



**Centre for Environmental
Policy and Advocacy**

An environment and natural resources library for Malawi

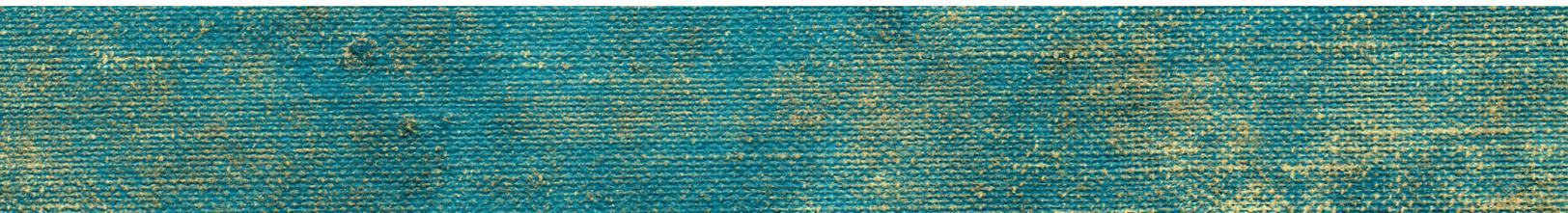
CEPA Content Management Manual



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March 2, 2017



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How To Add Content to the Portal: A General Overview

A general overview of how to add content, including definitions of each standard content types.

Would you like to contribute?

You can contribute content to this website. Content includes: *web pages, files, links, images, news items, and calendar events.*

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, and what each are used for:

Collection

Collections are used to group and display content based on a set of **criteria** which you can set. Collections work much like a query does in a database.

Event

An Event is a special page-like content type specifically for posting information about an event (such as a fundraiser, barbecue, etc). This content type has a function which allows the site visitor to add the event to their desktop calendar with either the iCal or vCal standard. This includes 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.

European Plone Symposium 2010

When	<u>May 26, 2010 11:00 AM to</u> <u>May 30, 2010 07:00 PM</u>
Where	Sorrento, Italy
Attendees	Alexander Limi, Martin Aspeli
Add event to calendar	 vCal  iCal

From Plone 3.3 on 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`. There are plans to provide a link to this iCal calendar inside the UI in a future release.

File

A File in Plone is any binary 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 TinyMCE or Kupu, Plone's visual page editors. The Link content type is often used to include

a link to an external website in Navigation and other specialized uses.

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.

Note: Depending on what add-on products you have installed, you may see more options in your **Add New . . .** drop-down menu than appear here. For information about those additional content types, refer to the Product documentation for the add-on in question.

Title

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

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/personnel/sally/bio`

or

`www.mysite.com/images/butterflies/skippers/long-tailed-skippers`

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.

The web address of a given item is referred to as the **short name** in Plone. When you use the **Rename** function, you'll see the short name along with the title.

The fields will vary according to the content type. For instance, the Link content type has the URL field. The File content type has the File field, and so on.

Description

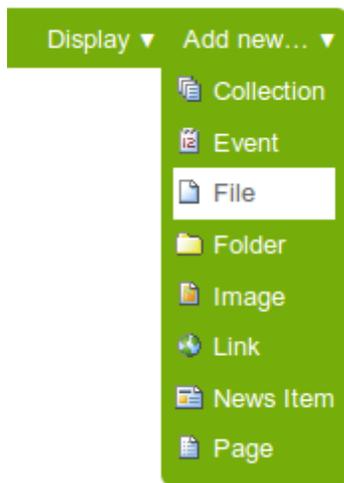
The **Description** appears at the top of pages, just under the Title. Descriptions are often used to conjunction with a variety of Folder and Collection views (such as Standard and Summary). The Description also appears in search results via Plone's native search engine.

Adding Files

How to upload files in the portal.

Files of various types can be uploaded to Plone web sites.

Choose file in the *Add new...* menu for a folder to upload a file:



You will see the *Add File* panel:

Add File

An external file uploaded to the site.

The screenshot shows the 'Add File' panel with the following elements:

- Tabbed interface with 'Default' selected.
- 'Title' text input field.
- 'Description' text area with the placeholder text 'Used in item listings and search results.'
- 'File' field with a 'Browse...' button.
- 'Save' and 'Cancel' buttons at the bottom.

Click the *Browse* button to navigate to the file you want to upload from your local computer. Provide a title (you can use the same file name used on your local computer if you want). Provide a *description* if you want. When you click the save button the file will be uploaded to the folder.

Example file types include PDF files, Word documents, database files, zip files... -- well, practically anything. Files on a Plone web site are treated as just files and will show up in contents lists for folders, but there won't be any special display of them. They will appear by name in lists and will be available for download if clicked.

Adding Links

How to add links in the portal.

In addition to links embedding within pages, Links can be created as discrete content items. Having links as discrete items lets you do things like organizing them in folders, setting keywords on them to facilitate grouping in lists and search results, or include them in navigation.

Add a link by clicking the menu choice in the *Add new...* menu for a folder:



You will see the Add *Link* panel:

Add Link

A link to an internal or external resource.

Default Categorization Dates Ownership Settings

Title

Description
Used in item listings and search results.

URL

Change note
Enter a comment that describes the changes you made.

Save Cancel

Good titles for links are important, because the titles will show up in lists of links, and because there tend to be quite a number of links held in a folder as a set.

Paste the web address in the URL field or type it in. There is no preview feature here, so it is best to paste the web address from a browser window where you are viewing the target for the link to be sure you have the address correct.

