Chapter 6. History and Checkouts

Plone allows multiple people to cooperate in writing and editing a document. Collaboration involves three components: setting up sharing, setting up the submission/approval process and making sure people don't step on one another's toes. This last function is the subject of this chapter.

This chapter assumes that the content creator has rights to create and edit a content item. The next two chapters will cover the publication sequence (Workflow) and how to set up sharing.

Reverting to Previous Saves (the History Feature)

Plone has the ability to go back to previous versions of a content item. It also lets you compare different versions of the same content item and even revert to an earlier version. It also lets you view publication history.

If you do not see the History tab on a piece of content you are editing, perhaps your Plone Administrator has not enabled versioning for the site or for the content type you are working with. Generally, though, versioning should be enabled. A Plone Administrator can verify this by going to Plone Site Setup --> Types --> (your file type) -- Type Settings. Verify that the **versioned** checkbox is checked. Most of the time, it will be. For more information, see the section called "Types" [214].

Solar System: Budget Vacation Resort

by Dick Solomon — last modified Jul 15, 2010 02:47 AM — History

If your content is being versioned, you will see a History hyperlink near the byline.

When you click **History**, you will see a popup dialog with the history of previous versions and its submission history.

1.Compare to current lets you compare any version with the current one. Compare simply lets you compare two adjacent versions 2. History also stores workflow history. 3. Any change notes will be listed in history.

The **Revert to This Version** button lets you switch to a previously saved version of the same item. To be on the safe side, you probably should compare the older version with the newest one to make sure this is the version you want. The comparison screen uses color coding to show what is different:

· **Dark Green**. This shows any changes in HTML code (new paragraphs, etc).

· **Pinkish Red**. This shows any content which was later deleted.

· **Light Green**. This shows text which was later added.

The Showing Differences Inline comparison feature uses color coding to let you see what has been added or changed.

Show Differences inline or as code? When you reach the Version/History page, you also have the option to Show Differences inline or as code. Inline is the default, and that is probably best for most cases (because it does highlight some HTML changes in dark green). Showing Differences as code will show you both versions in two separate columns and show only HTML code. It is not pretty, but the code view makes it easier to spot what exactly has changed whenever the Inline view is unclear.

Versioning and Deleted Items. Once you delete something, that item is gone for good. Even the history information is gone too.

Need to Undo a Messup? You can revert to an older version if you have already saved, but what if you haven't saved yet? Don't forget that you also have the ability to use the browser's undo command (Control Z). See the section called "Playing it safe ...." [28].

Change Notes. On the bottom of every content item is a field for Change Notes. These notes display after you press the History tab. It is optional to write a change note, but doing so makes it easier to identify later which version is the best to revert to.

Page Locking

Plone uses a system of "soft locks" to prevent two users from overwriting one another's changes on the same content item. It is not foolproof, but it is functional and easy to understand.

When a content item is opened for editing, Plone will note this fact and warn anyone who tries to edit the same item that someone else has "locked this item for editing."

Figure 6.1. Title

Plone's builtin locking feature is not foolproof, but it does give an alert when another person is trying to edit the same document.

The second person to open the item has the choice to stop editing or to "break the lock" of the original person editing the item. As long as the second person waits until Dick Solomon finishes editing the document, things will go fine. But what if Dick Solomon starts editing, forgets about it and leaves the browser open the whole time? The second person will have no way of knowing whether Dick Solomon is still editing the content item or intends to do so. Conversely, the person who receives this lock message may decide to break the lock and start editing. In the worst case scenario, Dick Solomon could do a lot of editing, but when it comes time to save, he would overwrite Liam Neesan's changes after Liam overwrote Dick Solomon's changes. Sure, you could reconstruct the remnants of each edit by examining the entrails of previous versions, but that would be tedious.

Checking Out Working Copies of Published Items

Plone has a feature which allows one or more users to edit a temporary/private version of a content item which has already been published. It is called **Working Copy**.

Working Copy functionality is not installed by default, but it is included as an add-on which must be enabled. To do that, the Plone Administrator must go to **Plone Site Setup**, choose **Add-Ons** and enable **Working Copy Support**.

After this is enabled, you will see the **Check Out** action appear in the dropdown menu for content items.

Figure 6.2. Checking Out Content
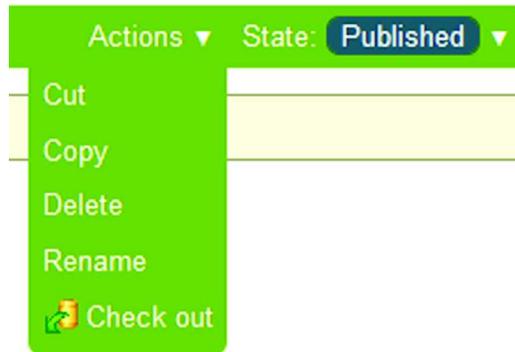
Checkout allows you to keep editing already published items

Although it is theoretically possible to check out private items, the most common situation where you use this feature is to check out a content item which has already been published.

When you check out an item, two things happen:

· Plone will protect the original (published) version from additional changes. The Edit option will no longer appear on the toolbar even for users who have edit rights for the content.

· Plone will create a temporary working copy at a different temporary URL which is editable by one or more users. In other words, using a working copy does *not* give exclusive editing rights to a single individual. It merely protects the original URL of the item while the working copy is being edited. Even if the item were published before you checked out a working copy, the editable temporary copy will be in a **private** state.

You will see a Plone locked message which describes who created the working copy, a link to the original URL and a link to the list of changes from the original version.

Figure 6.3. Checking out a Working Copy
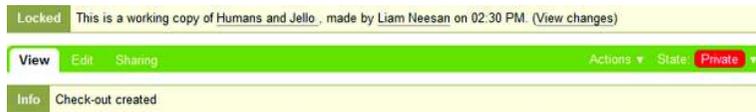
Choosing the checkout option will create a temporary version of a published item for editing

After you check out a working copy, you will notice that the URL has changed. Note the differences:

· **http://www.pendelton.edu/academics/physics/dick-solomon-stuff/jello** *(the original item)*

· **http://www.pendelton.edu/academics/physics/dick-solomon-stuff/copy_of_jello** *(the working copy you are now editing)*

Working copies offer two advantages: They allow you to leave a published item untouched while you reedit it. They allow you to keep a change log of private edits you are making to the working copy. They let you keep saving and editing until you have come up with a draft that you feel is polished enough to replace the current published version. **Remember:** the revision history of the working copy will *not* go into the revision history for the original item (and vice versa).

When you have reached that point, you will simply check the item back in. (Actions --> Check In). Doing this will replace the "live" published version with the version you were editing as the working copy.

Working copies provide a good solution to the problem of having to edit something after being published. Because it allows you to work with a private version of a published item, there is little risk of accidentally overwriting or ruining the published copy. Depending on your website's workflow, after you check something in, the content item will either be published directly or submitted for approval.

If you decide that you want to discard the working copy, simply choose Actions --> Cancel Checkout.

A word to the wise: Always Check Things In!

Warning

Even though you will be able to change the state of a working copy from Private to Published or Pending, don't do this until you first check in the working copy! (Actions --> Check In). If you publish a working copy as is, you will be publishing a parallel (and nearly identical) version of the originally published item. That means you will now have two published versions.