Purdue Site Training June 24-25

Using Plone

Online Resources
You will find the following online information about the Plone CMS:
- documentation (manuals) https://docs.plone.org
- training guides https://training.plone.org
- discussion forum https://community.plone.org
- all things Plone, including chat https://plone.org
- high level overview of Plone https://plone.com

Logging In
- We will use https://plonedev.ecn.purdue.edu/ for the training
- Go to https://plonedev.ecn.purdue.edu/login and log in to the site
  - Note: from anywhere in the site, you can add /login to the end of the url
- You will be authenticated through Purdue’s CAS
- When you are taken back to Plone, you should see the black edit bar on the left

Managing Users and their Permissions
https://trac.sixfeetup.com/purdue-engineering/wiki/ManageUsers

Adding New Content / Managing Existing Content
- Plone documentation: https://docs.plone.org/working-with-content/index.html
- Navigate to the location in the site where you want new content to appear. From the ‘Add new’ menu, select the content type you want to add
  - Note: many types you see here only apply to specific parts of the site. The types you will most likely be adding regularly will be Folders, Pages, and News Items.
- From the root of the site, add a new folder with your name. This will be your testing playground for the training.
• Content is private by default. When it is published, it is viewable to anonymous users.

• Content also has publication and expiration dates (Dates tab of the edit view) that apply to **published** content. Setting these dates does not automatically publish or retract any page. The dates affect when the content item will appear in folder listings and search results.

**Add some content to get used to the Plone interface:**
• Add a couple Pages. Fill out the Title, summary, and body text fields
• Add a couple Files/Images
• Add a collection with criteria

**Change the display of the folder view**

**Managing the Home Page**

• **Hero**
  o Managed in the News Control Panel
  o A blue edit button in the Hero area links to the News Control Panel

• **Proof Points**
  o Managed in `/homepage/proof-point-images/college`

• **Social**
  o ‘Social’ link is in the template
  o Feed comes from an external service

• **News**
  o ‘News’ link is in the template
  o Six displayed items are managed in the News Control Panel
  o ‘Suggest a Story’ link is in the template
  o News feature banner is managed in the News Control Panel

• **Events**
  o ‘Events’ link is in the template
  o Dynamically displays upcoming events from the `/AboutUs/News/Events` folder happening in the next year

• **Dean’s Message**
  o Left side is in the template
  o Right side is pulled from `/homepage/deans-message`. Click ‘Edit message’ to edit the page
• Proof Points
  • Managed in /homepage/proof-point-images/school

Managing News Banners, Features, and listings
• Managing the News Banners and Features on the homepage and news landing: https://trac.sixfeetup.com/purdue-engineering/wiki/NewsControlPanel
• Add a News Item to your folder

More information
• Detailed walk-through example for the Academic Affairs page: https://trac.sixfeetup.com/purdue-engineering/wiki/EventNewsListingPage
• Options for the Content Listing tile display: https://trac.sixfeetup.com/purdue-engineering/wiki/UsingMosaic/ContentListing (this will be covered more in the Mosaic section)

Managing Events
• There are three event types: Event, Seminar, Legacy Event
  • The purpose of the Legacy Event type was for migrating older event items into the new site to keep all the information attached to them. New Legacy Events should not be added to the site.
  • The event and seminar types each have their own template
• Add a new Event into your folder

Images and Files:
• On the event edit view, there is a tab for managing Images and Files
• Images and files can be selected or dragged and dropped onto the upload area
• After uploading, images and files will appear with fields for title and caption, plus thumbnail and display options
• ‘Use as thumbnail’ allows you to select the image that will represent the image on listing views. Only one image can be set as the thumbnail
• ‘Display when viewing’ will show the image or file on the edit detail view

Folder Display options
From your folder, click Display in the edit bar. You will have several options to choose from for how the folder landing will display
Default Plone Options

- Standard view is the default for new folders. The other options are Album view, All content, Event Listing, Summary view, and Tabular view.
- Another option in default Plone is the ability to ‘Select a content item as the default view’. This allows you to select a page or collection from within the folder to use as the view users see when they navigate to the folder.

Select a content item as default view...

- This option will bring up a list of items contained within the folder.
- With an item set as the default view, users will see the item when landing on the folder instead of the folder view. Note that they are not redirected, the url will be the same as the parent folder.
- When clicking edit on the Folder, you will be taken to the edit page of the default item. A notification appears at the top to warn you of this.
- Note that items set as the default view may also have a custom layout that they use. When opening the Display menu on the folder, you will see the menu separated into ‘Folder display’ and ‘Item display’.