The Link Object in Use

A link object will behave in the following ways, depending on your login status, or permissions.

- **If you have the ability to edit the link object**, when you click on the link object you'll be taken to the object itself so that you can edit it (otherwise you'd be taken to the link's target and could never get to the edit tab!)
- **If you don't have the ability to edit the link object**, when you click on the link object you'll be taken to the target of the link object. Likewise, if you enter the web address of the link object directly in your browser, you'll be taken directly to the link's target. The link object in this case acts as a *redirect*.

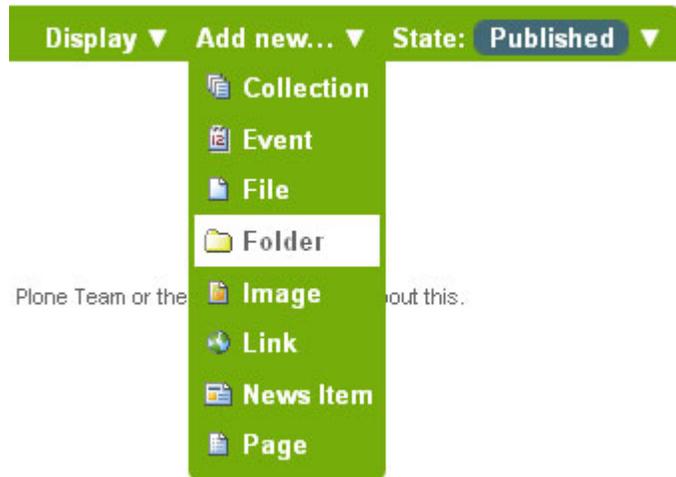
Adding Folders

How to add folders to the portal.

Adding folders to a Plone web site is the basic way of controlling the organization of content.

You have undoubtedly created folders (directories) on your computer's hard drive. Personal computers use a hierarchy of folders to structure and organize the programs and files on the hard drive. In Plone folders are essentially used the same way, except that they are created on a Plone web site, for organizing content in Plone's built-in storage system.

Folders are added by clicking the **Add new...** drop-down menu. Select **Folder** from the menu:



ght corner)

You should now see the *Add Folder* screen. Fill in the **Title**. The title is required, as indicated by the red square. The **Description** is optional; you can always come back to the edit panel if you need to add a description of the folder. Descriptions are useful when a site visitor uses the search tool included with Plone - results will display with both the Title and Description of the item.

Add Folder

A folder which can contain other items.

A screenshot of the 'Add Folder' form in Plone. At the top, there are tabs for 'Default', 'Categorization', 'Dates', 'Ownership', and 'Settings'. The 'Default' tab is selected. Below the tabs, there is a 'Title' field with a red square next to it, indicating it is required. The text 'Butterflies' is entered in this field. Below the title field is a 'Description' field with the text 'Used in item listings and search results.' and a large empty text area for input. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

You will also notice tabs along the top:

- *Default*, for entering the Title and Description fields,
- *Categorization*, for specifying categories that apply to the folder (you may know these as *keywords*),

- *Dates*, for setting the time period when the folder should be available for view on the web site,
- *Ownership*, for specifying the creator and/or contributors for the content item,
- *Settings*, for allowing comments about the item, adding next and previous links, and choosing whether it shows in the navigation menu for the web site.

These tabs are standard, so you'll see them when you click other content types. We will cover these tabs in another section of this user manual.

Be sure to click **Save** at the bottom of the page when you are finished. This will complete the folder creation process.

Adding and Using Collections

A Collection in the Portal works much like a report or query does in a database. The idea is that you use a Collection to search the portal based on a set of Criteria such as: Tags (Climate Change, Webinars, Endangered Species), content type (File, Page, News item, Image), the date it was published, location (in a particular folder), or search terms contained in the title, description, or body.

[Introduction to Collections](#)

A Collection in Plone works much like a report or query does in a database. Use Collections to dynamically sort and display your content.

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.

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.

Common applications for Collections are:

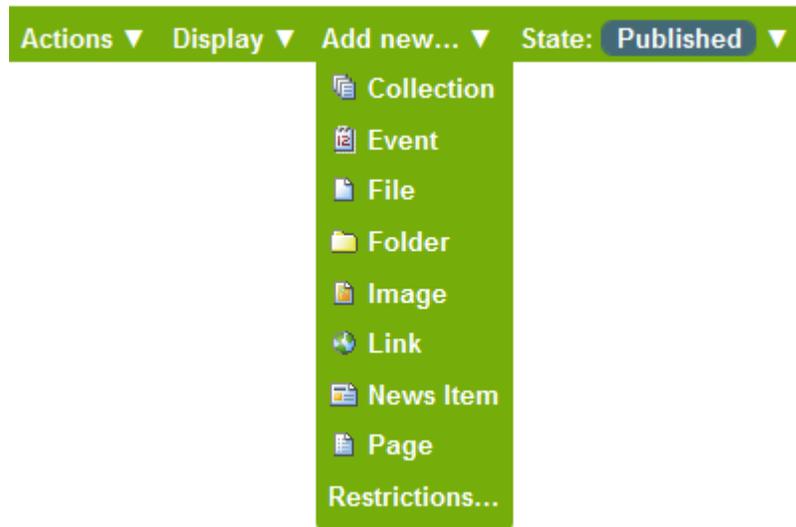
- News Archives
- Event Archives
- Photos Displayed by Date Range
- Content Displayed by Keyword

How to Add Collections

Collection are virtual container of lists of items found by doing a specialized search.

