Handbook for Authors and Editors

Content Management with Plone

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gocept gmbh & co. kg

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Contents

Contents

Contents

List of Tables

List of Figures

List of Figures

Preface

In our projects with gocept, we have noticed that a comprehensive user's guide is an element not to be underestimated in the successful introduction of a software system. That is true especially when dealing with open source software such as Plone.

This book has come about for two reasons. The first, is that it is necessary for us to document our own content management solutions. The second, is that we developed the desire to support the, in our view, especially important open source project, Plone, with an easily accessible and comprehensive German and English language user documentation.

In all likelihood, most Plone installations will be customized to suit the special desires and needs of their administrators, and so acquire individual qualities. Nonetheless, basic functions and operational concepts remain fundamental to the system's use. It thus became clear, that we ought to write a handbook for the basic system, handling the software's fundamental similarities.

This book is aimed at reaching users who work in a Plone portal as authors or editors.

We especially aim to provide those working as trainers with a support tool, with which they should be able to expand their own knowledge, and introduce new users to working with Plone, using the concisely delineated tutorial section.

In this second edition, we have updated the book for use with Plone 2.1, reworked some of the language, and attempted to present its contents in an even more comprehensive structure.

Preface

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

Thomas Lotze und Christian Theune, March 2006

Reference

This book is in reference to Plone 2.1.2. Errata for this edition, and information concerning other versions can be found on the Internet at ⟨http://www.gocept.com/go/plonebook/⟩.

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 auditioned.

For administrators and programmers, we recommend the book, "Plone," by Andy McKay, in order to become informed over adaptation, development and installation of Plone.

Comments and Questions

We are happy to receive any comments or questions by e-mail at:

plonebook@gocept.com

Licensing of this Book

In the event that you might be interested in using the text from this book as the basis for documentation of individual projects, the LATEX sources are available for licensing.

If you should want to offer the book digitally (in PDF format) to co-workers in the context of job training, this is also possible by agreement. For questions concerning this matter, please refer to the aforementioned address.

Improvements in Plone 2.1.

- Item types:

  - Images can be rotated and mirrored.
  - News items contain a cover image.
  - Text files can be read in the file view display.
  - Folders include various viewing formats.

- Navigation:

  - A site map has been added.
  - Items can be excluded from navigation.
  - Global tabs can be automatically created for folders.

- Users:

  - Plone creates an author page for each member.

- User interface:

  - Kupu has been added for use as visual text editor.
  - The search field has been expanded for the live search.
  - Portal pages can be viewed in full screen mode.
  - Items include a menu for copying, pasting, etc.
  - The item view display contains the publishing history.
  - Item links are color-coded according to their review state.
  - Images are automatically scaled down to a sensible size.

Acknowledgments

1. Introduction – What is Content Management?

This chapter will provide you with an overview of what a content management system (CMS) is. It will then go on briefly to describe how Plone performs the tasks of a CMS.

"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 any kind of information which can be saved onto a computer.

Through the prevalence of computers and data networks, especially the Internet, most of the information dealt with in many companies and institutions is now available digitally. A content management system makes it possible to organize joint information collectively. A CMS is primarily used in creating an intranet or establishing a presence on the Web. For doing this, there are customized as well as general solutions within these areas of operation. A customized CMS, for example, might be specialized in dealing with files, customer information, or images, whereas a general type CMS can be administered in a wide variety of applications.

Plone is a general type of CMS. At the same time, it can be customized to fit the special needs of various organizations. Examples of some of these might include Internet magazines, or public agencies. Alongside the storage of files, a CMS offers its users a wide variety of further advantages, which are listed as follows.

1. Introduction – What is Content Management?

Freedom and Independence

- Data is accessible twenty-four hours a day. You do not need to depend on the presence of a co-worker, or wait in getting through to a certain department when needing to access a statistic, read a report, or review a file.

- Documents are specially processed automatically, so that you can review a document regardless of whether or not it has been formatted as a PDF file, as one of the application specific formats from programs like Open Office, Word, Excel, Access, or another format.

- CMS can also make content available for physically disadvantaged users. A blind person can use a Braille display or screen reader to access text documents. In addition to that, adherence to standards such as "WAI-AAA" (see ⟨`http://www.w3.org/WAI/`⟩) ensures that the user interfaces retain an appropriately high level of quality to meet the special needs of these people.

- In the search for information, you no longer need to know which format the information has been saved in. Full-text searches gather information from documents of various formats (PDF, Word, Excel) as well as files, images, events, and databases. Sophisticated technology also makes it possible to find information without having a precise knowledge of wording.

- You are not dependent on working out of a specific location. You are free to access a CMS using your laptop, mobile telephone, or PDA, just as you would using your desktop computer.

Reliability

- Through the storage of systematic information known as "metadata," confusion caused by unnoticed application of conflicting or old documents is avoided. This increases the reliability of content which is managed by the CMS.

- Publishing processes offer the option of automating the handling and release of company specific content corresponding to desired terms of reference and usage. In this way, the proper individuals retain current and reliable information over tasks to be completed, or carried out by others.

- The inclusion of an archive also makes information which is no longer frequently needed accessible. This helps to avoid information which is still needed from being deleted.

Cooperative Work

- The interlinking of the various types of information makes it possible to attend to numerous everyday tasks, bundeled together under the umbrella of a single system. A number of people, for instance, can be authorised to work on one page. Saved images from other users can be applied, and automated overview lists show recently modified items or give reminders concerning events.

- Adherence to open source standards makes possible the application of information, taken from a CMS, in other information processing systems as well. For example, a CMS can consolidate news and events from other content management systems, such as one used by a press agency, and present these in edited form to the user.

- A CMS allows for various forms of communication. On the one hand, a CMS supports a so-called "Push" communication form, whereby a centralized editor disperses information on outwards to the user. At the same time, users are able to enter information themselves, and make it available to others.

   It is often the case that a CMS includes areas which make use of screening and verification, in addition to having open areas with no screening. Blogs and forums belong to this latter group.

1. Introduction – What is Content Management?

- · CMS users can be placed in roles according to their responsibilities and areas of work. Thus in a CMS, there are users who are responsible for the creation of content (authors), as well as those who review and release information (editors). At the same time, a user can be an editor in his or her own area, whereas he or she may be an author in another area, or even be limited to viewing information which has already been released.

  The assignment of roles to a single person not only enhances security, but also allows users of a CMS to make contact with the responsible parties.

Security

- · Through managing content using security guidelines, a CMS ensures, on multiple levels, that documents be created, edited, released, archived, and viewed by authorised users only. Through accommodation of company specific demands, a CMS can be seamlessly integrated into the existing workflow.

- · Clear separation of security guidelines for users, roles, and specified groups in 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 necessary background information needed to follow the tutorials to come.

2.1. Content Items

When using a Plone portal for the first time, it will remind you of a conventional Web site. The individual pages offer both editorial content as well as access to a variety of functions.

In order to better find your way around your portal, however, you should be aware that the visible pages are not the primary elements from which Plone is made up of. These are merely "windows," through which content can be viewed. Content units viewed in this way create the core of a Plone portal, and are the key to orientation. These units are referred to here as "items."

As either editor or author working in a Plone portal, you will be working with items: you can, for example, add, edit, or move them. It is Plone's function to make these items visible, which means creating the corresponding pages.

2.1.1. Item Types

Each item belongs to a specific item type, which defines its designated use and properties.

Plone recognizes the following ready-made types of items:

- Pages
- News items and events
- Images and files
- Links and favorites
- Folders and smart folders

These types are each specialized in carrying out various tasks; their similarities and differences are described in more detail starting on page .

Among the various items used by Plone, folders and smart folders play an especially unique role. Folders group together items from a Plone installation, whereas smart folders consolidate related items from multiple folders. This can be used to structure your content and retain overview over highly extensive installations.

2.1.2. Metadata

Plone provides authors and editors with an ease of handling with hundreds or even thousands of content items. Furthermore, these contain information which facilitates the cataloging and locating of single items within a large archive.

This information is referred to as "metadata," or data which describes other data (images for example). Included among these entries are the title of the item, the name of its author, and copyright information.

Metadata is not only used in Plone, but has been in use for a long time on the Web, and in other mediums as well. From out of this context, a standard has been developed which defines a minimum of information to be retained in a given item's metadata. This standard has been named after its place of origin as "Dublin Core."

Plone items can retain all Dublin Core required entries. When creating an item, you will be asked to give a title and a short description; further entries 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

So that you can work with portal items as a visitor, author, or editor, Plone provides you with these items in various display forms. This is done primarily using World Wide Web technology on an intranet or on the Internet. Further access capabilities will be explained on page .

For each item, Plone can produce multiple screen displays, each of which serves a different purpose. Along with the presentation of content which can be viewed by any portal visitor, there is also content displayed which is meant solely for authors and editors. In the various screen views, you can edit items, control user access from your portal, or inform yourself over given tasks in the workflow.

Plone frames item displays alongside so called "portlets." In these, global functions, operational elements, or more extensive information is provided. Portlets are to be found to the sides of each item's display.

Examples of portlets are the navigation menu, the calendar, and the list of recent changes.

2.3. Members

A content management system is of interest to its users for various reasons. Visitors want to be able to view public content, while at the same time enjoying the publicly accessible functionality. Authors contribute to the public content, while editors direct and control the content's publication.

So that Plone can offer each user the appropriate information and access options, any number of users can be made known to the portal as members.

After you have registered with a user name and password, the portal is able to produce and behave in accordance with your own personal profile and in relation to your needs and responsibilities. Users who are not recognized as portal members, or who have not been registered, will always be given the portal's public access screen display.

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

At the same time, through differentiation of members, and the recording of access privileges, it becomes possible to protect private information, and to limit the responsibility of users to certain areas.

In addition, as member of a Plone portal, you will be provided with a member folder. There, you can add, edit, and delete subfolders and other items according to your own discretion.

3. Appearance of the Plone Interface

In this chapter, you will become familiar with the appearance of the Plone interface. After doing this, you should be able to find and identify interface elements which will be referred to over the course of the following tutorials.

Open your Web browser and go to the Plone installation by typing in the portal address which you have received from your administrator. We will refer to this as ⟨http://*plone-address*⟩ throughout this book.

You will now see the Plone portal interface as it is presented to visitors (see Figure 3.1 on the following page). Every page in the portal follows this same basic form layout. The diagram here outlines the main elements of a Plone page:

1. Head
2. Content area
3. Side columns
4. Base

These elements will be described in more detail in each section of this chapter.

3. Appearance of the Plone Interface

Figure 3.1.: Plone interface for visitors. The main elements are the head (1), the content area (2), the side columns (3), and the base (4).
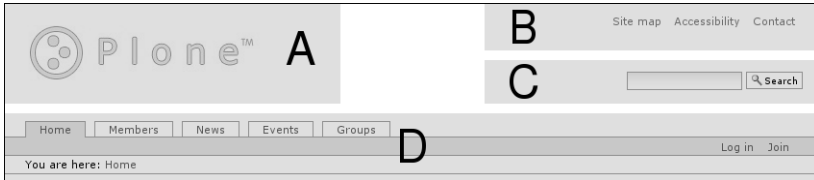
Figure 3.2.: The head of a Plone page. It contains a logo (A), site actions (B), the search field (C), and a navigation bar (D).

3.1. The Head

Diagram 3.2 shows the individual parts of the head of an ordinary portal page. These include the following four elements:

A. Logo
B. Site actions
C. Search field
D. Navigation bar

As a rule, the logo in the upper left-hand corner of the page is customized by the operating party. Otherwise, the Plone logo, which can be seen in the diagram, will be set by default.

On the upper right, you will find the site actions, such as the site map, some information and settings concerning accessibility, and the contact form.

Directly under these, you will find the search field. Enter a keyword or search term and activate the search button, and a full-text search will be performed throughout the entire portal.

The navigation bar is made up of three parts:

1. Global tabs
2. Personal bar
3. Directory path

The global tabs serve as references to important areas of the portal, which can thus be quickly reached from each page.

The personal bar to the right, within the colored task bar, contains links and information concerning the current user. At this time, you will be informed here that you have not yet logged in. The bar provides links to both a log in and registration form.

On the directory path bar, beneath the global tabs and to the left, you can check your whereabouts in the portal at any time, tracing the path through the folder hierarchy which has led you from the portal's home page all the way to your current position. Each step in-between refers to a folder traversed along the way. At this time, the directory path should display just one entry for the home page.

3.2. The Content Area

Plone can portray each item in your portal using various screen displays. These occupy each portal page's content area.

In the middle of the page reached at ⟨`http://`*plone-address*⟩, you will see the contents of the Plone portal's home page.

3.3. The Side Columns

The columns alongside the main content area incorporate operational and other additional information. Each of these two areas can also contain multiple portlets. On some sites, the portlets to the right have been hidden to create more working space. In full screen mode, all portlets are hidden.

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

The calendar portlet, on the right-hand side, displays the current date and 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. As soon as you move the mouse cursor over the day, more detailed information about the event will appear.

The upper left portlet is for navigation. It displays the folder structure of the portal. What and how much you see there depends on the amount of content other portal members have already contributed. An entry for the home page can be seen at all times.

The log in portlet, as with the registration form, contains entry fields for your user name and password. In the event that you should have forgotten the latter, another form can be found here which allows you to have it sent to you by e-mail. The registration form can be found here as well.

3.4. The Base

The base of each portal page contains copyright information about Plone, and references to Internet standards to which Plone adheres.

4. Working with Plone

The following tutorials will guide you step by step through using Plone. Each building on top of the other, these will provide you with easier access to the reference part of this book.

If you would like to follow the tutorials hands-on, experimenting with your own Plone installation, you can learn how to configure such an installation on page 153.

4.1. A Quick Tour

In the first tutorial, you will become familiar with basic tasks such as logging in, signing out, and using the navigation bar.

Start by going to your Plone portal at ⟨http://*plone-address*⟩. You should now see the portal's home page in your Web browser. The structure of this page is described in more detail on page 29.

4.1.1. Viewing the Portal as a Visitor

As long as you have not logged into the portal, it will appear as it does to all other visitors. Not until you have registered with a user name and password can you go to work as an author or editor, having access to the necessary information for that purpose.

Before doing this, take some time to become acquainted with your portal from the point of view of a visitor.

· Follow the links in the "Navigation" portlet and in the content area of the page to view various items in your portal.

· Watch the folder structure in the navigation portlet change as you switch from item to item.

· Take a look at the "Log in" and "Join" forms which you can reach on the personal bar.

· Try using the global tabs to move around to the home page, the news page, events page, or the members search.

4.1.2. Logging In

We are assuming that your administrator has provided you with a user name and password. Use either the log in form from the personal bar, or the "Log in" portlet to log in.

· 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 visiting before. This is true regardless of whether you used the log in form, or the log in portlet, for logging in.

Errors on Logging In

If you have made a typing mistake in entering your user name or password, Plone will inform you that the log in has failed. The "Password" entry box will be highlighted, and a link there will refer you to a form which you can use to receive your password via e-mail. Use this option in the event that you are certain of not having made any mistakes in typing your log in entries.

· Follow the link above the password entry box. You will be taken to a form titled, "Lost password."

· Enter your user name in the form's entry box.

· Activate the "Send me my password" button.

· Check your e-mails. You should have received a new message containing your password. Log in again using that password.

If you have not received a message from the portal, or if logging in with the new password has also failed, try getting in touch with your administrator.

After First Logging In

After first logging into a Plone portal, it may be requested that you change your password. We recommend that you do this. On subsequent log ins, you will not be asked to do this again. You may, however, change your password at any time on your member preferences (see page 86).

4.1.3. Viewing the Portal as a Member

After having logged in, you will find yourself back on the page from which you started. A few things will now have changed (see Figure 4.1 on the following page).

Status Report

At the top of the content area, you will see an orange colored status report. You are being informed, that you are now logged into the portal. After leaving this page, the message will disappear. Over the course of your work, status reports such as this one will appear often, giving notice as to the success or failure of the task to have been carried out.

The Personal Bar

The personal bar now offers some more personalized options. Aside from the link to your folder, over which the next step of this tutorial is concerned, you are also able to access your own preferences.