Specific View Layouts

- CoE History View - Displays a timeline layout of CoE History Items from within the folder. Built for the History page.
- Awardee Listing View - Displays Awardee Profiles, based on folder order. The content below the listing comes from a page with id content-footer.
  - Faculty Awardee Listing
  - Staff Awardee Listing
- Faculty Listing View - Displays Faculty items, which are custom profiles not connected to the RDB. Ex: New Faculty listing
- Calendar View - Displays a fullcalendar. If applied on a Folder, all site events will display. If applied on a collection, events are limited by the collection’s criteria. Ex: Calendar view
- Edit Image Weights - For proof point folders, gives editors a view for managing the weights of all the images at once.

Redirects

- Redirect to Parent - This is for folders where you don’t want end users to see the folder view. Users will instead be redirected to the parent item.
Redirect to First Item - [https://trac.sixfeetup.com/purdue-engineering/wiki/RedirectLayout](https://trac.sixfeetup.com/purdue-engineering/wiki/RedirectLayout)

**Mosaic Layouts**
- Mosaic Layout - Changes the page to a Mosaic view. Tiles fit in the normal content column, portlets will display if available
- Full-width Mosaic Layout - Changes the page to a Mosaic view. Tiles fill the browser width, portlets will not display

**Editing local CSS**
- From the folder or item where the CSS will apply, click Actions > Edit CSS
- Look at the URL to make sure you are where you want to be
  - If you click Edit CSS from a page that is set as the default view for a folder, you will be editing the CSS only for the page, when you may want to edit it for the Folder
  - If you need to change the location, you can edit the url to go to the parent folder
- Click ‘+ View Inherited CSS’ to open the section that will show you what local.css files are inherited in the current location
- If you don’t want the CSS to be inherited, deselect the checkbox
- Enter your local CSS in the textbox and Submit to save.

**Mosaic**
- Set up a copy of the Giving Page:
  - From your folder, add a Page, save
  - Set to Full-width Mosaic Layout, edit
  - Select Basic layout
  - Layout > Customize
  - Delete any tiles that are not needed
  - Edit the Banner tile, point to an image, add a title
  - Add breadcrumbs
  - Add two rich text areas
    - set dark background on the second
  - Add Raw HTML
- set black background on the row
  - Add Wide News, image on left
  - **Tagged People tile** has not been created yet
  - Insert Raw HTML or Rich Text for the ‘Stories of Impact’ button
  - Add a content listing
    - Location: About Us > News Spotlights
    - Type: News Item
    - Review State: Published
    - Tag: Advancement
    - Limit to 12

More information:

### People Listings
- **In your folder, add a Group Listing**
- Select a group, save
- Click on a group
- Edit the People Listing
- Change the profile row fields
- Review by clicking on a group again
- On the group listing, change the order of the groups, hide a couple

More information:
- Video: [https://www.dropbox.com/work/Projects/Purdue/Demo](https://www.dropbox.com/work/Projects/Purdue/Demo)

### Development setup
- Currently only Hilary has access to the repo
- See https://bitbucket.org/sixfeetup/engineering/src/develop/README.rst for getting set up
- Postgres has some issues on MacOS. You can link to the `local-no-pgsql.cfg` from `buildout.cfg`
- Compiling CSS

**Getting staging/prod data to your local instance**

There are three ways this could be done:

1. If using postgres locally, copy the database from the server to your local instance. Blobs will need to be copied separately. (Instructions for this will eventually be set up on the wiki).
2. If not using postgres locally, a `zodbconvert` can be run on the server to turn the database into a Data.fs file. Blobs will need to be copied separately. (Instructions for this will eventually be set up on the wiki).
3. Use `.zexp exports`
   a. From staging, go to the ZMI to the parent folder of the item you want to export
   b. Check the box next to the item, click Import/Export at the bottom of the page
   c. Select the radio button for “Download to local machine”, Export
   d. Put the downloaded `.zexp` into the `buildout/var/instance/import` folder
   e. In your local ZMI, navigate to the folder where you want to import the item
   f. Click Import/Export at the bottom of the page
   g. Select your `.zexp` from the dropdown, click Import

**Development Process**

- Make changes to the homepage
- Check the changes locally
- Check in the code
- Update the ticket

**Releasing**

**Ticket workflow**

There are two main instances to release to: Sandbox (plonedev) and Staging (future prod, ploneserver).
- [https://trac.sixfeetup.com/purdue-engineering/wiki/ReleaseToPloneDevel](https://trac.sixfeetup.com/purdue-engineering/wiki/ReleaseToPloneDevel)
• https://trac.sixfeetup.com/purdue-engineering/wiki/ReleaseToProd

Export/Import

• Export from Workshop: https://trac.sixfeetup.com/purdue-engineering/wiki/WorkshopEnvironment#ExportingDatafromZope
• Running the full import https://trac.sixfeetup.com/purdue-engineering/ticket/122
• Import specific sections: https://trac.sixfeetup.com/purdue-engineering/wiki/RunImport