

# **Plone for Departmental Web Managers**

**Classroom reference for  
DWM training**

**///wdc**

# Introduction

## **What is a CMS?**

A system used to manage the content of a Web site. A web-based CMS allows content management and editing to be done through a browser interface. Open source means that the code for the system is developed by a community of users who make the source-code of the system available for free over the internet for anyone who wants to improve or add to it.

## **How is it different than the Toolkit?**

- The Toolkit was developed by the Health System for the Health System, it enforced a minimum level of display standards and was as simple as possible to use.
- Plone was developed for a global audience and is being actively improved and added to by thousands of companies and individuals. In addition to being easy to use, it is also able to change as internet and web publishing changes.

## **What is your role?**

As a Departmental Web Manager (DWM) you will be responsible for creating and maintaining the content that makes up your site. This includes pages, images, files, and forms - as well as additional document types as they are added to the system.

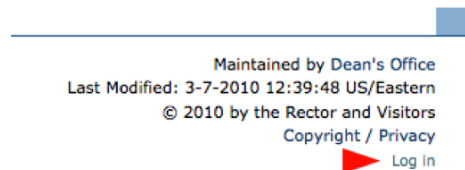
## **Getting Help**

Getting help with Plone is the same as getting help with Toolkit. Send your questions or report bugs to [wdc-support@virginia.edu](mailto:wdc-support@virginia.edu) or call us at 434-243-6702 (or extension 3-6702).

# Navigating, Editing and Adding Content

## Logging in as an Editor

Before you can edit content, you must log into a website using a user account which has editing privileges. To do this, go to the bottom of the page and click on the Log In link at the right edge of the page under the site information.



This will bring up the login box where you can use the username and password you were given.

A screenshot of a login box. It contains two input fields: "Login Name" and "Password". Below the "Password" field is a button labeled "Log in" with a small icon. To the right of the input fields is a link that says "Forgot your password?" followed by the text "If you have forgotten your password, [click here to retrieve it.](#)".

Once you have logged in, the login link will be replaced with your name and a Log out link.

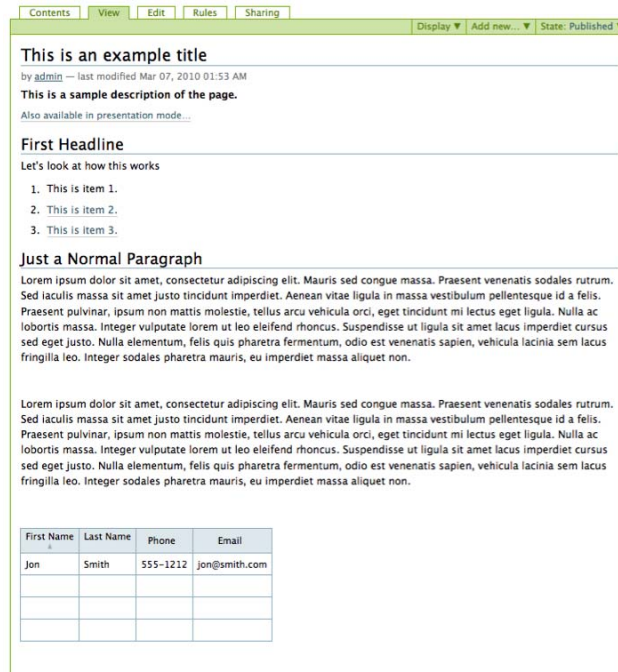


## Navigating Content

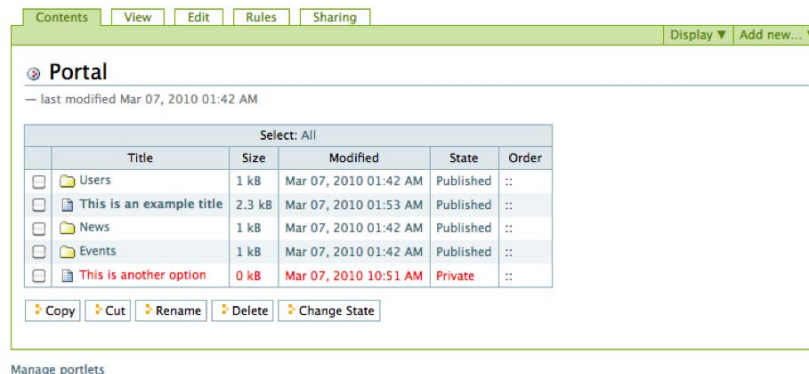
The fundamental change in how Plone works, versus the Toolkit, is the idea of editing in place. You browse your Plone site exactly as you would a web site - because, well, it IS a web site. No more browsing through directories of files, no more editing on staging and then publishing. You go to the page you want to change, you click the "edit" tab, make your changes, click "save" and you are done.

You will find it takes some getting used to, yet is much more intuitive to people who already use the web on a regular basis.

Let's say, for example, you want to find a page and edit it. First, just go to your Plone site using the normal URL (no more staging.healthsystem.virginia.edu), browse or search to find the page you want to edit. That's all you need to do in order to get ready to edit a page.



The other option is to navigate your site as though it was a series of files in a directory. To look at Plone this way, just find the top level of your site in Plone, then click on the "Contents" tab.



This will show you a directory of all the files and folders that make up your site. You can go to any of them by just clicking. In the case of clicking a folder, you will see a directory of the files that are inside that folder.