4. Working with Plone
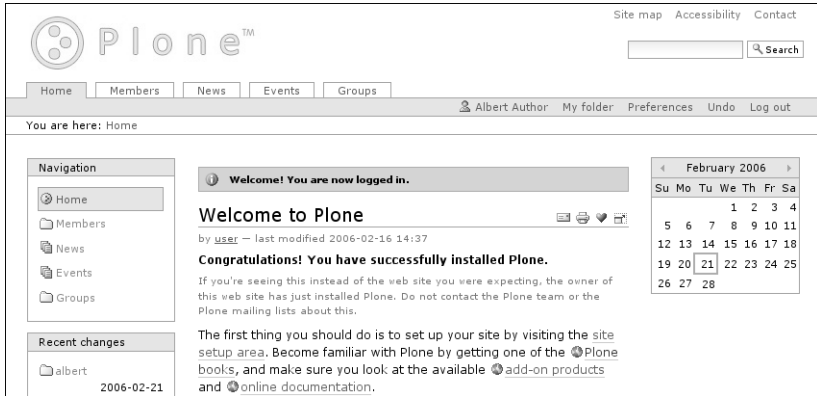
Figure 4.1.: Plone interface after logging in

· Follow the "Preferences" link on the personal bar.

· Follow the link to "Personal preferences." Take note of what personal information is collected in the portal, and which settings can be adjusted to customize the look and performance of the portal to your personal needs.

· Make sure that "Kupu" is selected in the "Content editor" field. Otherwise, select it from the drop-down list, and save the settings using the button at the bottom of the form. For the following tutorials, we are assuming that this has been done.

4.1.4. Your Folder

Make yourself familiar with your folder.

· Follow the "My folder" link on the personal bar.

Plone offers an array of five different folder displays. On first opening the folder, the "View" display is opened (see Figure 4.2 on the next page).

Figure 4.2.: Display of your folder

Your folder is named by default with your user name.

Throughout your work in the portal, you will be putting items into your folder. The display will then show a content overview list. At this time, you will simply see an indication that your folder contains no content.

4.1.5. Logging Out

At this point, we are ending our first tour through the Plone portal. 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 portal will appear once again as it would to all visitors.

4. Working with Plone
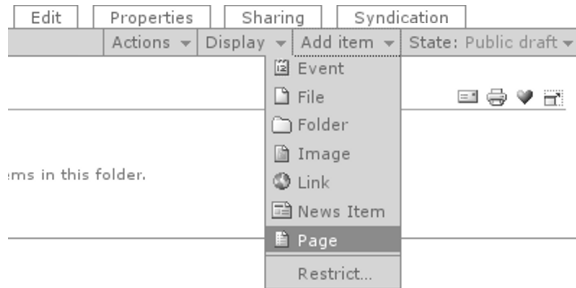
Figure 4.3.: Menu for adding items

4.2. Working with Pages

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

4.2.1. Adding a Page

There is a place in your Plone portal which has been especially designed for adding items and for working on them there as you please, without establishing a direct connection to the rest of the portal. This place is your folder. That is, therefore, where you will be working throughout the rest of this as well as the following tutorial.

· Proceed to your folder, using the "My folder" link in the personal bar.

Underneath the item display tabs, you will find the "Add item" menu on the task bar to the right (see Figure 4.3).

· Open up the menu and select "Page."

You will now see the entry form for the new page.

Figure 4.4.: Editing form for a page

4.2.2. Editing a Page

The "Edit" display for a page contains five entry fields (see Figure 4.4):

· Title
· Description
· Body text
· Related items
· Allow discussion

4. Working with Plone

Figure 4.5.: Error message due to empty required fields

Title and Description

The first entry field designates the title of the page. This field must be filled out for each item. Required entry fields in Plone are always marked with a red square to the right of the field's heading. If you try to save an incompletely filled out form, you will receive an error message.

Before giving your page a new title, notice how Plone reacts to an incomplete required field:

· Activate the "Save" button without making an entry.

Plone has not saved the page, but has, instead, generated the form again. The title and content fields have been retained, with the additional indication that both are required fields (see Figure 4.5).

· Now, enter the title for your page into the field – "Albert Author's Site," for instance.

The second field allows for a short description. That might include a content description, a summary, or an abstract. The description will then be applied in the automatically generated overview lists as an introduction to the text. This should help the editor in deciding whether or not the item is of interest to him or her. It is therefore always advisable to enter a description.
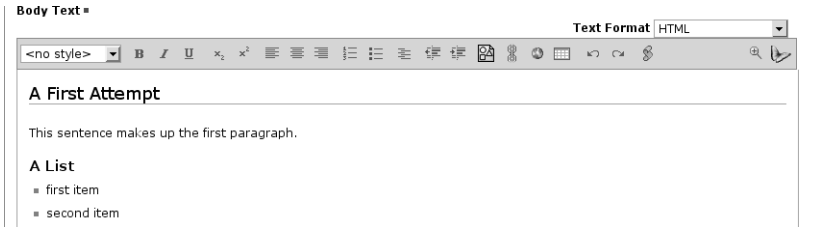
Figure 4.6.: Kupu in a page's editing form

· Enter a summarizing text into the "Description" entry box.

Body Text

The "Body text" field provides a convenient atmosphere in which to create the main body of text for your page (see Figure 4.6). We are assuming that, as recommended in the first tutorial, you have opted for using the Kupu text editor.

Kupu allows you, for instance, to set selected parts of your text in italics or bold, or to create headlines or paragraphs, which can be aligned to the left or right. A detailed description of format options can be found on page 134.

· Enter some written text into the "Body text" entry field.

· Select various font options from the text-style menu to create headlines.

· Outline a number of points to be made using one of the two list icons.

Notice how the entered text is immediately presented in the style of the portal. This allows you to get an impression of what the end result will be right away.

4. Working with Plone

Figure 4.7.: The page after having been edited

Saving Entries

Save your entries when you feel satisfied with them.

· Activate the "Save" button at the bottom of the entry form.

If Plone has accepted your changes, it will show you the full edited page (see Figure 4.7). You will be informed by a status report that the page has been saved.

If a problem has occured in saving the page, you will be kept in its edit display, whereby you should read the error message, and correct your entries accordingly.

Notice how your entries are now presented in the view display. The page heading should now be the title which you have chosen. Accented visually, the description, and then the main text follow.

You are free to change a page's title, description, and body of text at any time. The Edit tab will take you to the Edit form from any of the various page displays.

Figure 4.8.: The page in your folder and in the navigation portlet

The Page in the Portal

- Go into your folder and have a look at the view display as well as the "Contents" display.

You will see that the content overview list in your folder now has an entry for the page (see Figure 4.8). In addition, a new entry has appeared in the appropriate place in the navigation portlet, and the latest addition to the "Recent changes" portlet now refers to the page you have just edited.

4.2.3. Undoing Changes

Plone offers the option of undoing already saved changes.

- Make a few changes to the newly created page.

- Activate the "Undo" option which can be found on the personal bar.

You should now have received a table showing an overview of the last tasks carried out (see Figure 4.9 on the following page). This will include adding and editing the page. Now undo the last completed step.

- Mark the box for the last step, and activate the "Undo" button which can be found below the undo table.

Undo	Action performed	Affected Item	Performed by	Date and Time
☐	Edited ATDocument Albert Author's Page at http:// _____ /sandbox/Members/albert/albert-author-s-page	/sandbox/portal_factory	sandbox albert	2006/02/21 16:13:15.735 GMT+1
☐		/sandbox/portal_factory	sandbox albert	2006/02/21 16:12:58.518 GMT+1
☐	Initiated creation of Document with id document.2006-02-21.7773410 in http:// _____ /sandbox/Members/albert	/sandbox/createObject	sandbox albert	2006/02/21 16:12:57.679 GMT+1
☐		/sandbox/login_form	sandbox albert	2006/02/21 16:12:48.614 GMT+1

Figure 4.9.: Undoing changes

· Go back to the page's view display.

You will now see that the title, description, and text are just as they had been before the last change was made.

In some circumstances, not all of the changes made can be undone. In that case, Plone will inform you with an error message.

Plone has a limited memory, and can therefore only recall steps which are not all too far back. Your administrator can inform you over how far back your history can be saved.

4.2.4. Deleting the Page

Items which are no longer needed can be deleted from the portal. Delete your newly created page at this time.

· Go to your page.
· Open the "Actions" menu and select "Delete" (see Figure 4.10 on the next page).

Plone will ask you for a confirmation before actually deleting the page in order to avoid accidental deletions. When you have confirmed with "OK," Plone will delete the page, refresh the content list in your folder, and make note of the task carried out with a status report.

Figure 4.10.: Menu for actions

4.2.5. Other Item Types

In this tutorial, you have become familiar with the item type, "page." Now try out other types of items. Add an event or news item, for example, editing and deleting these items as well.
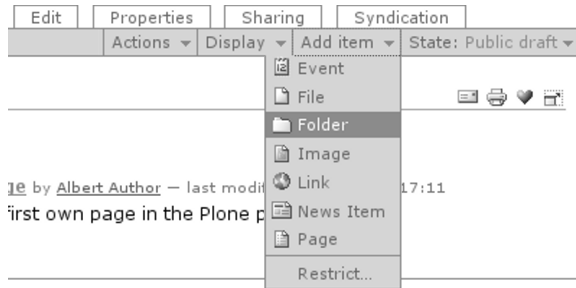
Figure 4.11.: Adding a folder

4.3. Working with Folders

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

4.3.1. Adding a Folder

In the last tutorial, you have created a page and possibly other items in your folder. Now you will learn how to add a folder.

· Go to your folder.

· Add the item type, "folder" (see Figure 4.11).

You will now be directed to the edit form 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 new folder. For the rest of this tutorial, we will be assuming that you have given it the title, "Projects."

After saving, the Projects folder will be displayed with a status report letting you know that changes made have been saved. Its view display
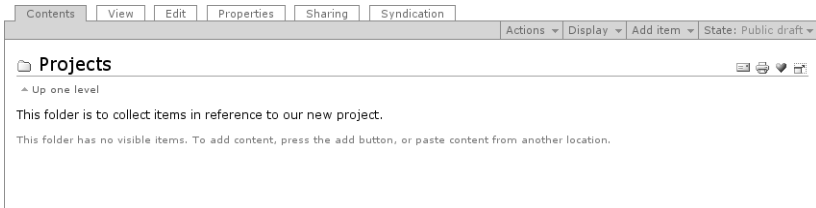
Figure 4.12.: Contents display of a newly added folder

will not differ from that of your member folder, prior to your having added items to it. The only differences will be the folder's title and description.

4.3.2. Folder Content

The contents display of an empty folder looks similar to its view display (see Figure 4.12).

· Move to the contents display of the Projects folder.

Notice how the content overview list in your Projects folder now behaves when you add new items.

· Add a new page to the Projects folder, just as you did in the last tutorial.

· Return to the Projects folder, and look at its contents display.

In the contents display of your Projects folder, Plone has now generated a list, which, so far, has only a single entry for the newly created page (see Figure 4.13 on the following page).

· Create more items in your Projects folder. Check the contents and the view display of your Projects folder after adding each item.

4. Working with Plone
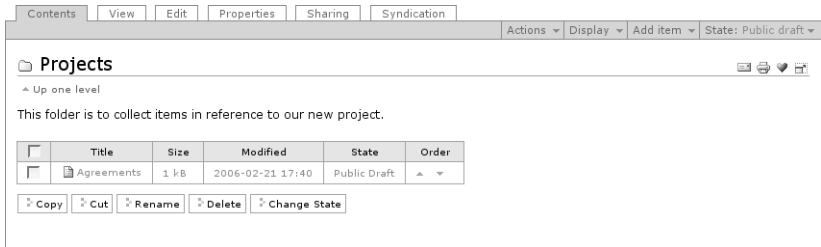
Figure 4.13.: Contents display of a folder containing one item
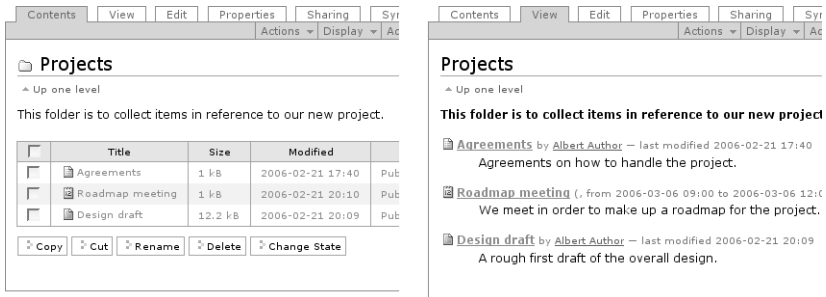
Figure 4.14.: Contents display and view display of a folder containing
multiple items

In doing this you will add to the lists which are created by Plone in both the contents and view displays. The order of the item entries is always the same in both displays, with new entries being added at the bottom of the list (see Figure 4.14).

Now change the order of the entries. The content overview table in the contents display contains a column to the far right with the heading, "Order." In that column, there are two arrows for each item. One of them is pointing downward, and serves to switch the position of the according item with that of the following one. The other arrow points upward, and can be used to switch the item with
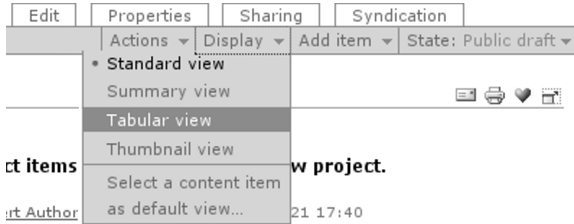
Figure 4.15.: Menu for folder view templates

its predecessor.

· Move to the contents display in your Projects folder.

· Using the arrows, move the items upward and downward through the list, noticing the effect which this has on the view display of your folder.

4.3.3. Folder Views and Default-View Pages

Plone utilizes various templates in displaying folders.

· Go to your Projects folder.

· Open the "Display" menu and select "Tabular view" (see Figure 4.15).

Plone now displays the content of your Projects folder as a table, with entries for each item in the folder, instead of as a list.

· Try out the other view templates in turn. For the thumbnail view to take effect, you will need to add some image items to the Projects folder.

In place of the automatically generated folder view display, Plone can use one of the items inside that folder as the view display. This item is then referred to as the "default-view page."

4. Working with Plone

Select default page
Please select item which will be displayed as the default page of the folder.

○ 📄 **Agreements**
   Agreements on how to handle the project.

○ 📄 **Roadmap meeting**
   We meet in order to make up a roadmap for the project.

[Save] [Cancel]

Figure 4.16.: Selecting the
default-view page

· Open the "Display" menu, and select "Select a content item as default view."

· You have now been taken to a form, with which you can choose from items held in that folder (see Figure 4.16).

· Mark the desired item, and save the form.

Plone will now lead you on to the display of your Projects folder. Instead of the automatically generated content view last selected, you will see the view display of the default-view page.

In the contents display, you will notice that the default-view page has been highlighted in bold type.

4.3.4. Copying and Moving Items from Folder to Folder

Not only does Plone allow you to add and delete folders and other items, but you can move them or copy them into other places in the portal.

First, copy a page from your Projects folder to your member folder.

· Open up the item which you would like to copy.

· Open the "Actions" menu and select "Copy."

· Go into your member folder.

· Paste a copy of the selected item into the folder by using the "Paste" command in the actions menu.

Notice the new entry in the contents display of your member folder. Check to see that nothing has changed in the content of your Projects folder.

Next, move an item from out of the Projects folder to your member folder. The procedure is similar to that of copying.

- · Open up your Projects folder.
- · Open the "Actions" menu and select "Cut."
- · Move to your member folder.
- · Paste the item into your folder using the "Paste" command in the actions menu.

You will notice that the item has not immediately disappeared from out of your Projects folder on cutting it out. Not until being pasted into its new destination is it actually deleted from its original position. After moving the item, check the content of your Projects folder.

As a last step, you will see that when copying folders, a folder's entire content is always retained and copied along with it.

- · Make sure that your Projects folder still has at least one item left in it. If that is not the case, add a new one.
- · Open up your Projects folder.
- · Copy your Projects folder.
- · Move to your member folder.
- · Paste the copied folder in.

In the contents display of your member folder, you will now see two entries entitled, "Projects."

- · Make certain that both of the folders contain the same items.

4.3.5. Deleting Folders

To delete folders, proceed exactly as you learned to do in the last tutorial when deleting other items. Remember that when deleting folders, the items contained within them will be deleted as well. Accidentally deleted items can be retrieved by undoing the deletion.

Part II.

Reference

5. Item Types

In this chapter, the properties of each item type will be systematically outlined. 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 give you an overview of the available types.

5.1. Similarities

Each Plone portal item has at least four different displays:

- · View
- · Edit
- · Properties
- · Sharing

If you have access to an item, you also have the privileges to its view display. If you are able to make changes to the item, some or all of

Table 5.1.: Item types

Item Type	Icon	see Page
Page		66
News items and events		68, 69
Images and files		72, 73
Links and favorites		75
Folders and smart folders		76, 78

5. Item Types

Figure 5.1.: Tabs for the item displays
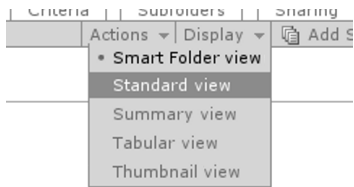
Figure 5.2.: Selecting a view of a smart folder

the remaining three displays will be available to you as well. You can switch between them using the item display tabs (see Figure 5.1).

