Editing Content in Plone

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Slide 1.

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Contents

- What is Plone?

- A Guided Tour:
  - Joining a Plone site and logging in
  - Creating and editing documents
    - WYSIWYG through-the-web
  - Submitting content for publication
  - Reviewing content before publication

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Requirements

- You should be able to
  - Use a web browser
  - Use a word processor (Word, OpenOffice, WordPerfect, etc.)
- You should have access to a basic Plone site somewhere
  - Custom Plone sites may have different looks and behaviors.

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- We will be using a web browser directly, though not a word processor. This is a guide to expected skill level.

What is Plone?

- System for managing content
  - Documents, news, events, files, images
- Mostly done *Though The Web* (TTW)
  - access through other technologies possible
- Organizes and controls content creation and access

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Your Plone site

- Might be different. It may:
  - Look different
  - Have different features
  - Have different products and tasks
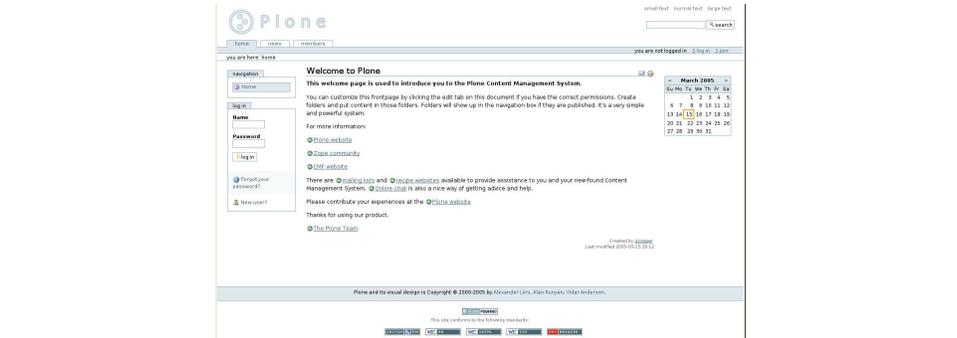- This is for a standard Plone site, so where it deviates we'll point this out.

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- If you are using a customized version, then that customization is normally done by a site developer or system administrator.

Getting to your Plone site

- It has an address, just like any web site.
- It'll show the front page:

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- If Plone is installed on the machine you're sitting in front of, you can use the special name localhost.

Joining

- We can add ourselves to a Plone site. Click the "join" link at top right, or "New User?" in the left-side box.

- Goes to a form asking for user information.

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Screenshot: Join form

Description: Join form

- Red dots indicate required fields
- Put in a full name and a user name*.
- You will use the user name and password to log in later.
- Password notes
  - Make the password unguessable.
  - But don't forget it!
  - If you do forget it, you can get a confirmation email.

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- A username is something short like "andym" or "andy". It will be unique to you in the site.

First login

- When you join, you get an automatic login. You can push the button and you're ready to go.

- But don't do that this time! We'll practice the regular login method.

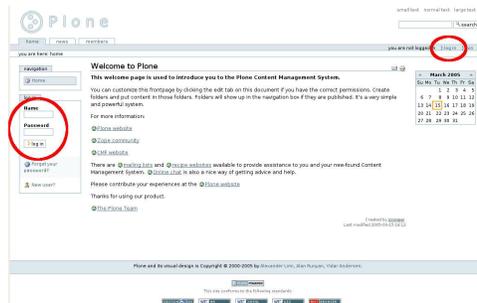- Click on the "Home" tab to go back to the front page.

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Logging In

- Login can be done with
  - the left-side login box
  - the "log in" link at the upper right

- These locations should seem familiar from the Join section.

Logging In (2)
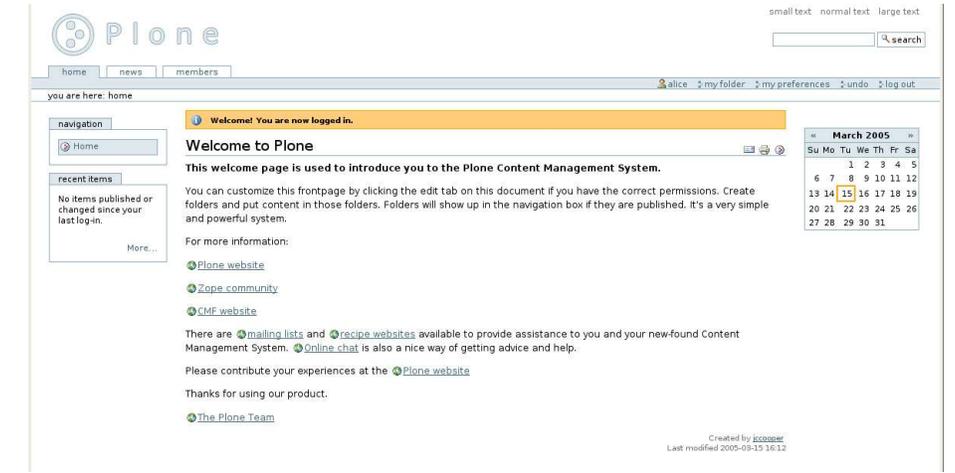
- Fill the form with the user name (not full name) and password previously used.