ContentsViewEditRulesSharing

Display▼Add new...▼

**Portal**

— last modified Mar 07, 2010 01:42 AM

Select: All					
	Title	Size	Modified	State	Order
<input type="checkbox"/>	Users	1 kB	Mar 07, 2010 01:42 AM	Published	::
<input type="checkbox"/>	This is an example title	2.3 kB	Mar 07, 2010 01:53 AM	Published	::
<input type="checkbox"/>	News	1 kB	Mar 07, 2010 01:42 AM	Published	::
<input type="checkbox"/>	Events	1 kB	Mar 07, 2010 01:42 AM	Published	::
<input type="checkbox"/>	This is another option	0 kB	Mar 07, 2010 10:51 AM	Private	::

Copy

Cut

Rename

Delete

Change State

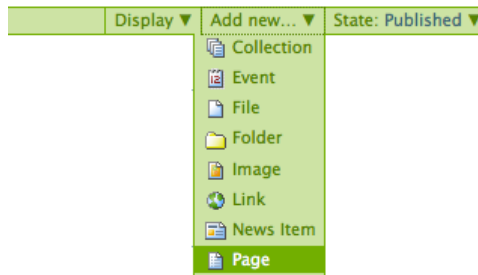
[Manage portlets](#)

# Adding Content

## Adding a Page

A page is a single web page of content and should be on a single, coherent topic

To add a page, use the "Add new..." menu for a folder:



Select Page from the drop-down menu, and you'll see the Add Page panel:

A screenshot of the 'Add Page' panel in a web management system. The panel has a title bar 'Add Page' and a subtitle 'A page in the site. Can contain rich text.' Below the subtitle are five tabs: 'Default' (selected), 'Categorization', 'Dates', 'Ownership', and 'Settings'. The main content area is divided into three sections: 'Title' with a text input field, 'Description' with a subtitle 'A short summary of the content.' and a text area, and 'Body Text' with a rich text editor. The rich text editor has a toolbar with various icons for bold, italic, text color, background color, bulleted list, numbered list, link, unlink, and a dropdown menu currently set to 'Normal paragraph'.

The Title and Description fields are there at the top. Fill each of them out appropriately. There is a Change note field at the bottom of the page that is very useful for storing helpful memos describing changes to a document as you make them. This is useful for pages on which you may be collaborating with others.

## Add Page

A page in the site. Can contain rich text.

Default

Categorization

Dates

Ownership

Settings

Title

Type Your Title Here

Description

A short summary of the content.

Type the description here.

Body Text

**B**

*I*

Normal paragraph

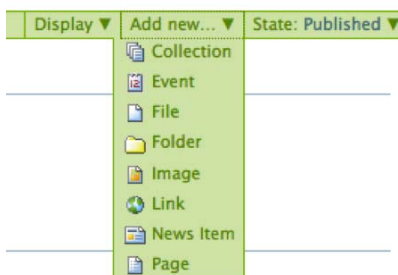
The middle panel, Body Text, is where the action is for pages. The software used for making Pages in Plone, generically known as a visual editor, is a most important feature allowing you to do WYSIWYG editing. WYSIWYG editing -- What You See Is What You Get -- describes how word processing software works. When you make a change, such as setting a word to bold, you see the bold text immediately.

People are naturally comfortable with the WYSIWYG approach of typical word processors.

## Adding New Content to Your Site

Plone has a number of different types of content you can add - pages, images, documents, events, etc. The good news is that all of them are added in fundamentally the same way.

New content items are added via the Add New . . . drop-down menu:



Adding content in Plone is done placefully, which is to say that you must navigate to the section of your Plone website that you wish the new content to reside before you use the Add New . . . drop-down menu. You can of course cut, copy, and paste content items from one section to another if necessary.

# Content Types

In Plone, you can use a number of Content Types to post certain kinds of content. For example, to upload an image you must use the Image content type. Below is a list of the available content types in order of their appearance in the "Add New" menu, and what each is used for:

## Collection

Collections are used to group and display content based on a set of criteria which you can set. Collections are like collections in a library in that they are grouped by subject or other attribute.

## Event

- An Event is used for posting information about an event (such as a fundraiser, barbecue, etc). If you use an event type, this will allow the site visitor to add the event to their desktop calendar with either the iCal or vCal standard. This standard is supported by applications such as: Google Calendar, Outlook, Sunbird and others.
- To add a single event to your calendar, click on the vCal or iCal links next to the "Add event to calendar" text in the main view of the event item.
- **Note: This is for advanced users:** You can also get all the events in a folder in one go (currently only available in iCal format). To download the iCal file, append @@ics\_view to the end of the URL of the folder that contains the events. For example, if you want to get all the events into the events folder in the root of your site, go to [http://yourdomain.tld/events/@@ics\\_view](http://yourdomain.tld/events/@@ics_view).

## File

A File in Plone is any type file you wish to upload with the intent that it can be downloaded by your site visitors. Common examples are PDFs, Word Documents, and spreadsheets.

## Folder

Folders work in Plone much like they do on your computer. You can use folders to organize your content, and to give your Plone website a navigation structure.

## Image

The Image content type is used for uploading image files (JPG, GIF, PNG) so that you can insert them into pages or other page-like content types.

## Link

Also referred to as the 'Link Object'; do not confuse this with the links you create via Kupu, Plone's visual page editor. The Link content type is often used to include a link to an external website in Navigation and other specialized uses.

**Special Note:** This appears differently when you are logged in. A normal visitor, not logged in as an editor, will be taken directly to the linked URL.

### News Item

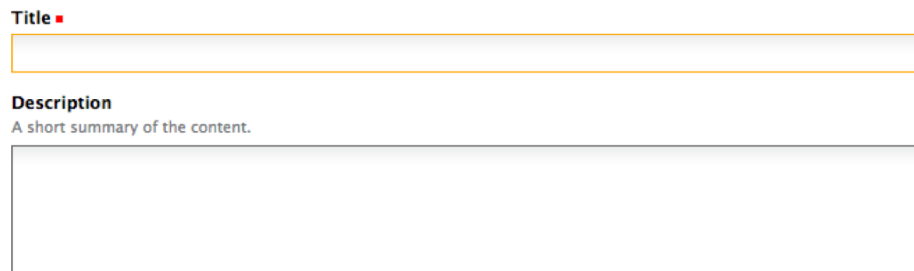
This content type is similar to Event, only News Item is specifically for posting news. You can also attach a thumbnail image to a News Item, which then appears in folder summary views next to the summary of the News Item.

### Page

A Page in Plone is one of the most simple content types available. Use Pages to write the bulk of your web pages on your Plone website.

## Common Items in Most Every Type of Content

Nearly all content types in Plone have two fields in common: Title and Description.



The image shows a form with two input fields. The first field is labeled 'Title' with a small red square icon to its right. Below the label is a long, empty rectangular box with a thin orange border. The second field is labeled 'Description' with a small red square icon to its right. Below the label is a smaller, empty rectangular box with a thin gray border. Below the 'Description' label, there is a line of small, gray text that reads 'A short summary of the content.'