Learning to think about content being stored wherever it is stored, and about using custom collections to gather up different "views" of the content, is an important step to using Plone most effectively. It is an intelligent system.

To add a collection, use the *Add new...* menu, as for adding other content types:



You will see the Add *Collection* panel:

Add Collection

An automatically updated stored search that can be used to display items matching criteria you specify.

Default Categorization Dates Ownership Settings

Title ■ (Required)

Title is required, please correct.

Description

Used in item listings and search results.

Body Text

Style... **B** *I* [List Icons] [Link Icon] [Image Icon] [Table Icon] [HTML Icon]

Limit Search Results

If selected, only the 'Number of Items' indicated below will be displayed.

Number of Items

Display as Table

Columns in the table are controlled by 'Table Columns' below.

Table Columns

Select which fields to display when 'Display as Table' is checked.

Creation Date	>>	Title
Creator	<<	
Description		
Effective Date		
End Date		
Expiration Date		

Below the title and description fields is a set of fields for specifying the format of search

Results returned by the search criterion for the new collection. The four fields in the panel above are in pairs. The top two fields let you limit the search results to a number of items that will be displayed. The bottom two fields let you control the order of the search result items.

Setting the search criterion

After setting the display configuration in the edit panel shown above, click the criteria tab to show the panel for setting search criteria:

Contents View Edit **Criteria** Sharing

Criteria for News and Events

No criteria defined yet. The search will not show any results. Please add criteria below.

[Add New Search Criteria](#)

Field name
The time and date an item was created

Creation Date

- Creation Date
- Creator
- Description
- Effective Date
- End Date
- Expiration Date
- Item Type
- Location
- Modification Date
- Related To
- Search Text
- Short Name
- Start Date
- State
- Tags
- Title
- Title

Save

The top area of the panel, *Add New Search Criteria*, lets you set a field and a matching criterion. The bottom area, *Set Sort Order*, is a simple selection for a field to sort on:

The criteria types for matching data in content items depend on which field is selected.

After saving the collection, the search criteria will be applied and the results shown when the collection is clicked. You can create any number of collections for such custom views. For the butterfly example described above, in addition to a date constraint to find recent items, the categories field could be used to match color to have a series of collections for "Blue Butterflies," "White Butterflies," etc.

Multiple criteria can be used for a collection. For example, a collection called "Butterflies Photographed in the Last Month," could be made by setting a criterion on Creation Date and on Item Type as Image. Such date-based collections are really effective to show up-to-date views of content that don't require any administrative hand-work -- once such a collection has been created, it will automatically stay up to date.

Note: A collection doesn't behave like a normal folder — you can't add content items via the add item menu, as you can for a normal folder.

Contents View Edit **Criteria** Sharing

Criteria for News and Events

No criteria defined yet. The search will not show any results. Please add criteria below.

—Add New Search Criteria

Field name

The time and date an item was created

Creation Date ▼

Criteria type

Criteria does match

Relative date ▼

Relative date

Date range

—Set Sort Order

Field name

List Available Fields

No sort order ▼

Reverse

Reverse display order

Save

[How to Use Criteria to Bring Items Into a Collection](#)

Definitions and examples of the different criteria fields available

The power of Collections most certainly lies with the Criteria fields. Mastering how to use the different Criteria will allow you to use Collections in several useful ways. In this section, we will use examples to illustrate the many ways of using Criteria.

Categories

The Category criterion allows you to search the **Category field** of objects. For this to work you must specify Categories for the content objects ahead of time (this is done through the Categorization tab on content objects). An example where you could use this is you want to create a Collection that would display all objects relating to the Category *Organization*. As you can see in the image below, we are able to select the value *Organization* for our criterion. Then, by saving this criterion and viewing our Collection, the results would be all content objects we had designated with the Category *Organization*.

Once again the values available to you are completely dependent on what you have specified on your objects in the Categorization tab.

Creator

When using the Creator criterion, we are **filtering objects based on who created them**. This might be useful if you want to do a featured author section, where you would only want to display content on your site that has been created by a certain author.

As you can see we have several options for our criterion type. They allow us to restrict the creator to the person currently logged in, enter the name of another user as text, or to select users from a list.

If you want to display results from multiple users, you would need to use the **List of Values** option. Otherwise you would normally use the Text option unless the creator you wanted to select was yourself in which case you would use Restrict to Current User.

Description

The Description field is essentially a **search box type** criterion. However, instead of searching the title and body of a page, it will **only search for the text in the Description field** of a content object. This criterion is only really useful if you fill out the Description field consistently for all your content objects.

Location

Using the Location criterion is much like specifying a location when you search for a document on your hard drive. By specifying a Location criterion, **the results that are displayed in your Collection will only come from that location**, most commonly a Folder. This can be useful if you only want to display content that is in the About Us section of your site, for example. This is also useful for narrowing Collection results when combined with other criteria.

To specify a Location, simply click the **Add button**, which will pop up a new window showing you a directory of your site. If we follow our example and want to search the About Us section of our site, we would click the Insert button next to the About Us folder.

You can open folders to view content contained within them either by clicking the Browse button or directly on the title of the folder you want to open. You may also use the Search box to search for the Title of an object.

Search Text

The Search Text is a very useful criterion. It is similar to the search box on your site or an Internet search engine. It takes the text you specify and searches the Title, Description, and Body of all objects and returns **any that have the word or phrase you specify**. This is useful when you want to find objects that have to deal with a certain thing, especially if the word or phrase appears across many content types. Using LearnPlone.Org as an example, if I want to create a Collection that displays all objects that reference the word Collections, I would use the Search Text criterion and specify *collections*. All Tutorials, Videos, Glossary items, etc with *collections* in the Title, Description, or Body would then appear in the Collection results.