The "View" display of an item makes the item visible to the visitor. The way it looks, and the information it includes depends on the type of item: While primarily content is displayed on a page, an event's view display reveals further information, such as time and place, for instance. The individual item types, and their corresponding display traits will be described in more detail on page 66.

Some item types allow for certain adjustments to be made to their view displays. Plone includes a number of templates for the folder and smart folder displays. With these items, using the "Display" menu, you are able to choose which of these templates should be used (see Figure 5.2).

The remainder of displays are the same in their basic functions for all items. The edit and properties displays will be described in the following sections, whereas the sharing display is explained on page 91.

5.1.1. Editing

Each item has an "Edit" display in which its most important qualities can be adjusted:
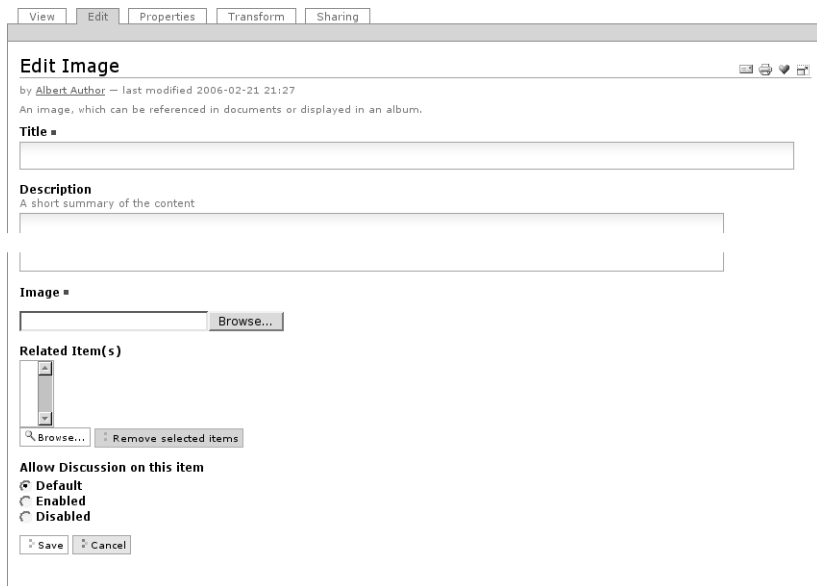
Figure 5.3.: Edit display of an image

- · Title and description
- · Content
- · References and discussion settings

Figure 5.3 shows the edit display of an image as an example.

Whether or not you see an entry field for short names depends on the settings for your portal, and on your member settings. You can learn more about short names on page 100.

Choose a telling and representative title for each of your items. It should be short and to the point, referring directly to the item's content. In doing this, because Plone uses your title for navigation, as well as for other things, your portal will become clearer, and its structure more intelligible. Aside from that, well chosen titles lead

to higher valuation from search engines on the Web, which in turn allows interested parties to find your site more easily.

The description should be made up of a few lines of simple text. It appears, on the one hand, as a summary in the item view display, and on the other, in lists such as the Plone generated folder overview list.

The edit display for folders contains entry fields for the title, the description, and possibly the short name as well. With smart folders, you can also configure the view display here. Folders and smart folders distinguish themselves from the other item types in that they serve to organize other items, as opposed to having editorial content.

With all other item types, the chief components of the edit display serve to make changes to the content of the items. Which options you have in doing this, depends entirely on the type of item, each of which will be fully explained later in this chapter.

In addition, the edit display contains an entry field for related items, as well as one where you can either block or allow discussion over an item.

With the "Related items" field, you can make cross-references to other items in the portal from the view display of an item. The edit display shows the current list of related items. Underneath the list, two buttons can be found. The "Browse" button opens up a window which can be used to move through your portal using the folder structure, looking for various items. You can view each of the items found in the folder or search results window displayed there, and then insert them into the current item's list of related items. With the "Remove selected items" button, you can delete all highlighted items from the list.

5.1.2. Metadata and Properties

In the "Properties" display, you can adjust the following attributes:

- · Allow discussion (only with folders and smart folders)
- · Exclusion from navigation
- · Metadata: keywords, contributors, creators, effective date and expiration date, language, and copyright

Figure 5.4 on the following page shows the properties display, as it appears for a page.

In the "Allow discussion" field, you can enable or disable discussions for the item. Activate the "Exclude from navigation" field, and the item will not be recognized by Plone's navigation elements.

Metadata and the Dublin Core Standard

Metadata is made up of entries which describe an item. With their help, an editor can rank and judge an item's content, deciding whether the item is of interest or not, without first having to read it in its entirety. In addition, metadata can easily be assessed mechanically.

Items in Plone possess a good amount of metadata, some of which is entered into the portal's Web pages. Among these are the title and language of a given text, as well as keywords. In this way, search engines are better able to categorize and find your content.

So that metadata contains useful information, standardized from item to item, the Dublin Core standard has been developed (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 enables libraries to better facilitate the exchange of information over their data pools, and helps search engines in indexing Web pages, among other things.

5. Item Types

Figure 5.4.: Properties display of a page

Table 5.2.: Metadata used by Plone following the Dublin Core standard

· Title	· Created (date)
· Creator	· Modified (date)
· Publisher	· Available (time frame)
· Contributors	· Resource type
· Subject and keywords	· 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.

Entering Metadata

A part of the metadata for an item can be entered in the properties display. Other fields are filled out automatically by Plone. Entering metadata as concisely as possible, will allow your pages to be more easily found and better rated by search engines. The following entries can be made in the properties display:

Keywords: Through using keywords, the content of Plone items can be categorized. Keywords can be used in extensive searches, for example, and serve to help find related content. If the portal has been active for a longer period of time, it will recognize a variety of keywords, and will display them in this field for you to choose from. Reviewers have the option of adding new keywords here.

Creators: In this field, all portal members who have taken part in the creation of the item can be entered into the system. This will often include the owner of the item. In order to include more than one person, write each name on one line in the entry field.

Contributors: In the event that some of the content material does not originate with the item's creators, the contributing parties can be entered into this field. That might include people who are not even members of the portal. Once again, use one line for each name to be included.

Effective date and Expiration date: Along with the workflow, or publishing process, the effective and expiration dates control the time frame in which items can be viewed by the public. Together, these make up the "Available" time frame entry from the Dublin Core standard.

Plone blinds the item out of view from overview tables such as the navigation menu or calendar before the effective date has transpired, and after the expiration date has been exceeded.

You can enter the date for both fields by opening the pop-up calendar, which can be reached via the calendar icon, found between the date and time drop-down menus. An entered date can be deleted by selecting "----" for the year.

Language: This field contains the language in which the item's content has been authored. The default language depends on your portal.

Copyright: This is where the legal conditions for publication of the content at hand can be described. This may include references to third parties.

Use of Metadata in Portlets

The Plone interface contains two portlets which serve as terrific examples for making use of metadata: "Recent changes" and "Related."

The "Recent changes" portlet (see Figure 5.5 on the opposite page) shows the last five items to have been edited in the portal. This portlet is only displayed when you are logged into the portal. The entries are sorted by modification dates, the item last changed to be
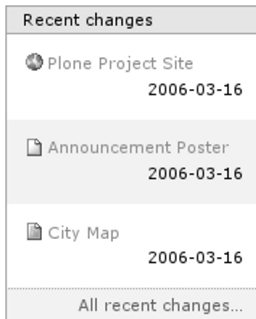
Figure 5.5.: "Recent changes" portlet
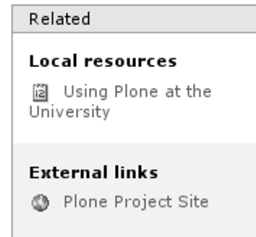
Figure 5.6.: "Related" portlet

found at the top of the list. Each entry is comprised of the title of the item, an icon for the item type, and the date of the change made. The title serves at the same time as a link to the item itself. In addition, the portlet has a link to a page displaying all recently edited items ("All recent changes...").

Along with the modification date, the keywords from items are also interpreted. The "Related" portlet (see Figure 5.6) lists items which have at least one keyword in common with the item at hand. Plone assumes that items with common keywords are related in their content, and that the user might be interested in viewing related items.

Each entry for this portlet is made up of the item title and an icon for the item type. The title is also a link to the actual item.

The item list is divided into two sections: Plone distinguishes between internal, or local, and external content. Link items are categorized as external whereas all others are local.

5. Item Types

Figure 5.7.: View display of a page

5.2. Pages

A page is a text which you can freely structure and design. In doing this, you have most of the tools at your disposal which you would have with a regular Web site. These include captions and headings, text formatting, links, images, and graphics. An example can be seen in Figure 5.7.

The freedom which you have in designing a page, however, also means that you will need to help Plone format your text, in accordance with the style of the portal. To do this, mark up structural elements, such as headings and lists, in your text.

The text for a page can be edited directly in the edit display, or be uploaded from your computer.

When entering your text directly into the edit display, you will most likely be using the visual editor, Kupu. This editor makes it especially easy for you to mark up the structure of your text, presenting it to you just as it will appear in the page view display. In addition, Kupu provides you with the basic functionality of common word

processing programs for formatting your text. More can be learned about Kupu starting on page 134.

If you cannot, or do not want to, use Kupu, an entry field still offers more simple word processing functions, such as insert, delete, or copy. Aside from unformatted text, you can also enter HTML or structured text, specifying formatting information by hand.

In order to upload a text from your computer, select the desired file using the "Browse" button. That might make sense when dealing with a longer text which you would like to create without using Kupu or the entry field, or for a document which has already been created or received from another source. Plone will attempt to recognize the text format from the uploaded document automatically. Structured text, HTML, and plain text are all supported, whereby HTML is the preferred format among these. If you have created text using either Kupu or the entry form, this will be discarded upon uploading new text into the form.

If you would like to upload or enter text as HTML code, you should take note of a few limitations to ensure that Plone is able to insert the page's content into its view display:

- You will not be able to use any frames.
- The HTML code must be created so that it can be contained in a `<div>`-element.
- You will not be able to make any entries which belong to the page heading.
- Because Plone displays the page item's title as a first level headline, the use of those should be avoided in your text.

If you have created a text using a word processing program, and would like to make it public in Plone, using that program's file format; the file item type is available for doing that.

Figure 5.8.: News portlet

5.3. News Items

Among the supply of information which a Plone portal has to offer, news items are pages which are meant to be viewed as current releases of information. Because Plone assigns these with an item type of their own, a news overview can be compiled:

- · The global "News" tab takes you to a display of all news items published in the portal.
- · The news portlet (see Figure 5.8) always displays the titles of the five latest news items.

Both lists contain only news items which have a "Published" review state, and are sorted by date beginning with the most current item. The portlet shows the modification date along with each news item.

In contrast to pages, news items also contain cover images, in addition to text. Cover images appear in the view display (see Figure 5.9 on the opposite page) as well as in the complete portal news overview display next to the item's description text. The cover image has nothing to do with images which you have inserted into an item's text using Kupu, for instance.

The edit display of a news item has a tool underneath the text entry field with which you can locate a cover image on your computer, and upload it into Plone. In another entry field, you are asked to enter a title for your image. In the event that you have already uploaded an image, it will be displayed there under "Image." You are free to keep, delete or replace it with another image. Plone ensures that the image is presented in a sensible size.
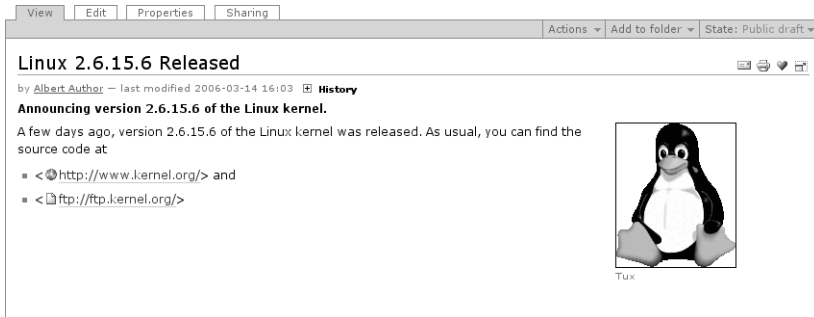
Figure 5.9.: View display of a news item

5.4. Events

As with a news item, an event is a page with special significance. Its text announces an occurrence, such as a publicity event, for example. In addition, the content of an event item is made up of entries describing the event, such as the period of time in which it takes place.

An event is made up of the following structured entries:

Event starts, event ends: the time frame in which the event is to take place

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

Event announcement: an announcement of the event or an invitation to a meeting

Attendees: a list of those expected to attend

Event types: choose between an appointment, convention, meeting, social event, or work

Event URL: address of an information source on the Internet which offers more details

5. Item Types

Figure 5.10.: View display of an event

Contact name: the name of a contact person who might address any questions

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

Contact phone: the contact person's telephone number

The start, end, and type of an event must all be entered, whereas the other fields can be left blank.

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

- Structured entries are displayed in a table in the view display of each event (see Figure 5.10).

- Using the global "Events" tab, you can reach a full-portal overview list of past and current events.

- The events portlet (see Figure 5.11 on the opposite page) reports over the next five current events. For each event, you will see its

Figure 5.11.: Events portlet

Figure 5.12.: Calendar portlet

title, place, and beginning date. If you hold the mouse cursor over the title, the beginning lines of its description text will appear.

· Plone enters events into the calendar portlet (see Figure 5.12). The title line of the portlet informs you as to which month is being 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, as long as that date can be seen.

Days for which at least one event is known to exist are highlighted, and serve as links to a list containing all events on that day. When holding the mouse cursor over one of these days, you will see its events listed with their starting and ending times, as well as their titles.

· In the view display and among the item actions for an event, you can download calendar files in iCal- and vCal-form in order to enter the event into your personal calendar.

The events overview list and portlet only recognize events which have a "Published" review state.

In entering an address for further information about the event, do not forget that Internet addresses must begin with "http://". If you leave this part of the address out, the link in the event's view display will not work.

5. Item Types
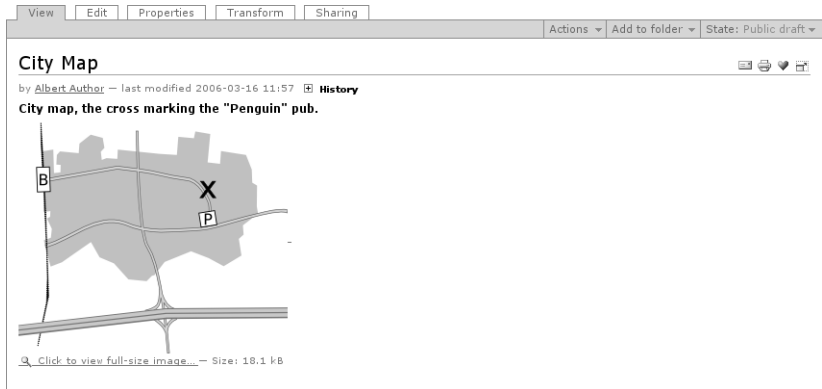
Figure 5.13.: View display of an image

Plone checks to make sure that your date entries for the beginning
and end of an event are valid. You can enter dates which do not have
possible values for the year, month, day, hour, and minute, such as
November 31st for example, but they will be rejected as an error. In
addition to that, Plone makes certain that the entered start of the
event does not come after the date entered as being the end of the
event.

5.5. Images

The image item type serves to manage single images within the Plone
portal. In doing this, they can be used in other portal items, for
example. Images are contained in folders, and have properties and
metadata. As with other content, you can publish and protect images
from unauthorized access.

The image view display depicts the image along with its title, a
description, and an image file size entry (see Figure 5.13). The image

itself serves as a link to a full-size presentation: a page containing the image with a link back to the view display.

Aside from title and description entry fields, all that the edit display of an image item contains is a browsing tool for uploading an image from your computer. To modify an image, open it up in a general-purpose 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 in the portal: image items have a "Transform" display in which you can flip and rotate the uploaded image. Select the desired function and activate the "Execute" button. 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 help from a file item, you can publish any desired file in your portal. The type, inner structure, and format of the file are not subject to any limits.

The disadvantage thereby is that, without having any knowledge about the structure and format of the file, Plone is not able to see into it, ruling out the possibility of its being included in a full-text search, for instance. Plone is only able to offer files for downloading.

