Consiglio Nazionale delle Ricerche

Eurid Public Web Site Content Management System Manual ver 1.1

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EUR*id* Public Web Site

Content Management System

Manual ver. 1.1

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Contents

1. Introduction

Plone makes use of current browser standards and techniques, so using a recent version of a web browser is recommended. These instructions cover the setup for Plone customized to manage the Eurid Web Site by means of the management interface via Web.

2. Logging

2.1. Logging In

The login interface could be found at the uri https://webeu-admin.iit.cnr.it/login, if you already have a username and password, you can log in to the site by typing them into the form and clicking the `log in` button. If you haven't a username and password you will need to contact your site administrator. Cookies must be enabled for you to log in to the site. Your exact rights depend upon how the site is configured.

2.2. Forgotten password

If you forget your password it can be sent to the email address you provided when you registered. You can request that your password be mailed to you by clicking on the `click here to retrieve it` link located near the password field. If you did not specify a valid email address when you registered, you will need to contact your site administrator.

2.3. Logging out

Once you are logged in to the Plone site, in the upper right hand corner you will see a link to `log out`. It is good practice to `log out` of Plone when you are finished using it.

3. Structure of the portal

The EURID site is set up with a hierarchical structure in folders that confer a logical structure on the site contents and permit organization of information in a coherent way. The folders can contain various kinds of objects (documents, news, FAQ, etc.) but sometimes only contain a single type of object; for example the news folder can only contain news-type objects. The navigation menu, found on the left-hand side of the page and shown in Figure 1, permits you to select the folder with which to work.
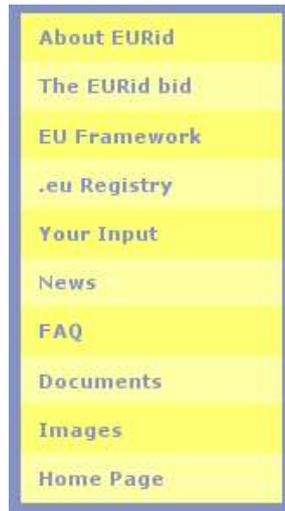
Figure 1-Navigation Menu

The navigation menu contains two special folders – Document and Images – that are not visualised to anonymous users. These folders are used to organize files (Word, Pdf, Excel, etc) and images contained in the EURid Website. Images and files contained in these folders can be referenced by a HTML page of the site. It's worth to note that images must be inserted only into the "Images" folder, while all other files must be inserted into the "Documents" folder.

4. View and Contents

There are two kinds of access to the files: `view` and `contents`.

Once login is performed, by clicking on a title from the navigation menu the selected folder is opened in `view` mode.
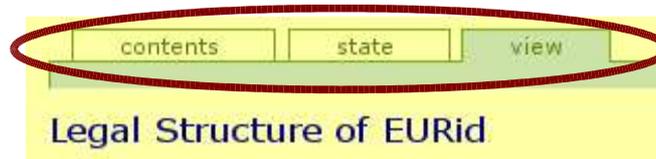

Figure 2-Content Bar

The current access function shown is indicated by the "content bar" (see Figure 2) which allows you to change functions by selecting the relative tab (`contents`, `view`). The mode shown in the example is `view.`

4.1. View

`view` mode permits you to visualize the way an object will be presented to the general user who will be viewing the site. The tab `view` is available both for the folder and for the other objects. In the case of the folder, the document *index_html* is visualised, if present, or if necessary a page is furnished by the portal administrators . For example, the news folder has its own `view` that shows the list of the News items inserted (a list that is dynamically created by the application). (see Figure 3).

Figure 3-News view

4.2. Contents

`contents` mode permits viewing the contents of the folder in the form of a list (see Figure 4). The `contents` tab also present for the other types of object (documents, news, FAQ), but by selecting it one can visualize the contents of the folder containing the object itself.

