content.

Body Text

Change note
Enter a comment that describes the changes you made.

Save Cancel

Figure 4.6: Editing form of a page

- Settings

At first, the “Standard” component of the form will be visible. The remaining sections of the form can be reached using the navigational buttons directly underneath the “Add Page” heading.

If Javascript is not activated, the edit page will show you all five of the form’s components listed consecutively. The complete range of functions for all five components will be explained in Section 5.1.2 on page 76.

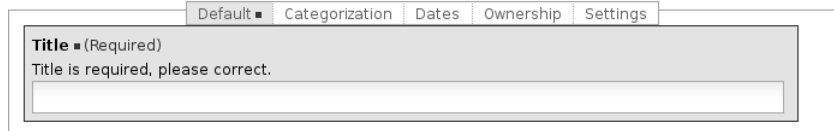
This tutorial will cover how to edit fields in the default component. It contains four entry-fields (see Figure 4.6):

- Title
- Description
- Body Text
- Change note

4 Working with Plone

Add Page

A page in the site. Can contain rich text.



The screenshot shows a web form titled "Add Page" with a subtitle "A page in the site. Can contain rich text." Below the subtitle is a horizontal menu with tabs: "Default", "Categorization", "Dates", "Ownership", and "Settings". The "Default" tab is selected. Below the menu is a form field labeled "Title" with a red square icon and the text "(Required)". Below the label is the error message "Title is required, please correct." and an empty text input field.

Figure 4.7: Error message due to a blank required entry-field

Title and Description

The first entry-field asks you to enter the title of the page. This field must be filled out. Required entry-fields in Plone are always marked with a red square to the right of those fields' headings. If you try to save an incomplete form, you will receive an error message.

Before giving your page a new title, notice how Plone reacts to required fields when left blank.

- Move the cursor into the “Description” field without having entered a title.

The “Title” field will now be highlighted in red, and you will be reminded to enter a title.

- Activate the “Save” button found at the bottom of the form without entering a title.

Instead of saving the page, Plone generates the same form again. The title field will now be highlighted along with an indication stating that the field is required (see Figure 4.7).

- Now enter a title for the page into the title field - “The Cooking Class” for example.

The second field asks for a short description. That might include a content description, a summary, or a passage taken from the main text. The description's primary purpose is to appear in generated



Figure 4.8: Kupu in the edit display of a page

lists of content items, such as search results. This helps readers to decide whether an item is of interest to them. Entering a description is therefore always advisable.

- Enter a summarizing text into the “Description” entry box.

Body Text

The “Body Text” field looks a bit different. At the top of the text-field, you will find a toolbar with editing functions for use with the Kupu word processing application (see Figure 4.8). If the toolbar is missing, this probably means that you have not selected Kupu as the visual editor on your personal preferences form. Read the tutorial on page 46 to learn how to select Kupu in your personal preferences as your word processor.

Kupu allows you to set selected parts of your text in italics or bold, designate a selection of text as a heading, or align text to the left or right. A detailed description of formatting options can be found in Section 8.5 on page 191.

- Enter some text into the “Body Text” entry-field.
- Place the cursor within a line of text which should be presented as a heading, and select the “Heading” style from the options menu.

4 Working with Plone

- Enter a new line of text and arrange it as a list by using one of the list icons on the style menu.
- Notice how new lines appear as additional items in the list until the list function has been deactivated.
- Try out the other formatting functions offered on Kupu's toolbar, and notice how switching them on and off affects the text.

Even as you enter new text, it is presented in the same style used by the website. This serves to give you an immediate impression of what the end result will be.

Change Note

Comment on the changes you have made to the page in the “Change note” field. Because Plone also saves older versions of each item, these notes can be useful later for finding out when or why certain changes were made.

Saving your Entries

Save your entries when you are satisfied with them.

- Activate the “Save” button at the bottom of the form.

If Plone has accepted your changes, it will present you with a view of the edited page (see Figure 4.9 on the next page). You will then be informed by a status message that your page has been saved.

Your entries are now presented under the view display tab, where the page heading is comprised of the title you entered. Just beneath that, you will see the description you entered, followed by the page's main body of text.

If there is a problem with saving, you will remain in the editing display. Read the listed error message and correct your entries accordingly.

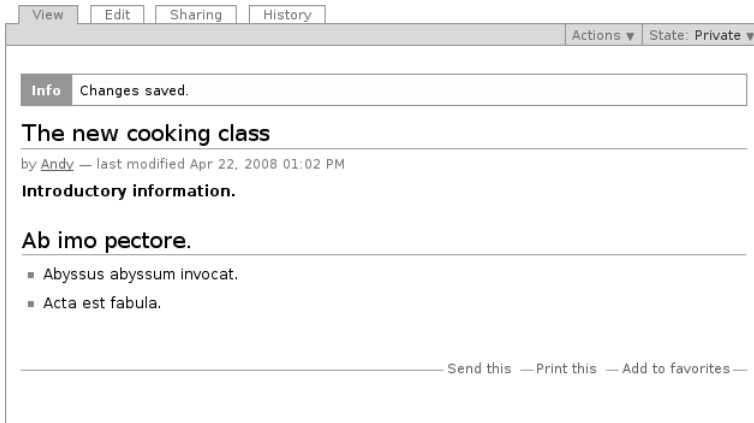


Figure 4.9: The page after editing



Figure 4.10: Instantly editing single elements of the page

Instantly Editing Single Elements

You can also edit single parts of the page directly in the view display. To do so, Javascript must be activated in your Web browser.

- In the page's view display, click on the title with the mouse.
- The page title is then put into instant-edit mode (see Figure 4.10). Change the title and save your changes using the "Save" button beneath the entry-field.

You can also change the description and the main text in the same way. This function is especially useful for making quick and easy

4 Working with Plone

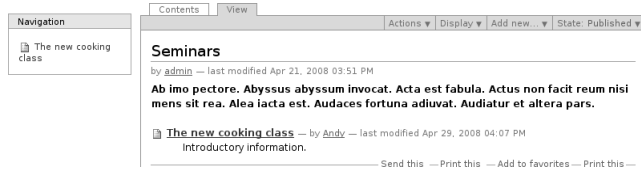


Figure 4.11: The page in your folder and in the navigation portlet

smaller changes to items. If you need to make more substantial changes, it is better to use the editing form, which you can reach using the “Edit” tab. The edit tab provides you with more tools to work with.

The Page as Part of the Website

- Go to the “Seminars” folder (it is one of the main navigation tabs at the top). Take a look at its view display and then at its “Content” display as well.

The folder’s content overview list now contains a new entry for the page you just added (see Figure 4.11).

4.2.3 Accessing Older Revisions

Plone saves previous versions of items. You are free to access these older revisions.

Before trying this feature, you will need to make a change to a page you have already created. Call up the page’s edit display and change the title, for example, to “Cooking Class – Current Information.” Make a note in the “Change note” field saying that you have changed the title, and save your changes.

Now call up the “History” display (see Figure 4.12 on the opposite page). It will contain a list of all the page’s versions to date. The last

Revision ▲	Performed by	Date and Time	Comment	Actions
Working Copy	Andy	Apr 22, 2008 01:31 PM	titel changed	<ul style="list-style-type: none"> ■ Compare to previous revision
0 (preview)	Andy	Apr 22, 2008 01:02 PM		<ul style="list-style-type: none"> ■ Compare to current revision ■ Revert to this revision

Figure 4.12: List of versions of an item

version saved is automatically used as the working copy. “Revision 0” describes the status of the page immediately after having first been added. You can view the various revisions in a preview shown below the list.

In the “Actions” column, you will find the following links:

Compare to previous revision: A comparison between the selected revision and the previous version is shown. This link is not available for revision 0, because there is no version preceding it.

Comparison to current version: A comparison between the selected revision and the most current version (the working copy) is shown. This link is not available for the working copy itself.

Revert to this revision: The most current revision is replaced by the version listed in the row to which the link belongs. This link is not available for the most current version.

Familiarize yourself with the functions offered in the history display.

- Replace the newest revision with an older one and take a look at the result in the “View” display.

4 Working with Plone

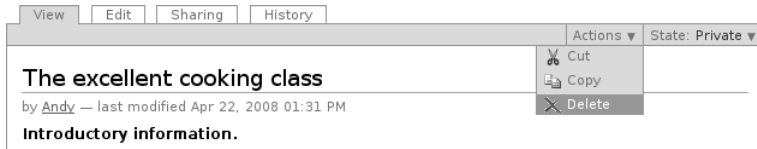


Figure 4.13: Actions menu

- Change back to the history display. A new working copy has been added to the list. In the “Comment” column, you will find a notice saying that you have reverted back to revision 0. The old working copy is now identified as revision 1.
- Make further changes to the page and notice how the changes are saved as various revisions.

4.2.4 Deleting a Page

Items which are no longer needed can be deleted from the website. Delete the page that you have just created.

- Call up the view display of the page
- Open the “Actions” menu and select “Delete” (see Figure 4.13).

Plone will ask you for a confirmation before actually deleting the page in order to avoid accidental deletions. You can now either cancel the deletion or confirm it by using the “Delete” button. After deleting the page, the folder in which the page existed will be called up. A status message will confirm the action.

4.2.5 Other Item Types

In this tutorial, you have become familiar with the “Page” item type. Now try out other types of items. Add an event or a news item, for

4.3 Working with Folders

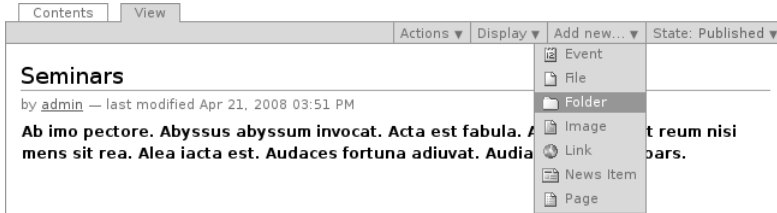


Figure 4.14: Adding a folder

example, editing and deleting these items as well, and take note of the changes recorded in the history display.

4.3 Working with Folders

This tutorial covers the special attributes of folders as opposed to other items.

4.3.1 Adding a Folder

Now add a folder by proceeding in the same way as in the last tutorial.

- Go to the “Seminars” folder.
- Select the “Folder” item type from the “Add new...” menu (see Figure 4.14).

You will now be directed to the edit page for the new folder, which contains two entry-fields: the title, and the description. These fields have the same function as with a page.

- Edit the newly added folder. For the rest of this tutorial, we will be assuming that you have given it the title “Cooking Class.”

4 Working with Plone

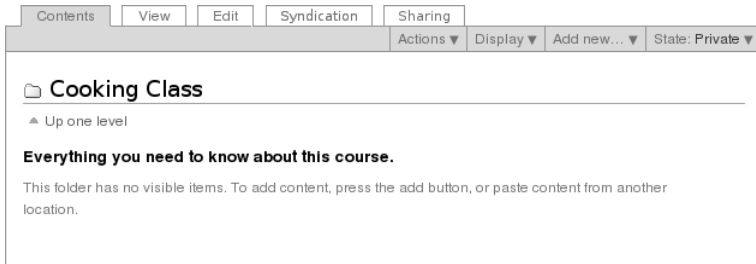


Figure 4.15: Contents display of a newly added folder

After saving the folder, you will be presented with its view display. A status message will inform you that the changes made have been saved. The view display shows you that the folder is empty.

4.3.2 Folder Content

The contents display of an empty folder is not much different than its view display (see Figure 4.15).

- Call up the view display of the “Cooking Class” folder.
- Add a new page to the Cooking Class folder, just as you learned to do in the last tutorial.
- Return to the contents display of the Cooking Class folder.

Plone has now generated a list containing a single entry so far for the newly created page (see Figure 4.16 on the opposite page).

- Create more items in your Cooking Class folder. Notice how the contents and view displays change after adding each item.

You will see that new entries are added to the bottom of the list in both the contents display and the Plone-generated view display of

4.3 Working with Folders

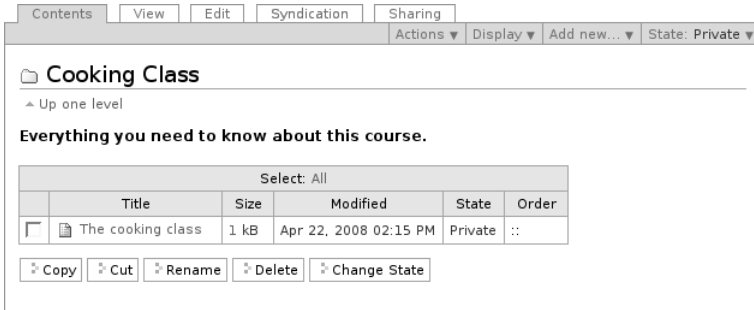


Figure 4.16: Contents display of a folder containing one item

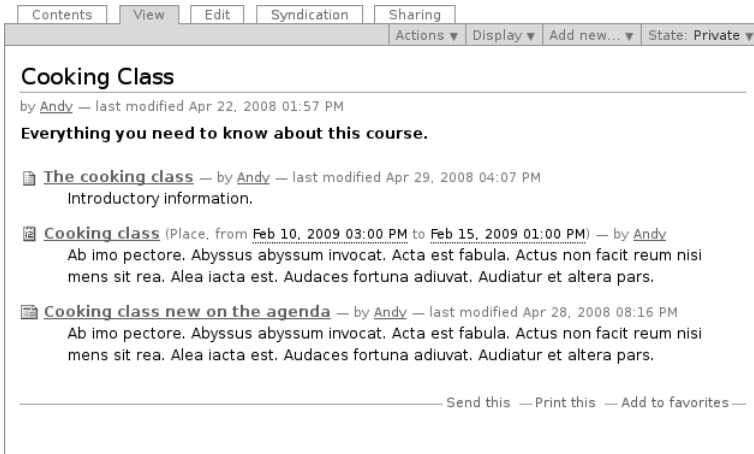


Figure 4.17: View display of a folder containing multiple items

4 Working with Plone

the folder. The preexisting entries retain their order in the lists when new items are added (see Figure 4.17 on the previous page).

Now change the order of entries. For doing this, the contents display of each folder contains symbols made up of two colons placed side by side. These can be found in the “Order” column next to each item.

- Move to the contents display of the Cooking Class folder.
- Move the mouse cursor over the double-colons in the “Order” column. Depending on your operating system, the mouse arrow will change into an icon for moving things or picking things up.
- Now, pick up an item and, holding down the mouse button, move it upward or downward in the list. When you let go of the mouse button, the item will be re-sorted into its new place in the list.
- Switch back to the folder’s view display a couple of times, and make sure that the order of items has been changed there as well.

If Javascript is not activated on your computer, you will see two arrows in place of the double-colon symbol. These can be used for moving items upward or downward in the list.

4.3.3 Folder Display Styles

Plone has various templates for presenting folders to view.

- Go to your Cooking Class folder.
- Open the “Display” menu and select “Tabular view” (see Figure 4.18 on the opposite page).

The folder’s view display now presents the entries for each item in a table instead of in a list.

4.3 Working with Folders

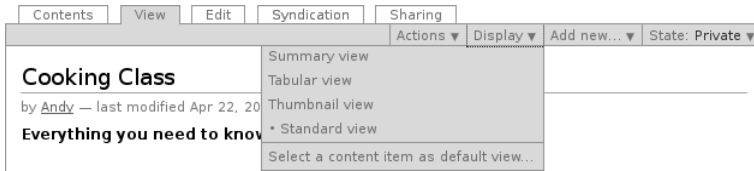


Figure 4.18: Selecting a folder display style

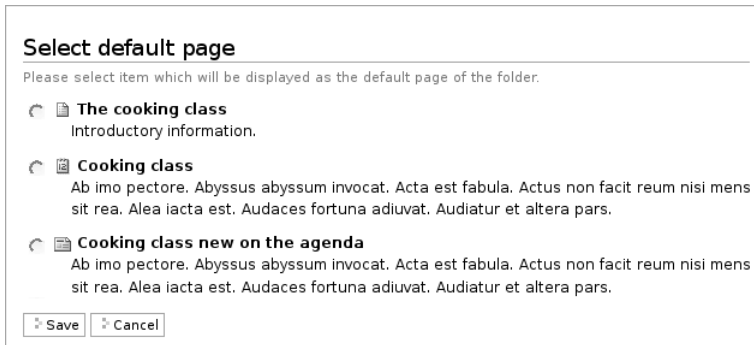


Figure 4.19: Selection of an item for use as the default page

- Try out the various presentation styles. The thumbnail display only applies if images are in the folder.

In place of the presentation lists or tables, Plone can also use one of the items inside that folder as the presentation display. This item is then referred to as the “default page.”

- Open the “Display” menu, and select “Select a content item as default view...”.
- You have now been taken to a form which lists all of the items – with the exception of subfolders held in your folder (see Figure 4.19).
- Mark the desired item and save the form.

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- Plone will now lead you back to the view display of your Cooking Class folder. Instead of the automatically generated content list or table, you will now see the default page.
- Move to the contents display using the contents tab. You will notice that the default page has been highlighted in bold type.

4.3.4 Copying and Moving Items

Plone allows you to do more than simply add and delete content. You can also move or copy it to other places in the website, for example.

To try this feature, add a subfolder to your Cooking Class folder. Now copy an item from the Cooking Class folder into the new subfolder.

- Add a new folder item to the Cooking Class folder.
- Call up the item in your Cooking Class folder which you would like to copy.
- Open up the “Actions” menu and select “Copy.”
- Move to the new subfolder.
- Paste a copy of the chosen item into the folder by using the “Paste” command in the actions menu.

A new entry will appear in the view display of the subfolder. Check to see that nothing has changed in the content of your Cooking Class folder.

Next, move an item from out of the Cooking Class folder to your subfolder. The procedure is similar to that of copying.

- Open up your Cooking Class folder and call up the item which you would like to move.
- Open the “Actions” menu and select “Cut.”
- Move to your subfolder.
- Paste the item into the subfolder using the “Paste” command in the actions menu.

You will notice that the item does not immediately disappear from out of your Cooking Class folder when you cut it out. Not until being pasted into its new destination is it actually deleted from its original position. Check the content of your Cooking Class folder after having moved the item.

You can only copy and move single items using the options on the actions menu one at a time. In the contents display of a folder, however, you can select multiple items to be copied or moved simultaneously.

- Move to the contents display of your Cooking Class folder.
- In the column to the far left, mark several items which you would like to copy.
- Activate the “Copy” button found beneath the overview table. Notice the status message.
- Move to your subfolder.
- Activate the “Paste” button. Read the status message and check to see how the overview table has changed.

If you copy or move a folder, all of the items found in that folder will be copied or moved along with it.

- Add another folder to your Cooking Class folder.
- Move to the contents display of the Cooking Class folder.
- Mark the first subfolder you created to be copied.
- Move to the new subfolder.
- Paste the older subfolder into the new one.

The older subfolder along with all of its content can now be found in the second subfolder as well.

- Make sure that both folders contain the same content items.

4.3.5 Deleting Folders

As with all other items, folders can be deleted using the “Delete” option on the “Actions” menu. Remember that when deleting a folder, all items contained within it will be deleted as well.

4.4 Publishing Items

This tutorial explains the workflows involved in publishing an item.

Whenever you add an item, it is initially “private,” and can only be accessed by you. Other visitors to the website will only be able to view it after it has been published. If you are the sole operator of your website, you are free to decide whether an item should be published or not. In many cases, however, you will not be the only person responsible for a website, so that the publication of items needs to be agreed upon with others. Plone supports coordination procedures such as these through predefined workflows (see Section 6.3 on page 129).

The creation, editing and publishing of items is usually a cooperative process in which various people are responsible for carrying out certain functions. Some of them – who, from now on, will be referred to as authors – are responsible for creating items, whereas others – the editors – are responsible for editing and publishing those items.

In Plone, authors and editors have different access rights (permissions). Because of this, it is recommended that you follow this tutorial using two separate roles. To do this, you may need to work on a different computer or work together with an editor. If you are working alone, you will need to log out during the tutorial and log back in with a new user name as an editor.

4.4 Publishing Items

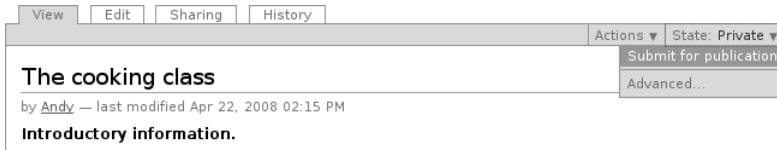


Figure 4.20: Submitting an item for publication

Logging in as an Author or Editor

In the following tutorials, we are assuming that there is a user registered on your website who has additional access permission and is allowed to publish items in the “Seminars” folder. We will refer to this user in the following as the “editor.” If you would like to try out the editor functions described in this tutorial, you will need to be logged in to the website with an editor’s user name. Ask your administrator for the required access information. When trying out author functions, you can log in using your own personal user name.

4.4.1 Submitting Items for Publication

Submitting a Single Item for Publication

- Log in to your website using your own user name.
- Add a new page to the “Seminars” folder, edit the title, description and main text, and save your entries.
- In the folder’s view display, check to make sure that the status of the item is “Private,” and that the entry for the item is displayed in red type.
- Submit the item for publication by moving to the item’s view display and selecting the “Submit for publication” option in the “State:” menu (see Figure 4.20).

4 Working with Plone

- Notice the status message and how the item has been marked in orange as “Pending review” in the state menu in the folder’s view display.

Submitting Multiple Items for Publication

You can also submit multiple items for publication simultaneously.

- Add multiple items to the “Seminars” folder.
- Move to the folder’s contents display. Your new items will all be displayed there in a “private” state in red type.
- Select the items you would like to submit for publication in the table.
- Activate the “Change State” button found below the table. You will be taken to a form (see Figure 4.21 on the opposite page), with which you can submit the selected items for publication. This form is outlined in detail in Section 6.3.6 on page 139.
- Enter a message for your editor in the “Comments” field.
- Select “Submit for Publication” at the bottom of the form in the “Change State” section and save the form.
- Notice the status message and how all of the submitted items have now been given the “Pending review” state along with a new color (orange).

You can also access this form by selecting the “Advanced” option from an item’s state menu. You will need to use this form for leaving messages for your editor.

4.4.2 Publishing or Rejecting Items

After an item has been submitted for publication, editors come into play. For that reason, you now need to take on the role of an editor by switching to the editor account.

4.4 Publishing Items

View Edit Sharing History

Publishing process

An item's status (also called its review state) determines who can see it. Another way to control the visibility of an item is with its **Publishing Date**. An item is not publicly searchable before its publishing date. This will prevent the item from showing up in portlets and folder listings, although the item will still be available if accessed directly via its URL.

Affected content

<input type="checkbox"/>	Title ▲	Size	Modified	State
<input checked="" type="checkbox"/>	 The cooking class	1 kB	Apr 22, 2008 02:15 PM	Private

Publishing Date
The date when the item will be published. If no date is selected the item will be published immediately.

2008 / January / 10 : 01 : 30 PM

Expiration Date
The date when the item expires. This will automatically make the item invisible for others at the given date. If no date is chosen, it will never expire.

2008 / -- / -- : -- : --

Comments
Will be added to the publishing history. If multiple items are selected, this comment will be attached to all of them.

Change State
Select the new state for the selected items.

No change
 Submit for publication

Figure 4.21: The extensive form for the workflows

- Log out of the website with your own user name.
- Log back in using an editor's user name.

After logging in, you will see a portlet in the sidebar to the right containing the “Review List” (see Figure 4.22 on the following page). This list contains items which have been submitted for publication and which you are free to publish.

4 Working with Plone

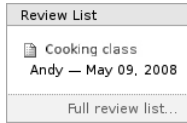


Figure 4.22: “Review List” portlet

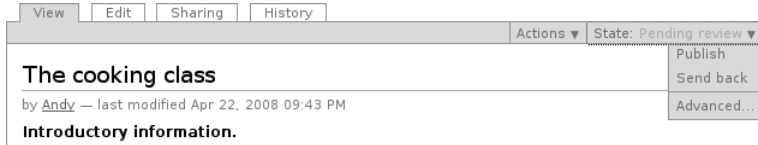


Figure 4.23: Publishing an item

Publishing Items

- Select an item from the review list.
- Read and edit the item.
- Publish the item by selecting the “Publish” option on the state menu (see Figure 4.23)
- Notice the status message and how, in the folder’s view display, the item has now been given the “Published” state and is listed in blue type.