Related To

The Related To field is another field, like Category, that **must be specified on a content object prior to being used for a Collection**. The Related To field on an object lets you specify which other objects in your site are similar or are relevant to the object you created. By specifying this field, when you create an object you can create a web of related content that will reference each other (think of a "see also" kind of function). When you have done this, you can use the Related To criterion in a Collection to display anything related to a specific object.

In this case we have specified that there are pages related to Our Staff, History, and the About Us Homepage. By selecting one or multiple values from this list, our Collection will display the pages that related to that Value.

If we selected History as the value we wanted, our Collection would show us everything that is related to the History page.

Keep in mind that the Related To Values list does not work based on which objects are related to content but on which objects have another object related **to it**. The Collection will display the results that are related to that value.

State

Using the State criterion is very simple. It allows us to **sort by published or private** state. It is a very good idea to restrict publicly viewable Collections **to filter on published**, so that no private content appears in the Collection results. Filtering on the Private state can be useful as well. For example, a site administrator might want to quickly see private content, so that

they could determine what work needs to be done and what could be deleted.

Dates

You may have noticed that there are **several different dates available** to use as Criteria. Since there are such a large number of dates, they will be covered on the [How to Use Dates](#) section of this manual.

[How to Set the Sort Order](#)

Learn how to use the Sort Order feature to customize the order in which your results display.

The Sort Order **determines the order the results of the Collection will be displayed in**. Sort Order allows you to sort by three main categories: text, object properties, and dates. When you sort by text, objects will be sorted in alphabetical order. When sorting by one of the object properties, we effectively are grouping objects together by the specified properties.

When we sort by a date the results will be displayed with the most recent first (although there are many 'dates' in Plone). All Sort Orders are in Ascending Order unless the Reverse Order check box is selected. By checking this we can display in reverse order, or newest dates first, etc.

Dates

There are numerous Date options which will be explained in the [How to Use Dates](#) section of the manual.

Object Properties

Item Type

When sorting by Item Type, we end up with a Collection that has results that are grouped by Item Type. We would want to use this if we have a Collection that will return many different Item Types. This way we can make the Collection very easy to browse for the site visitor.

State

Sorting by State will display results grouped by the publishing state. Since there are only two States in the default configuration of Plone, there will only be Published and Private items. We can use this to separate all pages on our site and easily see what we have that is public (Published) and what we are hiding from the public eye (Private).

Category

Category Sort Order is useful when we want to display the objects on our site in a manner where they are grouped by the Category we placed them in. Keep in mind, for sorting by Category to even be remotely useful, you must have specified the Category on several objects. If you have not specified any Categories, then sorting by Categories will do nothing.

Related To

The Related To Sort Order will actually apply a criterion to your Collection. It limits to the results to only those that have Related To information Specified on their properties.

[Text](#)

Short Name

Sorting by the Short Name is the same as putting the result objects in alphabetical order. By default Plone sets the Short Name of an object to be the same as the Title. The difference between the two is that the Short Name is all lower case and hyphenated between all words. For example the Short Name for the page titled About Us would be *about-us*. The Short Name is what Plone also uses in the URL for the page (www.myplonesite.org/about-us). You can specify a different Short Name for an object by using the Rename button on the Contents tab.

Creator

Sorting by the Creator will group all results in alphabetical order by their author. For example, let's say we had several documents published by Bob Baker and several of other documents published by Jane Smith. Sorting by the creator would result in all the documents created by Bob Baker listed first followed by those of Jane Smith.

Title

Sorting by Title will display the results in alphabetical order, by the object Titles.

[How to Use Dates for Collection Criteria and Sorting](#)

Explanation of the Dates associated with Collections and their uses.

There are several different types of dates we can choose from, many of them sounding similar. Because of this it is very easy to get confused about which date to use. Below, each date option is defined.

[Dates Defined](#)

Creation Date

The Creation Date is the date the document was made. You can think of this as its birthday,

the day it was born. You cannot change the Creation Date of an object.

Effective Date

The Effective Date is the date when an object becomes published. This date is customizable through the **Edit tab** on objects under the **Date tab**. However, there it is referred to as the Publishing Date (a minor discrepancy in Plone's nomenclature).

Creation Date and **Effective Date** are very similar. They both are representative of the beginning point of an object. A very important point to keep in mind when choosing which one you want to use, is that an object can be created long before it ever becomes public. You could have a page that is worked on for several weeks before it is actually published. Thus you would get different results in a Collection depending on which date you used.

We recommend using the **Effective Date**, instead of Creation Date for date-oriented Collections. This way your Collection shows results based on when they became viewable to the public, which is more relevant to the audience of your Collection. Also, you can go in and manually adjust the Effective Date to control the sort order which is not something you can do with the Creation Date.

Expiration Date

The Expiration Date refers to the day that the item will no longer become publicly available. This date is also customizable through the Edit tab (shown above) like the Effective Date. By default, objects have no Expiration Date.

Modification Date

The Modification Date is the date the object was last edited. Note that this date is first set the day the object is created and will automatically change every time the object is edited. There is no way to customize this date. You could use this as a Sort Order along with an Item Type criterion set to Page, to display all recently modified pages within the last week, for example. The What's New listing on the homepage of LearnPlone.Org uses Modification Date as its date criterion. That way both newly created documents *and* ones that have been updated appear in the listing.