- You'll go back to the front page, but notice that certain parts have changed.

  – Message says you're logged in.

  – Instead of "you are not logged in" message, your user name appears in the upper right.

  – Login and join links are replaced by others.

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Screenshot: Logged In

... and Logging Out

- One of the new changes is a "log out" link in the upper right.
  - (where login used to be)
- Click that and you will be anonymous again.
  - Helpful for seeing how everybody else sees your site.
  - Keeps unauthorized people from acting as you, if they use your computer.
- Don't do it just yet.

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A Quick Tour

- We'll take a look at the Plone interface and use it in the usual manner.

- Generally self-guiding. Help text is often right on screen.

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Main Tabs

- Access different areas of the site:

- home: front page

- news: show news items in a full page

- members: search for members

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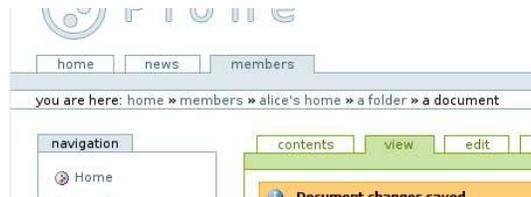- Other tabs can be added by the site administrator.

Breadcrumbs

- Show where you've been, let you get back there:

- We are looking at a document in a folder in alice's home folder, which is in the `members` folder, which is under the main site.

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- This is, of course, a "Hansel and Gretel" reference.
- The breadcrumb components are links, and can be used to get back to containers.

Text size

- Click to change text size

small text   normal text   large text
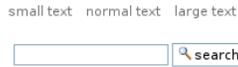
[   ] 🔍 search

- Three different settings. Takes place immediately.

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- Browsers will often have a text size control as well.
  - In Firefox, Ctrl - or Ctrl +
- Note that graphics (like logo) do not change size.
  - But there aren't that many graphics!

Searching

- Can find published content with a broad full-text search:

  small text   normal text   large text

  [   ] 🔍 search

- Enter terms to search. It'll find all content with all the terms.

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Personal Actions Bar

- Actions that this user can do.

- Different for different users
    - Anonymous has "log in" and "join"
    - Managers have "plone setup"

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Content View

- Main content area (in the green box):

- Changes depending on what content you're looking at.

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- *Folders* (which are content) will show a screen to manage their contents.
- *Documents* will show document contents and maybe let you edit them.
- *Images* will show images and maybe let you change them.
- ...And so forth.

Description: Content View

- If the page is editable, there is a *green box* around it and *green tabs*

- The *green tabs* are the *content tabs*, and change depending on type of contents.
    - They go to the different actions allowed on content.
    - A "contents" tab will go to the contents of the nearest folder.

- We'll look at this area in more detail a little later.
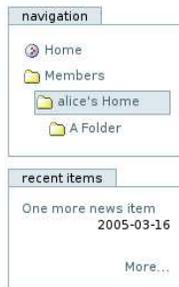
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Sidebars

- Contain "portlets": boxes with a small set of information.
    - Can be site-wide, like news
    - Can be location-specific, like navigation
- Many will not appear until they have something to show.
- If nothing is in a sidebar, it will collapse and give the room to content.

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Left Side Bar

navigation
Home
Members
alice's Home
A Folder

recent items
One more news item
2005-03-16
More...

- Navigation tree
  - Shows where you are, and some navigation options. Clickable.
- Login box
- Recent Items
  - For users. Items published since last login.
- Related Items
  - Content with the same keywords.

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- We've already seen the function of the login box. Only shows up when not logged in.

Right Side Bar

- Items to Review
    – Reviewers see content needing review.
- Calendar
    – Shows current day and events.
    – Hover over an event.
- News
- Events

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My Preferences

- In Personal Actions bar, there's a "my preferences" link.
- Can change a few things about your Plone environment.