### Title

The Title of content items, including folders, images, pages, etc., can be anything you want -- you can use any keyboard characters, including blanks. Titles become part of web address for each item you create in Plone. Web addresses, also known as URLs, are what you type in a web browser to go to a specific location in a web site (Or, you would click your way there), such as: [www.mysite.com/about/aboutus](http://www.mysite.com/about/aboutus)

Web addresses do have restrictions on allowed keyboard characters, and blanks are not allowed. Plone does a good job of keeping web addresses correct by using near-equivalents of the Title that you provide, by converting them to lowercase, and by substituting dashes for spaces and other punctuation.

### Description

The Description appears at the top of pages, just under the Title. Descriptions are often used in conjunction with a variety of Folder and Collection views (such as Standard and Summary). The Description also appears in search results via Plone's native search engine.

## Editing Existing Content

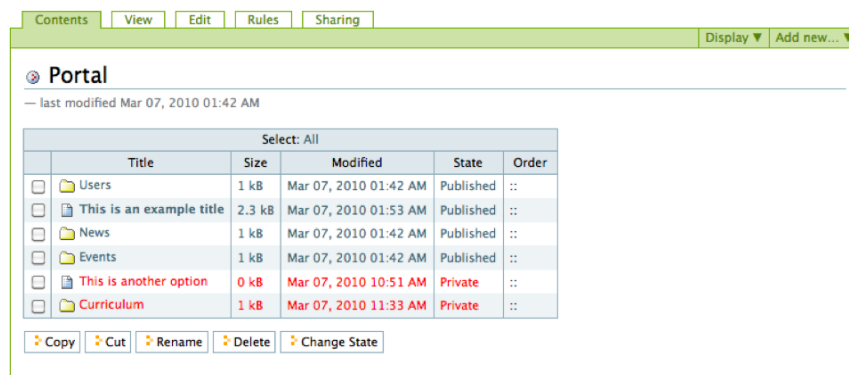
Editing Plone content works the same as adding content -- usually the data entry and configuration panels for the content are the same for editing as for adding.

Of course, when we edit an item of content, the item already exists. Click the Edit tab for an item and you will see the data entry panel for the item, along with the existing values of the item's data.

For an example of something really simple, where editing looks the same as adding, we can review how to edit a folder.

### Editing a Folder

The Edit panel for a folder simply shows the title and description input areas. Often a description is not provided for a folder, so the only thing changed is the title. If you do wish to give a description, which is a good idea for distinguishing folders in a list, the description can be text only -- there is no opportunity for setting styling of text, such as bold, italics, or other formatting. This keeps the descriptions of Plone content items as simple as possible.



Here is the Edit panel for a folder, in this case, one called "Curriculum":

Contents View Edit Rules Sharing

### Edit Folder

A folder which can contain other items.

Default Categorization Dates Ownership Settings

**Title**

Curriculum

**Description**

A short summary of the content.

This folder contains curriculum documents.

Save Cancel

You change the title by editing the text and clicking "Save".

Contents View Edit Rules Sharing

### Edit Folder

A folder which can contain other items.

Default Categorization Dates Ownership Settings

**Title**

New Curriculum

**Description**

A short summary of the content.

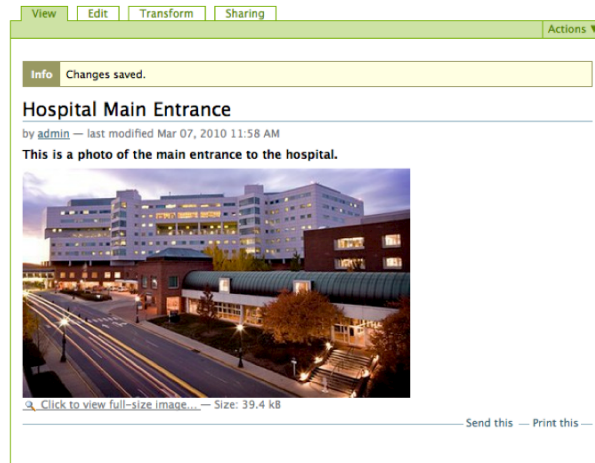
This folder contains curriculum documents.

Save Cancel

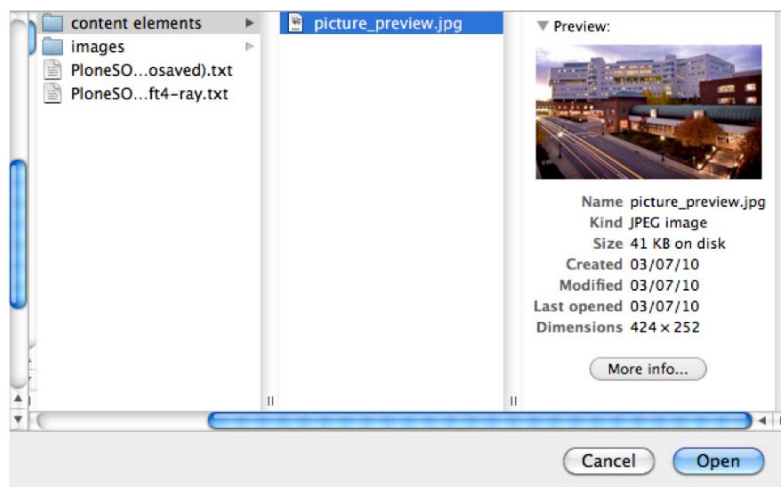
That's it. Change what you want and save, and the content item will be updated in Plone's storage system. You can repeatedly edit content items, just as you can repeatedly edit files on your local computer. Plone stores content as separate entities, akin to "files" on a local computer.

## Editing an Image

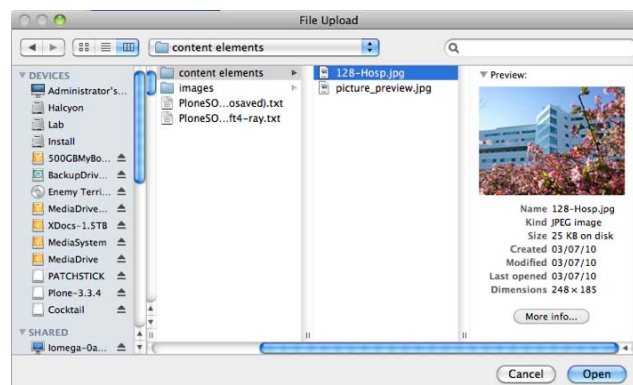
For an example of editing a content item that is a bit different than adding in the first place, we can examine editing an image. Editing an Image can be done by navigating to an individual image and clicking the Edit tab.