The published item will now be visible to anonymous visitors to the website.

Workflow History

Call up the published item and open up the workflow history by clicking with the mouse on the plus sign next to the word “History” found just below the item (see Figure 4.24 on the opposite page). There you can see who has submitted or published the item at which time. The table contains a list of all state changes made.

History

Action	Performed by	Date and Time	Comment
Publish	Betty	Apr 28, 2008 08:16 PM	item ok
Submit for publication	Andy	Apr 28, 2008 08:08 PM	No comments.

Figure 4.24: Workflow history

Sending Items Back

In the event that you believe an item should not be published, you can reject it for publication and send it back to its author.

- Select an item from the review list.
- Read the item.
- Reject the item by selecting the “Send back” option on the state menu (see Figure 4.23 on the preceding page).
- Notice the status message and how, in the folder’s display, the item has now been issued the “Private” state and marked in red.

The “Private” state will signal to the author of the item that it has been rejected for publication.

Because rejection without explanation or reason is not usually very satisfying for the author, you should take the time to use the extended “Publishing process” form in order to leave comments and justify the rejection. The item’s creator can then read these comments in the workflow history and rework the item accordingly.

In the event that you are following these tutorials with a partner, switch roles now and retrace the working steps outlined here once more.

Part II

Reference

5 Item Types

In this chapter, you will be introduced to the characteristics of each item type offered by Plone. We will begin with the similarities between the various item types, and then turn our attention to each one of these individually. Table 5.1 will provide you with an overview of the available types.






5.1 Similarities

The different items offered by Plone have a lot in common. For example, each of them has the following three displays:

- View
- Edit
- Sharing

Access to the individual displays is only granted to users with the appropriate access permission. Using the display tabs at the top of the green content frame (see Figure 5.1 on the next page), you can

Table 5.1: Item types

Item Type	Icon	See page
Page		89
News items and events		92, 94
Images and files		97, 98
Links and favorites		100
Folders and collections		102, 106

5 Item Types



Figure 5.1: Item “View” display tabs

access the displays available to you.

The view and edit displays have several identical features. These will be explained in more detail in the following sections, and the “Sharing” display will be dealt with in Section 7.3.2 on page 174.

5.1.1 The View Display

The “View” display presents content items just as they will appear to people who visit the website. The way the display looks and the information it includes will vary, depending upon the type of item. With a page, for example, the title, description and main body of text are the main elements shown, whereas further information such as time and place are included for an event. The individual item types, and their corresponding display traits will be described in more detail starting on page 89 in this chapter.

The view displays of all item types have a number of elements in common (see Figure 5.2 on the next page):

1. Title
2. Byline
3. Description
4. Item actions
5. History (only visible to logged-in users)
6. Next/previous navigation (depending on the settings for the folder in which the item exists)

The byline of each item indicates the name of the person who created the item as well as when it was last modified. The name of the author is a link to his or her profile. Take note of the fact that the byline

The screenshot shows a web interface for an item titled "Cooking class n€1 on the agenda". The interface includes a navigation bar with "View", "Edit", "Sharing", and "History" tabs, and "Actions" and "State: Published" buttons. The main content area contains the title (1), a byline (2) "by Andy — last r 2 ied Apr 28, 2008 08:16 PM", a description (3) in Latin, a photo of a shrimp (4) labeled "Scampi", and a "History" table (5). At the bottom, there are navigation links (6) "Previous: Co y Course" and "Next: The cookery course".


Cooking class n€1 on the agenda

by Andy — last r 2 ied Apr 28, 2008 08:16 PM

Ab imo pectore. Abyssus abyssum ir 3 . Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audace una adiuvat. Audiatur et altera pars.

Barba non facit philosophum, neque vile gerere pallium. Bene docet, qui bene distinguit. Bis dat, qui cito dat. Barbarus hic ego sum, quia non intellegor ulli.

Captatio benevolentiae. Carpe diem. Cogito ergo sum. Corruptio optimi pessima. Corruptissima re publica plurimae leges. Cui bono?

4  Scampi

Send this — Print this —

5 **History**

Action	Performed by	Date and Time	Comment
Publish	etty	Apr 28, 2008 08:16 PM	item ok
Submit for publication	Andy	Apr 28, 2008 08:08 PM	No comments.

6 ◀ Previous: Co y Course Next: The cookery course ▶

Figure 5.2: The make up of an item's view display: Title (1), Byline (2), Description (3), Item actions (4), History (5), Next/previous navigation (6)

does not indicate who made the last changes. Depending on how your website has been configured, the byline might only be visible to logged-in users.

Some item types such as folders and collections can display their content in more than one way. In these cases, the drop-down "Display" list on the green content frame allows you to select an alternative display style (see Figure 5.3 on the following page).

5 Item Types

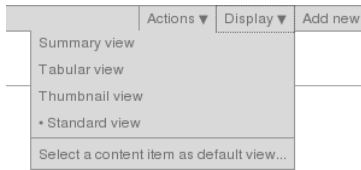


Figure 5.3: Choosing a display style for a folder



Figure 5.4: Instant editing on a page

5.1.2 Editing

If you would like to make changes to an item, there are two possibilities for doing so: you can use either instant editing or the edit display.

Instant editing means that you can simply use the mouse to click on the title, description, or main text in the view display of an item. This will call up an editing field for making changes to the respective element (see Figure 5.4). The mouse pointer changes into a cursor, and directly below the selected elements, you will find a button for saving your changes as well as one for canceling the edit. The main text can then be edited using the Kupu visual editor.

The instant editing function will only be available if you have activated Javascript, and it can only be used with certain elements of each item. You can identify these elements by moving the mouse pointer over them, whereby an editing frame will appear.

Additionally, each item has an edit display, in which all of its characteristics can be changed. Whether or not you are allowed to make changes to an item will depend on your access permission and the

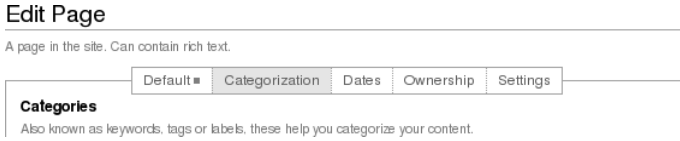


Figure 5.5: Selecting an edit page component

state of the item in question (see Sections 7.3 on page 172, and 6.3 on page 129).

The edit page is comprised of a partitioned form which includes the following parts:

- Default
- Categorization
- Dates
- Ownership
- Settings

You can reach each of the form's components with the navigational bar found beneath the heading at the top of the page (see Figure 5.5). Each time you call up the form, the "Default" will be open at first. If Javascript has been deactivated for your browser, each component will be listed consecutively.

At the bottom of each of the form's components, you will find an entry field for describing any changes that you make.

The "Default" Component

In the "Default" component (see Figure 5.6 on the next page), information meant for the viewing public can be entered. The bulk of the item's content is comprised of the information entered there:

- Title
- Description

For each item, choose a short but revealing title, which relates directly to the item's content. Because Plone uses titles for navigation purposes, for example, your website will remain more transparent and its structure more legible by choosing titles carefully. Additionally, well-chosen titles help your pages to receive higher ratings from search engines and be more easily found by potentially interested visitors.

The description should be comprised of a short text which summarizes the item's content or serves as an introduction. It will be presented as a content summary in the item's view display and in a number of other lists (such as the automatically generated folder overview list).

With each item type, except for folders and collections, the "Default" component can be used to make changes to the item's content. The possibilities you will have in doing so depend highly upon the type of item in question and will be described individually later in the book. Folders and collections, on the other hand, do not have any editable content of their own.

The "Categorization" Component

In the "Categorization" part of the form (see Figure 5.7 on the next page), you can categorize items. When doing so, you provide each item with descriptive information such as the language in which it is written, or a content-related category to which it belongs. This information is known as metadata (see Section 5.1.3 on page 86). The "Dates" and "Ownership" form components contain further metadata.

Categories: Categories in Plone function like keywords that are tagged to items. They can be helpful when you are conducting searches or grouping together related items.

If your website has been active for a longer period of time, it will already recognize a variety of keywords which will be offered

5 Item Types

The screenshot shows the 'Edit Page' interface with the 'Categorization' tab selected. At the top, there are tabs for 'View', 'Edit', 'Sharing', and 'History'. Below the 'Edit Page' title, a description states: 'A page in the site. Can contain rich text.' The main content area is divided into several sections:

- Categories:** A sub-tabbed menu with 'Default' selected and 'Categorization', 'Dates', 'Ownership', and 'Settings' available. Below it, a description reads: 'Also known as keywords, tags or labels, these help you categorize your content.' Underneath, 'Existing categories' are shown as a list of two items, each with an up/down arrow icon.
- Related Items:** A section with a search icon and an 'Add...' button.
- Location:** A section with the text 'The geographical location associated with the item, if applicable.' and an empty text input field.
- Language:** A section with a dropdown menu currently set to 'Language neutral (site default)'.
- Change note:** A section with the text 'Enter a comment that describes the changes you made.' and an empty text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Figure 5.7: The “Categorization” form-component

to choose from in this entry-field on the form. Editors have the ability to add new keywords to the list.

Related content: Links to related content serve to refer readers of a given item to certain other items which are somehow relevant to that item. Related content links are listed and highlighted below the content view display of an item.

The “Categorization” component of the edit page contains a list of all links added to the item. Below that, you will find a button for adding new links. If you activate it, a window will open

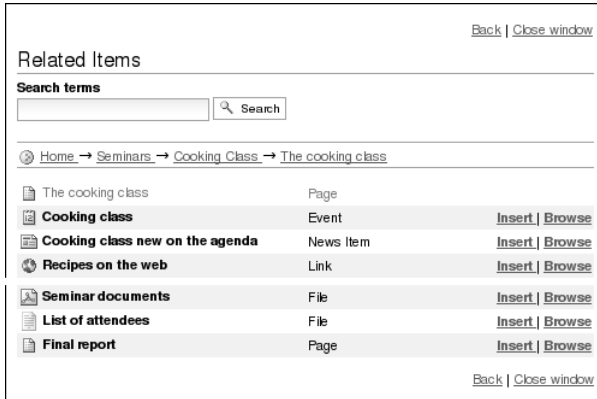


Figure 5.8: Searching for items to add as links

which displays a list of all the items contained in the current folder, a directory path, and a search field (see Figure 5.8). You can use these to navigate through the website, search for items on the website, or view items in the current folder or among the list of search results, and then add them as links to your item as desired.

To delete a link, remove the check-mark next to it and save the form.

Location: You can connect the item to a geographical place here. A number of add-on products for Plone can be used for evaluating this information by, for example, marking your location entries on a map of the world.

Language: Using this menu, you can select the language in which the item is written. Which language is set by default will depend upon how your website is configured.

5 Item Types

View Edit Sharing History

Edit Page

A page in the site. Can contain rich text.

Default Categorization **Dates** Ownership Settings

Publishing Date
If this date is in the future, the content will not show up in listings and searches until this date.

2008 / January / 10 01 : 30 PM

Expiration Date
When this date is reached, the content will no longer be visible in listings and searches.

2008 / -- / -- -- : -- --

Change note
Enter a comment that describes the changes you made.

Save Cancel

Figure 5.9: The “Dates” form-component

The “Dates” Component

The “Dates” part of the form allows you to set a duration of time for which the content is publicly visible (see Figure 5.9).

Publishing Date: This is where you can specify the date from which the item is visible to the public. Even if the item in question has been through the workflow process and received a “Published” state, it still will not be visible to the public until the publishing date has been reached.

Expiration Date: If an expiration date has been entered, the item at hand will no longer be visible to the public after that date.

Together, these two entries constitute the “Date Available” entry in the Dublin Core standard (see Section 5.1.3 on page 86).

You can enter the dates into both fields using the pop-up calendar which you can open with the calendar icon found between the date

The screenshot shows a web interface for editing a page. At the top, there are tabs for 'View', 'Edit', 'Sharing', and 'History'. Below these is the 'Edit Page' title and a subtitle: 'A page in the site. Can contain rich text.' A secondary set of tabs includes 'Default', 'Categorization', 'Dates', 'Ownership' (which is selected), and 'Settings'. The 'Ownership' section contains three main parts: 'Creators' with a text area containing 'Andy', 'Contributors' with an empty text area, and 'Rights' with an empty text area. Below these is a 'Change note' section with an empty text area and 'Save' and 'Cancel' buttons.

Figure 5.10: The “Ownership” form-component

and time fields. To delete a date which has already been entered, select “----” for the year.

The “Ownership” Component

In the “Ownership” component (see Figure 5.10), you can enter copyright information for the item and list the names of people who took part in creating it.

5 Item Types

Creators: Enter one or more user names. In order to include any number of people, enter each of their names onto a separate line in the “Creators” field.

Contributors: This is where you can enter the real names of any other people who made a contribution to the item. Here again, use a single line for each name. How you distinguish these two groups is not a technical issue but an editing one. Creators are generally thought of as people who were involved in creating the item on the website. Contributors are usually people who have made contributions or additions to the item but who have not actually added it to the website. They may not even be registered on the website at all.

Rights: In this field, you can issue a Creative Commons License or reserve all rights. This field may already be filled out by your administrator. This is also the appropriate place to inform third parties about copyright status.

The “Settings” Component

The settings offered for adjustment here depend upon the type of item you are editing. The following two settings are offered for all items. Figure 5.11 on the next page illustrates the “Settings” component of a page.

Allow comments: Your website can be configured so that commentary is allowed for individual item types in general. A check-mark will be placed next to the item types for which this is already the case. Regardless of these settings, however, you are free to determine whether commentary should be allowed for individual items by either placing a check-mark into the box or removing one which might already be present.

Exclude from navigation: Depending on some pre-settings, certain item types will appear in the navigation portlet or among the

View Edit Sharing History

Edit Page

A page in the site. Can contain rich text.

Default Categorization Dates Ownership Settings

Allow comments
If selected, users can add comments to this item.

Exclude from navigation
If selected, this item will not appear in the navigation tree

Presentation mode
If selected, this will give users the ability to view the contents as presentation slides.

Table of contents
If selected, this will show a table of contents at the top of the page.

Change note
Enter a comment that describes the changes you made.

Save Cancel

Figure 5.11: The “Settings” form-component

main navigation tabs. You can use this option to exclude single items from both of these.

Any additional settings options for individual item types will be described in more detail in the sections to come.

Locked Edit Page

If you happen to call up an item which is being edited by another user at that time, you will receive the relevant warning message (see Figure 5.12 on the following page). You will be “locked out” of the edit page, meaning that the edit tab will be missing. If you are certain that the stated user is no longer working on the item, you can unlock the item by activating the “Unlock” button.

5 Item Types

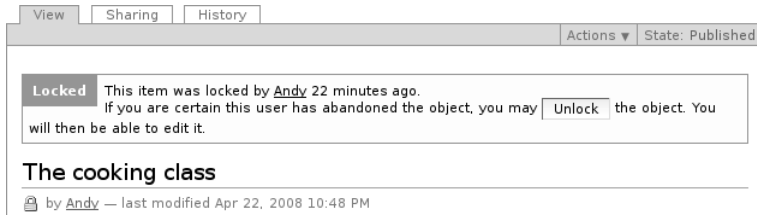


Figure 5.12: Warning message on trying to access a locked item

5.1.3 Metadata and the Dublin Core Standard

If you have ever searched for a certain book using a computer in a library, you have already been confronted with metadata. You may have searched for the book in a catalog using keywords which were relevant to a certain theme. Plone has a similar function available to users of the website.

Metadata is made up of entries which describe an item. With their help, viewers can assess a content item's relevance and decide whether the item is of interest or not, without first having to review it in its entirety. In addition, metadata can be automatically processed with ease.

Items on a Plone website possess a number of metadata entries, some of which are also displayed publicly. Among these are the title and categories which have been indexed for a given item. In this way, search engines are better able to categorize and find your content.

The Dublin Core standard was developed so that metadata can be used to compare various items to one another (see <http://dublincore.org/documents/dcmi-terms/>). This standard has defined a number of entries which should be included in an item's metadata. It is not only used in content management, but also enables libraries, for example, to better facilitate the exchange of information over their data pools.

Table 5.2: Dublin-Core metadata used by Plone

· Title	· Date Created
· Creator	· Date Modified
· Publisher	· Date Available (time frame)
· Contributor	· Resource Type
· Categories	· Format
· Abstract (content summary)	· Resource Identification
· Language	· Rights Holder

The Dublin Core standard for metadata currently encompasses 15 basic element entries and 40 additional element refinements. Table 5.2 outlines which of these are available using Plone.

The metadata entries for items are used by Plone in many application areas.

Advanced Search

Metadata is especially useful when conducting an advanced search (see Figure 5.13 on the following page). You can reach this function by using the search field above the personal bar, and then following the “Advanced Search” link.

Some of the advanced-search options serve to find items by searching through their metadata. Keywords can be entered for this purpose, and an item’s description field can be searched for entered terms, for example. You can also limit the search to items which were added within a certain time period or written by a certain author.

Portlets

Metadata also plays a role in many of the portlets. The “Recent Changes” portlet, for example, lists the last five items to have been changed (see Figure 5.14 on the next page). The “last updated” time

5 Item Types

Search Terms

Search Text
For a simple text search, enter your search term here. Multiple words may be found by combining them with **AND** and **OR**. The text in this field will be matched with items' contents, title and description.

Title
Return items matching this title.
Categories
Return items matching some or all of these Categories. Multiple words may be found by pressing **Ctrl** (or **Apple** key on Mac) while clicking the keywords.

 Match any
 Match all
Description
Return items matching this description. Multiple words may be found by combining them with **AND** and **OR**.
New items since
Return items added since you were last logged on, the last week, etc.
Item type
Return items of a specific type.

Select All/None

<input checked="" type="checkbox"/> Page	<input checked="" type="checkbox"/> Image
<input checked="" type="checkbox"/> Event	<input checked="" type="checkbox"/> Large Folder
<input checked="" type="checkbox"/> Favorite	<input checked="" type="checkbox"/> Link
<input checked="" type="checkbox"/> File	<input checked="" type="checkbox"/> News Item
<input checked="" type="checkbox"/> Folder	<input checked="" type="checkbox"/> Collection

Author
Return items created by a particular person.

Review status
You may search for items based on their review state. If you wish to constrain results to items in certain states, select them from this list.

Select All/None

Externally visible

Internal draft

Internally published

Pending review


Private


Public draft

Published

Figure 5.13: Advanced search

Recent Changes

 Cooking class new on the agenda
Apr 29, 2008

 The cooking class
Apr 29, 2008

All recent changes...

Figure 5.14: "Recent Changes" portlet

stamp (which is automatically updated by Plone whenever an item has been changed and saved) is used for keeping this portlet current.

The “News” and “Upcoming Events” portlets work similarly, also listing the five most recent relevant items. In order to do this, Plone uses a time stamp which is applied only once to an item as soon as it is created: the publishing date.

Collections

Collections list items from throughout the entire website which fulfill certain criteria. As with the advanced-search option, there are a number of various criteria which are related to metadata. You can learn more about collections in Section 5.9 on page 106.

Machine-Readable Metadata in HTML Source Code

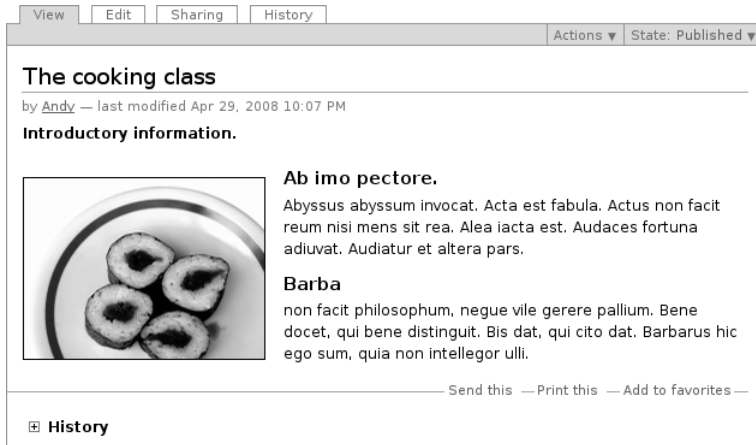
Metadata adhering to the Dublin Core standard can also be included in the HTML source code of your website to allow for machine-readability. This enables search engines to classify the pages on your website more efficiently. This function will not be activated at first, but you can ask your site’s administrator for more information on encoding Dublin Core metadata on your website.

5.2 Pages

A page is a text which you can structure and design for presentation. For doing this, you have headings, text-formatting tools, links, images, and graphics at your disposal, among other things (see Figure 5.15 on the next page).

When entering text, it is best to use the Kupu visual editor (see Section 8.5 on page 191). Kupu makes it easy for you to layout the structure of your text and presents the text to you just as it will later appear in the view display of the page. Additionally, it provides

5 Item Types



The screenshot shows a web page interface with a navigation bar at the top containing 'View', 'Edit', 'Sharing', and 'History' tabs. On the right side of the navigation bar are 'Actions' and 'State: Published' dropdown menus. The main content area has a title 'The cooking class' followed by the author 'by Andy' and the date 'last modified Apr 29, 2008 10:07 PM'. Below this is the section 'Introductory information.' which includes a square image of four sliced mushrooms on a plate. To the right of the image is the Latin text: 'Ab imo pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars.' Below the image and text is another section titled 'Barba' with the Latin text: 'non facit philosophum, negue vile gerere pallium. Bene docet, qui bene distinguit. Bis dat, qui cito dat. Barbarus hic ego sum, quia non intellegor ulli.' At the bottom of the content area are links for 'Send this', 'Print this', and 'Add to favorites'. A 'History' link is located at the bottom left of the page.

Figure 5.15: View display of a page

you with the most important functions offered by ordinary word processing programs to aid in formatting your text.

If you do not use Kupu, you will find a simple form field in its place, which you can use to enter unformatted text, HTML code, or a simplified text markup language such as Restructured Text, Markdown, or Textile. Plone transforms all entries into valid HTML.

If you have written a text using a word processing program and would like to publish it in the format in which it is saved, you should use the “file” item type for doing so.

Presentation Mode

When you are editing a page, you can activate the presentation mode in the “Settings” component of the edit page. A link will then appear in the page’s view display under the description: “Also available in presentation mode...”. In presentation mode, the page’s content will be divided into full-screen pages, which are ordered consecutively.

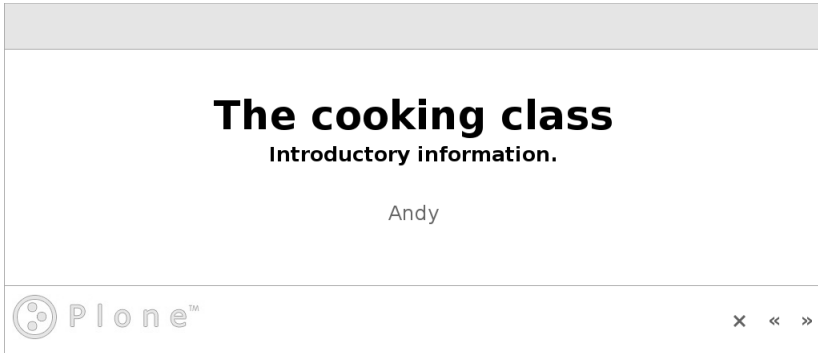


Figure 5.16: A page in presentation mode

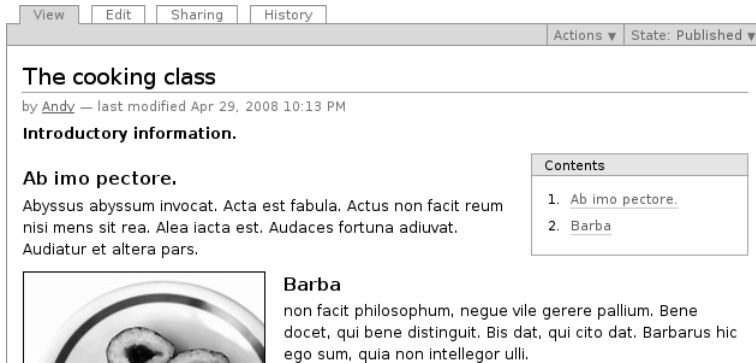
These might be helpful for use as slides when giving a presentation, for example (see Figure 5.16). Notice that only headings and lists are displayed on the slides; continuous text will be blinded out.