- Managers have more controls, to configure the Plone site in general.

Change Password

- Under the "Change Password" link:

Change password for alice

▲ Up to My Preferences

Password Details

Current password
Enter your current password.

New password
Enter your new password. Minimum 5 characters.

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

change password   cancel

- A standard password change.

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Personal Preferences

- Under the "Personal Preferences" link:

Personal Preferences

▲ Up to My Preferences

Your personal settings.

Member Details

Full name

Alice Liddell

E-mail ▪

alice@jcameroncooper.co

Content editor

Select the content editor that you would like to use. Note that content editors often have specific browser requirements.

None ▾

☑ **Listed in searches**

Determines if your user name is listed in member searches done on this site.

☑ **Allow editing of Short Names**

Determines if Short Names (also known as IDs) are changable when editing items. If Short Names are not displayed, they will be generated automatically.

Portrait

To add or change the portrait: click the "Browse" button; select a picture of yourself. Recommended image size is 75 pixels wide by 100 pixels tall.

[   ] Browse...

☐ **Delete Portrait**

⚡ save   ⬍ cancel

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Description: Preferences

- `Full name` and `E-mail` set from join form.
  - Be sure to provide a valid email address!
- `Content editor` lets you pick a TTW content editor, if installed.
  - Some browsers (older or unusual) may not support these.
  - We'll be using "Epoz", so select that *
- `Short name` is what shows up in the URL when viewing an object.

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- * We will be using Epoz later in this training, so please ensure that it is selected.
- If the email address doesn't work, you won't be able to use the password reminder mechanism. Other site functions may not work, either.
- If you don't set short names (aka ids) yourself, Plone will generate one. The generated ids are long and ugly.
- The user picture is used in the member search.

My Folder

- Also in the Personal Actions bar, a "my folder" link.

- Goes to your personal workspace.
    - The only place to create content, by default.
    - A folder named with your user name in the top-level folder `Members`

- Starts with a home page defined, which is seen if others go to the directory.

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Screenshot: My Workspace

The Content Tabs

- Allow you to perform tasks on the content
  - *content*: contents of nearest folder
  - *view*: see what the public sees
  - *edit*: change this content
  - *properties*: data about this content
  - *sharing*: allow other users expanded access
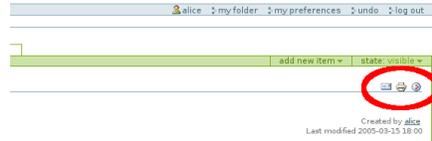- Some types of content may define other tabs.

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- Data about the content is typically called "metadata". It might be copyrights, effective and expiration dates, language, and more.

Other Content Actions

add new item ▾ | state: visible ▾

Created by alice
Last modified 2005-03-15 18:00

- – *Email*: send a link to this content by email
- – *Print*: print this page
- – *Add to Favorites*: create a "Favorite" in your personal folder
- – *External Editor*: if installed, launch a program on your machine to edit something*

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Creating Content

- Now that we've seen the interface, let's use it. We need to make some content.

- Two ways to create content:
    - Standard way
        - In folder contents, select type from drop-down, click button
    - Quick way
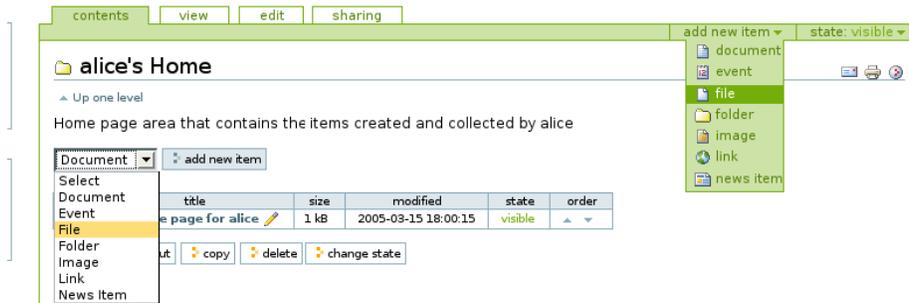   - In any content, select type from right side of green bar. It will be added in the nearest folder*.

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- * This only works with JavaScript enabled, which it should be on most browsers.

Screenshot: Creating Content

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- You cannot actually do both at the same time. This is an "artists rendering".

Content types

– *Document* – web-viewable document

– *Event* – an entry for the calendar

– *File* – any file

- Could be a file with extension .doc, .zip, .exe etc.