In this mode one can perform the following operations on objects in the folder : `rename`, `cut`, `copy`, `delete`, `paste`, `change state`. To apply an operation, select the object by using the checkbox to the left of the name of the object and then click on the button associated to the desired operation.

Figure 4-News contents

- **rename** – permits modifying the name of the object selected as well as its short name (the one visualised in the URL);

- **cut** – allows you to "cut out" the object; this function is used to move objects in a folder, cutting the subject and "pasting" it in another folder;

- **copy** – you to copy an object in order to "paste" it in the current or another folder;

- **delete** – cancels the object selected;

- **paste** – permits you to "paste" an object that had been previously cut or copied;

- **change state** – change the status of the current object (see paragraph 6.3).

By clicking on the name of the object, one can then view the selected object (in `view` mode).

This function also permits you to add objects to the folders (see paragraph 5).

4.3. Orientation and navigation suggestion

In order to understand one's location in the portal, the system provides a "path bar" indicating the various levels that separate the current location from the portal root.
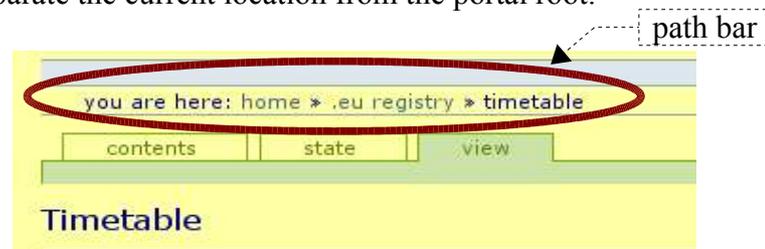
Figure 5-Path bar

Aside from indicating one's current position, the "path bar" supplies links to the upper level

folders. In the example shown in Figure 5 , the current position is the document "timetable" contained in the folder "eu. Registry" which in turn is contained in the "root" of the portal.

The navigation menu on the left also indicates the current position, coloring the item from the corresponding menu in a darker yellow, as shown in Figure 6 for the "Timetable" document.

Figure 6-Navigation Menu - Current Document Selected

Furthermore, when we are in a folder in the `content` mode, it is possible to go to an upper-level folder from the current one by means of the `Up one Level` shown in Figure 7.

Figure 7-Up One Level Link

5. Adding and editing content

User logged having the right permission can add content to the portal. This paragraph shows how to add and edit a `Document` in detail. All content types are added and edited in a very similar manner.

5.1. What is a Document?

A document is a page of content, usually a self-contained piece of text. Documents can be written in HTML using the integrated HTML editor. The home page for the Eurid Web site is one example of a document.

5.2. Adding a document

Documents (like all other objects) can only be added to folders where one has the proper authorization. To add a document to a folder it is necessary to go into the folder itself (for example by using the "navigation menu", (Figure 1) and go to `contents` (see Figure 2). If you do not see the `Contents` tab, you do not have permission to add or edit content in this location.