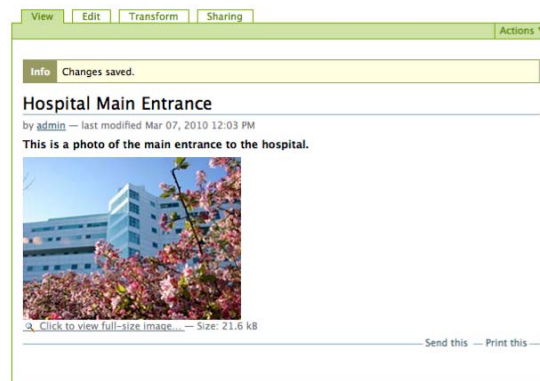


Clicking the Edit tab for the image, you will see the following Edit Image panel:

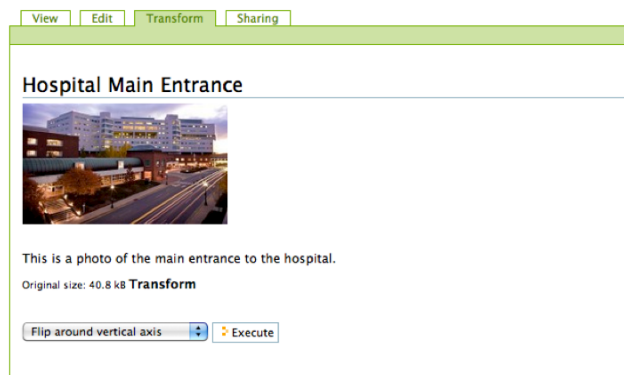
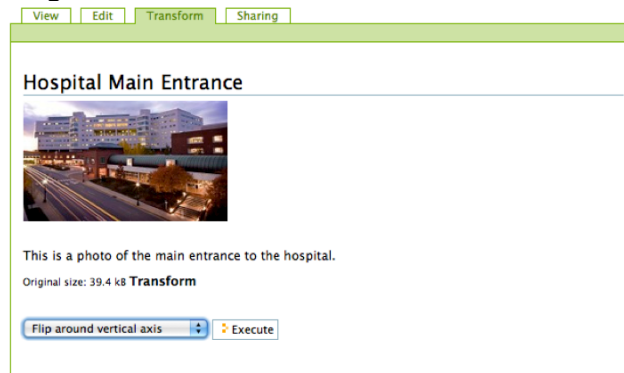


Here, an image called "Hospital Main Entrance" is being edited. You can change the title and description, as usual, in which case you would usually keep the setting to "Keep existing image." You can also change the image itself by checking the "Replace with new image" choice - and it will be replaced everywhere it appears in your site. Or, clicking the "Delete current image" choice will simply delete the image entirely.





Notice also the Transform tab at the top, which pertains specifically to images, offering a choice of several image transforms:



You can resize, rescale, and create multiple versions of an image using this simple interface. And it doesn't require a program like Photoshop on your computer to accomplish things.

So, editing an image is a bit different than adding one in the first place, but not by much.

## Editing an Existing Page

To edit an existing page, navigate to that page in the website.

Click the green "Edit" tab near the top of the page.

The screenshot shows the 'Edit Page' interface. At the top, there are tabs: 'Contents', 'View', 'Edit' (highlighted in green), 'Rules', and 'Sharing'. Below the tabs is a header 'Edit Page'. An 'Info' box states: 'You are editing the default view of a container. If you wanted to edit the container itself, [go here](#).' Below this is a note: 'A page in the site. Can contain rich text.' There are sub-tabs: 'Default' (selected), 'Categorization', 'Dates', 'Ownership', and 'Settings'. The 'Title' field contains 'This is an example title'. The 'Description' field contains 'This is a sample description of the page.' The 'Body Text' area has a rich text editor toolbar with icons for bold, italic, text color, background color, bulleted list, numbered list, link, unlink, image, table, and a dropdown menu set to 'Normal paragraph'. The body text contains a heading 'First Headline', a paragraph 'Let's look at how this works', a numbered list with three items, another heading 'Just a Normal Paragraph', and two paragraphs of Lorem Ipsum text.

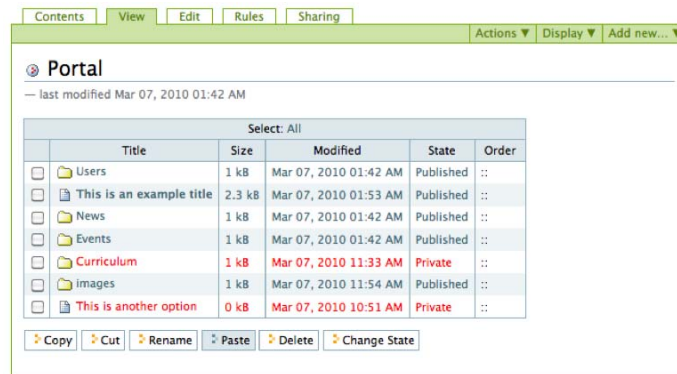
You can change text, change text formatting, add images, tables, create links, and several other functions in the body text area of the page by using the icons in the editing bar below.



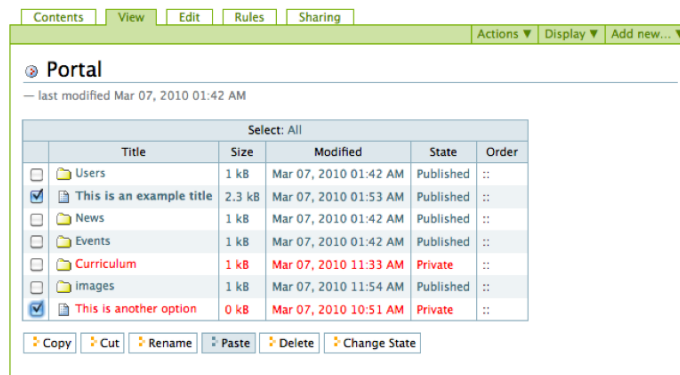
# Moving and Reorganizing Content

Plone makes the process of moving and reorganizing the contents of websites very simple and straightforward. For an example, let's move two files from the root level of a site into a folder to simplify the site organization.