Event Specific Dates

The two following dates **only** apply to objects that are **Events**. These two dates are very effective for creating Recent Events and Upcoming Events Collections that will let your audience know what your organization is doing and will be doing in the future.

Start Date

The Start Date is simply the date that an Event starts.

End Date

The End Date is simply the date that the Event ends.

Publication Date

The Publication Date is the date when object was last published. It can either be set manually by means of Effective Date field or, if the latter hasn't been set, calculated based on date when object was last published.

To display Publication Date on your pages you need to switch it on with "*Display publication date in 'about' information*" option in **Site Settings Control Panel**. Publication Date will be visible right before object Modification Date inside 'about' information area. Make sure "*Allow anyone to view 'about' information*" option is also enabled inside **Security**

Settings Control Panel to make it all work.

Setting Dates

A confusing thing about dates can be how its Criteria are set up. They have a setup that is not like any of the other Criteria. First off, you have to choose whether you want a Relative Date or a Date Range.

The Relative Date allows you to construct a **conditional statement**. Such as: Items modified less than 5 days in the past. A Date Range will allow you to **specify an exact range of dates**, such as 01/02/08 to 02/02/08. The Date Range is useful when you want to create a Collection with a static date that won't change. The Relative Date can be very useful as it will allow you to create Collections that are automatically updating themselves, such as a Recent News Collections or an Upcoming Event Section.

Relative Date

Looking first at the Relative Date option, you can see we have three options to fill out.

The first option is **Which Day**. This allows us to select the number of days our criterion will include. One of the options is called *Now*. Using this will set the date range to the current day. The other two options do not matter and can be ignored when using *Now*.

The second option is **In the Past or Future**. This enables us to choose whether we are looking forward or backward into time.

The last option is **More or Less**. Here we can choose from three options. *Less than* allows us to include everything from now to a period of time equal to or less than the **Which Day** setting, either in the past or future. *More than* will include everything from beyond our specified number of days equal to or more than **Which Day**. Finally *On the Day* will only include things that are on the day we specified in the **Which Day**. Using the example in the image above if we had selected *On the Day* instead of *Less than* our Collection would display only objects that were modified (we are using the Modification Date criterion) 5 days ago. If this is confusing to you, try reading it as a statement substituting in the field options you chose. "I want the results to include objects **More or Less** than **Which Day**, **In the Past or Future**". Our example in the image above would become "I want the results to include objects **Less than 5 days in the past**".

Date Range

The **Date Range** is much easier to understand. Both a Start Date and End Date are required (do not confuse these terms with the Event Specific dates!). The Date Range allows us to enter a beginning and an end date and the display everything within that time frame. Notice also that it allows us to specify a specific time of day as well.

[How to Adjust the Display Settings](#)

Learn how display settings can change the look of your Collection page.

While the main power of Collections lies in Criteria, the display settings can make a big difference in the way your Collection will appear. All three of the settings we will cover in this section can be found by clicking the **Edit tab** of a Collection.

Inherit Criteria

By selecting the **Inherit Criteria** option, the Collection will inherit the Criteria from a parent Collection. This is only useful when using Sub Collections. If this is checked, you can create another Collection that is more specific than the Parent while still retaining the basic criteria of the Parent. A simple example might be a Parent Collection for displaying all Events in a site, and a Sub Collection that also displays Events (by inheriting Criteria) *but only* those Events with a particular keyword.

Limit Search Results

We can use Limit Search Results to limit the number of results that are Collection will display *per page*. This way if we have a Collection that is displaying News Items, we can limit the results to five or ten, instead of having it show all News Items on a single, large list.

Display as a Table

Display as a Table is simply another way to display the results of a Collection. Instead of having the Collection spit out the results in a list form, we can have it **generate a table** with the results, and set exactly what information about the results we want displayed. We customize the table by selecting the **Table Columns** from the left and clicking the right arrow button to move it over to the right. In the example above we chose to include the Title of the object, its Creator, and the Effective date. You can use any number of the columns, or all of them if you so choose.

When considering what to select, keep in mind that not all objects will have the information for every column available. For example, the **Start Date** and **End Date** only apply to Events. Therefore if you added these columns and your table included Pages as well as Events then the rows for the Pages would not have the Start and End Dates filled in. The other thing to consider is that the more columns you have showing the more crowded the table will become. The best rule of thumb is to only display what you absolutely need to display. A few more notes on selecting columns: You can select more than one at a time by holding down the control key (Ctrl) while you click. If you want to remove a column, select it on the right and click on the left arrow button. Also you can add and remove columns by double clicking on their name.

Adding Images

How to add images to the portal.

[Preparing Images for the Portal](#)

How to prepare your images for use on the portal.