Once you are in `contents`, you will notice a drop down box in the upper left hand corner of the center panel next to the `add new item` button (see Figure 8).
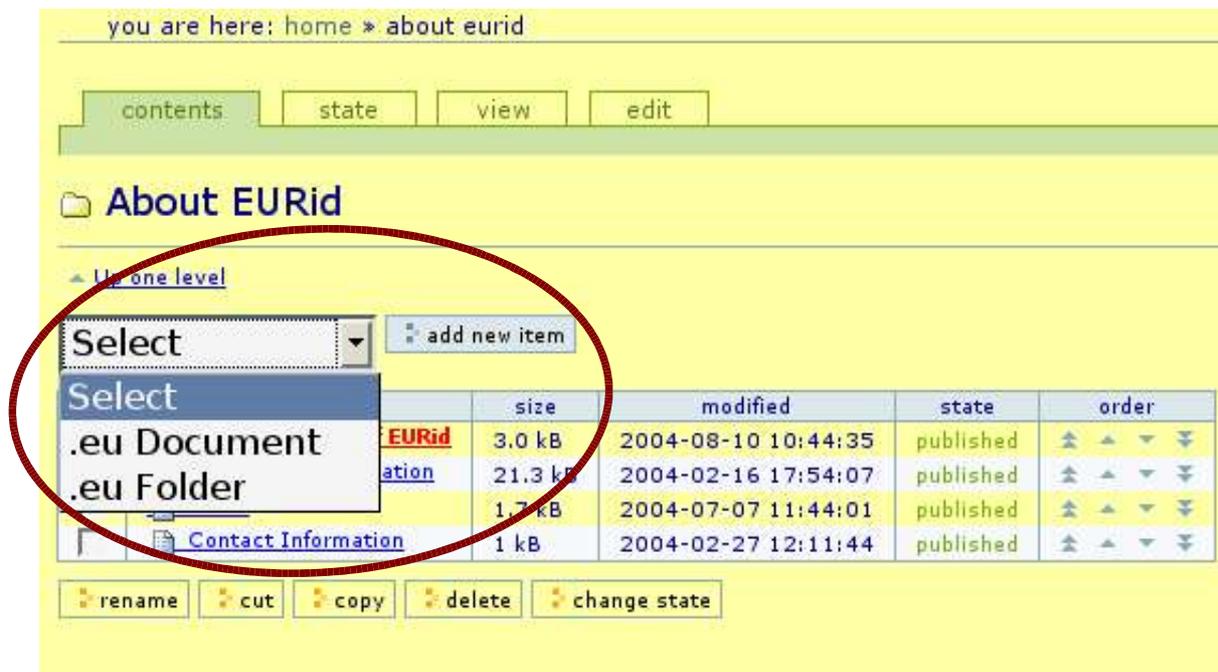

Figure 8-Add new document

This gives you the list of content types you can add in this folder. Select `.eu Document` from this list, then click `add new item`. Once a document has been added you are taken immediately to the edit page for that document and a message that the document has been successfully created appears at the top of the page (see Figure 9).
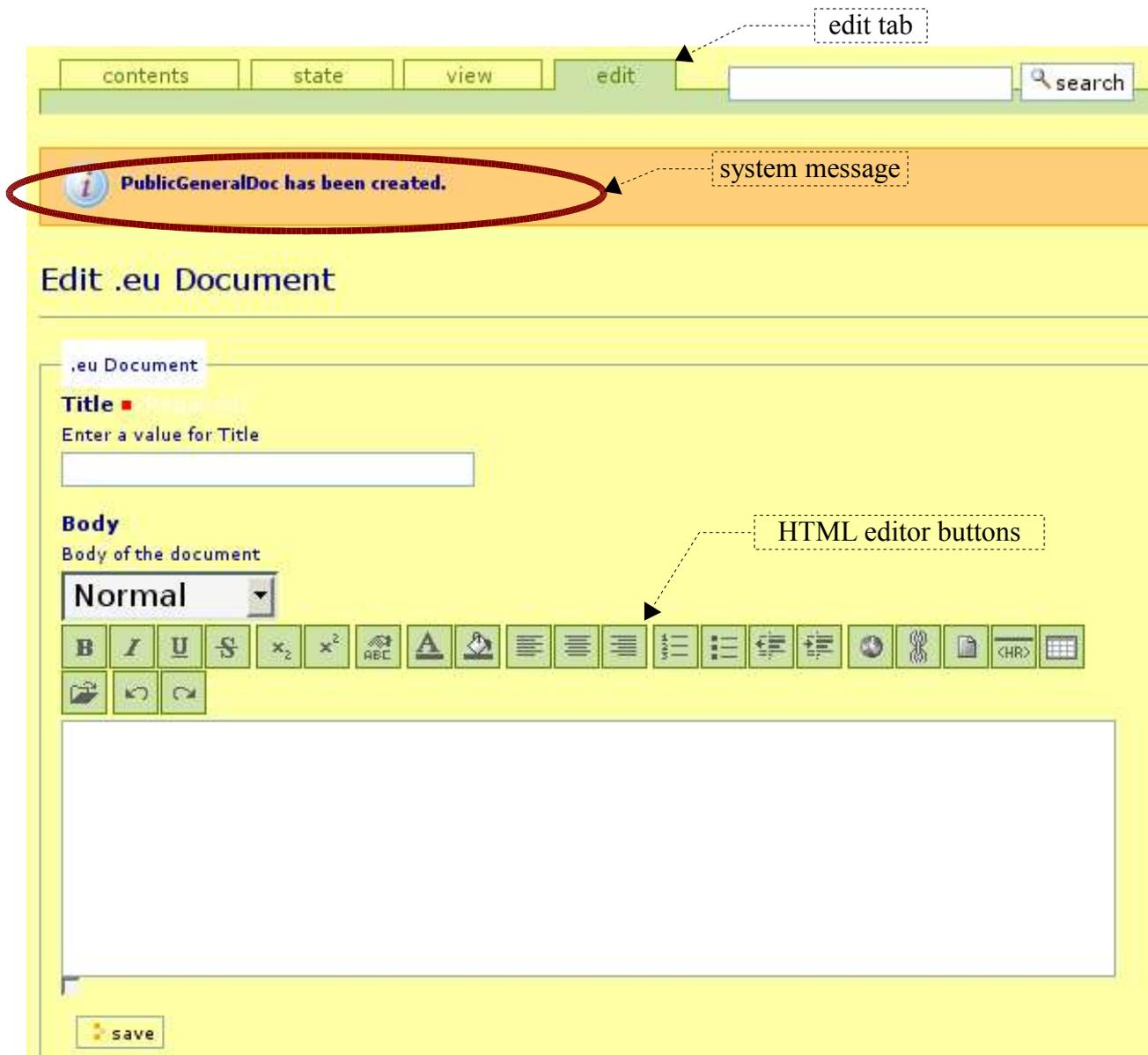
Figure 9-New .eu Document

