Chapter 1. Introduction to Plone

This aim of this book is to help content creators be productive with Plone. Plone is a mature content management system (CMS) with a proven track record of security, performance and extensibility. It has an active community of developers and users who contribute new features and plugins. It is an open source project, which means that the software is free and the source code is visible to all.

Plone has also grown. Since 1999 (when three developers started the project as a front-end to the Zope Content Management Framework), Plone has gone through three major releases and is about to release its fourth. Layout, functionality and usability have improved a lot since the initial release. At the same time, the field of content management systems has progressed quite a bit (not just for Plone). The concepts behind most content management are more similar than different; each CMS implements core features differently and use a different kind of interface. Often skillsets and interests of people involved may steer an open source project like Plone in a particular direction. Here are some characteristics I have observed about the Plone project.

· its security model is much tighter than other CMS's. That is one of Plone's main appeals (especially when compared with PHP-based CMS's which are prone to cross-server scripting attacks).

· Plone is especially adept at reflecting the organizational structure of a business or nonprofit. It's easy to create private areas and restrict access (and also to grant access). That is one reason why Plone is popular with organizations and businesses.

· For various technical reasons, Plone is not particularly well-suited for forums, discussions, comments or functionality which requires a high ratio of writes to the database. Often Plone developers will just use Plone for the main site and a separate application to handle the discussion features. (To be fair, high quality hardware can make any application run fast, and Plone 4 has made great strides in performance).

- Plone has remained a popular choice at universities and public agencies. For this reason, accessibility and standards compliance remains ahead of the curve. On the other hand, the default installation tends to be bare bones and lack common features you'd see on a basic content management system. If you want to have a blog on your site for instance, you need to install an addon which brings this functionality (and decide which blogging addon is best).

- A lot of features are enabled not by tweaking something in the interface but by uploading files onto the file system (often by means of an automated process to grab the python files from an external site). This separates the configuration files from the actual database. On the other hand, the Plone interface doesn't really allow you to edit these configuration files easily.

- Because of its security model, ordinary users often lack the right to modify default styles or to make major changes to the site's layout for pages they create. Content creators have control mainly over the main content area (which they edit with TinyMCE, the rich text web editor) and (for some) the ability to add/subtract portlets (small little boxes on the left or right side of the page).

Goals for this Book

This book is directed mainly for people who will be creating and editing content on a Plone site. Although it provides information about features available only to Plone Administrators (or users with the Manager role), this will not be covered in any great depth. Nor will this book discuss system administration tasks like upgrading/debugging/managing the files on the server and maintaining the Zope database. Programmers and web designers will not find any specific programming tips or customizations in this book. On the other hand, we will cover many common user problems with Plone sites, so this book might help site administrators anticipate problems before they occur.

Like many software projects, Plone is a vast ecosystem consisting of (mainly) open-source and proprietary add-ons. People have customized Plone for many different situations and content areas. It's possible for site developers to download and install business-oriented features (such as shopping carts

and classified ads), publishing features (books production, blogs & documentation development), multimedia (embedded video players, flash support), nonprofits (wikis, discussion boards) and corporate intranets (LDAP authentication).

However, it does not make sense to try to discuss these extra features and customizations. Instead this book has a simple goal: to provide an in-depth understanding for the most important out-of-the-box features found in a generic Plone installation. Why do this?

First, any customized content types found on a company's Plone site is likely to be based upon the original content types included with Plone. Even if your company's site has a content type called *Meeting Minutes*, it will probably contain many features from the generic Page content type.

Second, addons usually build upon and improve generic Plone features and make Plone easier to use. Once you learn about the basic content types (and other basic concepts like workflow and sharing), you will have mastered what I believe to be the "hard parts" about Plone.

Third, core features for Plone are less likely to change than features in products and add-ins. That means that information in this book will likely to remain useful even after Plone is upgraded to a newer version. Sure, each major upgrade adds and remove features, but the core functionality doesn't change that radically (except in a positive way). On the other hand, information about third-party plugins go out-of-date pretty quickly. Out of the stack of Plone books I have accumulated over the years (including an earlier edition of this book), the sections covering the generic features remain the most relevant and least out-of-date.

How this Book is Organized

Most of the chapters assume that you are an ordinary user, with no special Manager (i.e. Plone Administrator) privileges. However, some features may be available only if you user account has a certain role. The chapters on sharing and the publication process assume that multiple users are working together who have different user roles.

In a number of cases, I have described special features available only to the Plone Administrator when I thought that doing so might shed insight about why the feature appears the way that it does. In addition, I have provided a chapter (Chapter 12, *Global Settings for Creating Content* [204] which gives ordinary users a quick tour of some things the Plone Administrator can configure. In some cases, simply knowing that a feature is available may make it easier to convince the Plone Administrator that there is a need to enable it.

Some advanced topics (like portlets, collections and sharing) used to be available only to Plone Administrators. However, over time, Plone Administrators have figured out ways to delegate responsibility for these features to advanced users.

But most of the book covers the basics of how to create pages, how to share content items and the differences between various content types.

Near the end of the book are two chapters offering tips and tricks for how to perform common tasks and how to improve the usability and navigation of a site.

At the end is an appendix about workflows and a glossary.

Plone 4 vs. Plone 3: What is Different

The primary focus of the Plone 4 release was on improving performance and backend features for developers. Most of these changes will not normally be visible to the content creator (except perhaps the sense that Plone is faster). But there are also noteworthy changes of interest to the content creator:

1. Plone 4 has changed its default text editor from Kupu to TinyMCE. TinyMCE doesn't look much different from Kupu, but it has a bigger base of users than just Plone users.

2. The default theme is different and streamlined from previous versions. It is more minimal, less intrusive. Usually an organization will customize the default theme, so it's unlikely that a content creator will deal with the default theme.

3. More popup dialogue windows have been used, and they save time and extra steps. They are also more responsive and less buggy than previous versions.

4. The portlet manager now allows users with access to it to hide/disable a portlet.

During the writing of this book, already work has begun for version 4.1 and beyond. Proposed features for 4.1 include an overhaul of the interface for configuring collections and a more usable Advanced Search form.

About the Examples

Content management can be explained more easily with real-life examples. The examples we will use here will be Pendelton State College, a fictional university which was used as a setting for the 1990s sitcom *Third Rock from the Sun*. If you recall, the main character was Dick Solomon, an alien from outer space who pretends to be a physics professor there. In fact, the example is not too far offbase. Many educational organizations use Plone because it is easy to clone new sites and set up users and groups.

Other Places to Find Help

First, rather than provide URLs as footnotes, I am just going to provide a generic bookmark URL which contain relevant/interesting links for readers of this book. All URLs will be listed at this URL. **http://www.enfoldsystems.com/support/a-users-guide-to-plone.html**

Plone.org has excellent documentation if you know where to find it. The **Plone 4 User Manual** on plone.org covers many of the subjects mentioned in this book (albeit in much less depth). It is an excellent reference. The Plone forums tend to be a good place to find help although you may find that they cater more to developers than end users.

Changes, Errata, Etc.

Even the best-edited technical books will have errors, and I will keep an ongoing list of errors/corrections on the Enfold