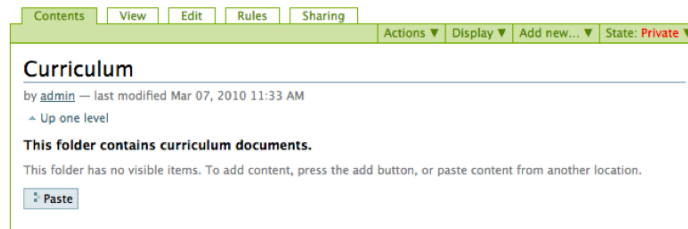
First, click the "Contents" tab of your site - this will show the site contents as folders and files.



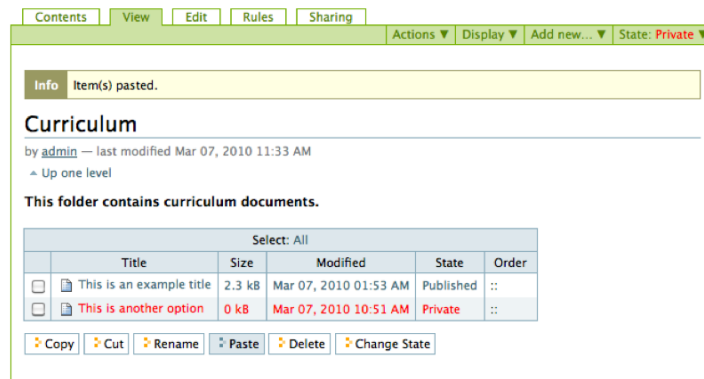
Next, click the checkbox next to files that you want to move and click the "Cut" button below the file list.



Click on the folder you want to move the files into in order to show the folder contents.

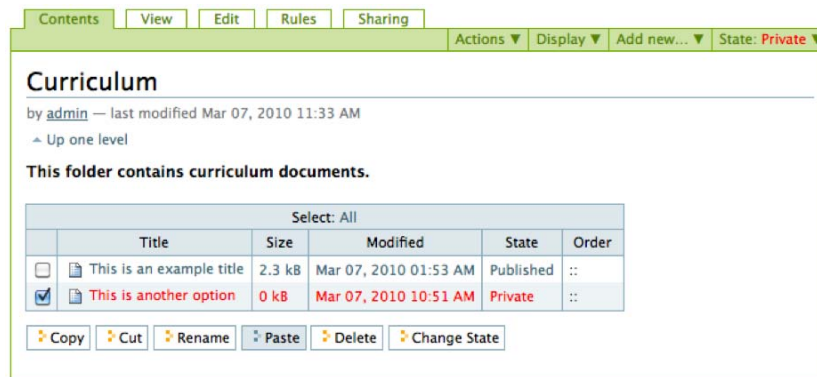


Click the "Paste" button to complete the move of the files into the folder.

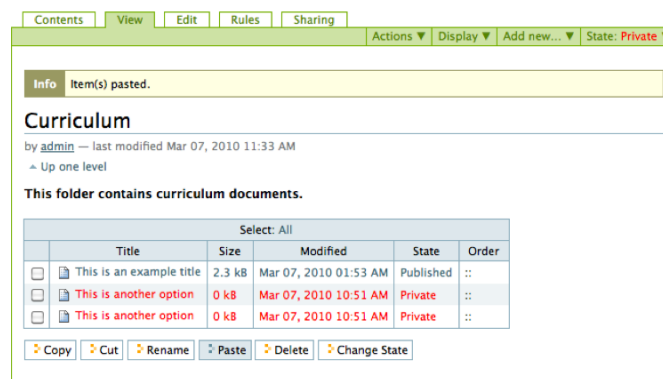


Something to keep in mind is that if you "Copy" the selected files and then "Paste" them into a folder, you won't move the original files -- you will make copies of them.

So if you want to make a copy of a page that you can edit as the basis of another page, just select the checkbox next to a file, click copy, then click paste to paste a copy of the that file into the same folder as the original.



Note that the copy will have the same name as the original - so make sure you edit and change it immediately to avoid confusion.

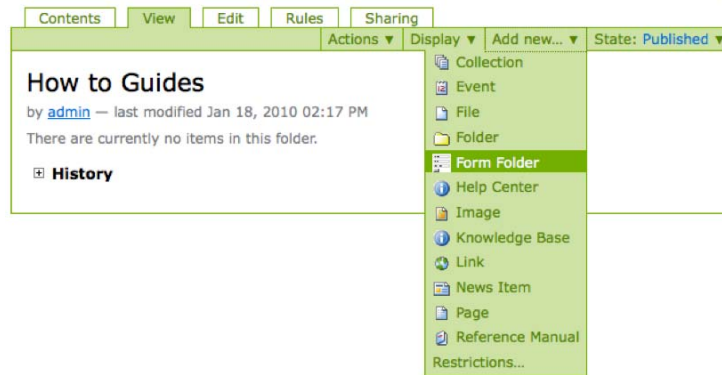


# Creating Forms

*The way forms are created in Plone is very different than the way it was done in the Toolkit. As a result, users very familiar with the Toolkit may find it has a bit of a learning curve. Don't worry, it will make sense once you have tried it a couple of times.*

There are two parts to a form in Plone - the form folder, which contains the elements of a form, and the form elements themselves - which let you manage the different types of information that you want to get from people and control what is done with that information when the form is submitted.

The first thing you want to do is create a form folder. Go to the place in your site where you want the form to appear and click on the 'add item' tab and select 'form folder'



## First Edit Page

- 1) Fill in the Edit form folder. The Title and Description of the Form should be self explanatory.
- 2) The 'Submit Button Label' defaults with the word 'submit'. If you want this to say something else, enter that here.
- 3) The 'Cancel' button is checked by default. If for some reason you do not want this, uncheck it.
- 4) 'Mailer' (the functionality that sends an email to someone once the form is submitted) is checked by default. If you do not want this to happen, you should uncheck the button next to 'Mailer'

- 5) The "Thanks Page" - Once someone submits a form, you can also opt to have the page they navigate to be a 'Thank You' page. If you don't want them taken to a "thanks page," choose 'None' under 'Thanks Page'.
- 6) Form Prologue: this is a space for text and links that will go above the form elements (form elements are where people input their information). Many times, people choose to place other contact information for the organization here, or instructions for filling out the form.
- 7) Form Epilogue: This is where you can place text and links that you want to have appear under the form.