Technically speaking, presentation mode is nothing other than the view display combined with presentation commands based on the S5 system. You can learn more about S5 at <http://yati1.de/s5/> or at <http://meyerweb.com/eric/tools/s5/>.

Table of contents

For longer texts involving numerous subheadings, Plone can automatically generate a table of contents at the beginning of the page item, containing links to the individual sections listed (see Figure 5.17 on the following page). You will have to activate the “Table of contents” option in the “Settings” component of the edit form for the page.

5 Item Types



The screenshot shows a web page with a navigation bar at the top containing 'View', 'Edit', 'Sharing', and 'History' tabs. On the right side of the navigation bar are 'Actions' and 'State: Published' dropdown menus. The main content area is titled 'The cooking class' and is attributed to 'Andy' with a last modified date of 'Apr 29, 2008 10:13 PM'. Below the title is the heading 'Introductory information.' followed by the Latin phrase 'Ab imo pectore.' and its translation: 'Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars.' To the right of this text is a 'Contents' table of contents box listing two items: '1. Ab imo pectore.' and '2. Barba'. Below the text is a small image of a plate with sliced vegetables, followed by the heading 'Barba' and its translation: 'non facit philosophum, negue vile gerere pallium. Bene docet, qui bene distinguit. Bis dat, qui cito dat. Barbarus hic ego sum, quia non intellegor ulli.'

Figure 5.17: Automatically generated table of contents



The screenshot shows a 'News' portlet with a title bar. Below the title bar is a news item with a small icon of a document, the text 'Cooking class new on the agenda', and the date 'Apr 28, 2008'. At the bottom of the portlet is a link that says 'More news...'

Figure 5.18: News portlet

5.3 News Items

The layout of news items is similar to that of pages. They should be perceived by viewers of the website as announcements or news:

- The “News” tab on the main navigation bar will take you to a display of all news items published on the website.
- The “News” portlet (see Figure 5.18) displays the titles of the five most recent news items.

Both lists contain only news items which have received a “published” workflow state and are sorted by date, beginning with the most current item. The portlet lists the modification date along with each news item.

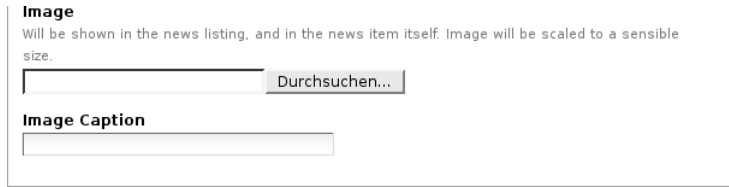


Figure 5.19: View display of a news item

In contrast to pages, news items contain cover images in addition to text. Cover images appear in the view display (see Figure 5.19) as well as in the complete website news-overview display next to the item's description. The cover image has nothing to do with the images you can insert into an item's text using Kupu, for instance.

In the edit display of a news item, you can select and upload a cover picture from among the images on your computer (see 5.20 on the next page). In the entry-field below, you should enter a caption for the image. If you have already uploaded an image for that news item, it will be listed there under "Image." You are free to keep, delete or replace it with another image. Plone reduces large images down to a size which is suitable for use on the Web.

5 Item Types



The screenshot shows a form with the following elements:

- Image**: A section header followed by the text "Will be shown in the news listing, and in the news item itself. Image will be scaled to a sensible size." Below this is a text input field and a button labeled "Durchsuchen...".
- Image Caption**: A section header followed by a text input field.

Figure 5.20: Inserting a cover image into a news item

5.4 Events

Event items announce occurrences which are planned for certain dates, such as meetings or seminars. Such an announcement contains information typically relevant to events of this kind, including the start and end dates and times of the event, the event location, and details concerning a contact person. This event-related information can be entered into individual entry-fields on the edit page for event items and is then saved in structured form, allowing Plone to use it directly.

Just as with pages, event items possess a field for the title, description, and main body of text. The latter is referred to with an event item as the "Event body text." There, you can enter formatted text with subheadings, images, tables and other elements using the Kupu text editor.

The following structured entries with individual entry-fields belong to the edit display of an event:

Event Location: the location of the event or place of meeting

Event Starts/Event Ends: the time frame in which the event is to take place

Attendees: a list of expected participants

Event Type(s): choose one or more categories or add a new one.

Event URL: an Internet address for further information

View Edit Sharing History

Actions State: Published

Cooking class

by [Andy](#) — last modified Apr 28, 2008 09:30 PM

Ab imo pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars.

Barba non facit philosophum, neque vile gerere pallium.
Bene docet, qui bene distinguit. Bis dat, qui cito dat.
Barbarus hic ego sum, quia non intellegor ulli.

Captatio benevolentiae. Carpe diem. Cogito ergo sum.
Corruptio optimi pessima. Corruptissima re publica plurimae leges. Cui bono?

More information about this event...

What	
When	Feb 10, 2009 03:00 PM to Feb 15, 2009 01:00 PM
Where	Place
Contact Name	Andy
Contact Email	name@firma.xxx
Contact Phone	000-0000000
Add event to calendar	vCal iCal

iCalendar — vCalendar — Send this — Print this — Add to favorites —

History

Figure 5.21: View display of an event

Contact Name: name of a contact person who is responsible for answering any question concerning the event

Contact Address: the contact person's e-mail address

Contact Phone: the contact person's telephone number

The event start and event end fields are the only required fields among these.

Plone specifically evaluates the additional entry-fields in order to offer simple event management services:

- The structured entries are displayed in a table in the view display of each event (see Figure 5.21).

5 Item Types



Figure 5.22: Event portlet



Figure 5.23: Calendar portlet

- Using the “Events” tab on the main navigation bar, you can reach an overview list of past and future events.
- The “Events” portlet (see Figure 5.22) lists each of the next five coming events. For each event, you will see a title, place, and beginning date. If you hold the mouse cursor over the title, the beginning lines of the event’s description will appear.
- Plone enters events into the calendar portlet (see Figure 5.23). The title of the portlet informs you as to which month is currently displayed. It also contains links to the preceding and following months; the current month is displayed by default. The current day is highlighted with an orange frame.

Days for which at least one event has been planned are highlighted in the calendar and serve as links to a list which contains all events taking place on that day. You will also see any events planned for a given day, listed with starting and ending times, and titles, when holding the mouse cursor over the date.

- If you would also like your computer’s calendar to record the event, you can download calendar files in iCal- and vCal-formats (iCalendar/vCalendar) in the view display among the item actions for an event.

The events overview list and portlet only recognize events which have received a “Published” workflow state.

In entering an address for further information about the event, do not forget that the Internet address must begin with “`http://`”. If you forget this part of the address, you will receive an error message. Plone only saves addresses possessing a complete URL-scheme such as `http`, `https`, or `ftp`.

Plone checks to make sure that your date entries for the beginning and end of an event are valid, and that the start date does not lie after the end date.

5.5 Images

The “Image” item type serves to manage single images on a Plone website. Images can be placed into folders and possess properties and metadata. If you want to use an illustration on a page, that illustration must be available on the website in the form of an image item. The only exception to this is with cover images of news items, which can be directly uploaded using each news item’s edit page. They cannot be used in combination with other items.

The view display of an image item is the image itself, along with a title, description, and image-size entry (see Figure 5.24 on the next page). The image links to a full-size presentation which is made up of a page containing the image and a link leading back to the view display. Using the links, you can jump back and forth between the view display and the full-size presentation.

Aside from title and description entry-fields, the edit display of an image item also contains a browsing tool for uploading an image from your computer.

To modify an image, you should generally open it using an image processing or graphics program in your computer. You can then upload the edited image, replacing the original version. A few simple changes can be made directly on the website: image items have a “Transform” display, which you can use to flip and rotate the

5 Item Types



Figure 5.24: View display of an image

uploaded image. Select the desired transformation function and activate the “Execute” button (see Figure 5.25 on the opposite page).

Plone can make the following modifications to your image:

- Flip horizontally and vertically
- Rotate clockwise and counter clockwise 90°
- Rotate 180°

5.6 Files

With the help of a file item, you can publish and offer any desired file for download on your website. The type, inner structure, and format

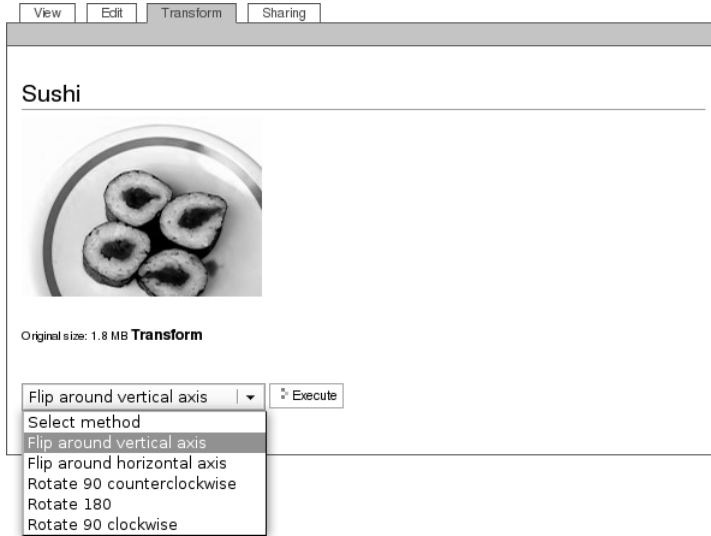


Figure 5.25: Transforming an image

of the file are not subject to any limits.

The disadvantage with files is that Plone is only able to recognize a small number of them and, because it has no knowledge about the structure and format of other files, is not able to see into them. Because of this, full-text searches will only function with PDF, Office, and simple text files but not with any other formats which may also include passages of text. In order to maximize use of Plone's capabilities, therefore, you should always save texts as "Page" or "News" items and images as "Image" items, even though it is technically possible to save them as "File" items.

Along with the title and description field, the view display of a file item also contains the name of the file, and a link for downloading it, as well as particulars about the file's size and MIME type (see Figure 5.26 on the next page).

5 Item Types

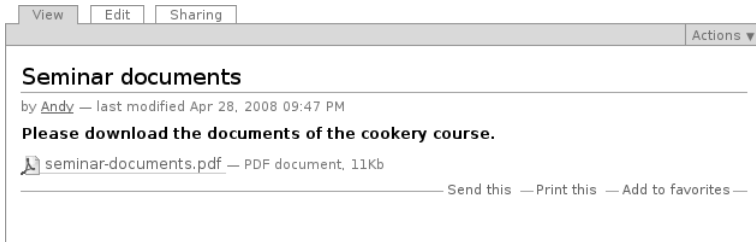


Figure 5.26: View display of a file

An exception to this is with text files such as plain text, source code from programs, or HTML text. In these cases, Plone is able to display the content of the files. It recognizes text documents in that their MIME type begins with “text/”. Normally, your browser ensures that the appropriate MIME type is sent along with a file on uploading.

Depending on the type of file and the configuration settings for your Web browser, files are either opened in your browser with the help of an appropriate program, or saved onto your computer. In many cases, both options are available; the Web browser asks you what you would like to do with the file.

Similarly to images, files can be uploaded on the file item’s edit page. If a file has already been uploaded, that file’s name, size, and file type will be listed. You are then free to retain the file or replace it with another. To upload a file for the first time or to replace another file, simply select a file on your computer using the “Browse” button and then save your changes.

5.7 Links and Favorites

On a Plone website, you can manage links to other websites or other resources just as you can do with any other types of content. The “Link” item type exists for doing this. Its content consists of an

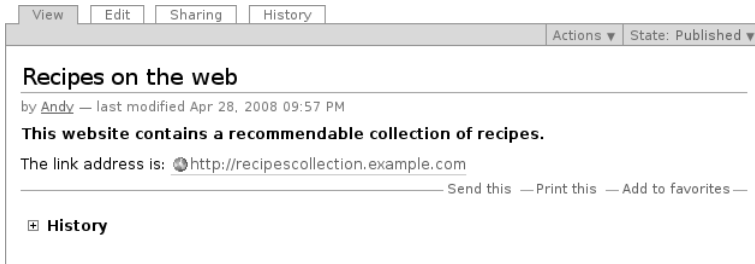


Figure 5.27: View display of a link

Internet address. In the view display of a link item, you will find a title, a description of the resource, and a link to the address (see Figure 5.27).

In a folder or collection containing multiple link items, you can create lists of links with commentary for each link, for example. When links are shown in the navigation portlet or in the view display of a folder, they will link directly to the given address and not to the link item itself.

In the edit form, the address is a required entry; without it, the item would not have any content. Remember that a website address must always begin with “http://”. Aside from Web addresses, of course, you can also use addresses for other Internet services such as an FTP resource, which would begin with “ftp://”.

“Favorites” are special links which lead to other items on your website. Using the “Add to favorites” option, you can create favorites links on individual pages of your website. Favorites are described in more detail in Section 8.2.2 on page 183.

5.8 Folders

By consolidating related items into a folder, you can organize your content thematically. This allows visitors to recognize the relatedness of content and navigate through the website more quickly and easily.

Unlike most other item types, folders do not include their own editorial content; they simply contain other items. Folders and subfolders group items on the website together and organize the potentially large number of these into comprehensive content units.

The view display of a folder either displays a list of the content items it contains or uses one of them more or less as a title page. For the presentation of your content, folders possess various templates which you can choose from in the “Display” menu found on the green content frame of a folder’s view display:

- Summary view
- Tabular view
- Thumbnail view
- Standard view

The standard view display of a folder (see Figure 5.28 on the opposite page) includes the title and description of each item listed, along with the date of the last changes made to the item and a link to its creator’s profile. The title is a link to the corresponding item. One exception to this is with entries for events: with these, the location and time frame for the event are shown in place of the modification date.

Items with a “Private” workflow state are not usually visible to the public. You will only be able to see those private items which either belong to you or exist in your personal folder.

If you would like to use an item from the folder as a title page for the folder’s view display, select “Select a content item as default view” from the display menu. You will be taken to a form with which you

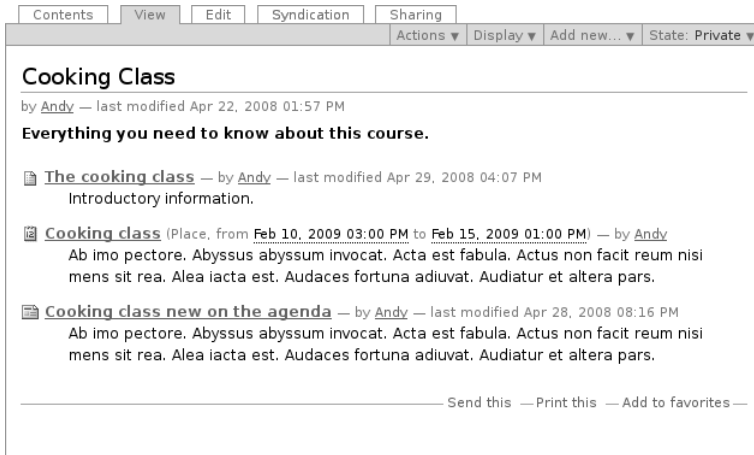


Figure 5.28: The content of a folder as a standard-view list

can select an item from the folder. In the view display of the folder, you will now see the selected item instead of the list of content items.

Plone can also create RSS feeds for folders. This process is called syndication. For this purpose, each folder has an additional display view, in which you can control its syndication behavior (see Section 6.6.3 on page 151).

On the edit page for a folder, there is an “Enable next previous navigation” option in the “Settings” part of the form (see Figure 5.29 on the following page). If this option has been selected and more than one item is in the folder, “Previous” and “Next” links will appear in their view displays (see Figure 5.30 on the next page). These links lead to the items which precede and follow the item at hand respectively. This can be used to divide a longer text into smaller sections, allowing the reader to flip easily from one to the other.

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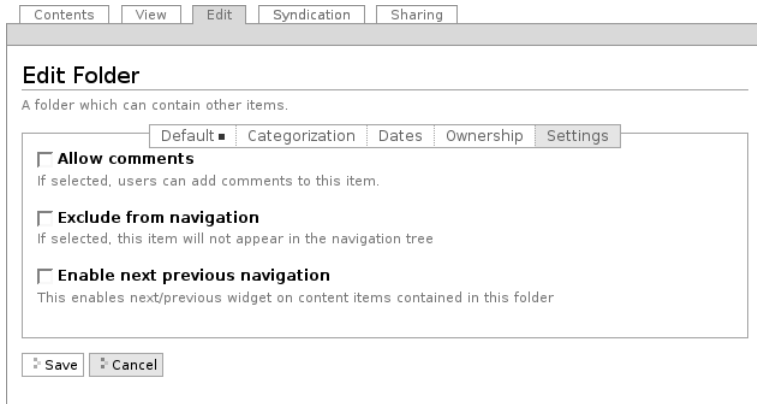


Figure 5.29: The “Settings” edit-page component for a folder

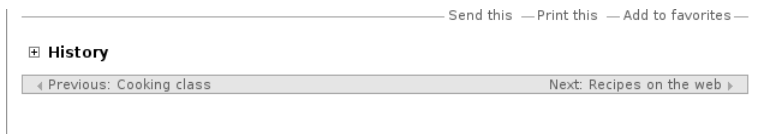


Figure 5.30: Flipping between items

5.8.1 Contents Display

If you are allowed to manage a folder, you will also have access to its contents display (see Figure 5.31 on the opposite page). This can be reached using the “Contents” tab.

The contents display for a folder contains a table of links to all of the items found in that folder, along with their most important properties. In this display, you can copy, move or delete individual items. If you have chosen an item to serve as the default-view page for the folder, it will be set in bold type.

Items exist in a folder in the same order they were added. The same

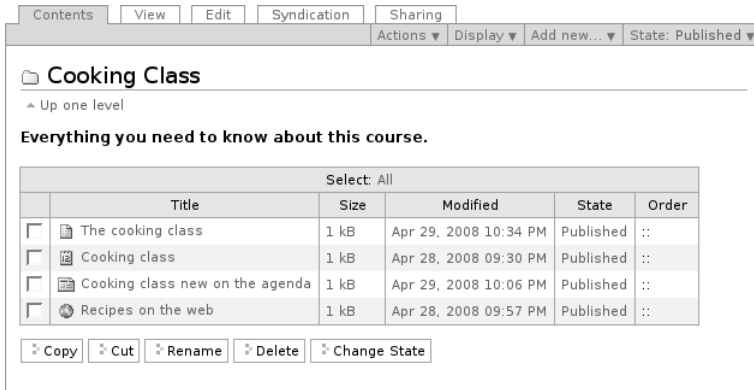


Figure 5.31: Contents display of a folder

Select: All								
	Title	Size	Modified	State	Order	ried	State	Order
<input type="checkbox"/>	The cooking class	1 kB	Apr 22, 2008 02:15 PM	Private	::	08	Private	▲ ▼
<input type="checkbox"/>	Cooking class	1 kB	Apr 22, 2008 02:28 PM	Private	::	08	Private	▲ ▼
<input type="checkbox"/>	Cooking class new on the agenda	1 kB	Apr 22, 2008 02:47 PM	Private	::	08	Private	▲ ▼

Figure 5.32: Changing the order of an item: with Javascript (left) and without Javascript (right)

order is used when presenting them in the folder view displays and navigational elements. You can change the order by moving them with the “::” icon found in the “Order” column to the far right by “picking up” the items with the mouse and moving them upward or downward. If Javascript has been deactivated, you will find arrow icons in the column instead (see Figure 5.32).

5.9 Collections

It may often be the case that you want to consolidate related items in a website, such as in a news overview or a list of all items dealing with the same theme. A single item can be relevant to a number of such overview lists at the same time. Because each item occupies just a single place within the website's folder hierarchy, however, folders are not well suited for grouping items together in various categories.

Instead, you can use "collections" to create a wide variety of overview lists as needed. These overview lists are independent from the folder structure of the website. You might think of a collection as similar to a search results page; Plone continuously updates the selection of items on the basis of predefined search criteria.

As with folders, there are a number of templates for the view display of collections which you can select from the "Display" menu:

- Standard view
- Summary view
- Tabular view
- Thumbnail view
- Collection

As an example, Figure 5.33 on the opposite page illustrates the presentation as a list.

Like folders, collections do not have any editorial content of their own. When you edit a collection, you determine which criteria it uses to collect items and how it displays them for viewing.

In the edit display of a collection (see Figure 5.34 on page 108), you can set the number of items to be listed on each page. Select "Limit search results," and enter the desired number of items into the field below. If more items are found than the number entered here, the list will be split across multiple pages. You will then find links to the additional pages below each list. If you do not limit the search results,

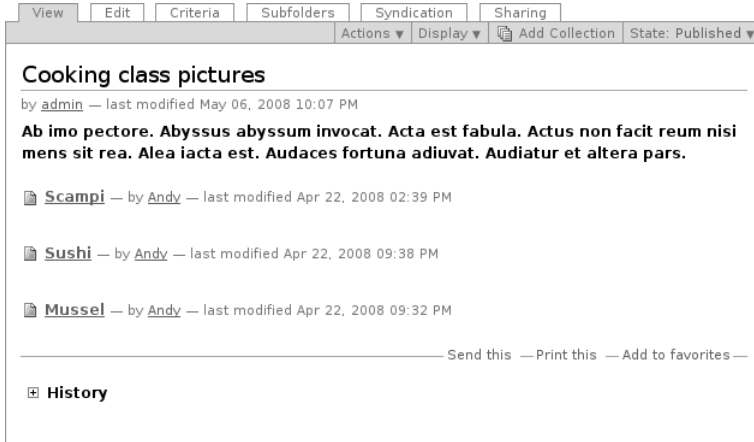


Figure 5.33: Presentation of a collection as a list

or if you enter the number “0” into the box, all items matching the search topic will be presented on one page.

If you would like to have a collection presented as a table, there are two possibilities for doing so. The first of these is to select the “Table” option from the “Display” menu, so that the collection’s content will be presented in a fixed table with four columns (Title, Author, Content type, and Modification date).

The other option is selecting the “Collection” entry on the same menu and specifying that the collection should be displayed as a table using the edit page. With this option, you can determine how many columns should be displayed in the table and which information should be presented for the collection at hand. A column can provide information about an item’s metadata, size or workflow state. The default settings can also be adjusted to display the item title only, this serving as a link to the actual item.

If you select the “Collection” display style but do not check the

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View Edit Criteria Subfolders Syndication Sharing

Edit Collection

An automatically updated stored search that can be used to display items matching criteria you specify

Default Categorization Dates Ownership Settings

Title

Cooking class pictures

Description
A short summary of the content.

Ab imo pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars.

Body Text

Normal paragraph

Limit Search Results
If selected, only the 'Number of Items' indicated below will be displayed.

Number of Items
0

Display as Table
Columns in the table are controlled by 'Table Columns' below.

Table Columns
Select which fields to display when 'Display as Table' is checked.

Creation Date	↑	Title	↑
Creator			
Description	>>		
Effective Date	<<		
End Date			
Expiration Date	↓		↓

Save Cancel

Figure 5.34: Edit display of a collection

“Display as table” field, the items contained in the collection will be presented in a list. Lists such as this one display the title and description of each item listed, along with a link to its creator’s profile and the last modification date. The title serves as a link to the item itself.

For each collection, Plone generates an RSS Feed. You will find a link to the feed in the item actions for the collection (see Section 6.6 on page 148).