5.3. Editing a document

The document can be edited directly in the web browser, using the edit form. One thing to note is the highlighted `edit` tab at the top of the page.

There are two fields for a document:

- **Title**: This item will be shown at the top of the page, in the path bar, in the search interface, in the title of the browser and so on. This field is required.

- **Body**: This field contains the body of the document.

A red square next to the label of an input field means the field is required.
Any errors, for example the absence of a required field, will be reported by an appropriate message during the *save* phase (see Figure 10).
The integrated HTML editor (Epoz) allows you to edit documents with a wysiwyg-editor (See

Figure 10-Error reporting.

Figure 9). For details on HTML editing see paragraph 5.6.

5.4. Other forms of content

There are several different object types that come by default in the Eurid Web site. Adding and editing these object types is a similar process to the one described above for documents.

5.4.1. Folder

Folders are the simplest mechanism for organizing content. A Folder is a container that can house Document and other Folder. Folders cannot be added directly under the root of the site or under the News folder; if this is necessary one can contact the site administrator.

To add a folder, enter the folder that will contain it (for example using the "navigation menu",(Figure 1) and then go in `contents` mode (see Figure 2). If you do not see the `Contents` tab, you do not have permission to add or edit content in this location. Once you are in `contents`, select ".eu folder" from the drop down box in the upper left hand corner of the center panel next to the `add new item` button (see Figure 11).

Figure 11-select add .eu folder

Once a folder has been added you are taken immediately to the edit page for that folder where it will be possible to insert the name of the folder (see Figure 12). This title will be shown at the top of the page, in the path bar, in the search interface, in the title of the browser and so on.
For each folder it is possible to create a default page to be visualised when the folder is selected in `View` mode. If the default page is not present, the system will show the list of the items contained in that folder.

Figure 12-Edit a folder

If you want to create the default page (index_html) in this folder you can press the "create default document" button (see Figure 13). Note that the button is present only if the index_html page is not present.