– *Folder* – contain other content

– *Image* – web-viewable image

- Could be an image with extension .png, .gif, .jpg etc.

– *Link* – URL to somewhere

– *News Item* – entry for news portlet and news tab

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- Plone content types are much "richer" than files on your computer. Try not to think of them too much as files.

Exercise 1: Let's create some content

- Make a Document in your folder.
- Use either method you like.
  - Or both!
- Fill in the edit fields if you like, especially the names. Be sure to click the "Save" button.
- Go back to the folder contents view and look at it.
- Click on the Document to look at it again.

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View screen

- The view tab show what content looks like when "rendered", like an anonymous user might see.
  - Different for different types.

contents	view	edit	properties	sharing		
					add new item ▾	state: visible ▾

Home page for alice   ✉ 🖨 ⊗

Alice's home page. This is the description.

This is the document that defines Alice's home page. This bit is the body text.

Created by _alice_
Last modified 2005-03-16 12:48

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Edit screen

- Lets you change the contents of the content.
  - The contents, as shown in the view tab.
- Common fields:
  - *Short Name*: what shows up in the URL
  - *Title*: used everywhere else
  - *Description*: a few sentences to summarize
- Different types will have different fields.
  - Document has Body Text; Link has URL; etc.

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- Description shows up in bold in just under the title in the content view.

Screenshot: Edit tab

contents	view	edit	properties	sharing

add new item ▾ | state: visible ▾

Edit Document

Fill in the details of this document.

Document Details

Short Name

Short Name is part of the item's web address. For accessibility reasons, do not use spaces, upper case, underscores, or special characters.

index_html

Title ■

Home page for alice

Description

A brief description of the item.

Alice's home page. This is the description.

Body text

Normal ▾

B | I | U | S | ×₂ | ×² | ... | A | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ↶ | ↷

This is the document that defines Alice's home page. This bit is the body text.

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...and the bottom

– Always remember to use the "Save" button. Changes won't be saved otherwise.

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TTW WYSIWYG Editing

- Acronyms are fun!
  - Through the Web What You See Is What You Get
- Some content fields, like Document body text, can be "rich content".
  - colors, bold, italic, links, etc.
- You can write HTML or Structured Text, but we can have a more friendly environment.
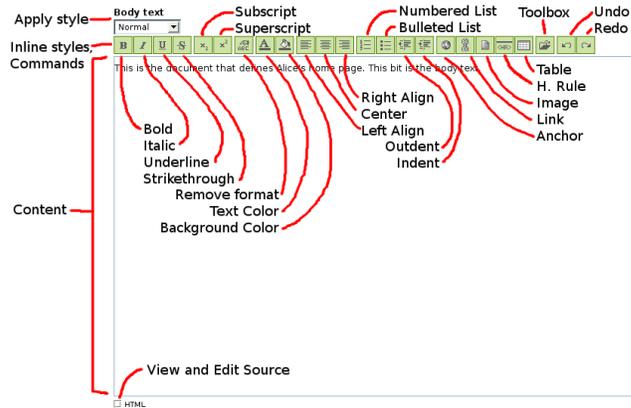- Epoz, if installed and selected, can do this.

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- Epoz is Zope spelled backwards.

Epoz

- We saw Epoz in the Document edit tab.

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Using Epoz

- Type text in the Content box.
- Apply styles to paragraphs with the style box.
- Apply changes inside paragraphs with inline styles
  - bold, italics, underline, colors
- Use commands to create special structures
  - lists, tables, images, links
- Like any word processor

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- Please note, you can hover over a button to get some help text.

Using Epoz (Adv)

- *Toolbox*: highlight text and open the Toolbox to find content to link to.

- Link to off-site content with the Link button.

    - Link to internal anchors with #anchorname

- We're actually creating HTML. To see the source, check the HTML box.

    - Editing source works too.

- Remember the Save button!

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Exercise 2: Editing

- Use Epoz to create a document.
  - Put some styles to it.
  - View the HTML
- Save and view.

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Properties screen

- Edit some common properties of content.

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Description: Properties tab

- *Allow discussion*: if enabled, users can add threaded comments. May use site policy.

- *Keywords*: select relevant keywords from a site-wide list. Used for related content and searches. Managers can create keywords here.

- *Effective* and *Expiration Dates*: content is only visible when published and between these two dates. Leave blank to ignore.

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Description: Properties tab (2)

- *Format*: set MIME type. Leave this alone in most cases.

- *Language*: set the language that the content is written in.