Therefore, in order to maximize use of Plone's capabilities, you should always deposit texts and images in their corresponding item types, even though it is possible to save them as file items.

Next to the title and description field, the view display of a file item contains a link with which to download that file, as well as

5. Item Types

Figure 5.14.: View display of a file

particulars about its size and type (MIME type). Figure 5.14 illustrates an example.

One exception to this is with text files, meaning plain text, source code from programs, or HTML text: The view display of such documents reveals the actual text. Plone recognizes text documents in that their MIME type begins with "`text/`". Normally, your browser ensures that the fitting MIME type is sent along with the file on uploading.

When downloading a file, you will either be offered to save ("download") the file to your computer, or it will be opened right away in your browser. Which of these happens, depends on the type of data being transferred, and on your browser's settings. Most common browsers, for example, can be enabled to open and display PDF files. If your file is an image which your browser can recognize as such, it will be displayed directly.

As with images, files can be uploaded in the item's edit display. If a file has already been uploaded, you will see its name, size, and type of data along with a link for downloading it. You are then free to retain the file, delete it, or replace it.

Figure 5.15.: View display of a link

5.7. Links and Favorites

A link item has only one distinguishing quality: the Internet address to which it refers. Its view display is comprised only of its title and description, as well as the link to the address (see Figure 5.15). Link items are well suited for creating annotated lists of references which also allow for discussion, for example.

In the edit form, the address is a required entry; without it, the item would have no content. Make sure to remember that a Web site address has to begin with "`http://`". You are, of course, also able to use addresses from other Internet services such as an FTP resource, which would then begin with "`ftp://`".

A special type of link item also allows you to save favorites. You can learn more about favorites on page 129. For each portal page that you bookmark, Plone will add a favorite item into your favorites folder. You can thus edit and organize your favorites using the same procedures which you have already learned with other items.

Favorites do not distinguish themselves from other links items in terms of their properties. Notice, however, that you can only create favorites manually in your favorites folder, and nowhere else within the portal.

5.8. Folders

Folders allow you to retain an overview of your portal. Thanks to a sensible thematic based order, the visitor is better able to establish connections between content, and to quickly find searched for information.

In contrast to most of the other item types in Plone, folders do not include their own editorial content. Instead, a folder contains a number of other items. In this way, folders and subfolders group together items from the portal and organize the potentially large number of these into comprehensive content units.

Folders have various templates for the view display, which you can switch between using the "Display" menu:

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

These views are generated automatically by Plone. In addition, you are able to select an item to be the default-view page in a folder, by selecting the "Select a content item as default view" command in the display menu. You then come to a form with which you can choose from among the items in that folder. The chosen item's view display will then be used as the display of the folder itself. In the contents display of the folder, the default-view page is highlighted in bold type.

Figure 5.16 on the next page shows the standard view display of a folder. For each entry, it includes the title, description, a link to the creator's author page, and the date of the last changes made. The title is a link to the corresponding item. The only 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.
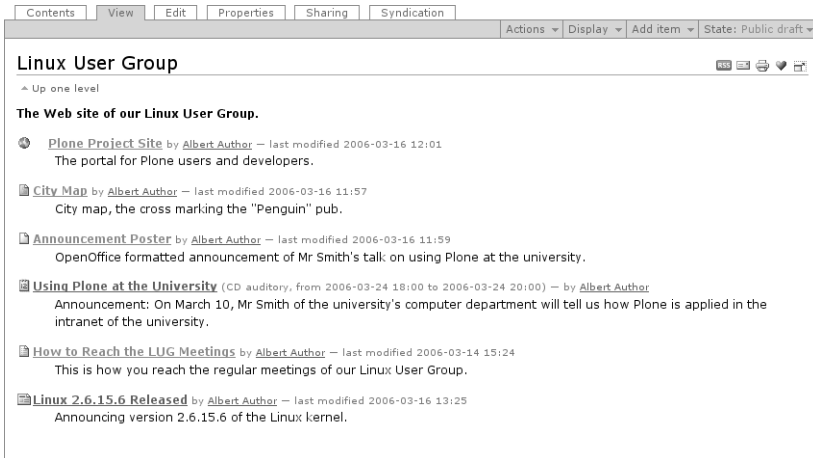
Figure 5.16.: Standard view display of a folder

Overview lists such as these, usually blind out items which have a "Private" review state. You will only be able to see such private items if they belong to you or reside in your member folder.

If you are allowed to manage a folder, you will also have access to its contents display. This can be reached using the "Contents" tab. If the folder has a default-view page, the tab will also be available in that item's different displays.

The contents display for a folder is made up of a table, which contains links to all of the items to be found in that folder, along with an itemization of their most important properties. In the contents display, you can manage the items, copying or deleting them, for example (see page).

Plone can release folders for syndication. For this purpose, each folder also has an additional display view, in which you can control its syndication behavior. That will be described in more detail on page .

5.9. Smart Folders

You might often want to consolidate related items in the portal, by creating a news overview, or a list of all items containing a certain keyword, for example. An item can be relevant to a number of such overview lists. Because each item in the portal occupies a single place within the portal's folder hierarchy, however, folders are not well suited for grouping items together in various categories.

Instead, you can use smart folders to create a wide variety of overview lists as you please. These displays are independent from the folder hierarchy of the portal. You might think of a smart folder as being a ready-made search function; its display revealing an overview of the search results.

There are a number of templates for the display view of smart folders. Using the "Display" menu, you can switch between them:

- · Smart folder view
- · Standard view
- · Summary view
- · Tabular view
- · Thumbnail view

(An example of the smart folder view display can be seen in Figure 5.17 on the opposite page.)

A smart folder can contain subfolders in order to refine the search, or to group together related items. In that case, the smart folder view display will contain links to its subfolders.

Similarly to a folder, a smart folder does not have any editorial content of its own, but first becomes relevant in connection with other portal items. How to consolidate particular items in a smart folder and its subfolders using search criteria will be explained on page 106.

The edit display of a smart folder serves the configuration of the smart folder's view display. To start with, you will be able to define
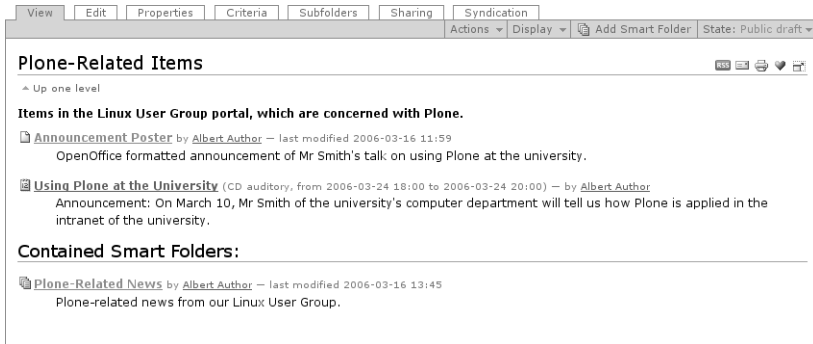
Figure 5.17.: Smart folder view display of a smart folder

the maximum number of entries which can be shown in the overview list at the same time. Select "Limit search results," and enter the desired item number into the field below. If more items are found than the number entered here, the list will be spread out across multiple pages. At the top and bottom of the lists, you will then find links to the additional pages.

If you do not limit the search results, or if you enter the number "0" into the box, all items matching the search topic will be presented on one page.

Additionally, you can choose whether the items should be presented in a list or in a table. A list displays the item's title and description, as well as a link to the item itself. In a table, the columns can be arranged as desired. A column can provide information about the item's metadata entries, the size of the item, or its review state. The default settings can also be adjusted to display the item title only, this serving as a link to the actual item.

In the edit display of subfolders, you can also decide whether or not criteria from smart folders should be inherited by the their subfolders. More over this can be learned on page 110.

6. Members, Roles and Groups

A Plone portal is an environment which presents items to its users for viewing. In addition to that, some users are actively involved in publishing content. They are known to the portal as being members. Members retain individual "privileges," or authorization, in their work with Plone items, and can be arranged together into groups.

6.1. Members

Each member has a user name with which they are clearly identifiable in the portal. Each user name may only be assigned once within a portal.

6.1.1. Logging In

In this book, we are assuming that you have received your user name from your portal's administrator. He or she has then also given you a password. In as far as you have already completed the tutorial on page 35, you will have already changed your password once as well.

After you have logged in with your user name, and identified yourself with your password, you are able to access certain areas in the portal. The user interface adjusts itself according to your member settings, then offering additional functions.
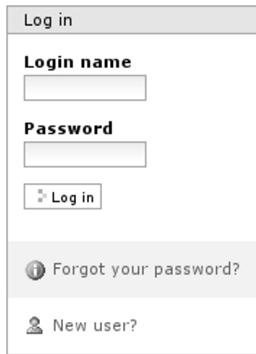
Figure 6.1.: Log in portlet

Forms and Portlets

You can log into the portal in different ways. One of these is by using the log in portlet (see Figure 6.1), which can be seen by anonymous visitors on any portal page. Another is with the "Log in" link on the personal bar, which leads anonymous users to a log in form.

Both the portlet and the log in form contain input fields for your user name and password, as well as a button for logging in. They also have links to two other forms: under "Forgot your password?," registered users can have their password sent to them at the e-mail address which they have entered. The join form serves to register new members into the portal. In the event that the administrator has deactivated registration for new members, the link to the registration form will not be shown.

6.1.2. The Member Folder

When logging into the portal for the first time, Plone generates a member folder for you. If you are logged into the portal, you can reach your member folder on the personal bar under "My folder," or by going to the members area.

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

Member folders are just as visible to the public as any other content in the portal. You can, for example, find the folders belonging to other members through doing a search in the members area (see page 88).

In your own folder, in addition to the publicly viewable items, you can also see items which carry the "Private" review state, meaning that they are hidden from other members and unregistered users.

If you use favorites, Plone will add a favorites folder for you. It can then be found in your member folder under the title, "Favorites." A favorite item will be created in this folder for each favorite added.
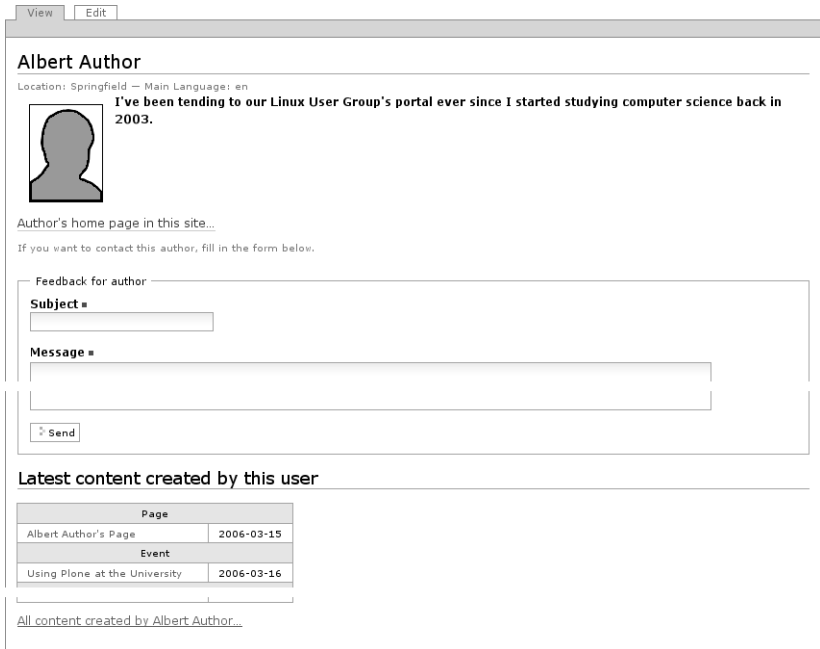
6.1.3. The Author Page

In order to give other Plone users an overview of who you are and what you are doing in the portal, Plone generates an author page for you (see Figure 6.2 on the following page). You can reach your own author page by following the link in the personal bar, titled with your name. Portal item displays, as well as some overview lists, contain links to the author pages of the respective items' authors.

The author page is always kept current by Plone, and contains the following information:

- · your name
- · your location and main language
- · a portrait and biography
- · a link to your home page in the portal
- · a feedback form
- · a list of latest content created

6. Members, Roles and Groups

Figure 6.2.: Example of an author page

You can keep this information up to date by changing entries in the edit display of your author page.

With the feedback form, visitors are able to take up contact with you. The form forwards messages to the e-mail address which you enter in your member preferences, anonymous visitors not being able to view the address. A message is made up of a subject entry and text.

The list of latest content is sorted by item types, and contains the title and modification date for each created item. The title acts as a link to the corresponding item. In addition, a link to all items which have been created by you can be found at the bottom of the list. In
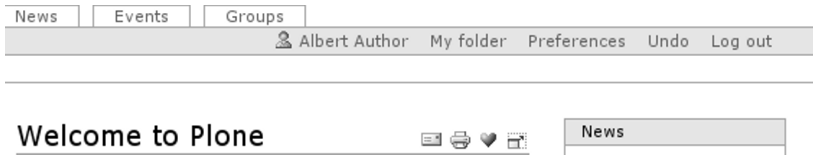
Figure 6.3.: A logged in member's personal bar

doing this, Plone initiates a widened search, sorting the search results by modification dates, beginning with the latest.

6.1.4. User Actions

Plone provides members of a portal with functions which other users are not able to access. These include the member folder, customization of the interface, and the ability to edit portal content.

In order to facilitate briskly paced work, you will receive direct access to a number of actions on the personal bar after logging in (see Figure 6.3):

Your author page: This link, which is titled with your name, takes you to your author page.

My folder: Here is where you can reach your member folder. Your user name, which can be found to the left of "My folder," also serves as a link to your member folder.

Preferences: This option allows you to edit your member settings for the portal and to change your password.

Undo: Plone gives you the option of undoing changes which you have made to items. This option leads you to an overview list of the last changes made.

Log out: This is where you can log out of the portal. After doing so, you will be viewed by the portal as an unknown user, no longer

having access to the additional functions for portal members, until logging in again.

6.1.5. Personalizing the Portal and Changing Passwords

You can customize your Plone portal. This means two things:

- · You can adjust Plone to fit your personal preferences. Your settings will be activated immediately, and will be retained after logging out.
- · The portal saves information about your person, which appears, for example, in the Plone generated author page. You are free to edit this information.

The "Preferences" option first links you to a page where you can decide between doing either of these things.

Changing Your Password

If you choose "Change password," you will be asked to verify your old password, and then to enter the new desired password twice. The second entry serves to rule out any typing mistakes, as you will not be able to see the letters typed.

Personalization

If you follow the "Personal preferences" link on the Plone preferences page, you will be able to edit and adjust your member data as well as a few predefined settings controlling Plone's behavior. The form reached here is also the edit view of your author page.

Your member data includes the following entries:

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

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.

Main language: Your native language.

Biography: A few sentences about yourself and your work. This text will be used to present yourself on the author page.

Portrait: Here is where you have the possibility of uploading a portrait of yourself, which will be shown, for example, in the members list. Choose an image which is 75 pixels wide, and 100 pixels high; Other formats will be distorted in their presentation.

To delete a portrait which has already been uploaded, select "Delete portrait."

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

Content editor: Here, you can choose which content editor you would like to use to edit the body text on your pages. There are two possibilities:

· Kupu is a convenient editor. You can format your text with it directly, seeing just how it will appear later in Plone. Most users prefer using Kupu.

· The normal form-editor is a simple multiple-lined input field, and is supported by every Web browser. With it, you can enter plain text, structured text, or HTML.

Listed in searches: When this option is checked, other users in the portal will be able to find you using the member search function. This option does not determine whether or not your items or folders are visible to the public.

Edit short names: Select this option if you would like to have the ability to change the short names in the edit display of items. Turn this option off if you prefer having a more streamlined appearance to the view displays. In that case, you will still be able to 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 allowed for short name editing.

6.1.6. Member Searches

The member search function can be reached using the "Members" tab. Using this function, you can search for other portal members using the following criteria:

Name: Enter the user name of the member here. You can also search using a word or part of a word.

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

Last logged in: Here, members who have not been logged into the portal for a long period of time will be left out of the search.

Not logged in since specified time: Use this option to reverse the effect of "Last logged in." In this way, you can find members who have not been logged in for a longer period of time.

Groups: In selecting a group here, you can limit your search to members of that group.

All search criteria are implemented simultaneously, and only members who match all of the criteria will be shown in the results. Criteria which have not been specified will be ignored in the search.