## Add Form Folder

A folder which can contain form fields.

Default

Categoryization

Dates

Ownership

Settings

Overrides

Title

This is a test form

Description

A short summary of the content.

Describe your form

Submit Button Label

Submit

☒ Show Reset Button

Reset Button Label

Reset

Action Adapter

To make your form do something useful when submitted: add one or more form action adapters to the form folder, configure them, then return to this form and select the active ones.

☒ Mailer

Thanks Page

Pick a contained page you wish to show on a successful form submit. (If none are available, add one.) Choose none to simply display the form field values.

☐ None

☒ Thank You

☐ Force SSL connection

Check this to make the form redirect to an SSL-enabled version of itself (https://) if accessed via a non-SSL URL (http://). In order to function properly, this requires a web server that has been configured to handle the HTTPS protocol on port 443 and forward it to Zope.

Form Prologue

This text will be displayed above the form fields.

Text Format

HTML

B I HTML

Normal paragraph

This is text that goes before the fields of your form.

[Edit without visual editor](#)

**Form Epilogue**  
The text will be displayed after the form fields.

**Text Format** HTML

Normal paragraph

This is text that goes after your form fields.

**You can style your text.**

You can even add tables or images or [links](#).

[Edit without visual editor](#)

Save Cancel

8) Click the 'Contents' tab to view the form elements that are automatically generated in the creation of a form folder.

## Adjust Form Mailer

1) From the 'contents' tab, click on the 'Mailer' form element.

Contents View Edit Rules Sharing

Actions Add new... State: Private

**Info** Changes saved.

**This is a test form**

**Describe your form**  
This is text that goes before the fields of your form.

**Your E-Mail Address**

**Subject**

**Comments**

Submit Reset

This is text that goes after your form fields.

**You can style your text.**

You can even add tables or images or [links](#).

2) Click Edit tab.

3) Fill in the Recipient Name and the Recipient Email Address. This is the person who will receive the email created by this form.

4) Click 'Save'. You'll see a page that shows how the email will be sent.

The screenshot shows a preview of an email within a web interface. At the top, there are tabs for 'View', 'Edit', and 'Sharing'. The email content is as follows:

**Thank You**  
by [admin](#) — last modified Mar 07, 2010 05:16 PM

**Thanks for your input.**

**Your E-Mail Address**  
youremailaddress@virginia.edu

**Subject**  
Results from my test form

**Comments**  
This is an email from my form

At this point, you have created a form - but one which has no elements and therefore is pretty useless. This next section will describe how you add elements and make the form functional.

The screenshot shows the 'How to Guides' page. At the top, there are tabs for 'Contents', 'View', 'Edit', 'Rules', and 'Sharing'. Below these are buttons for 'Actions', 'Display', 'Add new...', and 'State: Published'. The main content area contains the following text:

**How to Guides**  
by [admin](#) — last modified Jan 18, 2010 02:17 PM

**This is a test form** — by [admin](#) — last modified Mar 07, 2010 05:16 PM

Describe your form

**History**

## Form Elements - Making Your Form Work

The next part of this tutorial shows you how to add elements and make the form do what you want it to do. The 'Contents' tab of an existing Form Folder will look something like this:

The screenshot shows the 'Contents' tab of a Form Folder. At the top, there are tabs for 'Contents', 'View', 'Edit', 'Rules', and 'Sharing'. Below these are buttons for 'Actions', 'Add new...', and 'State: Private'. The main content area contains the following text:

**This is a test form**  
by [admin](#) — last modified Mar 07, 2010 05:16 PM

[Up one level](#)

**Describe your form**

<input type="checkbox"/>	Mailer	0 kB	Mar 07, 2010 05:16 PM	::
<input type="checkbox"/>	Your E-Mail Address	0 kB	Mar 07, 2010 05:16 PM	::
<input type="checkbox"/>	Subject	0 kB	Mar 07, 2010 05:16 PM	::
<input type="checkbox"/>	Comments	0 kB	Mar 07, 2010 05:16 PM	::
<input type="checkbox"/>	Thank You	0 kB	Mar 07, 2010 05:16 PM	::

Copy Cut Rename Delete Change State

At this point, we want to add any additional elements we want on the form, and arrange them in the order that we want them.

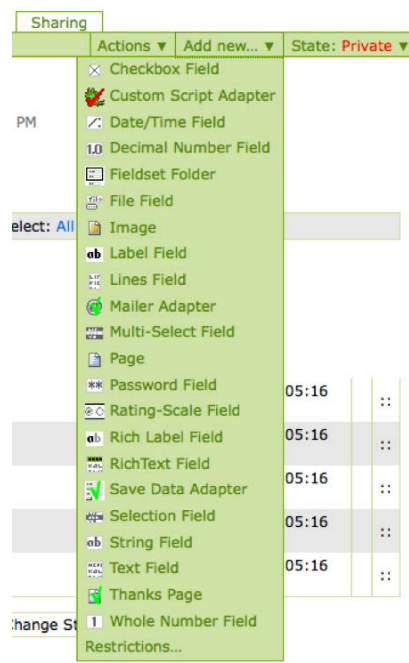
The types of elements we will go over in this tutorial are:

1. Boolean Field (Check Box)
2. String Field (Regular Text Box)
3. Multiple Select Field
4. Field Set Folder

We will also show you how to organize the form elements on the page.

## Adding Elements

You add form elements by going to the form folder you created and using the "Add New" menu item.



## Boolean Field (Check Box)

Boolean Fields are fields where the answer is either yes or no. On a form, a boolean 'yes' is indicated by a check inside the check box, and a 'no' is indicated by leaving the check box empty.

To create a boolean field:

- 1) Click on the 'add item' tab from the form folder, and select 'boolean field'.
- 2) Enter the yes/no question you want to ask in the 'Field Label' area. If there is any explanation you want to provide the user, enter that in the 'Field Help' section.
- 3) If you want this to be a required field, check the 'Required' box.