- *Copyrights*: add rights info. Appears in content footer.

- *Contributors*: names others involved in making the content. Also appears in content footer.

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Sharing Content

- Allows other users expanded access.
  - By default all users can see content, but not edit.
- Anything can be shared: Folders, Documents, Links, etc
  - Anything in a shared folder is also shared
- Can only share roles you have.
  - For regular members, this is only Owner.
  - Reviewers can share Reviewer.

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Screenshot: Sharing

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Sharing

- Top of the form shows existing roles, and allows for removing them.
    - Won't let you do anything dangerous, so don't worry.
- Search for users in the bottom section. May use email address or user name.
    - Enter nothing to see all users.
- Select a user and a role. Regular members have only one role to chose. (Owner.)

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How Sharing Works

- Gives other users a role in a certain place.
- If a user is given the Owner role, she can act just like the "natural" owner.
    - Edit, view, share, etc.
- Shared roles from a folder apply to all its contents, and the contents of all subfolders.
    - This is where "Acquired roles" comes in.

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Back at the Contents page...

- Having worked with content, let's go back and see where it's stored.
- Hit "contents" tab to go to nearest folder.

Folder actions

- Folders are content that holds other content. You can see contents listed in the table.

- Folders have some special actions:

  - *Select all/none*: button in top left corner. Checks/unchecks all content. A time-saver.

  - *Cut, copy, paste, delete*: move around or remove. Note that cut content doesn't disappear until paste.

  - *Rename*: change short names and titles of content.

  - *Ordering*: use the arrows to move content up/down.

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- There's also a "change state" button for doing workflow actions on a batch basis. We'll look at this in a few slides.
- Note, of course, that actions only apply to checked content.

Submitting content

- Content is created in the "visible" state.
    - Viewable to other users, but not published
- When done, we submit content for review.
    - Must be reviewed to be published.
    - Special users (Reviewers) will then be notified.
    - Reviewer may publish or reject submitted content.
- We can see the state in the green bar and in folder contents.

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- This workflow is the standard issue one. Many sites will customize workflow to a lesser or greater extent.

Other workflow actions

- Some other actions besides "submit":
  - Make Private/Visible
    - Content can be hidden from other users in the "private" state. Chose "make private" to do this.
    - Reverse is available as "make visible".
  - Retract
    - Content that is "pending" (awaiting review) or "published" may be brought back to the simple "visible" state by retracting.
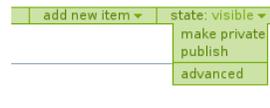- Reviewers have more options.

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- Managers can do anything.

But how?

- Much like content creation, there's two ways:
  - In content
    - In green bar, use the drop down to pick an action.
    - Only for a specific piece of content.
    - The "advanced" page allows comments and effective date.
  - In folder contents
    - Select content and push the "change state" button.
    - Pick action, provide comments and/or effective dates if desired. Same page as "advanced."
    - Can do multiple pieces of content.

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Published Content

- Published content participates in the public site. When published,
  - Events appear in calendar and events portlet.
  - News items appear in the news portlet and news tab when published.
  - Folders appear in the nav tree.
  - Content is no longer editable.
 - Content appears in Recent Items portlet.

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Exercise 3: Submitting

- Submit your Document from Exercise 1
- Create a News Item and submit it.
- View them from the folder contents of your folder. Notice the state.

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If you're a reviewer

- Don't bother with this unless you're set up as a Reviewer. (This is done by the site admin.)

- Content awaiting review (the pending state) shows up in Review portlet.

- Click on content to view/edit. Change state as seen already.
  - Publish
  - Reject

review list
Home page for alice
    2005-03-16
An event
    2005-03-16
A news item
    2005-03-16
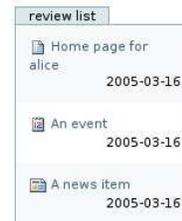
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- Reviewers who create content have the option of publishing straight away. Managers as well.

Exercise 4: Publishing

- Become a Reviewer, and go to the front page. See the review portlet.

    – Right slots are hidden in home folders.

    – Manager can also publish, but will not see the portlet unless explicitly given a Reviewer role.

- Click on content in the portlet. Publish it.

    – When publishing a News Item, notice what happens to the news portlet.

- Notice the state of the content.

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The End

- That's it!

- We've seen pretty much everything in a stock Plone site.

- For more, there are Plone books, plone.org, mailing lists, and chat rooms.

- But mostly the UI should be pretty straight-forward and self-explanatory.

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