5.9.1 Search Criteria

Collections possess a number of search criteria. Each criterion correlates to a specific property of the items searched. For an item to be taken up as part of a collection, it must meet all of the specified criteria (multiple criteria are connected using “and”). A search criterion can apply to an item property only once in a single collection.

Searchable item properties are referred to as fields. Each one has fundamental differences: with a title, you can search for a single word; with a date, you can determine whether it lies before or after a certain time point. A search-text, on the other hand, can either be entered freely or selected from a list of possible values. Table 5.3 on page 111 outlines the criteria that are possible for each field.

In the “Criteria” display (see Figure 5.35 on the following page), you can edit the search criteria for a collection. The display consists of:

- a table listing previously selected criteria
- a field for adding new criteria
- a selection field for determining the sorting order

The table showing selected criteria displays the field to which the selected criteria belongs in the “Field” column. The “Criterion Details” column lists the type of search criterion selected and contains an entry-field for its value (such as a word to be searched for).

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View Edit Criteria Subfolders Syndication Sharing

Criteria for Cooking class pictures

Field	Criterion Details
<input type="checkbox"/> Item Type An item's type (e.g. Event)	A portal_types criterion A portal_types criterion Values ■ One of the available content types. Event Favorite File Folder Image
<input type="checkbox"/> Location	A path criterion

Add New Search Criteria

Field name
List Available Fields
Categories

Criteria type
Criteria does match
Select values from list

Set Sort Order

Field name
List Available Fields
No sort order

Reverse
Reverse display order

Figure 5.35: Criteria display of a collection

Table 5.3: Search criteria for collections

Field Names	Criteria Types
Description	Text
Search Text	List of values
Short Name	
Title	
Creator	Text
State (workflow state)	List of values
Categories	Select values from list
Modification Date	Relative date
Creation Date	Date range
Start Date	
End Date	
Effective Date	
Expiration Date	
Item Type	Select item types
Related To	Select referenced content
Location (path in the website)	Location in site

The entry-fields correlate to the types of criteria available:

Text: Enter one or more words into the box. Only items containing the entered text will be included in the collection. Sequences of words will only be taken into account if you place them in quotation marks. You can also search for parts of words by using wildcard characters, as is also the case with the website's search field (see Section 8.2.3 on page 185).

List of values: Any number of values can be entered as seen fit. These might include, for example, a list of user names for the "Creator" field.

Below the list of values, you will see an option titled "operator

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name.” If you would like to enter more than one value, you can decide here whether the items searched for must conform to one of the values entered (“or”) or to all of the values entered (“and”). If you would like to collect all items created by “Adam,” for instance, as well as all items created by “Bertha,” you should combine the two values using the “or” operator.

Select values from list: Here, values can be selected from a predefined list, such as the list of all existing categories. Once again, you can choose between using the “and” or the “or” operators.

Relative date: You can require that the value for applicable fields fall before, after, or on a certain deadline. This deadline, however, is not a single fixed date but is relative to the point in time that the collection is displayed. In this way, you can create a constantly current list of all items which are less than one week old, for instance.

There are three input boxes for configuring this criteria type. The first two define a deadline which either correlates to the current date (“Now”) or determines a timespan to be selected in the past or future. With the “More or less” input box, you can decide whether the date listed in the search item’s respective field should fall on the chosen deadline, closer to that deadline than the current date is, or further away from it.

Date range: Choose two points in time (start date and end date) between which the value of the field searched should lie. Here you have two groups of input boxes, one for the beginning, and one for the end of the desired time period, each with a calendar day and time. The calendar icon will open up a calendar to assist you in selecting a date.

Select item types: Select as many item types as you like from the list. The collection will then include all items belonging to the types selected.

Select referenced content: Select as many items as you like from among all those published on the website. The collection will then only include items which reference all those selected here.

Location in site: Limit search results to include items located at specific positions in the website's folder hierarchy. You can also specify whether single items or entire folders, including all of their content, are to be included in the search.

To accomplish this, activate the "Browse" button found below the list of items. Your browser will then open a second window from which you can navigate around the website, selecting items to be inserted into the list. You can delete items from the list you have created by removing the check-mark next to them and saving the form.

In the last section of the criteria display, you can define the order in which the items collected should be presented. Choose an item property by which items should be sorted, and decide whether they should be sorted in ascending or descending order.

5.9.2 Sub-Collections

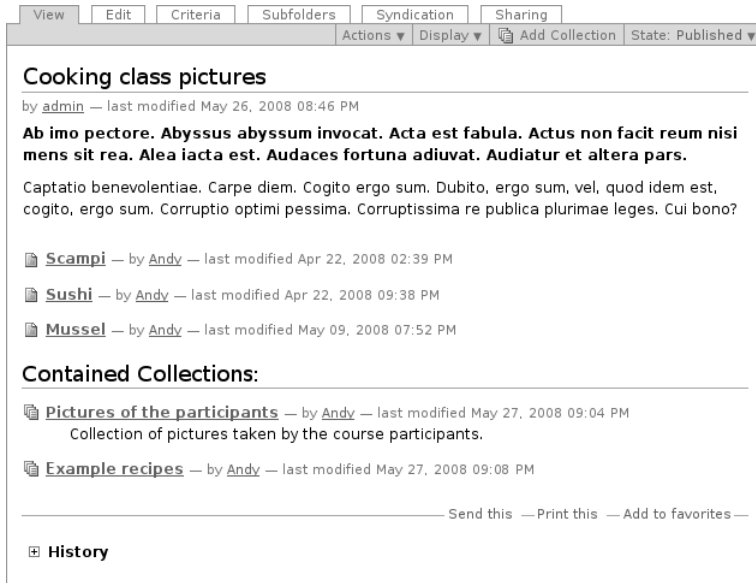
Collections can also contain sub-collections in order to refine the search using further criteria or to group together related collections. The view display of a collection will then contain a list of its sub-collections (see Figure 5.36 on the following page).

In the edit display of sub-collections, you can determine whether criteria specified for parent collections should be inherited or not. To activate criteria inheritance, place a check-mark into the entry box next to "Inherit Criteria" found toward the bottom of the sub-collection's edit display.

If a sub-collection inherits criteria, it no longer represents an independent search but refines the search criteria for its parent. It will only contain those items from the parent collection which fulfill both sets of criteria.

If both the parent and sub-collections specify criteria for the same field, the inherited criteria will be ignored in the sub-collection.

5 Item Types




The screenshot displays a web interface for a collection titled "Cooking class pictures". At the top, there are navigation tabs: "View", "Edit", "Criteria", "Subfolders", "Syndication", and "Sharing". Below these are action buttons: "Actions", "Display", "Add Collection", and "State: Published". The main content area shows the collection title, the author "admin", and the last modified date "May 26, 2008 08:46 PM". A Latin proverb is displayed: "Ab imo pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars." Below this is a Latin phrase: "Captatio benevolentiae. Carpe diem. Cogito ergo sum. Dubito, ergo sum, vel, quod idem est, cogito, ergo sum. Corruptio optimi pessima. Corruptissima re publica plurimae leges. Cui bono?". Three sub-collections are listed: "Scampi" (by Andy, Apr 22, 2008 02:39 PM), "Sushi" (by Andy, Apr 22, 2008 09:38 PM), and "Mussel" (by Andy, May 09, 2008 07:52 PM). A section titled "Contained Collections:" follows, listing "Pictures of the participants" (by Andy, May 27, 2008 09:04 PM) and "Example recipes" (by Andy, May 27, 2008 09:08 PM). At the bottom, there are links for "Send this", "Print this", and "Add to favorites", and a "History" button.

Figure 5.36: View display of a collection with sub-collections

Just as with other items, you can delete, copy, and move sub-collections. If you try adding items other than sub-collections inside collections, however, you will receive an error message.

The “Subfolders” display of a collection (see Figure 5.37 on the next page) is structured similarly to the view display of a folder (see Section 6.1.4 on page 126). There, you can rename, delete, or publish multiple sub-collections simultaneously.

If you move or copy a sub-collection to another place in the website, the criteria inherited by its former parent collection will be lost. If you have moved the sub-collection into another collection, it will then inherit its new parent collection’s criteria.



View Edit Criteria **Subfolders** Syndication Sharing

Contained Collections:



	Title ^	Size	Modified	State
	 Pictures of the participants	1 kB	May 27, 2008 09:04 PM	Published
	 Example recipes	1 kB	May 27, 2008 09:04 PM	Published

Figure 5.37: “Subfolders” display of a collection

6 Working with Items

In Chapter 5 on page 73, you learned how to edit the content of single items. This chapter will provide you with information about how to work with items as parts of your website:

- Adding, deleting, copying and moving Web content
- Consulting older revisions of items
- Using workflow states
- Discussing and commenting on content
- Offering RSS feeds from folders and collections

6.1 Items in the Website

An item is a part of a website. Each item has its own place in the website's folder structure and possesses a short name which identifies it within the folder that contains it. Consequently, a number of simple management tasks arise:

- Adding and renaming items
- Copying, moving, and deleting items
- Managing multiple items simultaneously

6.1.1 Adding Items

In the view display of folders, you will find the “Add new...” drop-down action menu (see Figure 6.1 on the following page), with which you can add new items to the folder at hand.

6 Working with Items

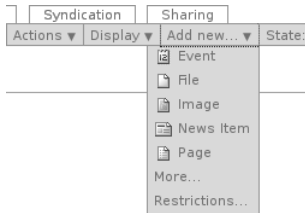


Figure 6.1: “Add new...” menu

From the menu, select the type of item to be added. Plone will then take you directly to the new item’s edit page. The item will only be added to the folder after you have successfully saved your entries.

It is possible that the “Add new...” action menu will not list all of the item types available on your website. This would mean that either your system administrator or the folder’s owner has limited the types of items available on the menu. In that case, the menu will contain a “More...” option, which will lead you to a complete list of all addable item types (see Figure 6.2 on the next page). Select the desired type and then activate the “Add” button.

If Javascript has been deactivated, you will not find any drop-down list, but the “Add” link will take you directly to the same “Add new item” form.

Restricting Addable Item Types

In the event that you are working in a folder for which you are the owner or manager, the menu will contain the “Restrictions...” option. It will take you to a form on which you can configure three basic settings to start with (see Figure 6.3 on the opposite page).

Use parent folder setting: this allows all the items that can be added to the parent folder to be addable inside the current sub-folder as well.

Add new item

Select the type of item you want to add to your folder.

Click to [configure what type of items can be added context...](#)

- Event**
Information about an upcoming event, which can be displayed in the calendar.
- File**
An external file uploaded to the site.
- Folder**
A folder which can contain other items.
- Image**
An image, which can be referenced in documents or displayed in an album.
- Link**
A link to an internal or external resource.
- News Item**
An announcement that will show up on the news portlet and in the news listing.
- Page**
A page in the site. Can contain rich text.

Figure 6.2: Complete selection of addable item types

Restrict what types of content can be added

Type restrictions
Select the restriction policy in this location.

- Use parent folder setting**
- Allow the standard types to be added**
- Specify types manually**

Figure 6.3: Settings for adding items

6 Working with Items

Restrict what types of content can be added

Type restrictions
Select the restriction policy in this location.

Use parent folder setting
 Allow the standard types to be added
 Specify types manually

Allowed types
Controls what types are addable in this location.

<input checked="" type="checkbox"/> Event	<input checked="" type="checkbox"/> Folder	<input checked="" type="checkbox"/> News Item
<input checked="" type="checkbox"/> Favorite	<input checked="" type="checkbox"/> Image	<input checked="" type="checkbox"/> Page
<input checked="" type="checkbox"/> File	<input checked="" type="checkbox"/> Link	

Secondary types
Select which types should be available in the 'More...' submenu *instead* of in the main pulldown. This is useful to indicate that these are not the preferred types in this location, but are allowed if you really need them.

<input type="checkbox"/> Event	<input checked="" type="checkbox"/> Folder	<input type="checkbox"/> News Item
<input checked="" type="checkbox"/> Favorite	<input type="checkbox"/> Image	<input type="checkbox"/> Page
<input type="checkbox"/> File	<input type="checkbox"/> Link	

Figure 6.4: Restricting addable item types

Allow the standard types to be added: this allows all standard types to be added. Remember that some item types may not be available on your website at all.

Specify types manually: this enables you to specify the items allowed for this folder individually.

If you select “Specify types manually,” the form will be extended to provide two lists of item types (see Figure 6.4).

Allowed types: only these item types will be allowed to be added to the folder.

Secondary types: these item types will not be listed directly in the “Add new...” menu but can only be found using the “More...” menu option.

If you have deactivated Javascript, the “Add new item” form will contain a link to a form that allows you to restrict addable item types. If you select the “Specify types manually” option, you will need to save the form before lists for both the types allowed and those designated as secondary types will appear.

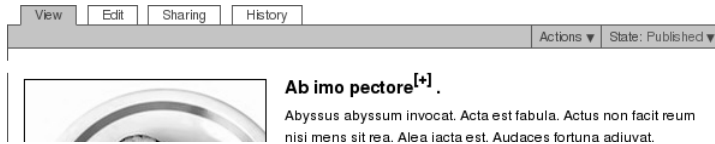


Figure 6.5: Wiki-links to items that have not yet been created

Adding Items using Wiki-Links

New items can be added in a way similar to how they are added in Wiki environments. If your website has been configured accordingly, you can create links to items which have not yet been created so that you can use them at a later date to create the items to which they correspond.

If you place a single word or phrase into double parenthesis or brackets when you are editing the main text of a page, news item or event, Plone will turn the selected text into a link, which leads to an item that resides in the same folder and has a short name corresponding to the text comprising the link (see Section 8.5.3 on page 198).

If the item does not already exist, the link will appear red and be marked with a plus sign enclosed in brackets (see Figure 6.5). When you follow the link, a new item will be added to the same folder. The name of the link will be issued as its title and its edit page will be presented. You can then edit and save the new item. The link will then appear as an ordinary link which leads to the new item.

When adding items using Wiki-links, you should take note of the following:

- Items generated in this way appear in the same folder as the item containing the corresponding wiki-link.
- Wiki-links in a given item always produce the same type of content item. Wiki-links created on a page generate a new page;

6 Working with Items

those in a news item create a news item, and those in an event generate a new event.

- Wiki-links can only be created in “Page,” “News” or “Event” item types.
- The wiki-method can be used regardless of how you decide to edit the text containing the links. Aside from working with the Kupu text editor, you can also create wiki-links using simple text or markup languages such as “restructured text.”

6.1.2 Short Names and Renaming

Each item on a Plone website possesses a short name which identifies it within the folder that contains it.

Though items also have titles, these are not well-suited for clear identification. You may decide to change a title, or might find a reason to give the same title to two items in the same folder. To allow for this, Plone utilizes short names.

To edit short names, the function must first be enabled both on the website and in your personal preferences. If this has been done, you will find an entry-field for the short name on the edit page of each item. This is where you can give short names to newly added items or rename older items.

If you have the manager role, the “Actions” menu (see Figure 6.7 on page 124) will provide a “Rename” option. This will lead you to a form where you can edit the item’s short name (see Figure 6.6 on the next page).

It is important to note the following rules when using short names:

- Short names may only contain Latin letters and digits, and the characters “.” and “-”.
- Umlauts and the German letter “ß” are not accepted. Also try to avoid using spaces.

Rename item

Each item has a Short Name and a Title, which you can change by entering the new details below.

The cooking class (the-cooking-class)

New Short Name
Short name is the part that shows up in the URL of the item.

New Title

Figure 6.6: Renaming an item

- Upper and lower case letters are recognized as separate characters. You should try to avoid mixing cases.

The Internet address of an item is made up of its short name, as well as the short names for all the folders in which it exists. The address of a page in a folder might read, for example, `<http://cms.example.com/workshop/content>` if `workshop` is the short name for the folder, and `content` the short name for the page.

This means:

- The short name for an item should be easily discernible, and should be directly related to the content of the item. Simple and pointed short names have two advantages: the addresses are easier to understand, and search engines will give your websites higher ratings.
- Each short name can only be used once in each folder. Items contained in separate folders, however, may have the same short names.
- You can always change short names, even when other items reference the item you would like to rename. Plone reroutes links to new addresses automatically.

6 Working with Items

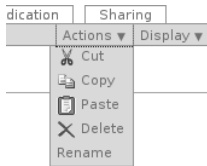


Figure 6.7: Item actions for managing items

If you do not want to or cannot decide on a short name for your item, Plone will automatically issue a name for it, which will be based upon the item's title. In doing this, it replaces characters which are not allowed and avoids issuing short names that have already been used in the same folder by adding a number to the end of them.

6.1.3 Copying, Moving, and Deleting

Not only can you create items, but delete them, move them to other places within the folder hierarchy, or copy them as well. The “Actions” menu offers the following item actions (see Figure 6.7):

- Cut
- Copy
- Paste (when available)
- Delete
- Rename

To copy an item, select “Copy” from the menu to mark the item. Paste it into the desired folder by selecting “Paste” from the destination folder's actions menu. The paste action will only be available after an item has been copied or cut.

If you paste an item into a folder which already contains another item with the same short name, the new item will be renamed. The new short name retains the old name along with an indication that it is a copy of another item. Such a short name would read “copy_of_seminar” if you had pasted an item named “seminar” into a folder already containing an item with that short name.

To move an item, proceed similarly as with copying. This time, use the “Cut” option in the item’s actions menu. The item will first be actually removed from its source folder on being pasted into the destination folder.

As soon as any item is marked as copied or cut, not only folders, but every item on the website will contain the “Paste” option in the actions menu. If the currently displayed item is not a folder when you are pasting, the marked items will be pasted into the folder in which the current item exists.

Plone only keeps the last item to have been marked as copied or cut at the ready for pasting or moving. When pasting an item into a new destination, the last item to have been marked will be the one pasted, and the selection will remain valid until you have marked a new item. This means that you can paste the same item repeatedly into any desired destinations on the website. If you try this with an item that has been moved, renamed, or deleted by another user in the meantime, however, Plone will notify you that it can no longer find the item.

Finally, you can also delete the current item using the “Delete” option on the actions menu. As a safeguard, Plone will check to make sure that you really want to delete the item.

If you would like to delete an item which is referenced by another item, you will receive a warning message from Plone with a list of all items which contain a link to the item that should be deleted (see Figure 6.8 on the next page). In that case, you can edit the listed items to remove the references as long as you have the permission to do so. Otherwise, you should contact the creators of the items in question and notify them about the no longer relevant links, or cancel the deletion.

6 Working with Items

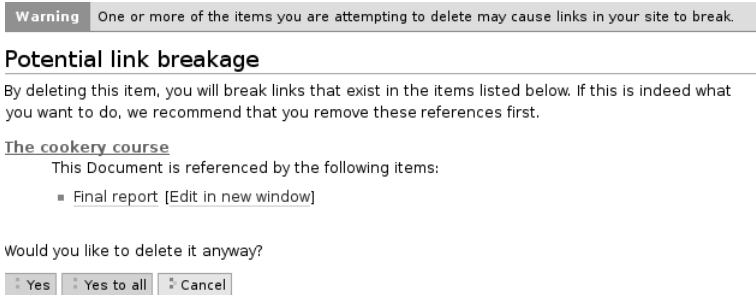


Figure 6.8: Warning concerning a defective link

6.1.4 Folder Actions

In a folder, you can copy, move, rename, or delete multiple items at the same time, changing the status of various items in one working step. For doing so, underneath the contents overview table for each folder, you will find a row of buttons, each corresponding to a folder action. Place a check-mark next to the item or items for which you would like to carry out an action, and activate the appropriate button for the desired action. The following actions are available for use:

Copy: marks checked items to be copied.

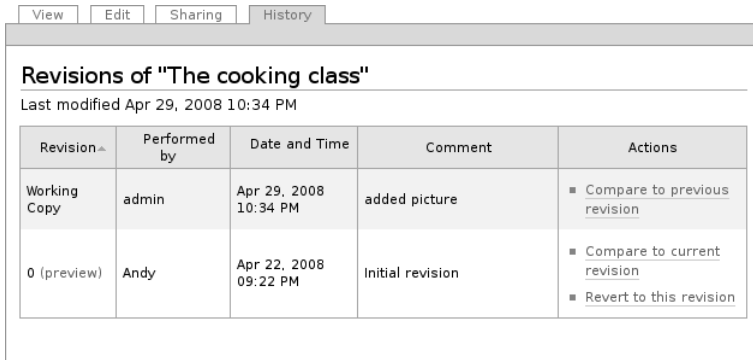
Cut: marks checked items to be cut.

Rename: leads you to a form similar to that seen in Figure 6.6 on page 123, but which also contains entry-fields for all checked items. Take note of the guidelines for giving short names which are listed in Section 6.1.1 on page 117.

Paste: If you have already marked one or more items to be copied or cut during the current working session, you can use this to paste them into the folder at hand.

Delete: deletes all checked items. There will be no safeguarding question, unlike when deleting a single item using the content “Actions” menu.

6.2 Accessing Revisions



The screenshot shows a web interface with tabs for 'View', 'Edit', 'Sharing', and 'History'. The 'History' tab is active, displaying the title 'Revisions of "The cooking class"' and the text 'Last modified Apr 29, 2008 10:34 PM'. Below this is a table with five columns: 'Revision', 'Performed by', 'Date and Time', 'Comment', and 'Actions'. The table contains two rows of revision data.

Revision	Performed by	Date and Time	Comment	Actions
Working Copy	admin	Apr 29, 2008 10:34 PM	added picture	<ul style="list-style-type: none">■ Compare to previous revision
0 (preview)	Andy	Apr 22, 2008 09:22 PM	Initial revision	<ul style="list-style-type: none">■ Compare to current revision■ Revert to this revision

Figure 6.9: The “History” display

Change State: leads you to a form on which you can change the state of multiple items in one working step (see Section 6.3 on page 129).

6.2 Accessing Revisions

When working on your website, you will occasionally want to undo changes and revert to an earlier version of an item. You can do that by using the revision management functions Plone provides. Each time you change and save content, the CMS creates an entirely new version of the item you are working with. Older versions of the item are not overwritten but remain accessible.

You can reach older revisions of a given item by calling up the “History” display (see Figure 6.9). There, you will find a table in which the current version and all older revisions are listed. The table provides you with a clear overview of the information available for each revision, organized into single columns.

Revision: In this column, you will find a number for each version, beginning with the number zero. The most current version is referred to as the working copy.

Performed by: This column reveals the user who saved the revision.

Date and Time: The time at which the revision was saved.

Comment: Any comments left in the “Change note” by the user who saved the revision can be found here.

Actions: In this column, you will find links to any actions which are relevant to the respective revision of the item at hand.

The following actions can be carried out with a given revision:

Compare to current revision: Using this link, you will come to a page on which the selected revision is compared with the current one (see Figure 6.10 on the opposite page).

Compare to previous revision: You will be taken to a comparison between the selected revision and the one preceding it chronologically.

Revert to this revision: This action changes the selected revision into the working copy. That means that visitors to your website will see an older version when viewing that item. The old working copy will then be saved under a new revision number.

Comparing Revisions

With revision comparisons, not only the changes made to the content of an item are shown, but any modifications made to the item’s metadata, categories, start or end dates, or any other settings are compared as well. The only exception is that links to other items are not included in revision management.

With metadata, a plus sign in the comparison indicates that the property which follows it has been newly added, whereas a minus sign indicates that entries or values have been deleted (see Figure 6.10 on the next page). With text fields such as the description, both

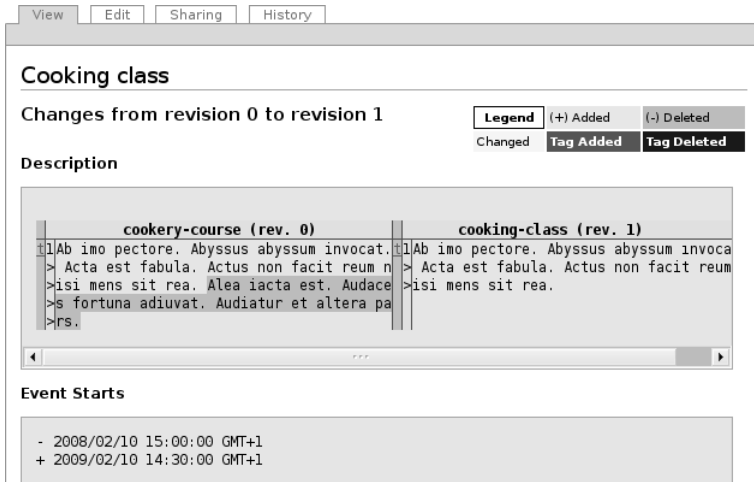


Figure 6.10: Revision comparison with changed metadata

versions are presented in two display columns, side by side. Added text is highlighted in light green, replaced text in yellow, and deleted text in light red.