Figure 13-Create Default Document

Items contained in a folder are visualised according to a default order. A new item (document, folder, news, image, etc.) is inserted at the bottom of the list. It is possible to change the order using the "Order buttons" (see Figure 11) that allows to move an item up or down of one position or to move it at the top or at the bottom of the list.

5.4.2. News (and Press Release)

News are divided in "Latest developments" e "Press Release"; to add a news item first go to the appropriate folder. Note that the last three news items inserted into the "Latest Developments" will

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be seen on the Homepage in the LATEST" box (see Figure 14).

Figure 14-Latest

Once you are in `contents`, of one of the aforementioned main folders, click on the `add new eurid news` button (see Figure 15).

Figure 15-add new eurid news

Once a *News* has been added you are taken immediately to the edit page for that News (see Figure 16) where the following fields can be inserted:

- **Title**. This title will be shown at the top of the page, in the path bar, in the search interface, in the title of the browser and so on;

- **Date**. The date of the News item; this date is utilized by the system to organize the news items in the `view` mode. The current date is presented daily by default;

- **Abstract**. This is a non-required text-type field, that can provide a summary of the news. If present, the text in this field is displayed instead of "News Content", both on the homepage and in the list of News items (in `view`); in this case, the text contained in "News content" can be accessed by clicking on the `more` link located below the abstract (see Figure 14).

- **News content**. Contains the full-length text of the News. As with documents, the text can be formatted by using the integrated HTML editor.

- **In home page?**. If the checkbox is selected, the news is candidate to be shown in home page. Only the last n (n<=4) candidate news, ordered by date, will be visualised in home page (see Figure 14).

Figure 16-Edit News

5.4.3. FAQ

The FAQs are divided into General Questions and Registrars Issue; to add a FAQ it is therefore necessary to go to one of these two folders.

Once in the *contents*, of one of these folders, click on *add new eurid faq* button (see Figure 17).

Figure 17-Add new Eurid FAQ

Once a *FAQ* has been added you are taken immediately to the edit page for that FAQ (see Figure 18) where it will be possible to insert the following fields:

- **Question**. Contains the question of the FAQ; this field will be displayed at the top of the page, in the path bar, in the search interface, in the title of the browser and so on;

- **Answer**. Contains the answer to the question in the Question field. As with documents and news, text can be formatted by means of the integrated HTML editor;

- **Mostly Asked Question.** This checkbox allows you to categorize the FAQ as a Most Asked Question (MAQ) The list of the MAQ can be seen in the FAQ folder when visualised by anonymous users (see Figure 19).

Figure 18-Edit FAQ

Figure 19-FAQ folder VIEW

5.4.4. File

Files of types Word, PDF, Excel, Powerpoint, etc. can be inserted in the portal to be linked from HTML pages. These files can be added only inside the "Documents" folder. The steps to follow in order to insert a new file are similar to those used for documents (see paragraph 5.2).

5.4.5. Image

In addition to files, it is possible to insert in the portal also PNG, JPG, and GIF images. These can be linked from HTML pages. Images can be added only inside the "Images" folder. The steps to follow in order to insert an image are similar to those used for documents (see paragraph 5.2).

5.5. How to modify the home page

The home page can be modified by going to web site homepage and selecting *home page* from the left menu. The home page is a normal document and thus can be modified like any other.

5.6. Integrated HTML editor

As described in the previous paragraphs, the system provides a tool that allows HTML editing directly from the Browser. No plugins are required. You only have to use a recent browser (IE >= 5.5, Mozilla >= 1.3.1, Netscape >= 7.1, Firebird >= 0.7) that supports Rich-Text-controls.
The integrated editor allows you to edit documents using typical word processor functions (boldface, italics, lists, tables, etc.), which can be called up by using the buttons located over the area to be edited (see Figure 20).