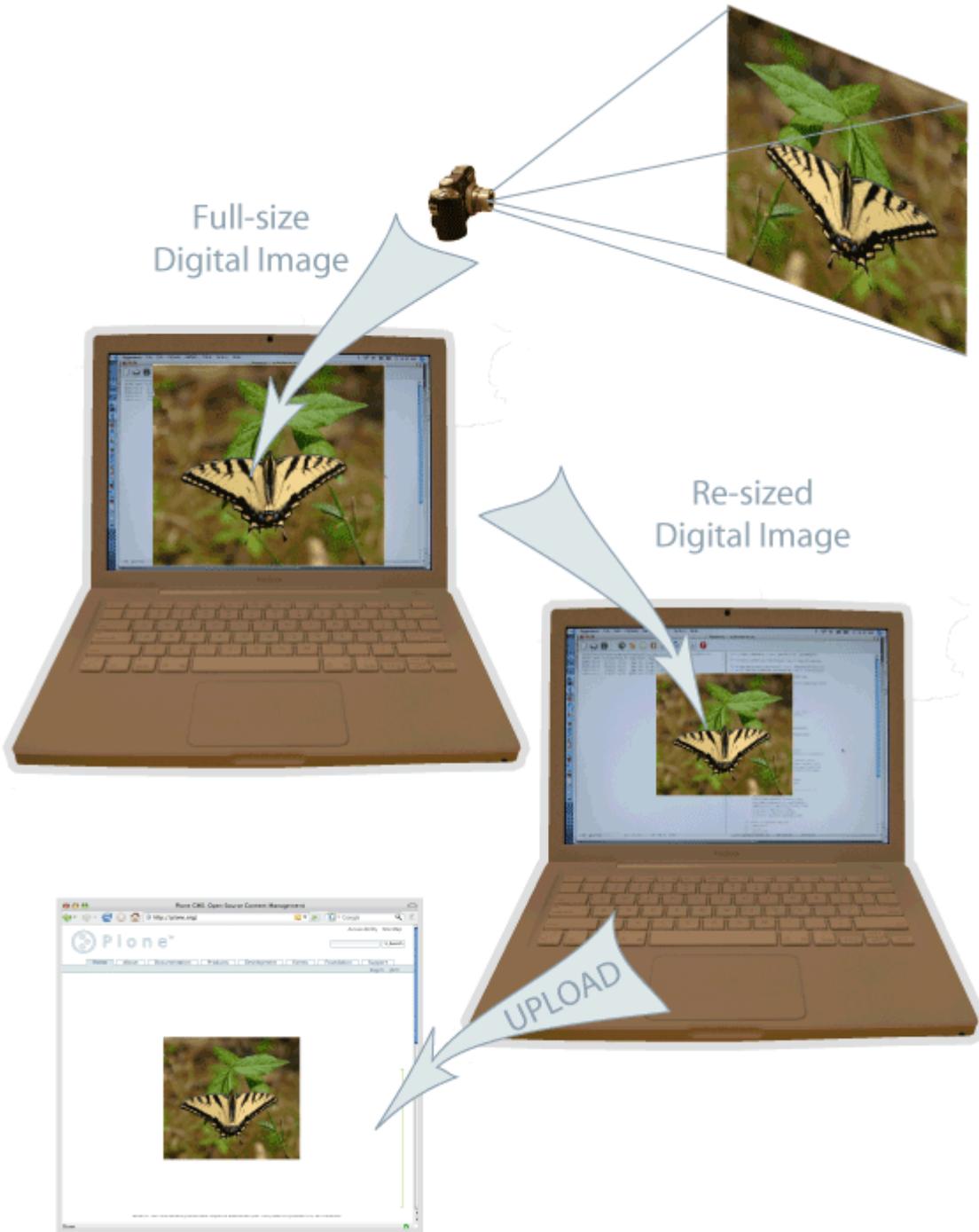
Preparing images for the web is an essential part of using images in Plone, or in any online context. As you will see, size matters.

Many people source photographs taken with a digital camera, but they can also be scanned images, graphical illustrations made with software, and other specialized images. Let's take a look at the case of a butterfly photo taken with a digital camera.

Digital photographs taken with modern cameras are usually too big to post directly on a website, so they need to be resized. A typical web site design may have a width of around 1000 pixels. When a photograph comes off your camera, it may be several thousand pixels wide and tall, and several megabytes in file size. You need to use software on your computer to resize the image to something less than 1000 x 1000 pixels, often much smaller than that.

The software you use to view or print your digital photos will often have this resizing functionality, or you may have graphics software such as Corel Draw, Adobe Photoshop, Irfanview, or Gimp on your computer. Resizing an image, sometimes called resampling, is a standard function you should be able to find in your software, often under the *Image* menu. How do you know what width, in pixels, to resize your image? It depends. For a little "head shot" photograph to go in a biography, maybe 200 pixels wide is just right. For a group photograph, 200 pixels would be too small to allow identification of the people in the photograph, so it may need to be closer to 400 pixels wide. For a scanned map image, perhaps the image width would need to be 1000 pixels for the map detail to be usable.

After saving your resized image, give it a name that indicates the new size (e.g., butterfly-resized-300px.jpg). The file format is most commonly .jpg (or .jpeg). Other common formats for images include .png and .gif. Take note of where you save images on your computer so that you can find them when you upload them to your Plone web site.



To summarize:

1. Take your photograph with your camera, or find an existing image you want to use
2. Transfer it to your computer
3. Use image software on your computer to resize your photograph

4. Upload it to your Plone website

Adding Images

How to add images in the portal.

Adding images to a Plone web site is a basic task that may involve a little work on your local computer, but is essential, because photographs, maps, and custom graphics are so important on web sites.

[Preparing Images for the Web](#)

Remember to use web-standard file formats for all images. Acceptable formats include: JPG, JPEG, GIF, and PNG. Do not use BMP or TIFF formats as these are not widely supported by web browsers.

When you are ready to upload an image, use the *Add new...* drop-down menu (You will only see the *Add new...* menu after logging in):



it corner)

After clicking to add an **Image**, you'll see the *Add Image* panel:

Add Image

An image, which can be referenced in documents or displayed in an album.