In the main body text of an item, changes are highlighted and contrasted in the same field (see Figure 6.11 on the following page). You can also compare both versions separately, however. Switch between the two presentation styles by using the “Show code differences” and “Show visible differences” links.

6.3 Using Workflows

In some cases, you may not want a new item to be viewed by the public before it has been finished. While you are working on it, the item should only be accessible to you or a small group of other people.

6 Working with Items

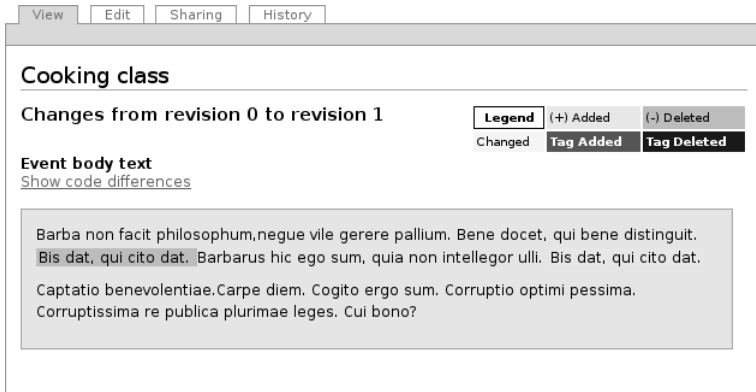


Figure 6.11: Revision comparison with changed body text

Your website may be configured so that you are not able to publish items as you please. In that case, another person would need to review the items before clearing them for publication. This other person performs the “editor” role within Plone.

In these cases, items are subject to a workflow process, which guides their progress from start to finish and spells out the actions required by authors and editors at each step of the way. Plone provides various workflow models, which are suitable for handling a wide array of publication scenarios.

The workflow in Plone is made up of a certain number of states which an item can retain, and a sequence of transitions between these states. These are referred to as “workflow states” and “state changes.”

Workflow States

The workflow designates who is able to view an item on a website and under which conditions. It distinguishes, for example, between items which can only be viewed by their authors, and those which can be freely viewed by logged in users or even visitors.

Table 6.1: Color codes for workflow states

Color	State
red	private
green	public draft
orange	pending review
blue	published

The state of an item determines who is allowed to view it. Each item put through the workflow process possesses a state, and this state can be changed along the course of the workflow process by authors and editors.

If you are logged in to the website, Plone will present the links to items which are listed in folder overview tables and portlets in colored type. Each color represents a workflow state (see Table 6.1). Elements such as the navigation portlet, the portlets on the home page or collections on the main navigation tabs can even be configured so that they only show published items.

State Changes

Not every transition of an item from one state to another is useful. To that end, the workflow not only provides items with states but also specifies which state changes are possible. The “Publish” state change, for example, describes an item being moved from a “Private” state to a “Published” one. State changes reflect the activities which, aside from the actual handling of content, make up the bulk of editorial work.

The workflow also dictates the circumstances under which state changes can be made. An item can only be published, for example, by someone with permission to publish items for the folder containing the item. How such permission for single folders can be appropriated is described in Section 7.3.2 on page 174. If you have the right to

6 Working with Items

publish items in a given folder, you will then be able to carry out the tasks reserved for editors which are described here as follows.

Plone recognizes four workflow models, each designed for a specific need:

- Simple Workflow
- One-Step Workflow
- Community Workflow
- Intranet/Extranet Workflow

Additionally, the website can be configured so that the visibility of items is not determined by a workflow state but by the state of the folder in which they exist. That is the case by default for images and files. These items do not possess any states, and state changes are not applicable to them.

It is the site manager's job to decide which workflow model fits best to which items on the website. It may therefore be the case, for instance, that the "Page" item type is governed by a different set of workflow guidelines than the "News" type.

6.3.1 Simple Workflow

Plone's default workflow is referred to as the "Simple Workflow." Users who are not logged in can only access items subject to this workflow model which have been published See Figure 6.12 on the next page.

The simple workflow includes three states:

Private: Beginning state (red); newly added items are automatically given the "Private" state. A private item can only be viewed and edited by its owner or by a manager.

Pending review: (orange) An item in this state has been submitted for review so that an editor can either publish or retract it. Both

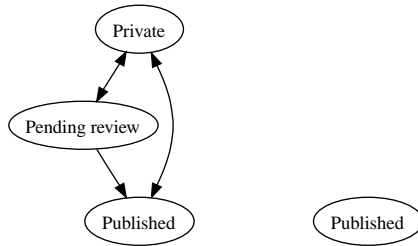


Figure 6.12: Simple workflow (left)

Figure 6.13: One-step workflow (right)

owners and editors can view the item, but only editors can make changes to it.

Published: (blue) Any visitor to the website can view published items. They will also be listed in the navigation portlet for anonymous viewers to access. After being published, an item can be edited by its owner as well as any editor.

The state changes reflect the following actions:

Submit for publication: Transition from the “Private” state into the “Pending review” state. The transition can be initiated by either the owner of the item, an editor, or the site manager.

Publish: Transition from the “Private” or “Pending review” states into the “Published” state. An editor or site manager changes the state of the item to “Published,” thereby designating it as official content of the website.

Send back: Transition from the “Pending review” or “Published” states back into the “private” state. An editor thus rejects an item for publication on the website. The author can then resubmit the item for further review after having reworked it.

Retract: Transition from the “Pending review” or “Published” states into the “Private” state. The owner pulls an item out of the pub-

6 Working with Items

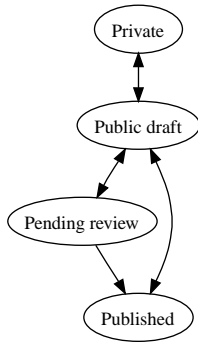


Figure 6.14: Community workflow (left)

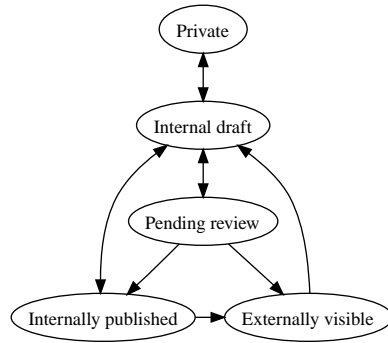


Figure 6.15: Intranet/extranet workflow (right)

lished state in order to rework it and resubmit it for publication at a later time, for example.

6.3.2 One-Step Workflow

In this workflow model, items are automatically given the “Published” state. This is the only state available, and there are no state changes. If an item subject to this workflow model should no longer be visible, it needs to be deleted from the website. See Figure 6.13 on the preceding page.

6.3.3 Community Workflow

Items in the community workflow are visible to all visitors to the website, as long as those items have not explicitly been issued the “Private” state. See Figure 6.14..

The following states are possible:

Public draft: Beginning state (green); newly added items are handled as public drafts. That means that any visitor to the website can view the items in this state. They will appear among the navigational elements and can be found by conducting a search. A public draft, however, can only be edited by its owner or by an editor.

Private: (red) In this state, an item is only visible to its owner or to the site manager.

Pending review: (orange) See Section 6.3.1 on page 132.

Published: (blue) Items in this state are accessible to all users. They can no longer be reworked by their owners or editors but only by managers.

The applicable state changes are as follows:

Make private: Transition from “Public draft” into the “Private state.” The owner keeps an item from the public view, in order to continue working on it in private, for example.

Promote to Draft: Transition from the “Private” state into the “Public draft” state. With this step, the owner makes the private item available to the public.

Submit for publication: See Section 6.3.1 on page 132.

Publish: Although items are already visible to visitors as drafts, it is still a good idea to publish them. Depending on how your website is configured, items might not be included among navigational elements until after they have been published.

Send back: Transition from the “Pending review” state into the “Public draft” state. The editor thus rejects publication for an item.

Retract: Transition from the “Published” state or “Pending review” state into the “Public draft” state. The owner withdraws the item from public view.

6.3.4 Intranet/Extranet Workflow

The “Intranet/Extranet Workflow” is intended for websites which should either partly or completely be accessed only by a closed group of users. The primary difference to the community workflow lies in the ability to publish items externally as well as internally. See Figure 6.15 on page 134.

The following states are available:

Internal draft: Beginning state (green); newly added items are visible to all logged in users. Anonymous visitors to the website will have no access.

Private: (red) See Section 6.3.3 on page 134.

Pending review: (orange) See Section 6.3.1 on page 132.

Internally published: (blue) Items with this state are accessible to all logged in users. They can no longer be edited by their owners or by editors but only by managers. Furthermore, internally published items are presented in prominent places on the website.

Externally visible: (blue) An item in this state is accessible to all who visit the website but can only be edited by administrators.

The respective state changes are as follows:

Make private: transition from the “Internal draft” state into the “Private” state. This may be used when the owner decides to keep an item hidden from public view in order to work on it at leisure, for example.

Show internally: Transition from the “Private” state into the “Internal draft” state. With this step, the owner makes the item accessible to all logged in visitors.

Submit for publication: See Section 6.3.3 on page 134.

Publish internally: Transition from the “Internal draft” or “Pending review” states into the “Internally published” state. An editor makes the item accessible to registered users.

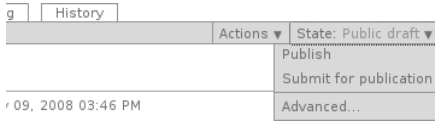


Figure 6.16: State menu

Publish externally: Transition from the “Pending review” or “Internally published” states into the “Externally visible” state. An editor makes the item accessible to both registered users and anonymous visitors to the website.

Send back: Transition from the “Pending review” or “Internally published” states into the “Internal draft” state. An editor rejects an item for publication.

Retract: Transition from the “Pending review,” “Internally published” or “Externally visible” states into the “Internal draft” state. The owner retracts the item from public view.

6.3.5 Tools

State Menu

The most important tool for managing the workflow process is the state menu (see Figure 6.16). It belongs to the drop-down lists found on the green content frame in the view display of items.

The title of the menu always displays the current state of the item being viewed. The menu contains entries for the available state changes relevant to that item as well as an entry which reads “Advanced...”.

If you select one of the state changes, the state of the item will be changed immediately, and the changes will be confirmed in the status message to follow. The entries in the state menu will also have changed: a new list of functions will be offered for use in the new state.

6 Working with Items



Figure 6.17: Workflow history switch

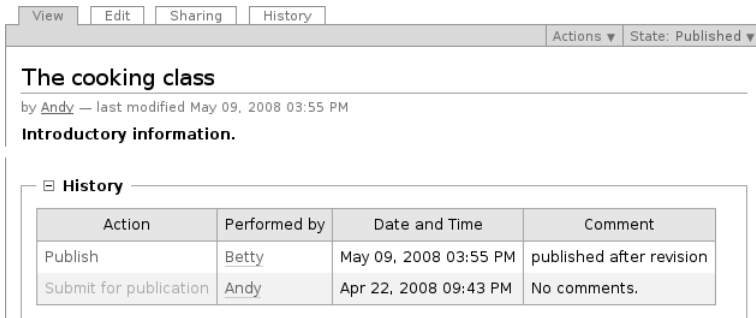


Figure 6.18: History of the state changes made to an item

In order to adjust the effective or expiration dates or save a comment in addition to making a state change, select “Advanced” from the menu. This will take you to the form described in Section 6.3.6 on the next page.

Workflow History

Plone creates a log recording all of the state changes made to each item along with any commentary added by users. As soon as a change has been made to the workflow state or any commentary about the workflow has been added, you can view the history log. In each item’s view display, a small entry will reveal all log entries for the item when clicked. It is represented by a plus sign and labeled “History” (see Figure 6.17).

The table contains the following entries (see Figure 6.18):



Figure 6.19: “Review List” portlet

- Action: notation of the state change
- Performed by: name of the user who carried out the state change
- Date and Time: date and time the change was made
- Comment: comments

The name of the user also serves as a link to his or her profile on the website.

Review List

The review list is a portlet which presents a list of all items submitted for publishing (see Figure 6.19). This gives editors an overview of existing work, and provides them with quick access to items needing to be reviewed.

Each item to be reviewed is represented with its title and last modification date. The title links to the item, and an icon identifies the item type. If you hold the mouse cursor over the title, you will also see the description of the item.

The list is sorted by submission date, beginning with the item to have waited the longest for review.

6.3.6 Simultaneous State Changes with Multiple Items

When multiple items are made up of related content, it might make sense to change their states simultaneously in one working step. This might include a page and the various images used on it, or multiple

6 Working with Items

The screenshot shows a web interface with a navigation bar containing 'Contents', 'View', 'Edit', and 'Syndication'. Below this is a section titled 'Publishing process' with a horizontal line underneath. The text explains that an item's status (review state) determines visibility and that the 'Publishing Date' controls visibility. Below this is a section titled 'Affected content' containing a table with columns for Title, Size, Modified, and State. The table lists two items: 'The new cooking class' and 'Cooking Class', both 1 kB in size and published. At the bottom, there is a checkbox labeled 'Include contained items' with a sub-note explaining its function.

<input type="checkbox"/>	Title	Size	Modified	State
<input checked="" type="checkbox"/>	The new cooking class	1 kB	Apr 29, 2008 04:07 PM	Published
<input checked="" type="checkbox"/>	Cooking Class	1 kB	May 06, 2008 09:57 PM	Published

Include contained items
If checked, this will attempt to modify the status of all content in any selected folders and their subfolders.

Figure 6.20: Workflow form, above

items which need to be published or removed from the public sphere at the same time.

With Plone, you can adjust the effective and expiration dates, add comments, and change the state of multiple items all at the same time. To do this, check the desired items in the contents display of a folder. Among the folder action buttons, there is a “Change state” option (see Figure 5.31 on page 105). This will take you to a form for making simultaneous changes.

The first section of the form (see Figure 6.20) contains a list of each item selected in the folder. At first, all of these will be marked with checks. You can reduce the number of items to be affected by removing check-marks from the list.

In the event that at least one folder is among the items on the list, you can place a check-mark at the bottom of the list into “Include contained items.” This will cause the status of all the items held within the folders listed there (including subfolders) to be included in the change. If there is no folder in the list, this option will not be available.

6.3 Using Workflows

Publishing Date
The date when the item will be published. If no date is selected the item will be published immediately.

2008 / -- / -- : -- : --

Expiration Date
The date when the item expires. This will automatically make the item invisible for others at the given date. If no date is chosen, it will never expire.

2008 / -- / -- : -- : --

Comments
Will be added to the publishing history. If multiple items are selected, this comment will be attached to all of them.

Change State
Select the new state for the selected items.

No change
 Retract

Figure 6.21: Workflow form, below

If you have reached this form through the “Advanced” option in the publishing state menu for a single item, the list of items affected will only contain this one item.

The next two sections on the form (see Figure 6.21) are for entering the dates effective and expiration dates. With both of these, you can enter a date and time. To enter the date, you can use the calendar. It can be reached via the calendar icon to the right of the input field for the day. If you enter a date effective, the item will not count as being published until that date at the earliest, even if the “Published” workflow state has already been issued. If you choose an expiration date, the items will no longer be treated as published after that date, regardless of workflow states.

After the deadline section, you will see an input field for adding commentary which will be added to the history log of each item.

Finally, this form offers a number of possible state change options.

6 Working with Items

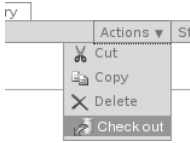


Figure 6.22: “Checking Out” to create a working copy

If you administer a state change that is not applicable to any of the items selected, it will still be applied to the others. You can also retain the workflow states of the listed items if you would simply like to edit deadlines or add comments.

6.4 Working Copies

When editing items that can be viewed by the public, working copies allow you to keep your unfinished revisions and saved drafts private. When you edit an item in this way, you first create a working copy of the item. After you are satisfied with the changes you have made, you then replace the item with the modified working copy.

6.4.1 Creating a Working Copy

If you would like to work on an item using a working copy that is hidden from public view, select the “Check out” option from the “Actions” menu (see Figure 6.22). You will be taken to a page on which you can decide whether the working copy should be placed into your personal folder or the folder of the original item (see Figure 6.23 on the next page).

Both possibilities have advantages: create the working copy in the same place as the original if you would like to work on it together with other users. Otherwise, it might make sense to have working copies placed into your own folder so that they do not get mixed up with originals, and so that you can keep track of your various drafts.

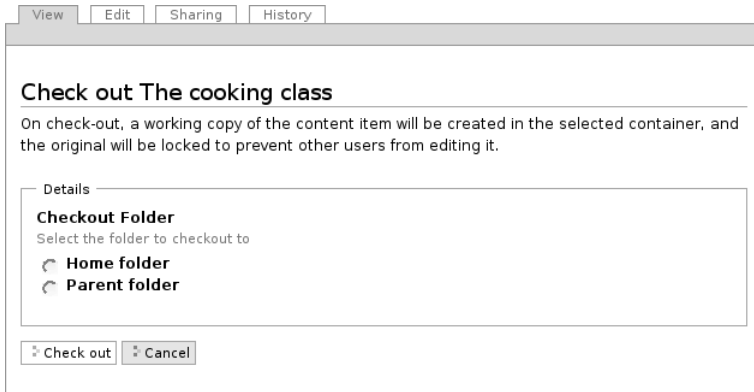


Figure 6.23: Selecting the destination folder for the working copy

Remember that working copies placed in published folders can be viewed by the public and may even appear among the navigational elements (if their revision state allows that). Keep this in mind when deciding what is best for you.

Though checkout copies follow the same workflows as the original item, their state changes are not dependent on those for originals. You are free at any time, for example, to shift a working copy into the “Private” state in order to keep it hidden from view to the public. The state of the original will still remain unchanged. The beginning state of a working copy will always be the beginning state for the designated workflow, independently of which workflow state the original item may be in at that time.

As soon as your working copy has been created, you can get to work in the usual way.

Whenever you call up a checkout copy, you will receive a status message (see Figure 6.24 on the following page) which alerts you to the fact that you are looking at a working copy. The message contains a link to the original, the user name of the person who created the

6 Working with Items

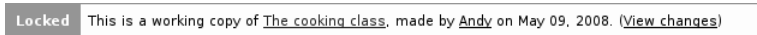


Figure 6.24: Status message on calling up a working copy

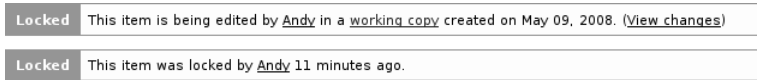


Figure 6.25: Status message due to a locked working copy

copy, and a link leading to a display of the changes contained as compared with the original.

When you call up an item for which a working copy has already been created, you will be informed about the existence of the copy (as long as you are allowed to edit the item). If it so happens that another user is editing the checkout copy at that time, you will also receive a status message saying that the item has been locked (see Figure 6.25).

6.4.2 Replacing the Original with a Working Copy

When you are satisfied with the changes you have made to your working copy and would like to apply them, replace the original with the copy. The actions menu contains the “Check in” option for doing so (see Figure 6.26).

When doing this, the original item is replaced by the working copy, and the original itself is deleted. You will be taken to a page on which

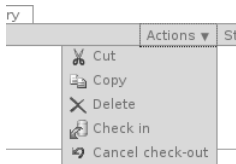


Figure 6.26: Actions menu with working copy entries

The screenshot shows a web interface with a top navigation bar containing buttons for 'View', 'Edit', 'Sharing', and 'History'. Below this, the main content area is titled 'Check in The cooking class'. A message states: 'Checking in this working copy will replace the existing item with the working copy.' Below this message is a section titled 'Check-in Message' with the instruction: 'Enter a message to be saved alongside the check-in. This should explain what was changed, for audit purposes.' There is a large empty text input field for the message. At the bottom of the dialog are two buttons: 'Check in' and 'Cancel'.

Figure 6.27: Replacing the original with the checkout draft

you can leave a note concerning the changes you have made (see Figure 6.27). This serves the same purpose as the change note in the view display. Your notes will appear in the tabular list of previous revisions of an item (see Section 6.2 on page 127).

Remember that the original can only be replaced with the working copy by someone who is allowed to edit the item. This may not be the case, for example, if the state of the item was changed while the working copy was being edited. In that case, you can submit the checkout copy for publication. The editor would then replace the original with the copy.

If you do not want to use a checkout copy, you can delete it by selecting the “Cancel check-out” option in the actions menu.

6.5 Commentary

Plone includes a commentary function which allows visitors to a website to exchange ideas over single items.

6 Working with Items

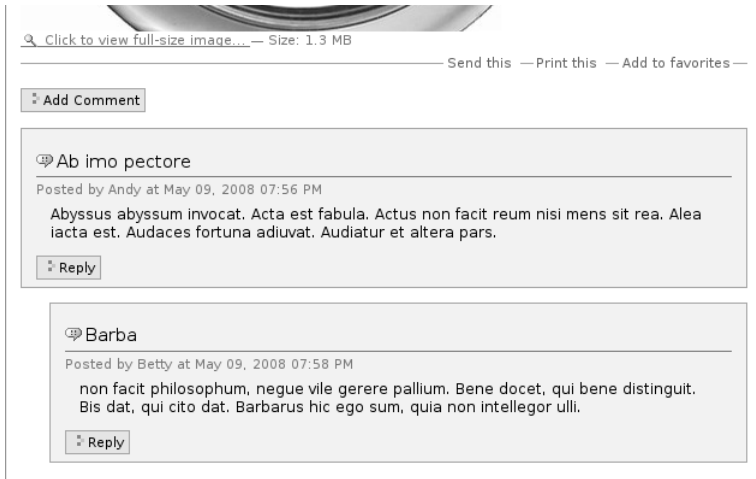


Figure 6.28: Commentary

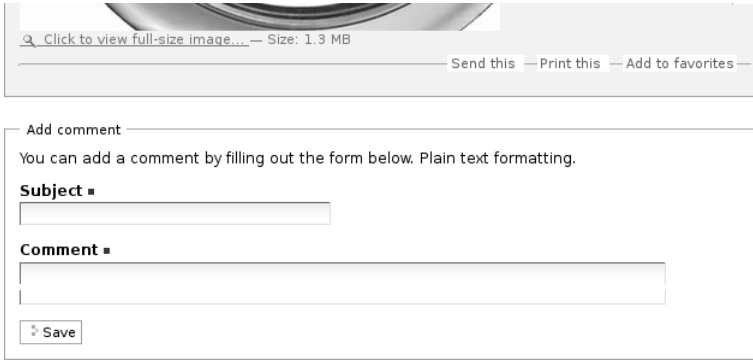
If discussion is allowed for an item, an “Add Comment” button will appear at bottom, along with added comments (see Figure 6.28). Replies to comments are indented below the comment to which they respond, allowing for extensive discussions.

6.5.1 Taking Part in Discussions

As long as the item’s creator has allowed commentary, you are free to add comments to that item. In order to do so, however, you usually need to be logged in. If you are not logged in, you will see a button which reads “Log in to add comments.”

After logging in, you will find the “Add Comment” button at the bottom of the item and the “Reply” button at the end of each comment. The buttons will take you to a form on which you can write your

6.5 Commentary



Click to view full-size image... — Size: 1.3 MB

Send this — Print this — Add to favorites —

Add comment

You can add a comment by filling out the form below. Plain text formatting.

Subject ■

Comment ■

Save

Figure 6.29: Entry form for adding commentary

commentary about an item or leave a reply to a contribution to the discussion (see Figure 6.29).