Figure 20-Epoz buttons

The editor (Epoz) provides the following functionalities: bold, italic, underline, strikethrough, subscript, superscript, remove format, text color, background colour, aligns, lists, indentations, insert link, insert anchor, insert image, insert rule, insert table, toolbox, undo, redo.
Following some of the above features are described.

Remove format: remove the format (bold, italic, underline, strikethrough, subscript and superscript) on the selected text, if present.

Insert Link: clicking this button, a new window will be opened and an hypertext link can be associated to the selected text.

Insert Anchor: clicking this button, a new window will be opened and an anchor[1] name can be associated to the selected text.

Insert Image: this button allows to insert an image into a document by means of the image's URI.

Toolbox: this button allows to browse links and images contained into the portal to be inserted in a document. Clicking this button, a new window will be opened (see Figure 21). This window allows to browse inside the portal and choose the image to be inserted or the document to be linked. A document or an image can be searched also using the search box.
Note that this is the suggested way to insert images contained into the "Images" folder or links (documents, files, images, news, folder, etc).

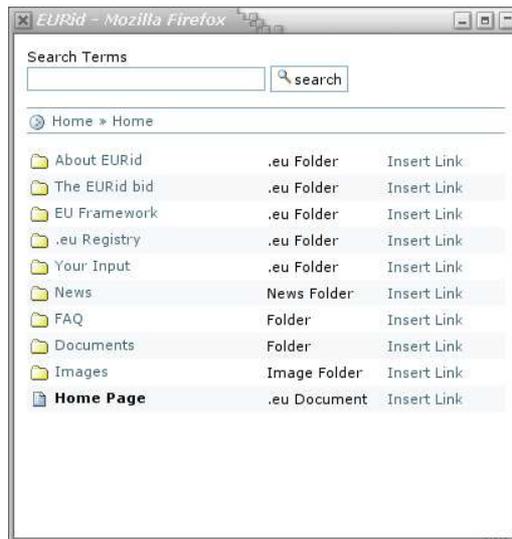1 Anchor: HTML link inside a document

Figure 21-Toolbox Window

5.7. Searching for content

There are two ways to search for content in Plone. At the top of your Plone site there is a search box that provides an easy way to do simple keyword searches. You can narrow down the search results by using the `Advanced search` functionality. This is accessed by clicking on the `Advanced search` tab at the top of page (see Figure 22).

Figure 22-link Advanced Search on search results page

In the `Advanced search` form you are able to query content by a number of attributes including: title, keywords, description, review state, creation date, content type and even author.

6. The Workflow System

Workflow is the process used to manage objects in a website. An example is a company's press release: an employee writes a press release and submits it to an editor for review before it is published on the website. This review process is called a workflow and is used by site managers to ensure that site content is correct. Plone has a very powerful and flexible default workflow system that is built around *Object States* and *User Roles*.

6.1. Object States

An object's state determines whether it is available to the various types of users defined in Plone, and what other states that object can be transitioned to. Plone's default workflow includes four states: visible, pending, published and private.

- By default, objects are created in the `visible` state. All users can find visible objects through the search function and can access them directly by visiting the object url. Visible objects do not show up in the navigation tree. Visible objects within private folders are still visible to all users and available through the search function. Visible objects are editable by their owners and site managers.

- `Pending` objects have been submitted for publishing by site members. From an end-user standpoint, they behave like objects in the visible state. The difference between the two types is that pending objects are flagged for review; site reviewers are prompted to publish or reject pending objects. Pending objects are editable only by managers.

- `Published` items are visible to all site visitors. They appear in search results and the navigation tree. When a News becomes published it becomes visible under the News box in the home page. Published items are editable only by managers, but can be retracted by owners for editing (retracting reverts an object to the visible state).

- Objects in the `private` state are visible and editable only by their owners and others with manager access to the folder in which they exist. They will not appear in search results or on the navigation tree for other users. Private items are editable by managers.

6.2. User Roles

Plone uses roles to define what different users can see and do. In this way, Plone builds security into every aspect of its operation. The roles defined in a default Plone installation include anonymous, member, owner, reviewer and manger.