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

6.2. Roles

Not every portal member has full access to every item in the portal. As a matter of fact, Plone is very precise in differentiating between which users in which areas of the portal can add, edit and publish which items, for instance.

In order to ensure clear and efficient management of privileges and restrictions, there are roles. A role in Plone correlates with an area of responsibility in the portal. It distributes the privileges required to carry out the corresponding tasks. Whoever, for example, is responsible for reviewing items before allowing their publication in the portal would be given the "Reviewer" role, and would thereby have the ability to publish items.

When becoming a member of a Plone portal, you automatically receive one or more roles assigned to you. These roles are valid throughout the entire portal. You can neither acquire further roles on your own, nor give up any which you have already obtained. Your administrator, however, can give out roles or retract them at any time.

6.2.1. Standard Roles

Each Plone portal recognizes at least four roles:

Member: This role is assigned to each new member throughout the portal. It grants privileges to take part in discussions over items, and to undo some changes.

Reviewer: A reviewer may publish visible and submitted items, turn down submitted items, and return already published items to their owners. In addition to that, a reviewer may edit submitted items.

Owner: This role is always assigned locally. It gives privileges – depending on the review state of the item in question – to edit content and properties, and to administer the assignment of

local roles. Owners can submit items for publication. When dealing with folders, they are free to add and delete subfolders and items within them. An item can be hidden by its owners from other members, while keeping it visible for themselves.

Manager: A manager retains all privileges held by members, reviewers, and owners. In addition, he or she may adjust the settings of the portal. Your administrator has the manager role.

Whereas each item always has exactly one owner, the owner role for one item can be given out to as many portal members as is desirable. The original owner is the member who created the item in question. When Plone is accordingly configured, however, a manager can re-assign ownership at a later time to another member.

6.2.2. Local Roles

Not only can members of a portal have roles assigned which apply throughout the portal, but also locally for single items and areas of the portal. There could be, for instance, members who are reviewers only in certain parts of the portal.

If you want to carry out a certain task for which certain privileges are needed, one of your roles must be able to provide that authorization. If the task to be carried out does not apply to a specific item, only the roles which you may use throughout the portal will be taken into account. If privileges are needed for accessing a certain item, the local roles which you have will also be taken into account.

Local roles can only be assigned by owners or managers of an item. It is not possible to acquire local roles independently. In the same way, local roles cannot be given up independently; only a manager or owner may withdraw them.

Local roles for a folder are also valid for the folder's content: they are inherited. If you were the reviewer for the "Linux User Group" folder in the portal used as an example in this book, you would also be the
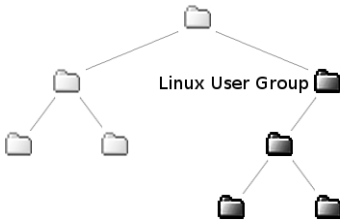
Figure 6.4.: Inheritance of local roles
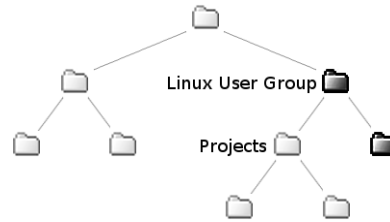
Figure 6.5.: Interrupted inheritance of local roles

reviewer for all of the subfolders and items in that folder. Figure 6.4 illustrates this in context; In this example, you have taken on the reviewer role for the darker folders.

The inheritance of local roles can be interrupted for single items. With such an item, only the local roles which have specifically been given out for that item are taken into account. In our example, the inheritance of a folder entitled, "Projects," which lies in the "Linux User Group," has been interrupted. You are therefore no longer automatically reviewer there; neither for any of the items in the "Projects" folder, nor for any of its subfolders. Refer to Figure 6.5 for an illustration.

6.2.3. Sharing Item Display

If you are the owner or manager of an item, you will have the "Sharing" display at your disposal. That is where you can manage the local roles of other members. Assigning roles to other members means sharing responsibility for the items in question. In this way, you can delegate tasks to your co-workers.

6. Members, Roles and Groups

Figure 6.6.: Sharing display of an item, upper part

The sharing display is made up of four sections:

· Current assigned roles
· Assign roles to users
· Assign roles to group
· Advanced settings

Current Assigned Roles

The overview table for current assigned roles (see Figure 6.6) lists all members and groups which have any kind of local roles for that item. With each entry, you can see which local roles a member or group has inherited, and which have been directly assigned for that item. If the inherited roles have been highlighted in gray, the inheritance has been interrupted, and the inherited roles are not applicable to the current item. They are simply shown to provide information, in that case.

You can use this overview chart to withdraw local roles which have been acquired directly for that item from members or groups. To do this, select the appropriate entries, and activate the "Delete selected roles and user(s)/group(s)" button located below the table. Notice that you are not able to select the entry displaying your own permission information. That is because it is not possible to withdraw your own roles.

The "Assign selected roles to selected user(s)/group(s)" button allows

Figure 6.7.: Sharing display of an item, middle part

you, in certain cases, to assign new local roles more easily than is normally the case. If you have been assigned to roles other than "Member," or "Owner," you will see a list between the table and the assignment buttons, with which you can choose between one or more of these roles. When you select entries in the table, and activate the button, members or groups will be assigned to the new local roles.

Assign Roles to Users

In the second section of the permissions form, you can assign local roles to members. As the amount of members in a portal can be extensive, you should first limit the number of relevant users by performing a search using member names, e-mail addresses, or names of groups (see Figure 6.7, left). Enter the search term, and activate the "Search" button. If you leave the search field empty, you will receive a list of all portal members.

Select the members to who you would like to assign a role, from among those who have come up in the search results (see Figure 6.7, right). Next, select the desired roles from the list underneath the search results, and activate the "Assign local role to selected user(s)" button. The list will only include roles which you yourself retain; it is not permitted to assign roles other than those.

6. Members, Roles and Groups

Figure 6.8.: Sharing display of an item, lower part

Assign Roles to Groups

To assign roles to a group, you should proceed similarly as with users. The section, "Assign roles to groups," contains a list of groups which exist in the portal, along with a list of assignable roles (see Figure 6.8). Because portals usually have many fewer groups than members, you do not need to search for applicable groups before proceeding. Select the desired roles to be assigned, choose and mark the groups to receive these roles, and activate the "Assign local role to selected group(s)" button.

Advanced Settings

The last section serves to allow or to block the inheritance of local roles for items. By default, the ability to inherit or retain local roles from the folder in which that item lies has been selected. Block this capability by unchecking the selection box, and then saving the permissions form. Inheritance of roles from higher levels will now be blocked. After doing this, the inherited assignments will be highlighted in gray at the beginning of the page. You can activate or deactivate the inheritance at any time.

6.3. Groups

Plone can organize members of a portal into groups. Groups reflect the organizational structure of the company or community operating the portal. A portal member can belong to multiple groups.

Creating groups and assigning members to groups is the job of the administrator. Plone includes two predefined groups: "Administrators," and "Reviewers."

6.3.1. Group Workspace

If your portal is configured accordingly, Plone will add a group workspace for each group. This means the creation of a folder which lies in a designated group area. The group workspace has the same function for the group as the member folder does for a single portal member.

You can reach the group workspace using the "Groups" tab, or by using the navigation portlet.

Because one of the groups in the workspace has a local owner role, all of the group members in the area will be able to add, edit, and delete items. The group workspace is therefore well suited for cooperatively preparing an item for publication in the portal.

Just as with member folders, group workspaces, along with all of their content, are openly visible. An item that has the "Private" review state and lies within a group workspace will be visible to all of the members of the respective group, but not to any other users. In addition, each member of the group has the ability to make the workspace itself private, visible, or published.

6.3.2. Cooperative Responsibilities

Plone defines member responsibility through using roles. When various users share the same tasks, it is possible to distribute the corresponding roles to each user individually. It is, however, often more effective to group the members in question together, assigning the appropriate roles to the entire group. They will then apply for each member of that group.

As an example, all employees working in the Public Relations department of a company might be responsible for updating and tending to the press releases in the company's portal. There would then be a group created entitled, "Public Relations," which, for press releases, would have the local role of reviewer.

7. Working with Items

In this chapter, you will learn how to work with items in your Plone portal:

- · Management of items as "tenants" of the folder hierarchy: adding, deleting, and moving them
- · Undoing changes
- · Publishing
- · Allowing discussions

7.1. Management

The following tasks belong to item management and will be described in this section:

- · Adding and renaming items
- · Copying, pasting, and deleting items
- · Managing multiple items simultaneously

7.1.1. Adding and Renaming

Adding Items

With the "Add item" drop-down content menu (see Figure 7.1 on the following page), a new item can be added to the current folder. This can be done with all items. As long as the item in question is not a folder, the menu will be titled, "Add to folder," and the new item will

7. Working with Items
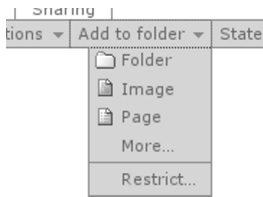
Figure 7.1.: "Add item" content action

be added to the folder in which the item currently being displayed resides.

The menu for this command contains a list of item types which can be immediately added. Select the desired item type from the menu, and Plone will take you directly to the new item's edit display. The item is then actually added to the folder after you have successfully saved the edit form. To do this, all required input fields must be filled out.

If the list of item types ends with the listing, "More…," that means the menu does not contain all addable item types. This additional listing will then take you to a complete selection of item types (see Figure 7.2 on the next page). Activate the button for the desired item type there, and you will, in this case as well, be taken to that item's edit display.

Add Menu Settings

Aside from the selection of item types, the "Add item" menu also contains a listing titled, "Restrict…." This leads you to a form with which you can configure the menu itself (see Figure 7.3 on the opposite page). The complete selection of all addable items also contains a link to these settings.

There are two things which can be adjusted in the settings display:

- · which type of items can be added to the current folder at all, and

Figure 7.2.: Complete selection of addable item types

Figure 7.3.: Settings for adding items

· which of these item types will then appear directly on the "Add item" menu.

The form begins with a selection of options: You can inherit the settings from the parent folder, use the portal default settings, or configure the add item settings manually. Only when selecting the last option will the entries for the rest of the form apply.

The "Addable types" field contains a list of all item types which Plone can add to the current folder. Generally, only some of the items which exist in the entire portal will be dealt with here; favorites, for example, can only be created in a favorites folder. You can limit the types of addable items available for the folder at hand even further by simply marking the desired types, and then saving the form.

In the last field, you can specify which item types will appear directly in the "Add item" menu. All item types available in Plone appear and can be chosen from here. Make sure not to select any item types here which you have not already selected in the preceding field, otherwise Plone will not allow the form to be saved.

Short Names and Renaming

Each item in a Plone portal includes a "short name" with which it is identified within the folder containing it.

Items carry a title, but these are not well suited for clear identification. You may want to change an item's title at a given time, or might have a reason to give two items in the same folder the same title. In order to keep these options open, Plone resorts to using short names.

The "Actions" menu (see Figure 7.5 on page 103) contains an entry named "Rename." It leads you to a form that lets you edit the short name and title of the current item (see Figure 7.4 on the opposite page).

In addition to that, if "Show short name on content" has been activated in the portal-wide site settings, and "Allow editing of short

Figure 7.4.: Renaming an item

names" has been enabled in your personal member preferences page, you will find an input field for short names in the edit display of each item. Using this, you can assign a short name to an item to be newly added, and can rename the item at a later time.

So that Plone can utilize the short names you have entered, a few guidelines must be followed:

· Short names can only contain Latin characters, digits, "`.`" and "`-`".

· Spaces and non-Latin characters, such as "é", are not allowed.

· Capital and lowercase letters are recognized as separate characters. Mixing cases should be avoided; using lowercase letters only is recommended.

The Internet address of a portal item is made up in part of the item's short name, as well as the short names for all folders in which that item resides. In our example portal, the members area is in the root folder, and has the short name, "`Members`". In this folder we find the member folder of the member named "albert": it is also named "`albert`". It in turn contains the folder, "Linux User Group", with the short name, "`lug`". The Internet address for this folder reads: ⟨`http://`*plone-address*`/Members/author/lug`⟩.

This means:

- · The short name for an item should be easily discernible, and should relate directly to the content of the item. Simple and pointed short names have two advantages: The addresses are easy to make note of, and search engines such as Google or Yahoo! rate your Web sites higher when the addresses establish a reference to the content of the sites.

- · Each short name can only be used once in each folder. Items contained in separate folders, however, may have the same short names.

- · Links to portal items created by authors, in link items or pages, for instance, will no longer function when the item's short name has been changed. Automatically generated links, on the other hand, such as in the navigation portlet, will continue to function as always.

In our "albert" member folder, for instance, no other item with the short name, "lug", can exist. In a separate folder, however, this would be entirely possible; due to their different places in the folder hierarchy, the items would be distinguishable from one another.

If you do not want to, or cannot decide on a short name for your item, a name will be chosen for you by Plone. It will try at first to use the title of the item. In doing this, characters which are not allowed in making short names will be replaced. If there is already an item of the same name in that folder, Plone will use the name of the new item along with the current date and a random number.

7.1.2. Copying, Moving, and Deleting

Not only can items be created in a Plone portal, but they can be deleted, moved to another place within the folder hierarchy, or copied. The "Actions" menu offers the following actions (see Figure 7.5 on the next page):
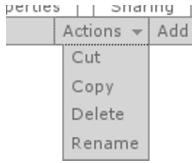
Figure 7.5.: Item organization actions

· Cut
· Copy
· Paste
· Delete

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 be available after an item has been marked within the same working session.

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_project`", if you pasted an item named, "`project`", 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 departure folder on being pasted into the destination folder.

As soon as any item is marked as copied or cut, not only folders, but every portal item will contain the "Paste" option in the actions menu. When pasting if the currently displayed item is not a folder, the marked items will be pasted into the folder in which the current item resides.

Each time an item is marked as copied or cut, Plone forgets which item was last marked. With pasting, the mark remains. This means that you can copy a marked item for a second time into a folder. If you try this with an item that has been moved, renamed, or deleted

7. Working with Items

Figure 7.6.: Contents display of a folder

in the meantime, however, Plone will indicate that it can no longer find the item.

Finally, you can also delete the current item using the "Delete" action. As a safeguard, Plone checks to make sure that you really want to delete the item. It is often possible to restore a deleted article by undoing the deletion.

Remember that, after moving or deleting an item, links to that item, which authors may have inserted into pages or link items, will no longer function.

7.1.3. Folder Contents and Folder Actions

The contents display of a folder not only offers an overview of the items residing in that folder, but also provides functions with which items can be sorted within the folder, and allows for multiple items to be managed simultaneously (see Figure 7.6).

104

Sorting

The items in a folder are not sorted arbitrarily. At first, their sorting order mirrors that with which they were added to the folder. That same order is generated in the folder view display and navigation elements.

To change the order of items in a folder, use the arrow symbols in the right-hand side column in the item list. For each entry, there is one arrow with which you can move the item upwards, and one with which you can move the item downwards in the list. Each item can be moved only one step at a time.

Folder Actions

Underneath the contents overview table for each folder, there is a row of buttons, each of which corresponds to a folder action. The respective folder actions apply to each checked item in the folder. The following folder actions are available:

Copy: marks the checked items to be copied.

Cut: marks the checked items to be cut.

Rename: gives all checked items new short names and titles. When doing this, Plone will lead you to a form similar to that seen in Figure 7.4 on page 101, but containing entry fields for all checked items. Take note of the guidelines for giving short names, listed on page 97.

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.

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

Change State: publishes the checked items together. More about this can be learned on page 112.

7.1.4. Smart Folders

Smart folders group together items from out of the entire portal which are in certain aspects related (see page 78). A smart folder is a ready-made search function; The items contained in it are the results of that search. Subfolders can refine the search, or carry it out according to specified criteria.

Search Criteria

A smart folder utilizes a number of search criteria. For an item to appear in a smart folder, it must fulfill all of the entered criteria at the same time (the criteria are connected in the search with, "and").

Each search criterion refers to a property of the items searched. These properties are referred to as fields. Table 7.1 on the opposite page lists all fields taken into account by a smart folder when performing a search. A smart folder can contain no more than one search criterion per input field.

The listed criteria differ from one another fundamentally: A title, for instance, can be searched for with a single word, whereas a date can be designated by determining the time frame in which it lies. Thus for each field, there are various kinds of search criteria; Table 7.1 on the next page outlines the allocation.