At the top of the form, the item's content will be displayed. If you are replying to a particular discussion entry, you will also see all contributions which have been made to that discussion prior to your reply. This provides you with an overview of the information to which you are replying as you type.

The comments form is for entering your own subject and comments; both fields must be filled out in order to save the form. Comments are made up of plain text which cannot be formatted. After saving, you will be taken back to the view display of the item. Your addition will already be visible.

As long as the website is configured so that unregistered users can take part in discussions, you will be able to enter your user name and password next to your contribution in the comments form, so that your name will appear along with your entry. If this is not done, the contribution will be saved anonymously.

6 Working with Items



Figure 6.30: Allowing commentary for an item

6.5.2 Discussion Settings

As the owner of an item, you can determine whether public discussion should be allowed for that item or not. Each visitor who is able to view the item will also be able to read that item’s complete discussion. Your administrator can adjust the settings for the entire website to either allow or disallow comments from unregistered visitors.

To allow discussion for an item, go to the “Settings” component of its edit page. You can switch the comments function off and on there by placing or removing a check-mark next to the “Allow comments” option (see Figure 6.30). There is a default setting for each item type which determines whether commentary is allowed for that type.

6.5.3 Deleting Contributions to the Discussion

If you are the manager of an item, you can delete single comments or entire parts of the discussion for that item. For doing this, each contribution to the discussion is accompanied by a button which reads “Remove” next to the “Reply” button. If you delete a discussion contribution, all replies pertaining to it will be deleted as well. Note that, when deleting, no further inquiry will be made.

6.6 Syndication

Syndication allows for fluctuating information (such as news headlines) to be used by various parties in many locations simultaneously. These locations might include other websites, or a news ticker on

your own computer. This allows you to follow recently published content on other websites, without having to visit them regularly yourself.

6.6.1 RSS Feeds and the RSS Portlet

Information which is to be distributed using syndication is first made available in machine readable form as a so-called RSS feed. RSS stands for “Rich Site Summary” or “Really Simple Syndication.” An RSS feed is simply a text file which can be called up at a certain Internet address. This file is updated whenever the information pertaining to it has been changed, such as when a current piece of news has been added. Other websites or programs on your computer call up this file in regular time increments.

The RSS feed contains a limited number of items in a standardized text format. The program used for processing them can analyze the files and then extract the title, summary, Internet address, and other entries from each item. This information is then displayed in a list of items on another website, for example.

RSS feeds also contain metadata such as title, description, and Internet address, and perhaps a logo. RSS feeds are also often described as news channels; a news ticker, for example, can display news taken from various channels at the same time, distinguishing between them by referencing the title.

On your Plone website, there is a portlet which displays the most current items from a given RSS feed from the Web (see Figure 6.31 on the following page). The portlet displays a list of titles, and each title serves as a link to the item’s text. The title of the portlet reveals the title of the channel and the foot of the portlet may contain a link which leads to a complete list of all items on the channel. The Internet address for the RSS feed, the number of items listed directly in the portlet, and the time increments at which the RSS feed should be accessed can all be adjusted in the portlet’s settings.

6 Working with Items



Figure 6.31: RSS Portlet

6.6.2 RSS Feeds published by Plone

Not only can Plone call up and present RSS feeds, but it can also publish feeds or channels from folders, collections, and searches. The RSS feed for folders lists the last item in the folder to have been modified. Feeds for collections and searches each contain the first matching item or search result found. This allows you, for instance, to subscribe to an RSS feed on your website using a news ticker on your computer, which would then inform you about any new items or changes on the website.

If syndication has been activated on your website, you can decide whether you would like to offer an RSS feed for individual folders or collections. To that end, these item types contain a “Syndication” display (see Section 6.6.3 on the next page), in which you can configure the RSS feed for that item, and turn it on or off.

Folders and collections which offer RSS feeds possess an item action called “RSS feed,” which links to the Internet address of the feed. This address can be entered into any RSS feed reader program by visitors who want to subscribe to the feed.

When you perform a search, at the top of the list of results, you will find a link which reads “Subscribe to an always-updated feed of these search terms.” This link leads to the Internet address of an RSS

feed which maintains a current list of results for the search terms entered.

With RSS feeds for folders or collections, the metadata of the folder or collection itself is used for creating the title and description of the feed. Along with a title, description, and Internet address, each allusion to an item will contain information about the publisher, author, copyright information, and publishing date. This information is taken from the item's properties and metadata.

Items in subfolders will not be included in RSS feeds for folders or collections: if syndication has been activated, they will need to have their own RSS feeds.

6.6.3 Syndication Item Display

If syndication has been activated for your website, folders and collections will have an additional "Syndication" tab. This correlates to an item display in which you can edit the syndication properties for that folder or collection.

Syndication must be individually activated for each folder. There is an "Enable syndication" button in each folder's syndication display for activating the feed.

After enabling syndication, the display will contain a number of input fields (see Figure 6.32 on the following page). At the top of the form, a button allows for syndication to be disabled at any time. Note that all syndication settings for that folder will then be lost.

Two fields follow, in which the feed's channel title and channel description are listed. These correspond to the title and description of the folder or collection. To change these entries, you will have to adjust the title and description of the actual folder or collection.

With the following three entry-fields, you can notify a display program as to when and how often it should call up the feed. The first two entries define the amount of time that should pass between each

6 Working with Items

Contents View Edit Syndication Sharing

Syndication Properties

Syndication enables you to syndicate this folder so it can be synchronized from other web sites.

Disable Syndication

Channel Title
Cooking Class

Channel Description
Everything you need to know about this course.

Syndication Details

Update Period
Controls how often the channel is updated.
Daily

Update Frequency
Controls the frequency of the updates. For example, if you want it to update every second week, select "weekly" above, and "2" here.
1

Update Base
This is the date the updater starts counting from. So if you want to update weekly every Tuesday, make sure this starts on a Tuesday.
2008 / January / 10 : 11 : 30 AM

Maximum Items ■
Maximum number of items that will be syndicated.
15

Figure 6.32: Syndication display

call-up of the feed. In the third field, enter a point in time which will serve as the starting point for the periodical updates. If you choose "weekly", "2", and the date of a certain Tuesday, for instance, you will have recommended that the display program call up a new RSS feed every second Tuesday.

RSS feeds for folders and collections are updated to the most current state possible on each call-up. If feeds are called up too often, however, the Web server may be unnecessarily burdened. On the

other hand, information can be missed if the channel is not reviewed often enough. Which frequency values make the most sense will depend highly upon the nature of your application and must be estimated individually for each folder or collection.

Finally, in the last entry-field, you can decide on how many items should be contained in an RSS feed. Usually this ranges from about ten to twenty. The more items a feed contains, the less frequently it should be called up.

7 Users, Roles, and Groups

Most users of a Plone website are anonymous visitors who would simply like to review the articles or items offered on the site. Some, however, are actively involved in publishing content, and are known to the website as registered users. Logged in users retain individual access rights, or “permissions,” which allow them to work on items in the website. To that end, users can also be organized into working groups to facilitate cooperation.

7.1 User Registration

Users can be registered either with the help of an administrator or on their own. The second option is only possible if the website has been configured accordingly.

7.1.1 Registering with the Help of an Administrator

When your site’s administrator has set up a user access account, you will receive an activation e-mail containing a link to a page on which you can choose the password for your account. On this page, you will find a form with three entry-fields:

My user name is: Your user name has already been entered. You should not change it.

New password: Enter the password you would like to use into this field. It needs to be at least five characters long.

7 Users, Roles, and Groups

Retype your password: Because the password is not displayed, you need to retype it here in order to rule out any typing mistakes.

The link to this page is valid for fourteen days. If this time period has elapsed before you were able to register, new registration will be necessary.

By choosing an individual password, you can be certain that nobody, not even the site's administrator, knows your password.

7.1.2 Self-Registration

If the website allows users to register themselves, a "Registration" link will appear on the personal bar. It will take you to a registration form. Alternatively, you can also follow the "Registration form" link in the log-in portlet to get there.

The registration form is constructed in the following way:

Full Name: Enter your first and last name.

User Name: Choose a short and succinct user name. This is the name you will use to log in to the website.

E-mail: Enter a valid e-mail address. Plone will send an activation e-mail to this address if you have forgotten your password, for example.

After making your entries, activate the "Register" button.

If the registration form only contains these three entry-fields, you will need to make one more step in order to complete your registration. You will receive an activation e-mail with a link which leads to a page where you can enter your password.

Otherwise, the registration form will contain two further entry-fields for specifying the password for your user account:

Password: Enter the desired password here.

Welcome!

You have been registered.

Click the button to log in immediately.

Figure 7.1: Registration confirmation

Lost Password

For security reasons, we store your password encrypted, and cannot mail it to you. If you would like to reset your password, fill out the form below and we will send you an email at the address you gave when you registered to start the process of resetting your password.

My user name is

If this will not work for you (for example, if you forgot your user name or your email address has changed), contact the [site administration](#).

Figure 7.2: Forgot your password?

Confirm password: Retype the password again to preclude any typos.

After you have registered, you will receive the greeting message illustrated in Figure 7.1. If you then activate the “Log in” button, you will be taken to the log-in page.

7.1.3 Forgot your Password?

If you have forgotten your password, you can have a new activation e-mail sent to you. Follow either the “Forgot your password?” link in the log-in portlet or the link underneath the “Forgot your password?” heading on the log-in page. These links will take you to a page (see Figure 7.2) on which you can enter your user name and then activate the “Start password reset” button. After doing so, you will receive an e-mail which looks similar to the activation e-mail. It too will contain a link to a page on which you can enter a new password.

7.2 Logged-in Users

Each registered user has a user name with which he or she is clearly identified on the website. To that end, each user name can only be issued once within the website.

After you have logged in to the website with your user name and password, the user interface will adjust to your personal preferences and provide you with additional functions. Among these are a personal dashboard, a personal folder, and the ability to edit Web content.

7.2.1 Logging In

In this book we are assuming that you have already registered on the website and know your user name and password. If you have followed the tutorial in Section 4.1 on page 39, you will already have changed your password.

There are several ways to log in. One way is to use the log-in portlet (visible to any visitor). The personal bar for anonymous visitors also contains a “Log in” link, which takes you to the log-in page.

Both the portlet and the log-in page contain entry-fields for your user name and password, as well as a button for logging in (see Figure 7.3 on the opposite page). They also contain links to one or two other forms:

- With “Forgot your Password?”, registered users can have a link sent to them by e-mail, which will take them to a page on which they can create a new password.
- The “New user?” link will only appear if the website has been configured so that new users can register themselves. It will lead to a registration form.

7.2 Logged-in Users

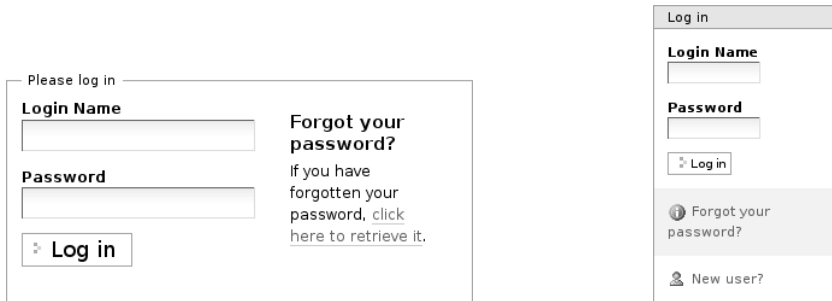


Figure 7.3: The log-in page and the log-in portlet

7.2.2 Logging In with OpenID

Plone supports logging in with an OpenID. The OpenID system makes it possible to log in to various websites, without having to create a new user account with a user name and password for each new site. Instead, you can create a single account with an OpenID provider, using a single password. The OpenID provider then verifies your password whenever you log in to a website with your OpenID.

Logging in to websites that support OpenID is not done using a name but with an OpenID URL. This is made up of an Internet address such as (<http://mustermann.myopenid.com/>), which usually contains your user name and the domain name of the OpenID provider. This ensures that each and every OpenID is clearly identifiable throughout the Internet.

When you log in to a website using OpenID, you are not recognized by the website as a regular user but, instead, retain certain access permissions which apply to all those who possess a valid OpenID. Because of this, you will not be provided with a personal folder or personal dashboard. Your OpenID URL replaces the user name displayed on the personal bar. All users who log in to Plone using OpenID are treated equally by Plone and have the same permissions.

7 Users, Roles, and Groups



Figure 7.4: Logging in with OpenID: registration form and portlet



Figure 7.5: Personal bar for a logged in user

Which permissions these are will depend upon how your website has been configured.

If your website supports OpenID, the log-in page will contain an additional component with the heading “OpenID login.” You will also find another log-in portlet for logging in with OpenID (see Figure 7.4).

To log in to a Plone website using an OpenID, enter your OpenID URL into the log-in portlet or form. You will then be connected to your OpenID provider, which will ask you for your password. If you enter your password correctly, OpenID will take you back to your website and confirm your identification there. You will then be logged in to the website.

7.2.3 User Actions

After logging in to the website, you will have access to a number of actions on the personal bar (see Figure 7.5):

Your name: The link consisting of your name will lead you to your personal dashboard page (see Section 7.2.4).

My Folder: Here is where you can reach your personal folder (see Section 7.2.7 on page 170).

Log out: This is where you can log out of the portal. After doing so, you will be viewed by the website as an unknown visitor, no longer having access to the additional functions available to logged-in users.

7.2.4 Your Personal Dashboard Page

Your personal dashboard is meant to be your home base on the website. You can reach it by following the link made up of your name on the personal bar after logging in.

Your dashboard should contain a summary of information and functions pertinent to your interests and work. To start with, you will find the following three links to the upper-right of your dashboard.

Profile: This link will lead you to the profile page (see Section 7.2.5 on page 166).

Personal Preferences: This is where you can edit profile information, as well as personal details and settings normally hidden from public view (see Section 7.2.6 on page 168).

Change Password: To create a new password for your user account, enter it into this form twice, and then verify the change using your old password.

In the main part of your dashboard, you can add and arrange portlets containing information that is relevant to you. You can find a summary of Plone portlets in Section 8.3 on page 188.

7 Users, Roles, and Groups

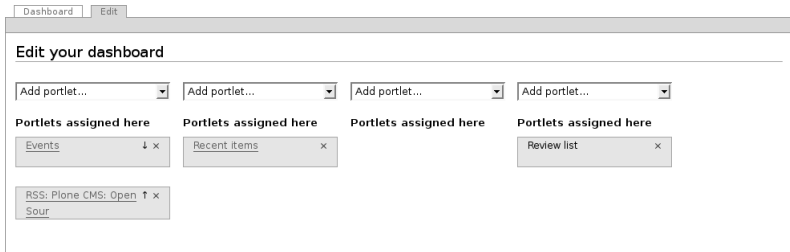


Figure 7.6: The edit display of a dashboard page

Adding Portlets

The portlets on your dashboard will be divided into four columns. In the edit display of your dashboard, you can add, sort, and delete portlets in each column as you please (see Figure 7.6).

Many of the portlets have to be pre-configured before they can appear on your dashboard. When adding one of these, you will first be taken to the portlet's edit page. The name of the portlet on your dashboard's edit page also serves as a link to this page. The various settings options for each portlet are listed as follows:

RSS Feed portlet: (Figure 7.7 on the next page)

- Number of feed entries in the portlet
- URL of the RSS feed
- Number of minutes after which the feed should be updated

Search portlet: (Figure 7.8 on the opposite page)

- Enable Live Search

Recent items portlet: (Figure 7.9 on the next page)

- Number of items to display

Add RSS Portlet

This portlet displays an RSS feed.

Configure portlet

Number of items to display ▾
How many items to list.

URL of RSS feed ▾
Link of the RSS feed to display.

Feed reload timeout ▾
Time in minutes after which the feed should be reloaded.

Figure 7.7: Adding an RSS feed portlet

Add Search Portlet

This portlet shows a search box.

Configure portlet

Enable LiveSearch
Enables the LiveSearch feature, which shows live results if the browser supports JavaScript.

Figure 7.8: Adding a search portlet

Add Recent Portlet

This portlet displays recently modified content.

Configure portlet

Number of items to display ▾
How many items to list.

Figure 7.9: Adding a “Recent items” portlet

7 Users, Roles, and Groups

Add News Portlet

This portlet displays recent News Items.



The screenshot shows a 'Configure portlet' dialog box. It has a title bar that says 'Configure portlet'. Inside, there are two main sections. The first is 'Number of items to display', with a sub-label 'How many items to list.' and a text input field containing the number '5'. The second section is 'Workflow state', with a sub-label 'Items in which workflow state to show.' and a list box containing five items: 'Internally published [internally_published]', 'Pending review [pending]', 'Private [private]', 'Public draft [visible]', and 'Published [published]'. The 'Published [published]' item is selected and highlighted. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Figure 7.10: Adding a news portlet

News portlet: (Figure 7.10)

- Number of news items to be displayed
- Workflow states to be included

The workflow states you can select for the news items to be shown depends upon the permissions you have retained. Published news items can be displayed by any user.

Events portlet: (Figure 7.11 on the next page)

- Number of event items to be displayed
- Workflow state of the event items to be displayed (see the description for the news portlet).

Static text portlet: (Figure 7.12 on page 166)

- Portlet header
- Text to be displayed (with all of the editing features offered by the Kupu text editor)
- Omit portlet border?
- Portlet footer
- URL pointing to further details
- Hide portlet (temporarily)?

Add Events Portlet

This portlet lists upcoming Events.

Configure portlet

Number of items to display ▾
How many items to list.

Workflow state ▾
Items in which workflow state to show.

Internally published [internally_published] ▲

Pending review [pending]

Private [private]

Public draft [visible]

Published [published] ▼

Figure 7.11: Adding an event portlet

Classic Portlets

The term “classic portlet” refers to any portlet created for earlier versions of Plone. These cannot be added directly. Instead, you need to choose the “Classic Portlet” option from the selection menu and, on the edit form, enter where Plone can find a description of the portlet.

The only classic portlet which comes out of the box with Plone is the “My favorites” portlet. Ask your administrator if there are any other classic portlets on your website.

Figure 7.13 on page 167 illustrates the edit display of a classic portlet. These portlets need to be described by a macro from a template; you need to enter the name of the template and the macro. Because, as a rule, portlet macros were given the name “portlet,” the form field is already filled out with this name. The template for the favorites portlet, for example, is called “portlet_favorites”.

7 Users, Roles, and Groups

Add static text portlet

A portlet which can display static HTML text.

Configure portlet

Portlet header =
Title of the rendered portlet

Text =
The text to render

B *I* [List icons] [Link icon] [Image icon] [HTML icon]

Normal paragraph [v]

Omit portlet border
Tick this box if you want to render the text above without the standard header, border or footer.

Portlet footer
Text to be shown in the footer

Details link
If given, the header and footer will link to this URL.

Hide portlet
Tick this box if you want to temporarily hide the portlet without losing your text.

Figure 7.12: Adding a static text portlet

7.2.5 Personal Profile

Your profile provides other users of the website with an overview of who you are and what you do (see Figure 7.14 on the opposite page). Links to your profile can be found in the items you have created and some of the automatically generated overview lists. You can also reach your profile by following the link on your dashboard.

Add Classic Portlet

A classic portlet allows you to use legacy portlet templates.

Configure portlet

Template ▾
The template containing the portlet.

Macro ▾
The macro containing the portlet.

Figure 7.13: Adding a classic portlet

Andy



Ab imo pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audaces fortuna adiuvat. Audiatur et altera pars. Barba non facit philosophum, neque vile gerere pallium. Bene docet, qui bene distinguit. Bis dat, qui cito dat. Barbarus hic ego sum, quia non intellegor ulli.

[Author's home page in this site...](#)

If you want to contact this author, fill in the form below.

Feedback for author

Subject ▾

Message ▾

Latest content created by this user

Page	
The cooking class	Jan 10, 2008
Event	
Cooking class	Apr 28, 2008
File	

[All content created by Andy...](#)

Figure 7.14: Example profile

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Your profile contains the following information:

- Name
- Location and language
- Portrait and biography
- A link to your personal folder
- A feedback form
- Links to your current items

You can keep your profile up to date using your personal preferences page.

Visitors can contact you with the feedback form. This form sends messages to the e-mail address you entered on your personal preferences page, so that anonymous visitors will not be able to see your address. The messages are comprised of a subject heading and a main text. When viewing your own profile, no feedback form will be displayed.

The latest content list is sorted by item type and contains the title and modification date of each item listed. Below it, you will find a link to a complete list of the items you have created, beginning with the latest.

7.2.6 Personal Preferences

If you follow the “Personal Preferences” link on your dashboard, you can adjust a few predefined settings which control Plone’s behavior. This form is also the edit display of your profile (see Figure 7.15 on the next page).

Your profile includes the following entries:

Full Name: Enter your first and last name here. With these names, you will be identified in the view display of your items as the author, for example.

7.2 Logged-in Users



The screenshot shows a web interface for 'Personal Preferences'. At the top, there are 'View' and 'Edit' buttons. Below the title, it says 'Up to my dashboard' and 'Your personal settings.' The form is organized into several sections:

- Personal Details:** Includes a 'Full Name' field with the value 'Andy' and an 'E-mail' field.
- Location:** A text field for the user's location.
- Language:** A dropdown menu set to 'Language neutral (site default)'.
- Biography:** A text area containing Latin text: 'Ab ino pectore. Abyssus abyssum invocat. Acta est fabula. Actus non facit reum nisi mens sit rea. Alea iacta est. Audace factus eduxit. Adistur et altera esse'.
- Home page:** A text field for an external home page URL.
- Content editor:** A dropdown menu set to 'Kupu'. Below it are checkboxes for 'Enable external editing' (unchecked), 'Listed in searches' (checked), and 'Allow editing of Short Names' (unchecked).
- Portrait:** A section for uploading a profile picture. It includes a 'Delete Portrait' checkbox (unchecked), a search button 'Durchsuchen...', and a 'Save' button. A placeholder image of a mannequin is shown.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Figure 7.15: Personal preferences

E-mail: Enter a valid e-mail address under which you can be reached. This field is required.

Location: The city or country in which you live or work.

Language: Your native or preferred language.

Biography: A few sentences about yourself and your work. This text will be used to present yourself in your profile.

Home page: If you have a website of your own, enter that here.

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Portrait: A photo of yourself, which will be displayed in your profile. If you upload an image that is too large, it will be scaled down to a sensible size. To remove a portrait, place a check-mark next to “Delete Portrait.”

In the remaining input fields, you can influence Plone’s behavior:

Content editor: Here, you can choose which text editor you would like to use for editing the body text of your pages. There are two possibilities:

- Kupu is a convenient visual editor. You can format your text with it directly, seeing just how it will later appear in Plone. Most users prefer using Kupu.
- The normal form-editor is a simple multiple-lined input field, and is provided by every Web browser. With it, you can enter plain text, structured text, or HTML.

Edit short names: Select this to enable short name editing directly from the edit page. Deactivate this option if you prefer that your edit pages have a more streamlined appearance. Regardless of this, you can always edit the short names of items by renaming them in the contents display of their respective folders.

You will only see this option if your administrator has generally allowed for short name editing.

7.2.7 Personal Folder

As long as your website has been configured accordingly, each user will receive their own personal folder. You can reach your folder after logging in by following the “My Folder” link on the personal bar. If there is no personal folder for you on your website, the link will be missing.

In your folder, you are free to add, edit, and delete items as you please. In other parts of the website, you might not have these options, or they may be limited.

Search for users

This search form enables you to find users by specifying one or more search criteria.

User Search Criteria

Name
Find users whose login-names contain

E-mail
Find users whose email-addresses contain

Full Name
Return users with full names containing this value.

Figure 7.16: User search

Personal folders are just as visible to the public as any other content in the portal. It is possible, for example, to find folders belonging to other users by doing a search in the “Users” area (see Section 7.2.8).

In your own folder, in addition to the publicly viewable items, you can also see items which carry the “private” workflow state. This means they are hidden from other users and unregistered visitors.

If you use favorites, Plone will add a favorites subfolder to your personal folder titled “My favorites.” A “favorite” item will then be created in this folder for each favorite you add.