- 4) If you want the field checked by default, click the 'Default' checkbox.
- 5) If a particular response is required in order to continue or submit the form, then check the appropriate Validator. Otherwise, leave as 'None'.
- 6) Click "Save."

### **String Field (Regular Text Box)**

String Fields are fields where the answer is to enter a line of text, such as a first name, an address or a phone number. This is a left-over computer term that refers to a string of characters.

To create a string field:

- 1) Click on the 'add item' tab from the form folder, and select 'string field'.
- 2) Fill in the field Label and the Field Help areas.
- 3) Check the 'Required' box if you want this field to be required.
- 4) Check the 'Hidden' box if you want this field to be hidden. This is an advanced feature, and is not necessary for most fields.
- 5) If you want a length/size restriction for the field (other than the default) enter that size here. The numbers will indicate the number of letters that the field will accept. If you are wanting a person to be able to fill in a 'description' type of field that requires more than 255 characters, then you probably want a 'text field' instead of a 'string field'.
- 6) This sets the size for the actual text box for this field. Experiment with sizes. It does not determine how many characters can be entered (#5 does).
- 7) 'Validator' is if you want the computer to review the contents of the field, and to prohibit submittal unless the terms of validation are met. There is a drop down box that allows you to select specific validators. This can be useful if you want to make sure a person puts a valid email address in an email field, or that they don't put text in a field meant for a number.
- 8) Click 'Save'

### **Multiple Select Field**

Multiple Select Fields are fields that enable a person to select a specific answer from a list of options.

To create a Multiple Select field:

- 1) Click on the 'add item' tab from the form folder, and select 'multiple select field'.
- 2) Enter the Field Label and the Field Help options, and check the 'Required' box if you want the user to be required to answer this form element.
- 3) Under default, you enter which items from the list you want the form to default as. If you enter an item that is not on the list, it will not show it as selected when the user is presented with the options for this field.
- 4) Rows is for the case of 'select lists', and determines how many rows will show automatically before the user has to scroll down for more options.
- 5) Options is where you enter the options for this field. You will want to separate each option with a line break.
- 6) The last setting on this page allows you to choose if this element is a 'Selection List' or a 'Check box List'.
- 7) Click 'Save'.

### **Ordering and Re-ordering Form Elements**

Sometimes, you want to reorganize a form that you have created to make it easier to use or more logical. This function allows you to do that easily.

Go to the 'Contents' tab of the form element or the field set. You can set the order on the elements in two ways:

Contents View Edit Rules Sharing Actions Add new... State: Published

### Website Request Form

by [Mark Corum](#) — last modified Jan 19, 2010 09:42 AM  
[Up one level](#)

**Any University of Virginia Health System department, division, or center may publish information on the Health System server. The request for Web space and the designation of persons responsible (Web Managers) should be approved by the head of the department or center and indicated with the request.**

Select: All				
<input type="checkbox"/>	Mailer	0 kB	Jan 19, 2010 09:48 AM	::
<input type="checkbox"/>	Your E-Mail Address	0 kB	Jan 19, 2010 08:24 AM	::
<input type="checkbox"/>	Subject	0 kB	Jan 19, 2010 08:27 AM	::
<input type="checkbox"/>	Thank You	0 kB	Jan 19, 2010 08:24 AM	::
<input type="checkbox"/>	Department or Division Name	0 kB	Jan 19, 2010 08:26 AM	::
<input type="checkbox"/>	Website Name	0 kB	Jan 19, 2010 08:29 AM	::
<input type="checkbox"/>	Directory Name	0 kB	Jan 19, 2010 08:33 AM	::
<input type="checkbox"/>	Type of Website	0 kB	Jan 19, 2010 08:31 AM	::
<input type="checkbox"/>	Any special security or access limitations needed?	0 kB	Jan 19, 2010 08:34 AM	::
<input type="checkbox"/>	If so, please describe these needs:	0 kB	Jan 19, 2010 08:36 AM	::
<input type="checkbox"/>	Site Purpose	1 kB	Jan 19, 2010 09:15 AM	::
<input type="checkbox"/>	Person responsible for developing and maintaining website:	1 kB	Jan 19, 2010 09:12 AM	::
<input type="checkbox"/>	Supervisor approving this site:	1 kB	Jan 19, 2010 09:37 AM	::
<input type="checkbox"/>	How do you intend to use this website and who will your audience be?	0 kB	Jan 19, 2010 09:42 AM	::

Copy Cut Rename Delete Change State

1) Being careful not to click on the name of the form element (which will open that element page), select the row of the element you want changed, and drag it to the desired location.

2) Use the up and down arrows on the right-most column to move an element one space at a time.

# Publishing Basics

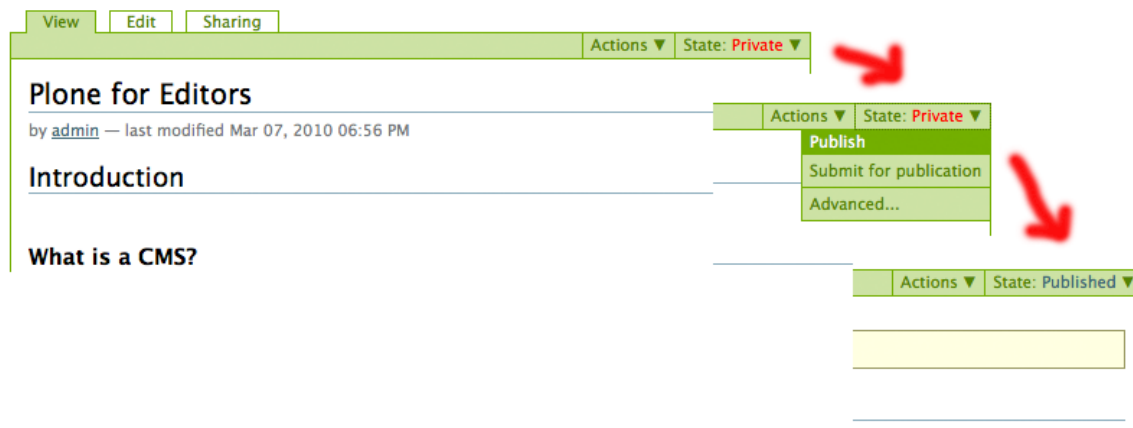
## What happens to “Staging” and “Production?”