In the "Criteria" display (see Figure 7.7 on page 108), you can select the search criteria for a smart folder. The display contains:

- · a table showing the already entered criteria
- · an input field for defining new criteria
- · a selection menu for setting the sorting order

Table 7.1.: Item properties employed as search criteria in a smart folder

	Field Names	Criteria Types
Texts:	Description Searchable text Short name Title	Text List of values
Lists:	Creator State (review state) Keywords	Text List of values Select values from list
Dates:	Modification date Creation date Start date End date Effective date Expiration date	Relative date Date range
	Item type	Select content types
	Related to	Select referenced content
	Location (directory path in portal)	Location in portal

The table of available criteria displays the field to which the corresponding criteria belongs in the "Field" column. The "Criteria" column displays the kind of search criteria, and contains an entry field for its value, which might be a piece of text to be searched for, for example.

To delete criteria, check the desired criteria and activate the "Delete" button found underneath the table.

The "Add new search criteria" section displays a list of fields to be searched in the "Field name" menu, for which criteria is not yet defined. The "Criteria type" menu contains criteria which is

Figure 7.7.: Criteria display of a smart folder

applicable to the selected field. Only one new criterion can be added at one time.

The different kinds of search criteria are met depending on various conditions, and the input fields where values are entered vary:

Text: Enter some text into the box. In order for the criteria to be met, the entered text must be found within the field to be searched (such as Description).

List of values: Any number of values can be entered as seen fit. Content in the field must agree exactly with one of the values

entered.

Select values from list: Here, values are chosen from an already compiled list. Again, one of these values must find an exact match in content from the field to be searched.

Relative date: You can require that the value for applicable fields lie before, after, or on a certain deadline. This deadline is not entered using a fixed date, however, but in correlation to the point in time at which the smart folder is opened. In so doing, you can create a constantly current list of items which are less than one week old, for instance.

Three entries belong to configuring this type of criteria. In the "More or less" input box, you can decide whether the date should fall on the chosen deadline, closer to that deadline than the current date, or further away. In the "In the past or future" box, you can enter whether or not the deadline falls before or after the current date. In order to enter the current date as the deadline, select "Now." In this case there will be no discernment between past and future.

Date range: Choose two days 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 as well as a time to define.

Select item types: Select as many portal-recognized item types as you like from out of the list. The criteria is then met for each item having an item type among those selected.

Select referenced content: You will receive a list of all items published in the portal. Choose as many as you like from among these. The criteria is then met for all items which contain references to all of the selected items.

Location in site: Limit the search results to items which reside in certain parts of the portal's folder hierarchy only. In doing so,

you can allow single items, or all the content held in entire folders, along with their subfolders, to be searched.

Plone provides you with a list which can be filled with portal items. At first, the list will be empty; in order to add items to it, activate the "Browse" button found below the list. On doing so, your browser will open a second window with which you can navigate throughout the portal, selecting items to be inserted into the list. With the "Remove selected items" button, selected items will be removed from the list.

With the last section of the form, you can define the order in which the items eligible to be held in the smart folder be presented. Choose an item property by which items should be sorted, and decide whether or not they should be sorted in ascending or descending order.

Subfolders

Smart folders can also contain subfolders. These may represent independent searches, or may utilize the search criteria from the parent folder in order to limit the number of matching items even further.

To use these, check the "Inherit criteria" input box in the subfolder's edit display. If both the subfolder and the parent smart folder already contain search criteria for a certain field type, the inherited criteria will not be recognized.

As with other folders, subfolders in a smart folder can be deleted, copied, or moved. If you try, however, to paste in items other than smart folders, you will receive an error message.

The "Subfolder" display structure in a smart folder (see Figure 7.8 on the next page) is similar to that of the contents display of a folder (see page 104). There, you can rename, delete, or publish multiple subfolders simultaneously.
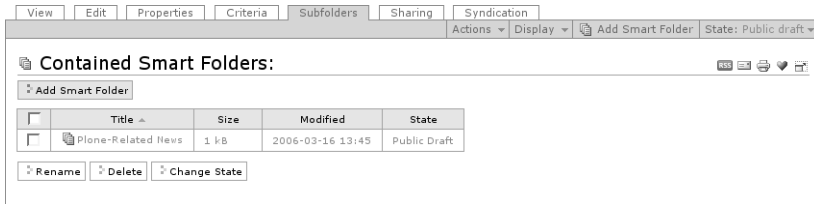
Figure 7.8.: Subfolder view display

If you move or copy a subfolder to another place in the portal, search criteria inherited from its parent smart folder will be lost.

7.2. Undo

Over the course of your work in the portal, the situation will arise from time to time that you would like to take back changes which have been made. In that case, Plone allows you to go back to an earlier stage of a particular item by retracting changes which have been made. Although this is not in every case possible, it can often be a valuable tool.

Plone keeps a record for each member of all changes which have been made to items in the portal. If you would like to recall a working step, just follow the "Undo" link on the personal bar to call up a list of past changes. If you are a manager for one or more items, the list will also contain all changes made to those items by other members.

So that modification lists do not grow beyond measure, Plone keeps a record of changes for a limited amount of time. The length of this time depends on your portal's configuration. Turn to your administrator regarding this.

For each modification, you will see which action was taken, which item was affected, and what resulted. There are always only fifteen changes shown at a time. If the list is longer than fifteen entries,

Plone will distribute it on multiple pages. You can switch between these by using the navigation elements above and below the list.

Included among the types of modifications listed are the following:

- editing the contents of an item
- editing properties and metadata of an item
- changing any other settings for an item, such as those concerning discussions
- all management tasks for an item
- any changes made to the review state of an item
- each undo carried out
- addition of portal pages to your favorites
- adjustment of your member settings
- each log in to the portal

To take back one or more changes, check the respective columns and activate the "Undo" button below the list. If the task was carried out successfully, you will receive a status report. The undone modifications do not, however, disappear from the list; instead, a new entry is created for each change undone.

Modifications which you have selected cannot always be retracted. It is unclear, for instance, what should happen when a change is undone after work has been continued on the results of that change. Furthermore, only under certain circumstances is it possible to retract changes to an item which has been deleted or moved in the meantime.

7.3. Publishing

All items in a Plone portal go through a publishing process, referred to as the "workflow," before becoming integrated into the portal and readable by the general public. This process guides the interaction between authors and editors, and gives portal members the option of defining which content should be open to the public.

Almost all Plone items behave in the same way with respect to publication. One exception to this is with folders: Their owner can make them public without having to first submit them.

7.3.1. Workflow

The publishing process, or workflow, used in Plone specifies who is able to view items in a portal. It distinguishes between items which can only be viewed by their owners, and those which can be viewed by any visitor to the portal. To this last group belong published items and items which have been submitted for publishing. Published items, in contrast to other viewable content, are declared by the reviewer to be official content of the portal, and can therefore be located using navigation.

Review State

In order for portal content to be distinguished under these terms, each item contains a review state. While an item goes through the workflow, this state is modified by authors and editors.

If you are logged into the portal, Plone displays all automatically generated links in various colors. Each color reveals a certain review state, so that you are able to get a quick overview of the status of the items in your portal.

Plone recognizes the following four review states:

Private: (red) A private item can only be seen and edited by its owner.

Public draft: (green) Items in this state can be called up by any visitor to the portal using the item's Internet address. They can be located in a search, but do not yet appear in the navigation menus. An item with the "Public draft" state can only be edited by its owner.

Pending: (orange) An item in a "Pending" state has been submitted for review by a reviewer. Both owners and reviewers may view the item, but only reviewers can edit it.

Published: (blue) Each visitor to the portal may view published items. These are listed in the navigation menus. Published items can no longer be edited.

Managers can view and edit items of any state.

State Changes

An author or editor who is allowed to edit an item, can also change that item's review state. Not every state, however, can be changed randomly into any other. Instead, there are a number of state changes that make sense within the workflow. State changes belong to those tasks which, along with actual content editing, make up the bulk of editorial work:

Make private: The owner of a visible or submitted item changes the state, making it, "Private."

Make visible: The owner of a private item changes the state to "Public draft".

Submit: The owner changes the state of a visible item to "Pending," thereby providing it to reviewers for review.

Publish: A reviewer changes the state of a visible or submitted item to "Published," thereby accepting the item as official portal content.

Reject: A reviewer changes the state of a submitted or published item to "Public draft," and at the same time rejects its being published in the portal. The author can re-submit the item for review after further modification.

Figure 7.9.: Publishing state menu

Retract: The owner changes the state of a submitted or published item to "Public draft." The item can be edited anew, and then re-submitted to review by a reviewer.

The manager of an item can apply any one of the above described state changes.

7.3.2. Tools

State Menu
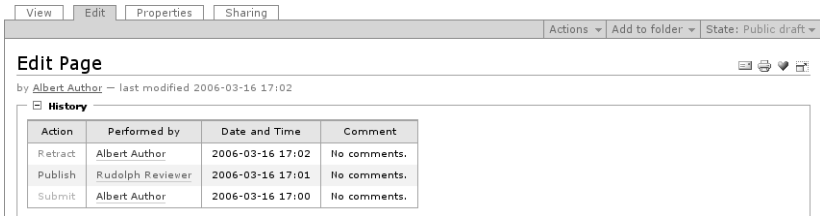
The most important tool in managing the workflow, is the drop-down workflow menu (see Figure 7.9). This belongs to the content action menus described on page 123.

The title of the menu always displays the current review state of the item being viewed. The menu contains entries for the accordingly possible state changes, as well as an entry for "Advanced."

On selecting one of the state changes, the state of the item will immediately be altered, and you will be informed as to the new state on the menu's heading. The options in the state menu will have now changed according to the new state: these are the tasks with which you can lead the item into its new review state.

To adjust the effective or expiration date in addition to the state change, or to add comments, select "Advanced" from the menu. You will come to a form with which you can publish multiple items simultaneously.

7. Working with Items

Figure 7.10.: Publishing history of an item

Publishing History

Plone creates a log for each item, which contains the changes made to the review state as well as comments on the publishing process. As soon as a change or comment exists for an item, you can view the log. The author line in the view display of each item contains a "History" plus-minus switch. If you activate this, a table will pop up showing the log (see Figure 7.10).

The table shows the following information for each entry:

- · notation of the state change
- · name of the member who carried out the state change
- · date and time the change was made
- · comments

Each portal member name is also a link to that member's author page.

The "History" switch, at the top of the frame which surrounds the table, can be used to close the publishing history window.

Review List

The Review list is a portlet which presents a list of all items submitted for publishing to reviewers (see Figure 7.11 on the opposite page).
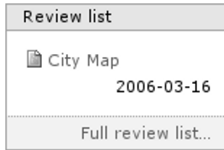
Figure 7.11.: "Review list" portlet

This gives them an overview of existing work, and provides them with quick access to items which need to be reviewed.

Each item to be reviewed is represented in the portlet with its title and last modification date. The title is a link to the item itself, and an icon shows you which kind of item is at hand. If you hold the mouse cursor over the title, you will also see a description of the item.

The list is sorted by the date of submission and begins with the item which has been waiting longest to be reviewed.

7.3.3. Simultaneous Publishing

When multiple items have related content, it might make sense to publish them simultaneously. This might include a page and the various images used on it, or multiple items which need to be published or removed from the public sphere at the same time. Simultaneous publishing is also referred to as batch publishing.

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" button (see Figure 7.6 on page 104). This will take you to the workflow form. This form's parts are described as follows:

Affected Content

The first section of the form (see Figure 7.12 on the following page) contains a list of each item selected in the folder. At first, all of these

7. Working with Items

Figure 7.12.: Workflow form, upper part

will be checked. You can reduce the number of items to be affected by removing checks from the list.

In the event that at least one folder is among the items on the list, the second section of the form will read, "Include folder items." If you check this box, the same workflow changes will be made to all items which reside in the listed folders and their subfolders.

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.

Publication Settings

The next two sections on the form (see Figure) are for entering dates effective, and expiration dates. With both of these, you can enter a date and time. To enter the date, you can use a calendar which is provided. This 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" review state has already been requested. If you choose an expiration date, from that date on, the items will no longer be treated as being published, regardless of their review states.

Following these deadline sections, comes an input field for comments, which will be added to the publication log for each item.

Figure 7.13.: Workflow form, lower part

Lastly, as with the publishing state menu, this form provides options for changing the state of the items involved. You therefore have the option of retaining a certain state for the items, in the event that you only want to add deadlines or comments. If the chosen items have different states, and a certain state change is selected, that state will simply be ignored with items to which it cannot apply.

7.4. Discussions

Comments and discussions allow visitors to a Plone portal to exchange ideas over particular items with authors and other visitors.

If discussion is allowed for an item, that item will contain all added comments at the bottom of its view display (see Figure 7.14 on the following page). Comments might deal with the item itself, or may be in response to past discussion entries. Replies are added below the comment to which they respond, and indented.
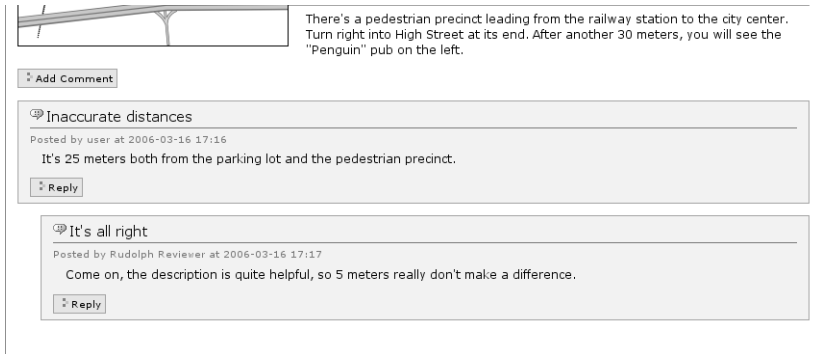
Figure 7.14.: Comments and tools for a discussion

Taking Part in Discussions

If you are logged into the portal, or if discussion has been allowed for all visitors, you will be able to add comments. You will find an "Add comment" button directly below the item, and a "Reply" button at the end of each comment. These buttons will lead you to a form with which you can add comments to an item, or reply to a certain contribution to the discussion (see Figure 7.15 on the next page).

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, providing you with an overview of all pertinent information.

In the comments form, you can enter your own subject and comments. Comments are made up of plain text. After saving the form, you will be taken back to the view display of the item. Your addition will be immediately visible.

As an unregistered user, you can take part in discussions which are open to all visitors. You can then enter your user name and password next to your contribution in the comments form so that your name

Figure 7.15.: Reply form for a discussion

will appear along with your entry. If this is not done, the contribution will be saved anonymously.

If you are not logged in, and discussion has been allowed for portal members only, instead of finding the "Add comment" button, you will find one which reads, "Log in to add comments," and which will lead you to the log in form.

Configuration

As 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 portal to allow for or prevent unregistered visitors from adding contributions.

To allow discussion for folders or smart folders, go to their properties display, and for all other items to the edit display. You will find a list of options there, where you will be able to choose between, "Default," "Enabled," and, "Disabled" (see Figure 7.16 on the following page). Select "Enabled" to allow for discussion in all cases.

Allow Discussion on this item
○ Default
⊙ Enabled
○ Disabled

[⁚ Save] [⁚ Cancel]

Figure 7.16.: Allowing discussion for an
item

For each type of item, there is a portal-wide default setting which determines if discussion is allowed for that item type. If you select "Default," you will employ this setting for the item at hand. If your administrator has not changed the original settings, they will be set to, "Disabled."

Deleting Contributions to the Discussion

If you are the manager of an item, you can delete parts of the discussion over that item. Next to the "Reply" button for each contribution in the discussion part of the view display, you will find another button which reads, "Remove." If you activate this button, the corresponding entry will be deleted immediately, without further inquiry.

When deleting a discussion contribution, Plone deletes all replies pertaining to it as well.

8. User Interface

The user interface is all that which you see as a visitor to a Plone portal in your Web browser. This chapter outlines the make up of the interface. You will receive an overview of how the information and tools which Plone offers are organized.

A Plone portal is presented in the form of HTML pages. Each of these contains, among other things, a display of a portal content item, refers to a registered member, or allows you to move throughout the portal, completing tasks.

8.1. Item Displays

The main element of almost every portal page is the display of an item. Which display options belong to an item depends on the type of item involved. You can find an outline of item displays, and a description of their content starting on page 57.

8.1.1. Tabs and Content Actions

If you are logged into the portal, you may view various displays of, or carry out management tasks for, a particular item. Plone frames the various item displays in a colored frame which includes tabs and menus (see Figure 8.1 on the next page).

To begin with, tabs which allow you to switch between item displays for which you have privileges can be found at the top of the frame.

Figure 8.1.: Display tabs and content action menus
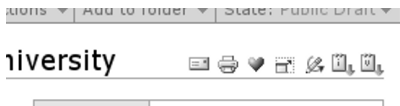
Figure 8.2.: Item action icons for a news item

Each tab is titled with the name of its corresponding display option, and the tab for the current display is highlighted.