7.2.8 User Searches

The user-search function can be reached with the “Users” tab among the main navigation tabs (see Figure 7.16). Using this function, you can search for other users on your website using the following criteria:

7 Users, Roles, and Groups

Name: Enter the user name of the person you are searching for here. You can also search using a single word, or just part of a word or name.

E-mail: Enter the e-mail address of the desired user. Here as well, you can search using only a fragment of the address.

Full Name of the User: Enter the first and last names of the user here. You can also enter a word fragment or part of the whole name.

All search criteria are implemented simultaneously: only users who match all of the criteria will be shown in the results. Unspecified criteria will be ignored in the search.

The list of search results contains the names and portraits of the users found. They also serve as links to each of the users' folders.

7.3 Roles

A CMS such as Plone makes it possible for you to work on your website together with other people. Individual users often take on various roles and require certain access rights, or “permissions,” to carry out specific tasks they are responsible for. Some users create content, others are responsible for reviewing and publishing it. Still others might want to reorganize the structure of the website and add new users, for example.

A single user can also take on various roles in different parts of the website. It is possible, for example, that you do not have access to certain parts of a website but are still free to review items in other parts of the site and only able to create items in still other areas.

All of these cases are taken into account and supported by Plone. It is very precise in differentiating between which users can view, add, edit and publish which items in different areas of the website.

Roles ensure clear and efficient management of permissions and restrictions. People who are responsible for reviewing items before they are published on the website, for example, need to be issued the “Reviewer” role.

When you register as a user of a Plone website, you are automatically assigned one or more roles. You can neither acquire further roles on your own, nor give up any which you have already obtained. Your site manager, however, can assign or retract roles at any time.

Roles can either be issued to individual users or entire groups. When a number of people are responsible for playing a certain role in carrying out tasks, it might make sense to create a group, assign those people to it and associate a role to the group. The role will then apply to all members of the group.

7.3.1 Standard Roles

Each Plone portal recognizes at least seven roles:

Member (User): : Whoever is registered on the website receives certain permissions, depending on the site’s defaults. In some cases, only registered users can access the content on the website (such as with an intranet).

Owner: Whoever adds an item as a user “owns” that item. With this role, a number of permissions are issued. These allow you, for example, to edit and delete the items which you own.

Contributor: The user can add new items but is not permitted to edit existing ones.

Editor: The user is permitted to edit items as well as change the content and metadata of given items.

Reader: The user is permitted to call up items in the Web browser and view them.

Reviewer: The user can publish items so that they can be viewed by all users and visitors to the website.

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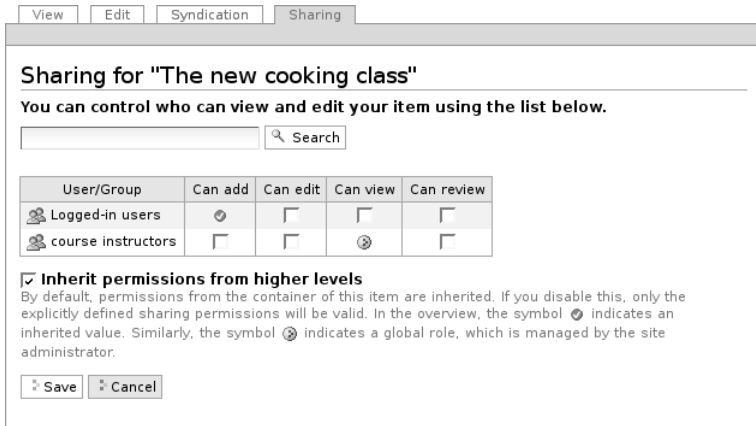


Figure 7.17: The “Sharing” display of an item

Manager: The user is permitted to carry out management tasks in the CMS. Included among these are user management (the issuing of roles to users and groups), as well as changing the structure and adjusting basic functions on the website.

You will only be able to see those roles in Plone which you are able to take on yourself, and which you can issue in the “Sharing” display of each item.

7.3.2 The “Sharing” Display

If you are the owner or manager of an item, you will have the “Sharing” display at your disposal for that item. That is where you can manage the local roles of other users and groups in order to delegate tasks to your co-workers, for example.

The sharing display (see Figure 7.17) is comprised of the following elements:

Search field: With the search field, you can search for users and groups which are not already listed in the table below it.

Table of issued roles: The table provides you with an overview of which roles have been issued to which users and groups.

Inherit permissions from higher levels: This option is usually active. In this case, roles from superordinate folders are inherited by the item at hand. Whoever has permission to add items to a folder, for example, will be able to do the same in its subfolders.

Inherited roles are indicated by a green check-mark. A circle containing three red dots indicates roles which have been issued globally for the entire website by an administrator.

If you would like to issue roles to a certain user, you will first need to search for that user's name using the search field. All users matching your search term will be listed in the table. The users then receive roles by your placing a check-mark into the appropriate boxes on the lines next to their names. If a user is to change the content of the item at hand, for instance, place a check-mark in the "Can edit" box for that user.

If you would like to issue roles to a group, follow the same procedure. You will recognize groups as such by the group icon next to their names.

7.4 Groups

Plone can organize users of a website into groups. Groups reflect the organizational structure of the company or community operating the website. A user can belong to various multiple groups.

Creating and assigning members to groups is the job of a site manager. Plone includes two predefined groups: "Administrators," and "Reviewers." There is also the "Authenticated Users" group, which is made up of all those who happen to be logged in to the website at a given time.

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If your website is configured accordingly, Plone will add a group workspace for each group. This means creating a folder which lies in a designated group area. The group workspace has the same function for the group as the personal folder does for a single user. For the predefined groups already mentioned, there is no group workspace.

You can reach group workspaces using the “Groups” tab among the main navigation tabs.

Because groups are the owners of their own workspaces, all group members in the area will be free to add, edit, and delete items. Group workspaces are therefore well-suited toward cooperative efforts in preparing items for publication on the website.

Because they begin with the “private” state, group workspaces are not visible to the public at first. Though workspaces become visible to the public after they are published, items with the “private” state remain visible to group members only. Each member of the group is free to make the entire workspace private, or submit it for publication.

8 User Interface

The user interface comprises everything you see in your Web browser as a visitor to a Plone website. This chapter outlines the layout of the interface. You will receive an overview of how the tools and information offered by Plone are organized for use.

8.1 Item Displays

The main element of almost every page on the website is the display of a content item. Item displays are where you can edit and view the content of the website. The display options belonging to an item depend on the type of item involved. You can find an outline of item displays and their functions in Chapter 5 on page 73.

8.1.1 Tabs and Menus

If you are logged in to the website, you are free to view various displays of certain items. The different displays of each item are presented as index cards which you can flip through using tabs. They are surrounded by a green frame to which tabs and possibly a number of drop-down lists are attached (see Figure 8.1 on the following page). Each tab is labeled with the name of the display to which it corresponds; the tab for the display at hand is highlighted in green.

Depending on which permissions you have, you will see the following drop-down lists:

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Figure 8.1: Tabs and menus using a folder as an example

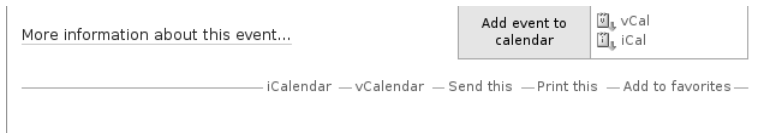


Figure 8.2: Item actions using an event as an example

Actions: Here is where you can copy, move, or delete the given item, as well as paste earmarked items into the folder at hand or “check out” to create a working copy (see Section 6.4.1 on page 142).

Display: If multiple display styles are available for an item, you can adjust them here. With folders, you can also select a default-view page here (see Section 5.1.1 on page 75).

Add item: Add a new item to the current folder by selecting the desired item type here (see Section 6.1.1 on page 117).

State: This menu displays the current workflow state of the given item. The menu options reflect the possible state changes (see Section 6.3 on page 129).

8.1.2 Item Actions

The item actions can be found below each item’s view display (see Figure 8.2). Table 8.1 on the opposite page outlines all available item actions. Which of these are available will depend upon the type of item as well as the permissions you have.

Table 8.1: Item actions

Title	See page	Title	See page
RSS feed	148	Add to Favorites	183
Send this	178	iCalendar	94
Print this	179	vCalendar	94

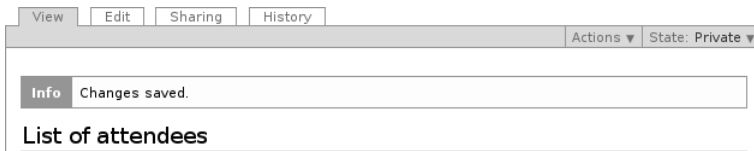


Figure 8.3: A status message

With the “Send this” action, you can send an e-mail containing the Internet address of the current Web page. The link will lead you to a form where you can enter the e-mail address of the recipient and sender, and a message text. If you are logged into the website, your sender address will already be entered.

The “Print this page” action activates the print function of your browser to print out the current page.

8.1.3 Status Messages

When changes are made to an item, Plone informs you about the success or failure of the attempted changes. To that end, a status message appears on the next page to be shown, directly following each action. The messages are presented at the top of the item display and are highlighted in color (see Figure 8.3).

There are different classifications for messages, each one with a varying degree of importance, which is denoted by its color:

Information (yellowish): the log-in confirmation, for example.

Warning (orange): the warning about defective links when deleting an item, for example.

Error (red): an incomplete required field when saving, for instance.

8.2 Navigation

There are several ways to navigate through a Plone website:

- Orientation within the folder hierarchy: main navigation tabs and navigation portlet, site map, and breadcrumb menu
- Links: portlet and favorites folder
- Searches: live-search field and advanced search

8.2.1 Folder Hierarchy

There are four interface elements on almost every page of a Plone website which assist in moving throughout the folder ranks: the main navigation tabs, the navigation portlet, the breadcrumb menu, and the site map. These elements complement each other. The main navigation tabs, navigation portlet and site map provide an overview of the website's content, whereby the portlet emphasizes the last page visited. The breadcrumb menu reveals your current whereabouts within the folder hierarchy.

Main Navigation Tabs

The main navigation tabs are available on each page of the website. They can be found in the page head to the left (see Figure 8.4 on the opposite page) and serve as links to important places in the website.

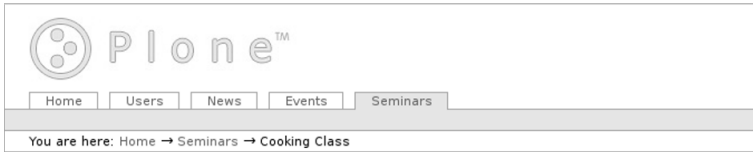


Figure 8.4: Main navigation tabs and breadcrumb menu

Table 8.2: Predefined navigation tabs

Title	Destination	See page
Home page	View display of the root folder	
Users	User search	171
News	News overview	92
Events	Events overview	94
Groups	Group working spaces	175

Some of these links are integrated into Plone by default (see Table 8.2). The tab for the group workspace, however, will only be available if your website uses group workspaces.

In addition to the tabs already described, Plone creates further tabs by default for all folders residing directly in the root folder. Each of these tabs is labeled with the title of the corresponding folder. If the website is configured accordingly, Plone will not only add folders to the tabs but also any items residing in the root folder to which you have access. The tabs are then labeled with the title of the item to which they correspond.

Navigation Portlet

The navigation portlet (see Figure 8.5 on the following page) displays parts of the website in tree structure. Only the folders and items for which you have permission are presented. Many characteristics of

8 User Interface



Figure 8.5:
Navigation portlet

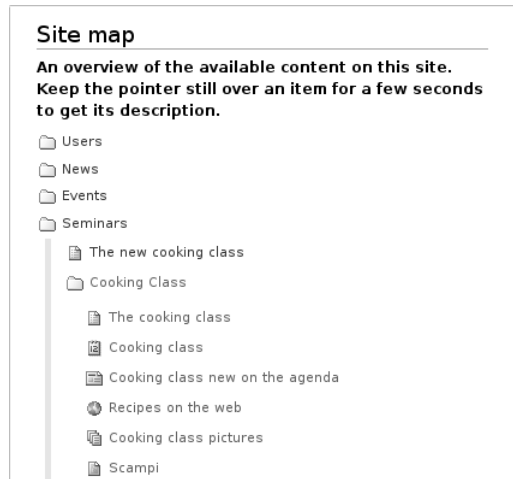


Figure 8.6: Site map

the navigation portlet depend on your website's configuration. By default, the portlet will not be shown on the home page but will first appear in the individual folders on your website.

Because the folder hierarchy in a large portal can become extensive and possibly overwhelming, the tree is never shown in its entirety. The navigation portlet always displays only part of the website, beginning with the parent folder at hand. The selection always contains the currently viewed item.

By default, the tree display always begins with a folder which exists in the root folder of the website. In this way, the navigation portlet provides a counterpart to the main navigation tabs. Whether the respective folder also appears among the navigation tabs or not depends upon how your website had been configured.

The entry for the currently viewed folder or item is highlighted in a light blue color. Each entry in the tree also serves as a link to a folder

or other item.

Because the navigation portlet (as with all portlets) can be configured individually for each folder and even for each item, it is possible that the portlet will behave in different ways on different pages.

Site Map

Among the links at the head of every page, you will find one which leads to the “Site map.” The site map is a tree-structure presentation of all items on the website, beginning with the root folder and branching out to a predetermined level in the folder hierarchy. By default, the tree will branch out to third-level folders including the items within them (see Figure 8.6 on the preceding page). Again, only items for which you have viewing permission will be included in the tree. Each leaf on the site-map tree is a link to the item or folder referred to.

Breadcrumb Menu

The breadcrumb menu can be visualized as a trail of crumbs, which leads through the folder hierarchy to connect your current position to the root folder. The first element of the path is the website’s root folder (see Figure 8.4 on page 181). All subfolders then follow, listed in the same order as you have traversed them on your way to the currently displayed item. The item at hand comprises the last step on the trail. Each element on the breadcrumb menu serves as a link to its respective place on the website.

8.2.2 Favorites

In addition to those navigational functions which are oriented around the folder structure of the website, you can also attach a number of

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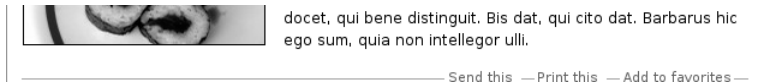


Figure 8.7: The “Add to favorites” item action

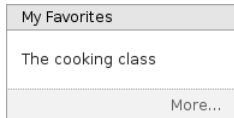


Figure 8.8: “My favorites” portlet

links to individual items. This makes a good deal of sense whenever you need to access certain items more often and do not want to have to look for them among the folder hierarchy each time they are needed. The favorites function needs to be activated on your website before you can use it.

Favorites are special kinds of link items (see Section 5.7 on page 100). They are created when you use the “Add to favorites” item action on a page of your website (see Figure 8.7).

The “My favorites” portlet (see Figure 8.8) contains a list of direct links to all of the items you have chosen to create a favorites link for. You can add this portlet to your personal dashboard. Depending on your site’s settings, it may also appear in one of the side columns of your website.

Your favorites will be saved in the “Favorites” subfolder of your own personal folder. You can manage and edit them there just as with other link items. The only difference between favorites and other link items is that favorites do not save the complete Internet addresses of the items they link to but only their paths within the website.

The portlet ends with the “More...” link, which will lead you to your favorites folder. You can also reach that folder by using the “My favorites” link on the personal bar if this option has been activated on your website.

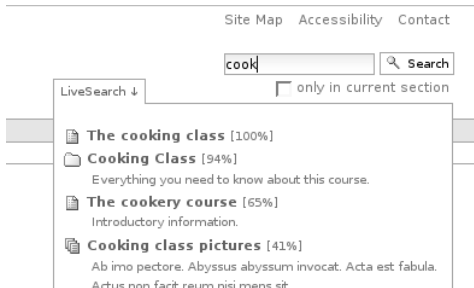


Figure 8.9: Live search

8.2.3 Search

You can search the contents of a Plone portal. You might do this, for instance, to find all items containing a certain word. Plone provides you with a simple search field as well as an advanced search option. You will always only be able to find items for which you have access permission.

The list of search results includes the title and description of each matching result, along with the name of the item's owner, its last modification date, its categories, and percentage points reflecting the item's relevance. An icon located to the left of the title displays the type of item found, and the title itself serves as a link to the view display of the listed item. Lists with more than thirty results will be distributed among multiple pages. On each of these, links connecting the pages can be found at the bottom.

Search Field

In the search field found at the head of every Plone page, you can enter one or more search terms. Plone's live search function displays results in the search bar even as you type (see Figure 8.9). You can either use the mouse or scroll through the list using the arrow keys

and then the enter key to select a result. If Javascript has been switched off, the live search function will not be available.

Using the “Search” button, carry out a full-text search through the titles, descriptions, and content of all items on the website. If you would like to limit your search to the contents of a folder which you are currently viewing, select the “only in current section” option found beneath the search field.

Complex Searches and Stopwords

If you enter multiple search terms for a search, Plone will locate items which contain all of those terms. The terms, however, may possibly be found in random or separate places throughout the text. To search for phrases, place quotation marks around the group of words.

You can also search for items containing at least one of the multiple terms entered by connecting the terms with the verity query operator “OR”. As a rule, a greater number of items will be found using this method than would be with a search for items containing all terms. In addition to using the word “OR”, you can also connect terms using “AND”, which has the same function as simply entering terms one after the other.

You can also combine the use of both operating-word methods. If you would like, for example, to search for a seminar or workshop on word processing, you could enter “word processing AND (seminar OR workshop)”.

Stopwords, or often used words such as “the” and “a”, are ignored when performing a search.

Complex searches incorporating language operators or word groups and stopword filtering are not possible with the live search. If you want to use these functions, you will need to conduct a regular search using the “Search” button or perform an advanced search.

Advanced Searches and Keywords

In the list of results from the search field, you will find a link to a form for making advanced searches. With this form, you can refine your search by limiting the item properties to be searched, for example, or by selecting search criteria other than a full-text match:

- Full-text search through titles, descriptions, and content
- Full-text search through titles
- Search through categories
- Full-text search through descriptions
- Search for new items
- Search for certain item types
- Search for items by author
- Search by workflow state (only accessible to editors)

For a full-text search, enter one or more search terms, which can be connected or grouped into phrases just as with the search field. For the other search criteria, Plone offers a number of values, from which one or more can be chosen.

The results of an advanced search must meet all criteria at once. Irrelevant entries will therefore limit the search unnecessarily. By entering the following criteria values, you can ensure that you search results will not be limited:

- for a text field: no entry
- for a keyword search: no selection
- for item types and workflow states: allowing every value
- for the “New items since” field: selecting the “Ever” option
- for the author field: selecting the “Any author” option

Search Portlet

Your website can be configured so that the search field appears in a separate portlet (see Figure 8.10 on the next page). The search portlet

8 User Interface

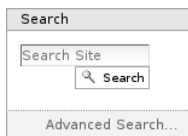


Figure 8.10: Search portlet

Table 8.3: Portlets in the sidebars to the left and right

Title	See page	Title	See page
Log In	158	Review List	139
Navigation	181	News	92
Recent Changes	87	Events	94
My Favorites	183	Calendar	94
Search	187	RSS Feed	149
		Static Text	189

works much the same way as the search field in the page head does. The only difference is that the search cannot be limited to deal solely with the area that you are currently viewing.

8.3 Portlets

The content of a Plone page is not only made up of the item displayed, but each page also contains a number of portlets which can be found to the left and right of the item view display. Portlets summarize information from the website, offer access to its functions, or provide other information.

In this book, details about each portlet are described in the same sections that outline their functions (see Table 8.3).

Portlets with no content are hidden from view. If there are no news items to be shown, for example, the news portlet will not contain any content and will not be shown on the interface. Furthermore, the



Figure 8.11: Static Text Portlet

navigation portlet does not appear on the home page at all, because the content it references first appears in subfolders (see Section 8.2.1 on page 181).

Many of the portlets contain a list of particular items on the website, such as the most recent news items. In order to save space, lists such as these contain only a few entries. They end, however, with a link which will lead you to a complete overview of all items belonging to the portlet. That could be a list of all news items on the website, for instance.

8.3.1 Static Text Portlet

As opposed to most other portlets, the content of a static text portlet is not recalculated each time the portlet is displayed. Instead, the freely formattable text from which it is comprised must be edited when the portlet is configured. The same text will be displayed whenever the portlet is viewed (see Figure 8.11). A static text portlet may also include a link to further information.

Static text portlets allow for complete control of both the actual content displayed and the appearance of its lay out: each static text portlet has its own header and footer text, whereby a footer which

has been left empty will be omitted altogether. In addition, static portlets may be displayed without borders.

Section 7.2.4 on page 164 explains in detail how to configure a static portlet.

8.4 Links in the Page Head

There are a few links at the top of every Plone page to the far right. They can be reached from any page on the website but do not belong to the site's main navigational elements.

- Site map
- Accessibility
- Contact

The site map is explained in Section 8.2.1 on page 183.

The accessibility link will lead you to an explanation of Plone's website accessibility functions. Accessibility means that websites can be used by people who are physically challenged, and be read by various types of devices. This means meeting the demand for large font-sizes, navigation without a mouse, and presentation for smaller screen-displays, among other things.

Plone contributes in many ways to the availability and creation of accessible websites. The accessibility page deals with two aspects:

Text size: Next to the heading, you will find three options with which you can adjust the font size of the portal between small, normal, and large.

Keyboard Shortcuts (Access keys): Plone defines ten keyboard shortcuts which you can use to immediately call up important places on the website. The shortcuts are numbered from 0 to 9, and can be taken using key combinations. On the accessibility page, all access keys are described, and directions for using them with

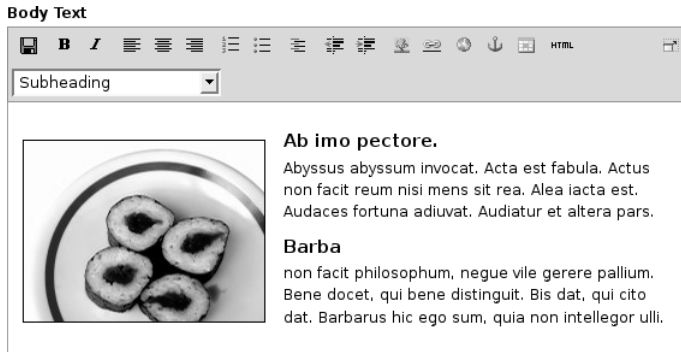


Figure 8.12: The Kupu visual text editor

various Web browsers are given. You can reach the accessibility page, for example, by using the “0” shortcut at any time.

















With the “Contact” link, you can send a message to the administrator or those responsible for the website. If you are logged in, you will only need to enter a subject and the message itself. As a visitor to the website who is not logged in, you will need to enter your name and e-mail address as well.

8.5 The Kupu Editor

When editing a page, news item, or event, you will usually want to use formatted text, implementing structural elements such as headings or lists. Kupu is a visual editor that makes this easy. Its toolbar offers a number of functions which allow you to format your text in the same way you would with a word processing program (see Figure 8.12). In this way, you are able to enjoy the advantages of using HTML, without actually having to write the HTML code.

In order to use Kupu, Javascript must be activated.

Table 8.4: Overview of the functions offered by Kupu

	Save		Decrease quote level
B	Bold		Increase quote level
<i>I</i>	Italic		Insert image
	Left justified		Insert internal link
	Center justified		Insert external link
	Right justified		Insert anchors
	Numbered list		Insert table
	Unordered list	HTML	HTML view
	Definition list		Zoom
			Delete element

8.5.1 Kupu's Toolbar

The Kupu toolbar illustrated in Figure 8.12 on the preceding page contains eighteen icons and an options menu. The exact number of icons seen there will depend upon how your site has been configured; Table 8.4 describes the default settings.

All the way to the left on the toolbar, you can save changes you have made to a text without leaving the editing screen. This allows you to save your work periodically when working on long texts or making substantial changes.