The days of staging and production are over. Plone doesn't have separate servers for content before and after publication – instead, it has one address and you control what is seen and not seen by changing the state of each page or document on the site.

So how do you publish a page in Plone once its ready to be made public?

When you create a page in Plone, its state is set to “Private” – which means only you and other editors can see it. You will see this on the page if you look to the far right at the top of the page where you see “Private” in red in the “State” box.

To publish, click on “Private” and when the pulldown menu appears, select “Publish.”



That's it. Your page is published.

If at some point you want to return in to an unpublished state in order to edit it, or just remove it from view, just click on the green “Published” in the “State” box and pull down to “Retract.” This will put the document back into the Red-colored “Private” state.

You can also publish and retract multiple documents by clicking the “Content” tab on any folder, checking the checkboxes next to the documents you want to alter, then click the “Change state” button below them.

There is also an advanced capability to control publication timing so that you can have pages published and unpublished automatically at a date and time of your choosing. Check out the tutorials section on the WDC website for more information on how this works.

# Cool New Features

## Collections

Let's say you have a large catalog of photos and maps on your website. You can easily display them all at once by creating a hyperlink to the folder they're stored in. You could even create different links for subfolders if you've organized things that way. However, if your images and maps were spread out over the site in many folders this would quickly become cumbersome. Also, there is no way with normal folders to display different content, from different parts of your site based on things like:

- keywords in the title
- date of creation
- author
- type of content

The need for showing content in a variety of dynamic ways has given rise to Collections. Collections do not actually contain any content items themselves in the same way that a folder does. Instead it is the Criteria that you establish which determines what content appears on each Collection page.

A Collection in Plone works much like a report or query does in a database. The idea is that you use a Collection to search your website based on a set of Criteria such as: content type (page, news item, image), the date it was published, or keywords contained in the title, description, or body.

Common applications for Collections are:

- News Archives
- Event Archives
- Photos Displayed by Date Range
- Content Displayed by Keyword

### Creating A Collection

Let's start by creating a Collection that will display all News Items found on your website. This is one of the most common Collections found on a site, and you may in fact already have one on your site.

- 1) Find a place on your site to keep your Smart Folders.
- 2) Click on the Add to Folder tab and select Collection from the list.
- 3) Give your Collection a Title and Description.
- 4) You may now choose to Limit Search Results (optional)
- 5) You may also choose to display results in a table. This is optional (the default display is a vertical list) so you can play around with this if you like.

6) Push Save to create the Collection.

## Creating Parameters to Make Your Collection Work

At this point the Collection exists, but it doesn't do anything because you have to give it some criteria to tell it what to do. As you might expect, click on the Criteria tab to finish your Collection set up.

Notice that there are two boxes. One is labeled Add New Search Criteria, and the other is labeled Set Sort Order. Ignore Set Sort Order for the moment.

The image displays two side-by-side screenshots of the 'Add New Search Criteria' form. Both forms have a title bar that says 'Add New Search Criteria'.  
The left form shows:  
- **Field name:** 'An item's type (e.g. Event)' with a dropdown menu showing 'Item Type'.  
- **Criteria type:** 'Criteria does match' with a dropdown menu showing 'Select content types'.  
- An 'Add criteria' button at the bottom.  
The right form shows:  
- **Field name:** 'The time and date an item was created' with a dropdown menu showing 'Creation Date'.  
- **Criteria type:** 'Criteria does match' with a dropdown menu showing 'Relative date', 'Relative date', and 'Date range' (the first two are highlighted in blue).  
- An 'Add criteria' button at the bottom.

Under Add New Search Criteria are two drop-down menus called Field Name and Criteria Type. Click on the Field Name menu to see all the choices. To create a News Collection, choose Item Type.

You may notice that when you select Item Type, that there is only one choice for Criteria Type. That is because you must push Add to create the search criteria, then you can select the exact content type that your Collection will search for. Other Field Names such as Creation Date will give you more than one Criteria Type to choose from. In the example on the right, you can choose a Creation Date range or relative date.

After pushing the Add button, the top of the Collection screen should look like this:

	Field	Criterion Details
<input type="checkbox"/>	<b>Item Type</b> An item's type (e.g. Event)	A portal_types criterion A portal_types criterion <b>Values</b> ■ One of the available content types. <div>             Image              Large Folder              Link  <b>News Item</b>              Page           </div> <b>operator name</b> ■ Operator used to join the tests on each value. <input type="radio"/> and <input checked="" type="radio"/> or

From the list under Value find News Item and select it. You may select several Content Types from this list by holding down the Control button when you click on content types. When you're finished with this, push Save.

You're now looking at three boxes on the screen. The top box is the criterion you we're just working on. The second box allows you to Add New Search Criteria. This is how you could, for example, search for News Items (criterion one) created before July 1st (criterion two). The third box is Set Sort Order if you wish to change the order the results display in.

**Note:** All the above only works if you actually have News Items on your Plone site. If you do not, try changing the Item Type to Page. That should show you at least some results.

## Content-Based Navigation

Those who have used the Toolkit are used to managing their navigation menu by adding links the the menu editor will find the approach taken by Plone very different indeed. Plone creates its navigation links automatically and based on the structure of your site – so that by default, you can navigate to any file or document in your site via the navigation menu.

<<add an image of a working menu from an SOM site>>

In order to create a hierarchical menu in Plone, just create folders that are organized the way you want your menus to appear. As soon as you add a published folder or file, it is immediately reflected in navigation menu unless you choose to exclude it. In

order to exclude an item, just open it, click its “Edit” tab, click the “Settings” sub-tab, then click the “Exclude from Navigation” checkbox as shown below.

**Edit Page**

A page in the site. Can contain rich text.

Default ■ Categorization Dates Ownership **Settings**

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

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

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

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

*This document was created by the Web Development Center to provide training support for our internal classes. Some of the instructions included in this training are taken in part from the official Plone documentation website – <http://www.plone.org/documentation>, (content which is all available under GPL) as well as information provided by Steve McMahon (Plone Foundation), Veda Williams (Groundwire) and Joel Burton (Plone Bootcamps). Special thanks to the Plone IRC channel and its admins for responding to questions and providing useful examples. The help of all is gratefully acknowledged.*