Below the tabs, you will find drop-down menus for content actions. Depending on your privileges, you can find the following there:

Actions: Here, you can copy, move, or delete the item, as well as paste other items into the folder at hand (see page 97).

Display: If the item has multiple view formats, you can adjust them here, as well as set the default-view page for folders (see page 58).

Add item: Add a new item to the current folder by selecting the desired item type here (see page 97).

State: The title of this menu displays the current review state of the item. The menu options reflect the possible state changes (see page 112).

8.1.2. Item Actions

Along with the main title, the item displays themselves also contain icons for item actions (see Figure 8.2). Table 8.1 on the next page outlines all Plone recognized item actions. Which of these you are able to see depends on the type of the item as well as on your member preferences and privileges.

Table 8.1.: Item actions

Title	Icon	see Page
RSS feed of this listing	RSS	146
Send this page to somebody		124
Print this page		125
Add link		129
Toggle full screen mode		125
Use external editor		141
iCalendar		69
vCalendar		69

With the "Send this page to somebody" action, Plone sends an e-mail containing the Internet address of the current portal page. The icon 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 portal, 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.

The full screen mode in Plone creates more room for the main content of the portal page: the current item display. The portlets, the logo, and the site actions are blinded out. The "Toggle full screen mode" item action activates the full screen mode when it is not active, and switches it off when it is activated. The full screen mode setting stays active when switching to another portal page.

8.1.3. Status Reports

When changes are made to an item, Plone informs you over the success or failure of the attempted changes. A status report appears on the next page to be displayed. This can be found at the top of the item display, and is highlighted in color (see Figure 8.3).

8. User Interface
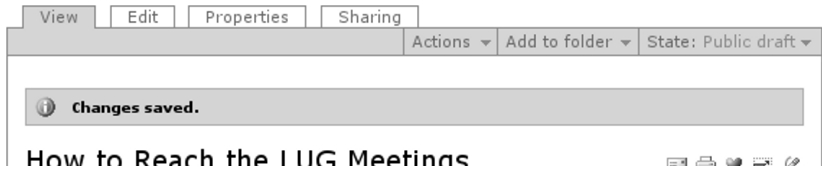
Figure 8.3.: A status report

8.2. Navigation

The possibilities for navigating through a Plone portal are manifold:

- · Movement through the folder hierarchy: navigation portlet, site map, and directory path
- · Portal-wide links: global tabs
- · Personal links: personal bar and favorites portlet
- · Item search: search field and advanced search

The personal bar is described on page . This section deals with all other navigation elements.

8.2.1. Folder Hierarchy

There are three interface elements on each page of a Plone portal which assist in moving throughout the folder ranks: the navigation portlet, the directory path, and the site map. These three elements compliment each other. The navigation portlet and the site map provide you with an overview of the portal's content, whereby the portlet emphasizes the last page to be visited. The directory path informs you over which place in the hierarchy you currently occupy.
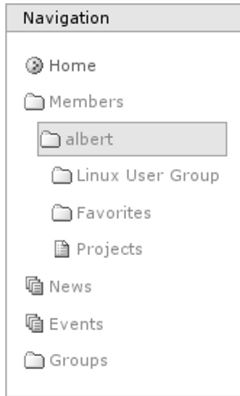
Figure 8.4.: Navigation portlet
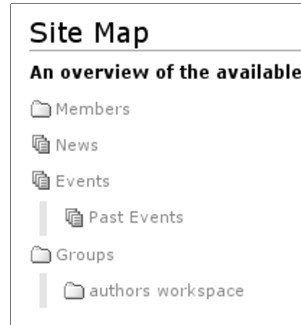
Figure 8.5.: Site map

Navigation Portlet

The navigation portlet (see Figure 8.4) displays the folder hierarchy in tree form, whereby only folders and items for which you have privileges are shown. The entry for the folder or item being visited is always highlighted in a light blue color.

Each entry in the tree is also a link to a folder or other item, and takes you to the view display of that item. The root of the tree is the portal itself: the parent folder which contains the entire content of the portal, within a hierarchy of subfolders. Its entry takes you to the home page of the portal.

Because the folder hierarchy in a large portal can become extensive and perhaps overwhelming, the tree is never shown in its entirety, but only as a selection, according to the item being viewed at the time.

Site Map

Among the site actions at the head of every portal page, you will find an option with the title, "Site map." This action will lead you to a tree map of all folders and smart folders in the portal. In addition, all items which lie directly in the root folder are listed there (see Figure 8.5 on the preceding page). Each entry serves as a link to the item or folder referred to.

Directory Path

The directory path can be understood as a guide for returning to the currently visited portal page at any time. The first element of the path is the root folder (see Figure 8.6 on the next page). Subfolders then follow, in the same order that you reach them, when navigating from the root folder to the current item. At its end, the directory path contains the current item, and sometimes, its currently viewed display as well. All listings in the directory path serve as links to the corresponding place in the portal.

8.2.2. Global Tabs

The global tabs also belong to the navigational elements available on each page. They can be found to the upper-left on the head bar (see Figure 8.6 on the opposite page) and serve as links to important places in the portal.

These links are integrated into Plone by default; see Table 8.2 on the next page. The tab for the group workspace is available only in the event that your portal contains a group workspace.

If your portal is accordingly configured, Plone will create further tabs for all folders and smart folders which reside directly in the root folder. Each of these tabs are then labeled with the title of the corresponding folder.

Figure 8.6.: Directory path and global tabs

Table 8.2.: Pre-integrated global tabs

Title	Destination	see Page
Home	display of the root folder	
Members	member search	88
News	news overview list	68
Events	events overview list	69
Groups	group workspace	95

8.2.3. Favorites

In addition to the global tabs, Plone provides you with further short-cut link options by allowing you to add your own personal favorites. To do this, Plone's favorites action must be activated in your portal.

All portal pages will then offer an item action with which you can bookmark the page at hand. The "My favorites" portlet (see Figure 8.7) lists the title of each page for which a favorite has been created. Each entry then links to the corresponding item.

The portlet ends with the link, "More...," which will lead you to your

Figure 8.7.: Favorites portlet

favorites folder. There, you can manage your favorites as you do other items; Plone adds a favorite item in this folder for each favorite created.

8.2.4. 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 utilizes a simple search field, as well as an advanced search. You will always only be able to find items for which you have access privileges.

The list of search results includes the title, percentage points reflecting relevance, the name of the owner, the last modification date, and a description for each result. An icon to the left of the title displays the item type. The title serves as a link to the view display of the item found. Lists with more than thirty results will be distributed among multiple pages. On each of these, links can be found at the bottom, connecting all pages of the list.

Search Field and Live Search

In the heading of each Plone page is a search field, in which you can enter one or more search terms. Using the adjacent button, you can start a full-text search through the titles, content, and descriptions of every item in the portal. After having performed a search, the search field will remain at the top of the search results list, containing the newly entered search term.

If live search has been activated in the portal, you will be able to see a preview of possible search results in a window below the search field while typing in your search terms (see Figure 8.8 on the next page). You can choose a result from among these by moving through the list using the arrow buttons, or using the mouse.
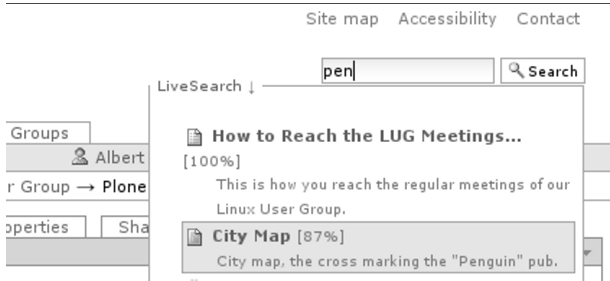
Figure 8.8.: Live search

If you enter multiple terms, Plone will find all items to contain all of those words. To search for a word group, put the group of words into quotation marks. When connecting various keywords with, "OR", Plone searches for items which contain at least one of these. (You can also connect terms using, "AND" to search for items containing all terms).

Advanced Search

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, for example, limiting the item properties to be searched, or selecting other search criteria than full-text search.

The form contains a number of sections, in each of which a criterion can be set:

- Full-text search through titles, descriptions, and content
- Full-text search through titles
- Keyword search
- Full-text search through descriptions
- Search for new items
- Search by item type

131

Table 8.3.: Portlets in the side columns to the left and to the right

Title	see Page	Title	see Page
Navigation	127	Review List	116
Log in	82	News	68
Recent Changes	64	Events	69
Related	64	Calendar	69
My favorites	129		

- Search by author
- Search by review state (for reviewers only)

For a full-text search, enter one or more search terms, which can be connected or grouped 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 the same time. Item properties which are irrelevant to the search should therefore not be selected. When necessary, just leave input fields blank, do not choose any keywords, allow all item types or review states, select "Ever" for the time frame, or "Any author" as author.

8.3. Portlets

The content of a Plone page is not only made up of the item being viewed. Each page also contains a number of portlets which can be found to the left and right of the item view display. Portlets condense information from the portal or offer access to portal functions.

This book describes Plone's portlets in terms of the functions to which they are connected. Table 8.3 contains references to descriptions of all portlets.

The portlets to the right are sometimes hidden from view in order to create more room for the main content. That happens in the member area, for instance. In full-screen mode, all portlets are blinded out. Portlets with no content are also hidden from view; it might be the case, for example, that there are no favorites or events to be shown at the time.

Many portlets contain lists of certain items in the portal, such as the latest news items. Due to space issues, 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 might be a list of all news items in the portal, for instance.

8.4. Site Actions

Plone recognizes a group of actions which do not have any connection to a certain item: the site actions. These can be found at the very top right-hand corner of every Plone page. Among the actions included are:

- · Site map
- · Accessibility
- · Contact

The site map is explained on page .

Through the accessibility link, you will be taken to an explanation of Plone's Web site accessibility functions. Accessibility means that Web sites 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 small screen displays, among other things.

Plone contributes in many ways to the availability and creation of accessible portal pages. The accessibility page deals with two aspects:

Font 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 with which you can immediately call up important places in the portal. The shortcuts are numbered from 0 to 9, and can be called up using key combinations. On the accessibility page, all access keys are described, and directions for using them with various Web browsers are given. As an example of these, you reach the accessibility page by using the 0 shortcut at any time.

With the "Contact" site action, you can send a message to those responsible for the Plone portal. You will come to a contact form, in which you can enter your name and e-mail address, as well as the subject heading and message text.

8.5. The Kupu Editor

When editing a page, news item, or event, formatted text must be entered. It might contain structural elements such as headings or lists. Kupu is a visual editor, which makes this work easy for you. It has a tool bar with a number of functions, with which you can format your text in the same way you would with a word processing program (see Figure 8.9 on the next page). In this way, you are able to enjoy the advantages of using HTML, without actually having to write the HTML code.

8.5.1. Physical Text Markup

Kupu defines various styles for text elements such as paragraphs, headings, and pre-formatted text passages. If you use these given styles, instead of using double spacing or bold or italic font, Plone
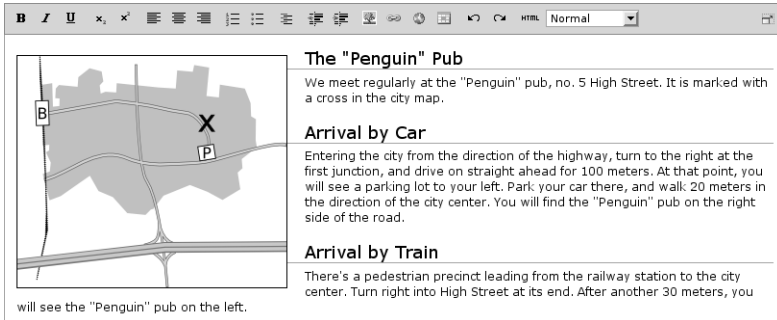
Figure 8.9.: The visual text editor, Kupu

will later be able to present your text in conformity with the rest of the portal. Choose the appropriate style using the options on Kupu's tool bar.

8.5.2. Formatting Text

The row of icons begins with a set of formatting functions. From left to right, you can see the following:

- bold and italic script
- underlining
- sub- and superscript
- left justified, centered, or right justified
- numbered, unordered, and definition lists
- out- and indent

If you keep the mouse cursor over an icon for a short time, a short description of the function will appear, along with that function's keyboard shortcut.

If you have highlighted a part of your text, the formatting function activated will be applied to that portion of text; otherwise that function

135

will be applied to all text which follows.

8.5.3. Non-Text Elements

The next icons in this row are dedicated to elements other than text:

- images
- links to portal items and to Internet resources
- tables
- deleting an image, link, or table

The functions used to insert images, links, and tables open up a window below Kupu's tool bar. There, you can pick out images or link destinations, or set up a table. For as long as this window is still visible, other Kupu functions will not be available. You can close any of these windows by simply activating the "OK" button, thus incorporating the new element into the text, or by activating the "Cancel" button, thereby discarding it.

You will only see the icon for deleting an element when typing directly near an image, link, or table. If you activate this button, the element will be deleted.

Images

The window for inserting an image is shown in Figure 8.10 on the opposite page. It is made up, for the most part, of three parts: To the left, you can choose whether you want to search for the image in the entire portal, in the current folder, or among the last items to be modified. In the middle field, you will see a list of identified images, and can also use the list to move around throughout the folders in the portal. In addition, to the upper right of the window, there is a search field which can be used to locate images in the portal.

When selecting an image from the middle field, Kupu will show a preview of it in the right-hand window area. You can enter an
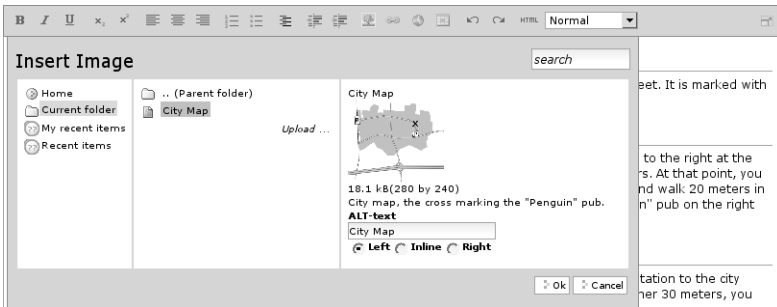
Figure 8.10.: Inserting an image with Kupu
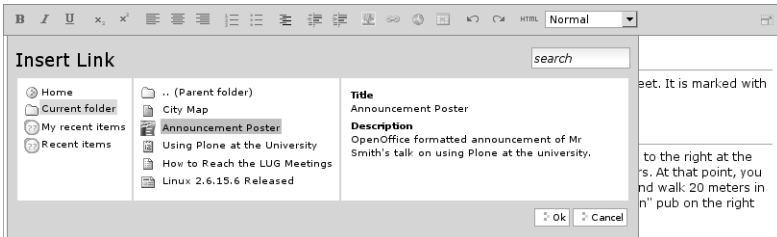
Figure 8.11.: Linking to a portal item with Kupu

alternative text there, as well as decide whether the image should be inserted to the left or right, or into the current cursor position. The alternative text should be constituted in a way which could replace the image as information.

Links to Portal Items

To insert a link into a portal item, proceed in the same way as with the selection of an image. Select the item to which you would like to link in the "Insert link" window, which is reached through the "Internal link" button (see Figure 8.11). The middle field in this window shows items of all types. Once again, the right-hand field contains a preview
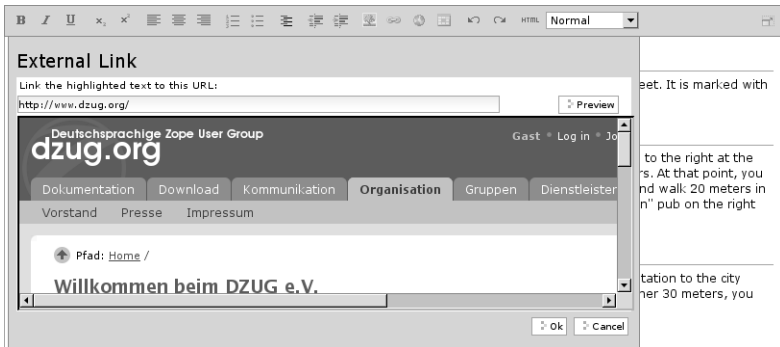
Figure 8.12.: Inserting an Internet link with Kupu

of the item, this time made up of the title and description of that item.

If you have just highlighted a portion of text in Kupu, this will be made into a link to the selected item after implementing your decision. If no text has been highlighted, Kupu will insert the title of the item chosen as a link at the current cursor position.