The screenshot shows the 'Add Image' panel with the following elements:

- Tabbed interface: **Default** (selected), **Categorization**, **Dates**, **Ownership**, **Settings**
- Title**: A yellow text input field.
- Description**: A larger text input field with the subtitle "A short summary of the content."
- Image**: A text input field with a "Browse..." button.

The Title and Description fields (field, as in "data input field") are there, as with adding a Folder, and at the bottom there is a place to upload an image. Let's look at the three input fields individually:

- *Title* - Use whatever text you want, even with blanks and punctuation (Plone handles web addressing).
- *Description* - Always a good idea, but always optional. Leave it blank if you want.
- *Image* - The Image field is a text entry box along with a Browse... button. You don't have to type anything here; just click the Browse button and you'll be able to browse your local computer for the image file to upload (*Remember*: You need to *remember* where you keep your images on your computer).

For images, at a minimum, you will browse your local computer for the image file, then click **Save** at the bottom to upload the image to the Plone web site. You'll have to wait a few seconds for the upload to complete (or a minute or so, if you have a slow Web connection). A preview of the uploaded image will be shown when the upload has finished. As of Plone 4, images and files that are uploaded into Plone have their IDs (URLs) based on the title that is given to the image (instead of the file name of the image or file). Since the

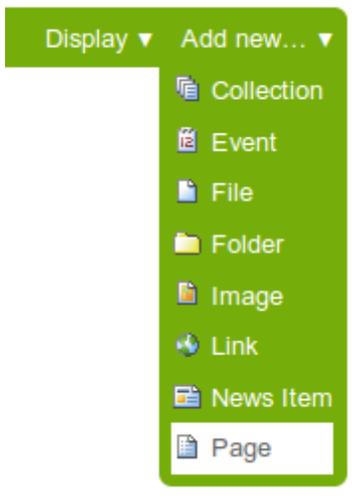
title field is not required, if you do not fill it out, the name of the item will default to using the name of the file in place of the title.

Adding Pages

How to add pages in the portal.

Pages in Plone vary greatly, but are single "web pages," of one sort or another.

To add a page, use the *Add new...* drop down menu:



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

Add Page

Default ■ Categorization Dates Creators Settings

Title ■

Summary

Used in item listings and search results.

Body Text

Text Format HTML

Style... **B** *I* [List icons] [Table icons] [HTML icon]

Change note

Enter a comment that describes the changes you made.

Save Cancel

The **Title** and **Description** fields are at the top. Fill each of them out appropriately. There is a *Change note* field at the bottom, also a standard input 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.

The middle panel, **Body Text**, is where the action is for pages. The software used for making Pages in Plone, generically called *visual editor* and specifically a tool called TinyMCE, 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.

Adding News Items

How to add news items in the portal.

Plone web sites have a built-in system for publishing news items.

Use the *Add new...* menu for a folder to add a news item:



You will see the *Add News Item* panel:

Add News Item

An announcement that will show up on the news portlet and in the news listing.

Default Categorization Dates Ownership Settings

Title ■

Summary
Used in item listings and search results.

Body Text

Style... **B** *I*          

Image
Will be shown in the news listing, and in the news item itself. Image will be scaled to a sensible size.

Image Caption

Change note
Enter a comment that describes the changes you made.

The standard fields for title, description, and change note are in the panel, along with a visual editor area for body text and image and image caption fields. You can be as creative as you want in the body text area, and you can use the insert image (upload image) function to add as much illustration as needed. The images you upload for the news item will be added to the folder in which you are adding the news item.

The *Image* and *Image Caption* fields are for adding an image to be used as a representative graphic for the news item, for posting in news item listings. The image will be automatically resized and positioned. Use the **Body Text** to insert an image in the actual body of the News Item.

IMPORTANT: News items will not appear in the main web site news listing or news portlet until they are **published**.

Adding Events

How to add Events in the portal.

Plone web sites have a built-in system for managing and showing calendar events.

Use the *Add new...* menu for a folder to add an event:



right corner)

You will see rather large *Add Event* panel:

Add Event

Information about an upcoming event, which can be displayed in the calendar.

Default Categorization Dates Ownership Settings

Title ▾

Description

Used in item listings and search results.

Event Location

Event Starts ▾

2010 ▾ / March ▾ / 22 ▾  02 ▾ : 10 ▾ PM ▾

Event Ends ▾

2010 ▾ / March ▾ / 22 ▾  02 ▾ : 10 ▾ PM ▾

Event body text

Style... ▾ **B** *I*                                 

From the top, we have the following fields:

- *Title* - **REQUIRED**
- *Description*
- *Event location*
- *Start date and time* - **REQUIRED**
- *End date and time* - **REQUIRED**
- *Event body text* (visual editor panel)
- *Attendees*
- *Event type(s)*
- *Event URL*
- *Contact Name*
- *Contact Email*
- *Contact Phone*
- *Change note*

Note that only three fields, title and start and end date and time, are required. So, although this is a large input panel, if you are in a hurry, just type in the title and the start and end times and save. Of course, if you have the other information, you should type it in.