- Anyone who visits the site and does not log in takes on the `anonymous` role. In public sites, anonymous users can see published, pending and visible content by directly visiting a url or by searching, however only published content is visible on the site navigation tree. If you have set your site up as private, anonymous users cannot see anything.

- `Members` are users who have logged in to the site. Members have the added ability to create content in their own folder, which is then submitted to site reviewers to be published. In public sites, members can see the same content as anonymous users. In private sites, members have access to published, pending and visible content. Members may also set their own preferences.

- As a `reviewer`, you can publish or reject content submitted by members. When a reviewer logs in, if there is content to be reviewed a "pending" message will appear in their personal bar. A review list also appears in the right-hand column of the page. Reviewers have access to the same content as members.

- Members have the `owner` role for all content they create. This allows them to edit the content,

submit or retract it, or make it private. Assigning the owner role to other users is not recommended.

- Site *managers* can see content in all states (visible, pending, published and private). In addition to all the capabilities of the member and reviewer, managers can add, edit, delete and move content. Managers can also add, edit and delete users and assign them roles. Site managers can give specific users additional rights in certain sections of the website. This can be accomplished by assigning local roles to folders. Managers and owners have permission to assign local roles.

6.3. Transitions - Changing Object States

Owners and managers can change the states of objects they control. The states that are available are controlled by pre-defined transitions. For example, site members can submit visible objects for review or make them private and site reviewers can publish submitted items or reject them. Site managers can also customize this portion of the workflow system.

To change an object's state in *contents* view, check the box next to the name of the object to be changed and then click the change status button at the bottom of the page (see Figure 4). Scroll to the bottom of the Publishing Process page and choose the desired state (see Figure 22), then click *save*.

Figure 23-Publishing Details.

One can also change states in item `view`. Simply click on the `state` tab of the "content bar" and a page like those in Figure 23 will appear; scroll to the bottom of the page, choose the desired state and click `save`.

6.4. Publishing an object

Object owners can alter and edit objects in the `visible` state. Once an owner finishes editing an object, it can be published by clicking the `State` tab. This opens a publishing form like in Figure 23.

This form gives you several options:

- **Effective Date and Expiration Date:** The effective date is the first day an object should be made available and the expiration date is the last day. Searches and navigation only show objects within this date range. Leaving these items blank makes an object infinitely available.

- **Comments:** Here you can enter any comments or reason for the change in state you are requesting. These comments will be preserved in the change log for the object.

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- **Change State:** The states to which a user can move an object. The states available here will depend on your role. Members can submit objects or make them private. Once submitted, objects are available to users with reviewing privileges, who can then publish or retract them.

6.5. Reviewing objects

If you have reviewing privileges, when you log in to your Plone web site, it is possible to present an indication with a list of the objects ready for review and then to select each object to review it.

In order to review an object click on the `state` tab and you will be presented with a form like the one above. At this point you have basically two choices - either approve an object and publish it (the publish option) or reject it (the reject option). If you reject the object you will probably want to provide a comment to the user explaining why you have rejected it.

6.6. Editing an object after it has been published

Managers may edit objects that are in any state. Members and Reviewers cannot edit an object after it has been published; they must first move it back into a visible state by retracting it. To do this, click on the `state` tab for the object and click `retract`. Then you can edit the object as much as you wish and resubmit it. This ensures that the review process is maintained for objects that have been edited.

As an example, lets see how to edit a FAQ after it has been published. The steps are the following:

1. select the FAQ to be modified;

2. click on the `state` tab of the "content bar", a page like those in Figure 23 will be shown;

3. select `retract` on the `change state` section, in order to change the FAQ status to *visible*;

4. now the FAQ is visible and so it is editable; click on the `edit` tab in order to change the FAQ as you wish.

Now, if you want, you can re-submit the FAQ to a reviewer or re-public it following the process described in paragraph 6.4.

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