Various text-formatting functions, such as bold, italic, alignment, numbering and other lists, and indenting options, follow. If you have selected part of the text, the formatting option activated will apply to that selection. Otherwise, it will apply to any text entered after the option has been selected.

Additionally, the toolbar includes tools for inserting images, links

from your site or from the Internet, and anchors and tables into your text. You can learn more about the insert tools below.

In HTML view, instead of formatted text, the editing window displays HTML code that has been generated by Kupu. You can edit the code directly there; the other options on the toolbar will not be visible. The icon for HTML view will return you to the formatted version of your text, where you can continue using Kupu's text editing functions.

When editing HTML code, remember that not all HTML language elements will be allowed. This is necessary to ensure that your text can be shown within the Plone website without rendering the page's code invalid as a whole. Which language elements are invalid depends on how your site has been configured. If you need help with this, contact your administrator.

To the far right, you will find a "Zoom" button for toggling into full-screen mode. If you do this, Kupu will take up all the space provided by your browser, so that you will be able to see a larger selection of the text you are editing. You can leave the full-screen mode using the same icon. The full-screen mode is especially suitable for working on longer texts.

If you hover the mouse over an icon for a short time, a tooltip describing the icon's function and corresponding accessibility key (for use as an alternative to the mouse) will appear.

8.5.2 Style Templates

In Kupu and Plone, there are style templates such as headings and paragraphs for text elements, which you can apply to individual passages of your text. Styles are used to demarcate the functions of various passages of text. Plone takes care to present each passage of text in a manner that is both appropriate for its function and congruent with the overall design of the website.

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Select styles using the menu on Kupu's toolbar (see Figure 8.12 on page 191). The following styles are available:

Normal: for simple continuous text

Heading: for headings

Subheading: for subheadings

Literal: for programming source code using a monospaced font on a light blue background

Discreet: for “fine print” set in small grey type

Pull-quote: for highlighted passages presented as margin notes

Call-out: for highlighting text passages in color

Page break (print only): for creating a page break at the cursor position that will only be applied when printing. In the edit display, it is represented by a fine line; in the view display, it remains hidden.

Clear floats: for designating a point at which the next paragraph of text should no longer wrap around an inserted image but continue below the image instead.

Highlight: a character style for highlighting single words

Paragraph styles either apply to the paragraph in which the cursor lies at the time of implementation or to paragraphs containing selected passages. Character styles are only applied to selected characters. With the “remove style” entry, you can remove applied paragraph or character styles either at the cursor position or for selected characters or paragraphs.

If no text style has been applied to selected text or the paragraph in which the cursor lies, the menu will display an entry which reads “no style.” If various styles have been applied to the passage selected, the entry will read “Mixed styles.” These two entries are not always displayed and cannot be applied as styles.

Your site's administrator can either provide you with additional style options to be included in the menu or can limit the amount of options available.

8.5.3 Images, Links, Anchors and Tables

The functions for inserting images, links, and tables open up a window which appears below Kupu's toolbar. In the window, you can select images or link destinations and create tables. As long as this window is visible, the other functions offered by Kupu will not be available. The window is closed as soon as you confirm your entries with "Ok" or discard them with "Cancel."

If you have selected an image, or if the cursor happens to be in a passage of the text marked as a link, an additional tool will appear on the toolbar: the button for deleting selected elements. If you activate this, the image or link will be deleted.

Images

The window used for inserting images (see Figure 8.13 on the next page) consists of three parts. To the left, you can decide where to search for the image to be inserted:

- Home: on the entire Website
- Current folder: in the current folder
- My recent items: among the items most recently changed by you
- Recent items: among the items most recently changed by anybody on the entire website

The selection field in the middle lists the images found. You can also search through subfolders on the website there, and the breadcrumb menu found above the selection will provide you with orientation. Additionally, there is a search field in the window to the upper-right.

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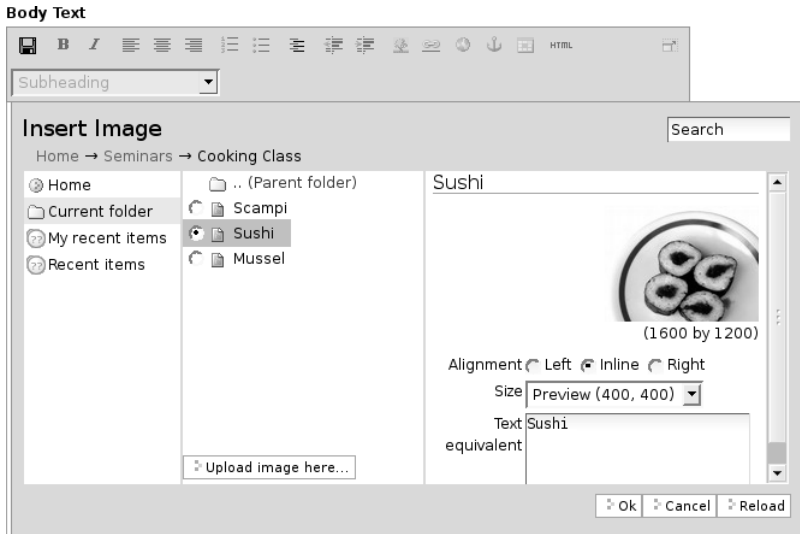


Figure 8.13: Inserting an image with Kupu

After you select an image from the middle column, Kupu will provide a preview of it, along with a size indication in the right column. There, you can also:

- align the image either to the left, at the cursor-position (Inline), or to the right
- insert a caption or other text
- select the size in which the image should appear among the text

The alignment option allows you to determine whether the image should be inserted at the current position of the cursor in the text, or at the left or right border of the text field.

For the caption, you can apply the description text from the item's metadata if your website has been configured accordingly. In that case, you will see an option for doing so which is already selected. If

no such option exists, or if you remove the check-mark next to it, an entry-field for an alternative text will appear. The alternative text for images is unformatted and should describe the image's content in such a way that it can stand in for the image itself. This is especially desirable from an accessibility point of view, as screen readers for people with visual impairments recognize these texts and present them to their users as image descriptions.

The image size is not chosen randomly but can be selected from a number of standard sizes. An entry for the original size may be among these. The image cannot be enlarged or distorted but may be reduced in size when desired.

In the window's middle column, there is also a button which reads "Upload image here." It opens up a form in the column to the right that allows you to upload an image in the selected folder (see Figure 8.14 on the following page). When this is done, an "Image" item is added which can be provided with the necessary metadata at a later time.

Using the "Search" button in the column to the right, open up your browser's file selection window to select an image from your computer. In the entry fields below the button, enter the title of the image and a description. Now go to the bottom of the form and enter the desired image size and justification values as described above, and then enter an alternative text. To reach these fields, you may need to scroll all the way down to the bottom of the selection window. After you have entered "OK," the image will be uploaded and inserted with the designated size and positioning into your text.

Links to Items on the Website

To link to an item in your website, use the "Insert internal link" icon. A window will be opened in which you can select items to link to in your text (see Figure 8.15 on page 199).

To select an item from the website, proceed similarly as when selecting an image, as described above. The middle field now shows

8 User Interface

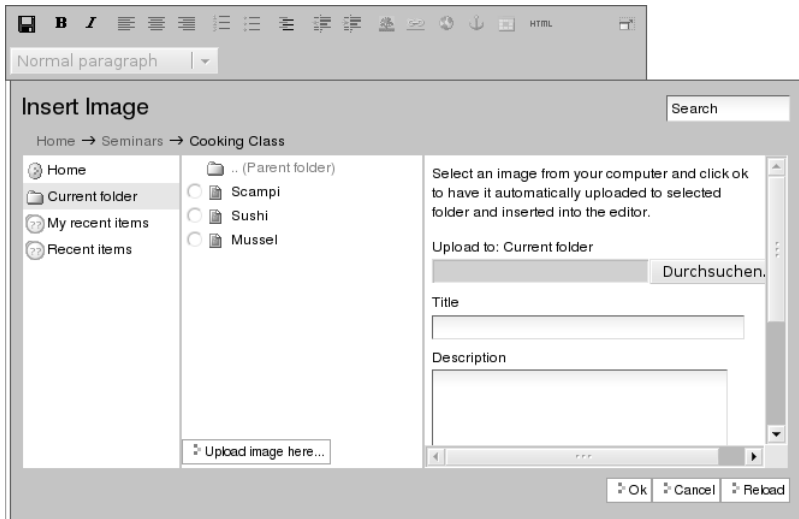


Figure 8.14: Uploading an image into Kupu

items of all types. Once again, the right-hand field contains a preview with the title and description of the selected item. You can designate whether the link leads to the beginning of the article or to a certain anchor in the text. Anchors will be described in more detail later in the book.

If you highlight a portion of text in Kupu before adding the link, the selected piece of text will be transformed into a link leading to the referenced item. Otherwise, Kupu will insert the title of the item chosen as a link at the current cursor position.

If your website has been configured accordingly, you can create new links in the main text of a page, news item or event just as you would when working with a wiki. Simply place a word or phrase in double parenthesis or brackets (see Figure 8.16 on the opposite page). If an item with a short name that corresponds to the word or phrase selected already exists in the same folder, the bracketed text will

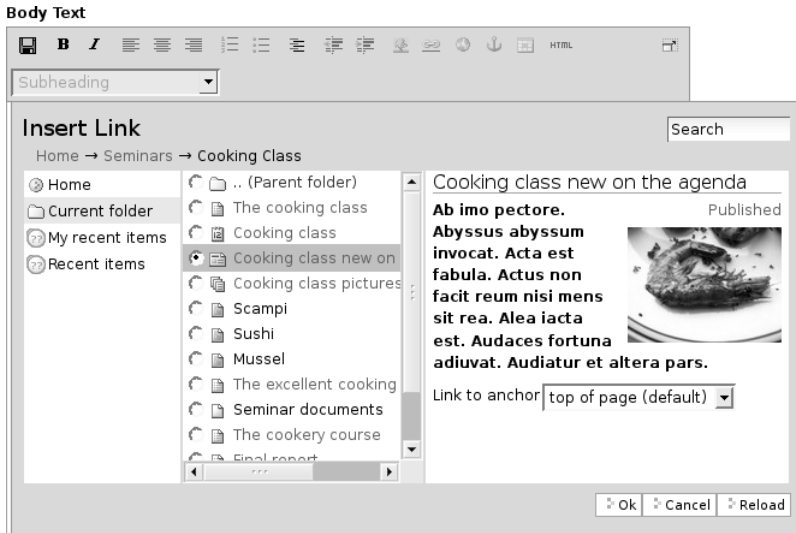


Figure 8.15: Linking to an item with Kupu

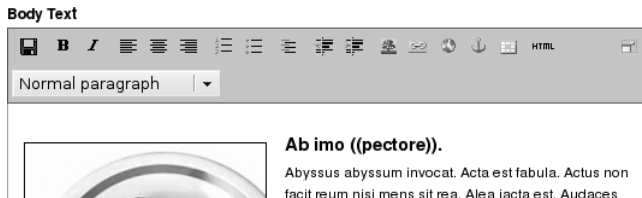


Figure 8.16: Adding links as you would with a wiki.

8 User Interface

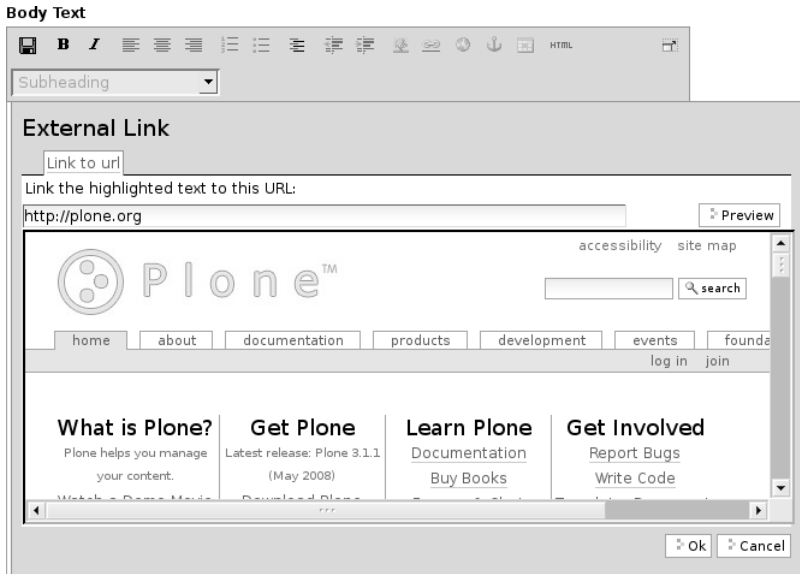


Figure 8.17: Inserting an Internet link with Kupu

be turned into an ordinary link leading to that item (as soon as you have saved your changes). Otherwise, Plone will turn the text into a link which can later be used to create a new corresponding item (see Section 6.1.1 on page 121).

Internet Links

For links to other websites or resources outside of your site, Kupu is obviously not able to provide you with any selection list; instead, enter the desired address directly. Kupu will provide a preview of the link destination (see Figure 8.17).

A complete address is required for each Internet link, and website addresses must begin with “http://”. This beginning sequence is automatically entered into the entry-field when Kupu opens the

window. Of course, you can also link to other types of addresses such as those beginning with “ftp://” or “https://”.

Text that has already been selected is turned into a link, as long as you confirm the entered address. If no text has been selected, Kupu inserts the Internet address as the link.

Anchors

Anchors are unseen markers within the text of a website, which serve as link destinations. Using these, readers can move directly to a certain heading in a lengthy text, for example. You can create links to anchors which have been set in the same article or in other texts as well.

The “Insert anchor” icon opens up a two-columnned window in which you can insert links leading to anchors into your text as well as set and manage anchors within your article (see Figure 8.18 on the next page). If you link to an anchor within the same text that does not yet exist, it will be created automatically.

Kupu can set anchors at places in a text which have been formatted using certain style templates. To link to an anchor within a text you are editing, simply select a style from the column to the left in the selection window. This will open up a list to the right which contains all places in the text conforming to the that format style. Select a passage of text from the list and confirm your selection with “OK.”

Kupu will now set an anchor at the selected place in the text and insert a link to it at the current cursor position. If you select a portion of text before setting the anchor, that selection will be used as the link. Otherwise, the same text selected as the anchor will be inserted as the link. With the “Heading” style, for example, this would be the text from which the selected heading is comprised.

The second tab, “Manage Anchors,” allows you to place and delete anchors which can be linked to from outside of the same text (see Figure 8.19 on page 203). The column to the left displays the selection

8 User Interface

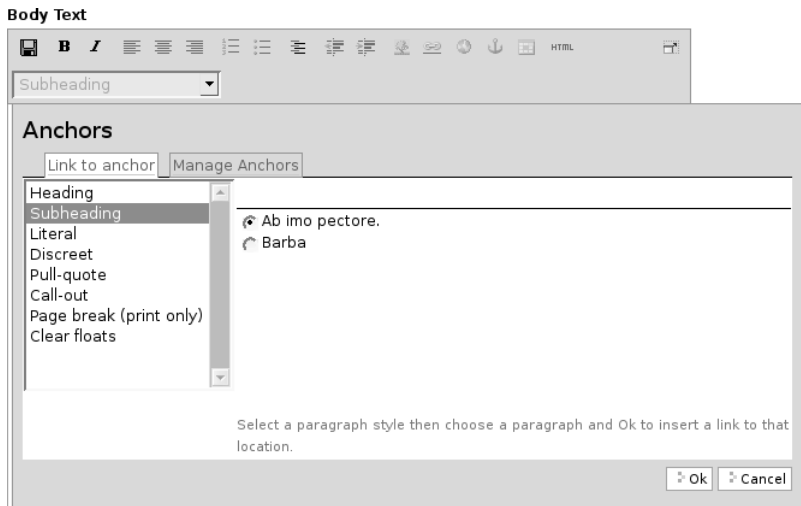


Figure 8.18: Linking to an anchor with Kupu

of formatting styles again, and the one to the right displays a list of all portions of text adhering to the selected style. If an anchor marker which looks something like “#name-the-place” happens to appear next to the name for a portion of text, this means that an anchor has already been set at that place. You can set new anchors by placing a check-mark into the box next to the desired passages, and can delete them by removing the marks. With the “toggle all” switch, you can add or delete anchors for all portions of text adhering to the selected formatting style.

Kupu recognizes when anchors are linked to from within the same article. Anchors such as these cannot be deleted. Kupu cannot discern whether other items contain links to anchors in the article at hand, however. For that reason, you should only delete anchors when you are sure that they are no longer being used anywhere on your or other websites. A link to a deleted anchor would then no longer lead the reader to the intended place in a text but, instead, to

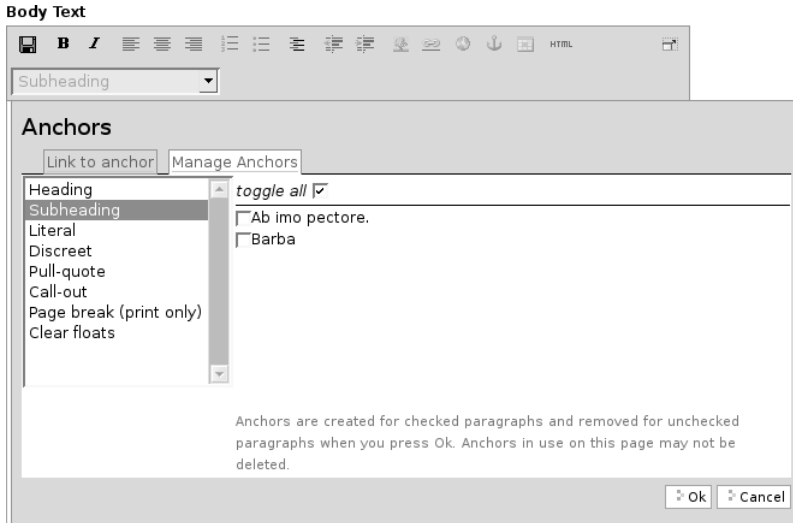


Figure 8.19: Managing anchors with Kupu

the beginning of the respective article.

Tables

If you would like to insert a new table into your text, use the “Insert table” icon. Kupu will then open the “Table” window (see Figure 8.20 on the next page), in which you can determine the following characteristics of the table to be added:

- the table style (Class)
- the number of rows and columns to be included in the table
- whether or not the columns should have headings

With the “Add Table” button, you create an empty table which is inserted at the position of the cursor. You can then fill in the table and adjust the headings of the columns as you like. With the “Fix All

8 User Interface

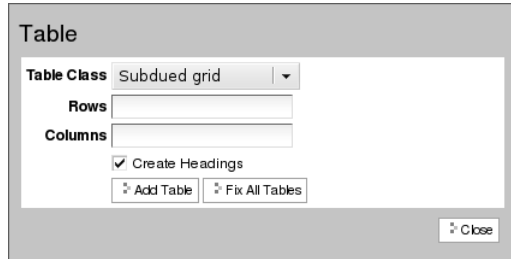


Figure 8.20: Adding a table with Kupu

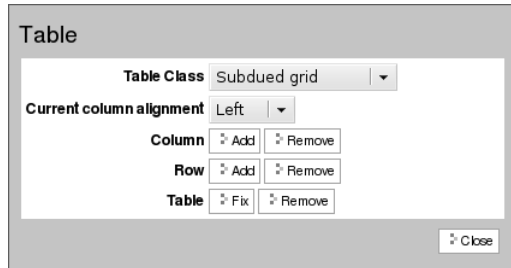


Figure 8.21: Editing a table with Kupu

Tables” button, you entrust Kupu with optimizing the size of all the tables in your text.

To modify an existing table, open up Kupu’s table window while leaving the cursor somewhere within the table to be changed. The table window will now contain buttons for the following procedures (see Figure 8.21):

- change the table style (Table Class)
- add or remove columns or rows
- determine the column alignment style
- optimize the size of the table (Fix)
- remove the table

Appendix

A Helpful Hints for Administrators

This appendix describes settings that need to be activated in a freshly installed Plone website, so that all of the functions described in this book can be used. It is in no way thought of as a comprehensive guide for website administrators.

You can find the Plone sources as well as complete packages and installation instructions for various operating systems at (<http://plone.org/products/plone/>). An installation manual is included with the software.

The following settings apply to the entire website and should not be confused with the personal settings. If you are an administrator, you can reach the Plone configuration settings using the “Site Setup” link found to the upper right of every page.

Configuring E-mail

The first thing you need to do is configure the e-mail settings for your website. You should make sure that e-mails can be sent from your website.

- Select the “Mail” option on the configuration page.
- Enter an SMTP server with the appropriate configuration parameters. If you have any questions, consult your system administrator.
- Fill out the “Mail Sender” form.

“Seminars” Tutorial Folder

So that users on your website can follow the tutorials, you need to create a folder titled “Seminars.”

A Helpful Hints for Administrators

- Create the “Seminars” folder at the top level of your Plone website.
- Open up the “Sharing” item display.
- Issue permissions for “Can add,” “Can edit,” and “Can view” to the “Logged-in users” group.
- Add folders for single seminars to the “Seminars” folder so that each trainee taking part in a training program, for example, will have their own area in which to work and practice. In this book, a cooking class has been used as an example seminar.

All logged-in users will now be able to view, add and edit items in this folder.

Users with Editor Permissions

In following the tutorials, users will need to take on the role of an editor. To facilitate this, create a user on your website with editor permissions.

- Go to the configuration menu and select the “Users and Groups” option there.
- Activate the “Add New User” button.
- Fill out the registration form.
- Issue the “Can review” role to this user for the tutorial folder.

Short Names

At first, the edit pages of items will not contain any field for entering short names. So that your users can edit short names, change the following settings:

- On the configuration page, select the “Site” option.
- Place a check-mark next to the “Show ‘short name’ on content?” field and save the form.

Self-Registration

By default, visitors to a Plone website are not able to register themselves. If desired, the self-registration option must first be switched on:

- Select the “Security” option on the configuration menu.
- Select the “Enable self-registration” field and save the form.

Personal Folders

By default, no personal folders will exist for registered users. If needed, you will have to allow for personal folders:

- Select the “Security” option on the configuration page.
- Select the “Enable User Folders” option and save the form.

Group Working Spaces

The group working spaces function needs to be activated before working spaces can be created. After you have done this, Plone will set up an area for groups and then automatically create folders for newly added groups. To allow for this, proceed as follows:

- Go to the ZMI (Zope Management Interface).
- From among the content in the root folder, select the `portal_groups` tool.
- Activate the “Turn workspace creation on” button.

Favorites

In order to use favorites, two settings need to be adjusted on your website: first, users need personal folders to which their favorites can be added (see above). Second, you need to activate the “Add to favorites” item action:

A Helpful Hints for Administrators

- Go to the ZMI (Zope Management Interface).
- From among the contents of the root folder, select the `portal_actions` tool. Then select the `document_actions` subfolder, and, there, select the `addtofavorites` action.
- Select the “Visible” field and save the form.

If you would also like to provide registered users with a favorites portlet, it can be added as follows:

- Go to the home page of your website.
- Follow the “Manage portlets” link in the left or right-hand sidebars.
- In the desired sidebar, select “Classic Portlet” from the “Add portlet” menu at the very top of each sidebar. If Javascript is turned off in your browser, you will also need to activate the “Save settings” button at the bottom end of the same sidebar.
- You will be taken to a configuration form for the new portlet. Enter `portlet_favorites` there as the template, and “portlet” as the macro. Save the form.
- You will now be taken back to the portlet management page, on which you can reorganize and delete portlets in the two sidebars.

Syndication

Syndication is activated for collections by default. In order to make changes to the syndication settings for collections and activate it for folders, the “Syndication” item display must be made visible.

- Go to the ZMI (Zope Management Interface).
- Select the `portal_actions` tool, followed by the `object` subfolder, and then the `syndication` action.
- Select the “Visible” field and save the form.

Wiki-links

If you would like to enable users on your website to use wiki-links, proceed as follows:

- Select the “markup” entry in the configuration menu.
- Go to the “Wiki behavior” form.
- Place a check next to the item types listed and save the form.