One part of the panel needs a bit more explanation: the event start and end times. The year, month, day, and other fields are simple pull-down menus. But for the day, often you can't remember exactly and you need to consult a calendar. There is a handy pop-up calendar that offers an alternate way to select the day. If you click one of the little calendar icons adjacent to the day pull-down, :

Event Starts ■
2007 / July / 5  10 : --

Event Ends ■
2007 / July / 5  10 : --

you'll see this pop-up calendar:

Event Starts ▾

2010 ▾ / March ▾ / 22 ▾ 02 ▾ : 10 ▾ PM ▾

Event Ends ▾

2010 ▾ / March, 2010

?	March, 2010							x
<<	<	Today	>	>>				
2010 ▾	Mo	Tue	Wed	Thu	Fri	Sat	Sun	PM ▾
9	1	2	3	4	5	6	7	
10	8	9	10	11	12	13	14	
11	15	16	17	18	19	20	21	
12	22	23	24	25	26	27	28	
13	29	30	31					

Select date

Just click the day and it will be set. Fill in the fields for which you have information and save the event, but remember:

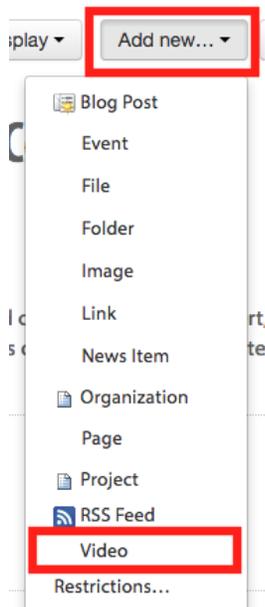
IMPORTANT: *It will not show on the main web site calendar until it has been **published**.*

Adding Audio and Video

How to add audio and video to the portal

[How to Add a YouTube Video](#)

From the Add new drop down menu, select Video.



Add a Title and Description.

Add a Video ID and Select the YouTube radio button. The YouTube video id is the section of the video's URL that follows the equal (=) sign. I.E. The section highlighted in red:

<https://www.youtube.com/watch?v=6pcH4b1xAH8>

VIDEO ID

6pcH4b1xAH8

HOSTING PROVIDER

YouTube

Vimeo

You can add additional text or links in the body field. You can also upload an image using the image uploader.

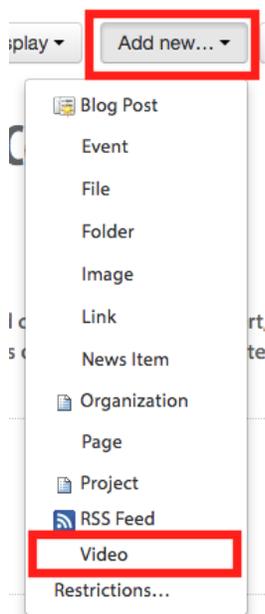
If you need to add any tags, you can do so by clicking the Categorization tab at the top of the page.

When you have finished adding all of your information, click Save to save your video.

Be sure and publish your video if you want it to be publicly viewable.

[How to Add a Vimeo Video](#)

From the Add new drop down menu, select Video.



Add a Title and Description.

Add a Video ID and Select the Vimeo radio button. The Vimeo video id is the last section of the video's. I.E. The section highlighted in red: <https://vimeo.com/205962536>

You can add additional text or links in the body field. You can also upload an image using the image uploader.

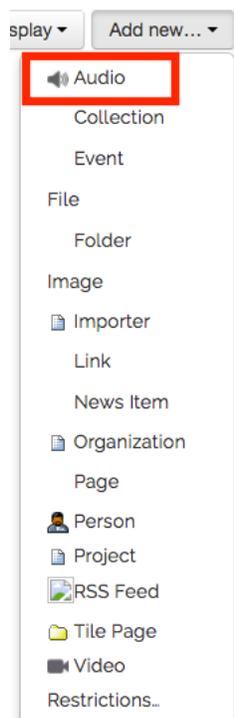
If you need to add any tags, you can do so by clicking the Categorization tab at the top of the page.

When you have finished adding all of your information, click Save to save your video.

Be sure and publish your video if you want it to be publicly viewable.

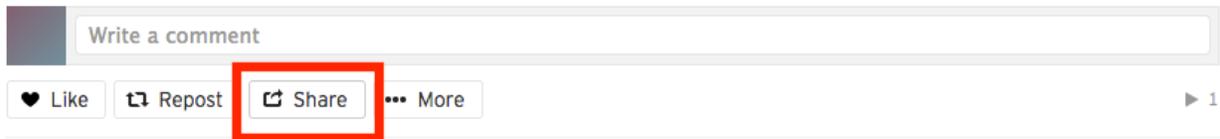
[How to Add a Sound Cloud Audio File](#)

From the Add new drop down menu, select Audio.

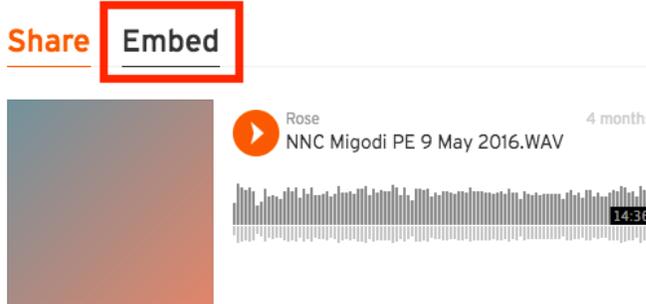


Add a Title and Description.

On SoundCloud, click the audio file's share button



Click the Embed tab



Copy the Embed code

Code and preview



On the portal, paste the embed code in the Embed Code field.

Add the Vimeo URL in the **URL of hosted audio** field.

You can upload an image using the **Image** uploader.

If you need to add any tags, you can do so by clicking the Categorization tab at the top of the page.

When you have finished adding all of your information, click Save to save your audio.

Be sure and publish your audio if you want it to be publicly viewable.