Internet Links

Obviously, Kupu cannot provide you with a list of links to resources outside of the portal to choose from. Instead, simply enter the desired address directly. Kupu will then show you a preview of the link destination; an example is shown in Figure 8.12.

For an Internet link, a complete address is required; Web site 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.

In this case as well, Kupu will turn highlighted text into a link after you have confirmed the entered address. If no text has been
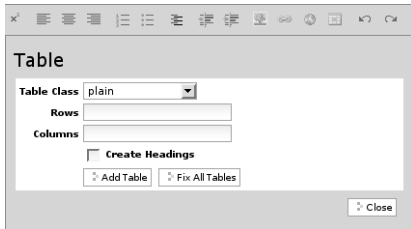
Figure 8.13.: Creating a table with Kupu
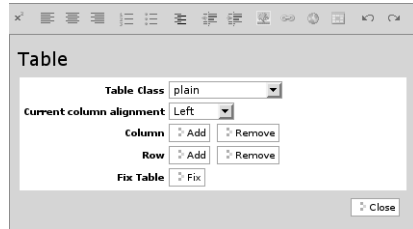
Figure 8.14.: Editing a table with Kupu

highlighted, Kupu will insert a link made up of the Internet address itself.

Tables

If you would like to insert a new table into your text, you must first let Kupu know how many columns and rows it should have, and whether or not you would like to have table headings with titles for the columns. These options can be entered in the tables window in Kupu (see Figure 8.13). With the "Table" button, you create an empty table which is inserted at the position of the cursor. After having done that, you can then fill the table out, and adjust the headings of the columns.

To change an already existing table, open Kupu's table window while working on the table. It contains buttons with which you can add or delete columns or rows, and determine the placement of text in the table's cells (see Figure 8.14).

8.5.4. Additional Functions

Finally, Kupu offers a few further functions, which apply not to the formatting of your text, but to your work with the visual editor:

8. User Interface

- undo and redo changes
- edit HTML code
- full-screen mode

The undoing and redoing of changes applies only to text being cur-
rently edited in Kupu. It has nothing to do with the Plone function
for undoing changes made to portal content, which you can find in
the personal bar.

The icon for the HTML view causes the HTML code generated by Kupu
to be shown in place of the formatted text in the editing window.
The variety of structure elements, the text formatting icons, non-text
elements, and undo and redo will all be blinded out. You can now
edit the HTML code just as with any normal text field in your browser.
The edit HTML code icon will then lead you back to the formatting
display of your text, so that you can continue to use Kupu's word
processing capabilities.

If you switch to the full-screen mode in Kupu, the editing window
will take up the entire space of your browser. Using the same icon,
you can leave full-screen mode again, so that Kupu is once again an
element of the edit form for your item. Kupu's full-screen mode has
nothing to do with Plone's full-screen mode, which hides the portlets
and some elements of the page heading from view.

9. External Access

Access to a Plone portal is achieved primarily by making use of the World Wide Web. Visitors, authors and editors work from their desktop using a Web browser, which exchanges data with the portal using HTML, or "Hypertext Markup Language."

A Plone server recognizes more data transfer protocols than just the World Wide Web. This allows for programs other than Web browsers to be used to review information in a Plone portal, or edit items, for example. This is known as external access.

In certain circumstances, external access is dependent on the attributes of your network. If problems occur, therefore, you should contact your administrator, who will be able to help in configuring the system, taking local conditions into account.

9.1. External Editor

Plone supports the use of external programs, such as office applications, image editing programs, or programs used for editing PDF files. This allows for easy and efficient editing of items, using the appropriate programs available in your computer. A good deal of content will be editable only in this way, as possibilities offered by entry forms in a Web browser are in fact somewhat limited.

In order to use the external editor, your computer must first be appropriately configured. Contact your administrator in dealing with this matter.

Figure 9.1.: Locking of an item during external editing

9.1.1. Usage

All content items can be edited using an external editor. To do this, use the "External editor" item action. This causes your Web browser to launch an appropriate program on your computer and hand the content to be edited over to that program. You can then work on the document, making changes as always. When you save the changes made, they will also be applied directly in Plone.

It is clear how to edit some item types. For example, an image manipulation program is started to edit an image. There are cases, however, where there is no such correspondence. In such cases, Plone creates a text file which you can edit with your favorite text editor. Plone interprets your changes according to the item type: The text file created for a link item contains a line with the target address, for example. If you change that line, Plone will change the link's target.

9.1.2. Locking and Exclusive Access

For as long as you have an external program open while editing an item, access to editing that item will be locked to other parties. On closing the program, the lock will be lifted. You can recognize locked items by the lock icon which appears in the author line in the item's displays (see Figure 9.1).

In addition, the edit display will contain a notice announcing the lock, and the "Save" button on the edit form will be deactivated for the

duration of the lock. The "External editor" item action is not available for locked items.

9.2. FTP

The possibility of accessing portal content in various ways is especially interesting for the import and export of large amounts of data. In this case, you can address Plone using FTP, or File Transfer Protocol.

When connected to a Plone portal using FTP, you will see portal items as folders and files, just like those you know from working with your computer. You can download items as files, work on them on your desktop, and then upload them back into the portal. This allows you to edit images and office files, for instance, in a normal way. Even with item properties, you can have FTP access: these are visible as text files.

With FTP access, although you are able to see items as folders and files, these do not really exist on the Plone server. In particular, there is no way of directly accessing the server's file system. The idea is more to provide a further display option, alongside those which have already been explained and can be viewed in your Web browser.

9.2.1. Requirements

In order to access a Plone portal using FTP, you need an FTP client. An FTP client is a program on your computer which supports FTP. Contact your administrator if you are in doubt about having such a program, .

With Windows 2000/XP as well as a number of other desktop systems, FTP can be integrated into the system's data-manager, such as Explorer, for example. In this case, you do not need any additional

client. You will, instead, see the content of the portal as if you were working in your own computer's system.

9.2.2. Establishing a Connection

To establish an FTP connection, you need the FTP address for your portal, along with your user name and password. Ask your administrator for the address. He or she can instruct you on how to apply the information with your FTP client.

As soon as the connection has been made, you will receive an overview of the folders and files which your portal offers in the FTP display. For the most part, it will reflect the structure and content of the folders in the portal. The portal's root folder contains some entries which are of a technical nature, and which so far, have been kept hidden from view in the Web display. We recommend ignoring these entries.

9.2.3. Downloading Files

Images and files in a Plone portal can be downloaded as normal files using FTP, though only the actual image or file content will be transferred. Metadata, security settings, and workflow information will not be viewable.

Other items, such as pages, news items, events, or links do not actually make up files as such. Just as when working with the external editor, you will receive a text file for such items. It includes the main body of text, if any, as well as a line of text for each additional content and metadata field. An example of the text file received for an event can be seen in Figure 9.2 on the opposite page.

There are also items which FTP cannot access, but which still can be displayed in the FTP folders. If you try to download one such item as a file, you will receive an error message from the FTP server which

```
id: using-plone-at-the-university
title: Using Plone at the university
excludeFromNav: False
subject: Convention
description: Announcement: On March 24, Mr Smith from the university's IT department will tell...
contributors:
creators: albert
effectiveDate: None
expirationDate: None
language:
rights:
creation_date: 2006/02/08 16:48:47.156 GMT+1
modification_date: 2006/02/09 11:28:30.480 GMT+1
startDate: 2006/03/24 18:00:00 GMT+1
endDate: 2006/03/24 20:00:00 GMT+1
location: Small IT auditory
attendees: Mr Stephen Smith
   Linux user group
   anyone who'd like to come
eventType: Convention
eventUrl: http://www.plone.org/
contactName: Albert Author
contactEmail: albert@example.com
contactPhone: +12345
relatedItems: d20c93c23de82123cc25bd954db3a6fe
allowDiscussion: None
Content-Type: text/html
```

What	Convention
When	2006-03-24 from 18:00 to 20:00
Where	CD auditory
Contact Name	Albert Author
Contact Email	✉ albert@example.com
Contact Phone	+12345
Attendees	Mr Stephen Smith, Linux User Group, anyone interested
Add event to calendar	📄 vCal (Windows, Linux) 📄 iCal (Mac OS X)

```
<p>Following an invitation by our Linux user group, Mr Stephen Smith will speak about...
```

Figure 9.2.: FTP text and Web display for an event

reads, "Error opening file." Usually, the file size of such entries will be shown as 0 bytes.

9.2.4. Uploading Files

Downloaded files can be edited and then uploaded back into the portal. The content of an image or file item will be replaced by the uploaded file. With other item types, Plone evaluates the uploaded text files, and then updates the content and metadata fields described in the file.

Information which should not explicitly be changed is retained when uploading. You do not, for example, need to worry about the title being replaced when uploading an image.

145

Table 9.1.: Correlation between files and item types

Convention	Item Type
Text file	page
Image file	image
File name ends with, ".news"	news item
File name ends with, ".url" or ".link"	link
Other files	file

9.2.5. Adding New Items

You can also add new items in Plone using FTP. To do this, upload a file with a still unassigned short name. Plone will recognize which type of item has been added from the file type. Table 9.1 outlines the correlation between items and their file types and file names.

9.3. Syndication

Syndication means, the sharing of constantly changing information by various parties. For example, through syndication, messages from a news source can be displayed almost simultaneously in other Internet portals, or at your workplace as a news ticker. In the same way, you can find out about changes made to content in a portal without having to visit the portal regularly yourself. Plone uses syndication for the latter purpose.

9.3.1. RSS Feeds

Technically speaking, syndication means that the information to be distributed must be made available in machine-readable form, as 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 text contains a limited number of news items in a standardized format, so that a program can analyze the files according to their title, summary, Internet address etc. This information can then be used, for example, to display a list of items. The program keeps the list updated by regularly calling up the RSS feed.

9.3.2. Syndication in Plone

Using syndication, Plone can report on changes made to content in single folders. If syndication is activated in your portal, you can decide for each folder whether or not an RSS feed with announcing the folder's current items should be offered. Items in subfolders will not be included in those reports. If syndication has been activated for them, they will have their own RSS feeds.

You can reach the RSS feed for a folder using the "Syndication" item action, which can be found in the folder's contents display. The action is simply a link to the Internet address of the feed. Along with the content of folders and smart folders, Plone can also syndicate search results. When carrying out a search, there will be a "Syndication" icon at the top of the list of results, which acts just as the syndication action for folders does. This icon links to an RSS feed with a continually updated list of search results.

An RSS feed constitutes what is commonly referred to as a "channel". The channel reporting on a Plone folder is titled after the name of that folder. In addition, the channel has a description, an Internet address, and a logo. For these, the respective properties of the folder are used.

Along with a title, description, and Internet address, each announcement includes entries for the creator, author, copyright, and publication date. This information is taken from the properties and metadata of the respective Plone item.

147

9. External Access

Figure 9.3.: Syndication display

9.3.3. Syndication Item Display

In the event that syndication has been activated in your portal, each folder will have an additional "Syndication" tab. This correlates to an item display in which you can edit the syndication properties for that folder.

Syndication must be individually activated for each folder. That is why the syndication display is at first made up of a single button which reads, "Enable syndication." After activating this button, the RSS feed for that folder can be called up.

After enabling syndication, the syndication display will contain a number of form input fields (see Figure 9.3). At the top of the form,

148

you will find a button with which syndication for this folder can be disabled at any time. Note that all syndication settings for that folder will then be lost, and will need to be readjusted on reactivating syndication.

Two fields follow, in which the RSS feed's channel title and channel description are listed. These correspond to the title and description of the folder itself.

In the following three areas, you notify the channel's readers about when and how often they should call up the feed. The first two entries define the frequency. Choose a unit of time, and decide how many of these units should lie between two call ups of the feed. In the third field, enter a time point which will serve as the start point for the periodical updates. If you choose, "weekly," "2," and the date of a certain Tuesday, for instance, you will thereby be recommending the readers of your channel to call up an RSS feed every second Tuesday.

The Plone folder RSS feeds are updated to the current state on each call up. Therefore, it is in no way advisable to call them up all too often, as the portal server would thereby be unnecessarily burdened. On the other hand, communications can be missed if the channel is too seldom reviewed, as a feed only contains the latest communications.

In contrast to programs which regulate the frequency of RSS feeds, authors and editors can surmise how often is appropriate to update the feed for a specific folder in their portal. With the entries described here, you make recommendations, which are passed on in the RSS feed itself, together with the channel data and items.

In the last entry field, you finally decide on how many items should be contained in an RSS feed. Usually, this is from about ten to twenty. However many more items a feed contains, the less frequently it should be called up.

Appendix

A. Notes for Administrators

This appendix should provide you with information over which settings should be activated in a freshly installed Plone portal, in order to provide you with all of the functions described in this book. It also contains notes on client-programs for external access. The appendix is in no way thought of as a comprehensive guide for administrators of a portal.

All further information lies outside of the realm of this book. An installation manual for Plone is included in the software package. Because entries such as the portal address for access over HTTP and FTP depend entirely on the particularities of your network, we do not deal further with these subjects here.

You can find Plone sources as well as complete packages and installation routines for various operating systems at ⟨`http://plone.org/products/plone/`⟩.

A.1. Settings

The following settings apply portal-wide, and should not be confused with thematically related member settings. If you possess the manager status, you can reach the Plone configuration page through the "Site setup" link, found among the site actions.

Short Names

By default, the item edit display contains no input field for short names. So that you can edit short names, make the following settings:

A. Notes for Administrators

- · In the site setup configuration menu, select the "Portal settings" option.
- · Check "Yes" in the "Show short name on content?" dialog, and save the form.

Group Workspace

The Group workspace must first be activated. After doing this, Plone sets up the group space and then generates an independent folder for each newly created group. Proceed as follows:

- · Switch to the ZMI (Zope Management Interface).
- · Select the `portal_groups` tool from out of the root folder.
- · Activate the "Turn workspace creation on" button.

Favorites

The "My favorites" portlet is no longer activated from the start with Plone 2.0.5. If you would like to use it, insert it manually.

- · Switch to the ZMI (Zope Management Interface).
- · Activate the "Properties" tab.
- · Type "`here/portlet_favorites/macros/portlet`" on one line into the `left_slots` property, and save the form.

Starting with the Plone 2.1 version, the "Add to favorites" item action is also disabled by default. Enable the action if you want to use the favorites portlet:

- · Switch to the ZMI (Zope Management Interface).
- · Select the `portal_actions` tool from out of the root folder.
- · In the "Add to favorites" dialog, check "Visible," and save the form.

Syndication

While the syndication properties for each item have to be adjusted individually, syndication must first be allowed portal-wide, and the "Syndication" item view must be made visible.

· Switch to the ZMI (Zope Management Interface).

· Select the `portal_syndication` tool there.

· Check "Visible" in the section dedicated to the "Syndication" action, and save the form.

· Activate the "Properties" tab in the tool's dialog.

· Activate the "Enable syndication" button.

Lowercase Lettering

We recommend deactivating the consequent use of lowercase letters on headings of tabs, buttons, and similar elements. The omission of capital letters is purely a design decision.

· Switch to the ZMI (Zope Management Interface).

· Select the `portal_skins` tool there, and continue there to `plone_styles/base_properties`.

· Activate the "Customize" button to be able to adjust the portal's presentation style properties to your liking.

· You will now see an editing form for the properties. Set the value for the "textTransform" property to "`None`", and save the form.

A.2. Clients for External Access

External Editor

In order to use an external editor, each user in the portal must have the "Zope External Editor" at their disposal in their computer. This receives the content to be edited, starts the appropriate editing program, and makes a connection to the server. This is how a file is immediately uploaded on saving, and the editing lock is lifted on closing the program.

The Zope External Editor is a part of Plone. The `ExternalEditor` folder included in the Plone package contains the files, `INSTALL-UNIX.txt` and `INSTALL-WIN32.txt`, along with installation instructions. Follow the manual for the respective operating system to install the external editor on all computers on which it should be used.

FTP

Unlike FTP access to a normal FTP server, FTP access to a Plone portal is subject to certain limitations.

- The client may not try to maintain access rights for a file when uploading or downloading ("preserve file permissions"). Plone's server does not support the changing of access privileges, and replies to an attempt to do so with an error message.

- To access a folder with FTP, you have to be the owner of that folder.

- The result of this is that the FTP client cannot attempt to read every folder visited when accessing the folders over various levels (by using the "LS" command). This would prevent a portal member from entering a folder which belongs to him or her when a single folder not belonging to him or her is in the way. In other words, at the beginning of a session, only the owner of the entire portal would be able to access any folder at all.