

HOW TO SETUP A PLONE INTRANET IN HALF A DAY

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ABOUT ME

- Director of Engineering @ Six Feet Up
- Have worked with Plone since 2003
- Developer → team lead → project manager
- 350+ Plone sites at University of Wisconsin Oshkosh, including the campus Intranet
- Plone Foundation Board (2014-2019), Plone Conference organizer (2016, 2017), Plone Symposium Midwest organizer (2013, 2014)

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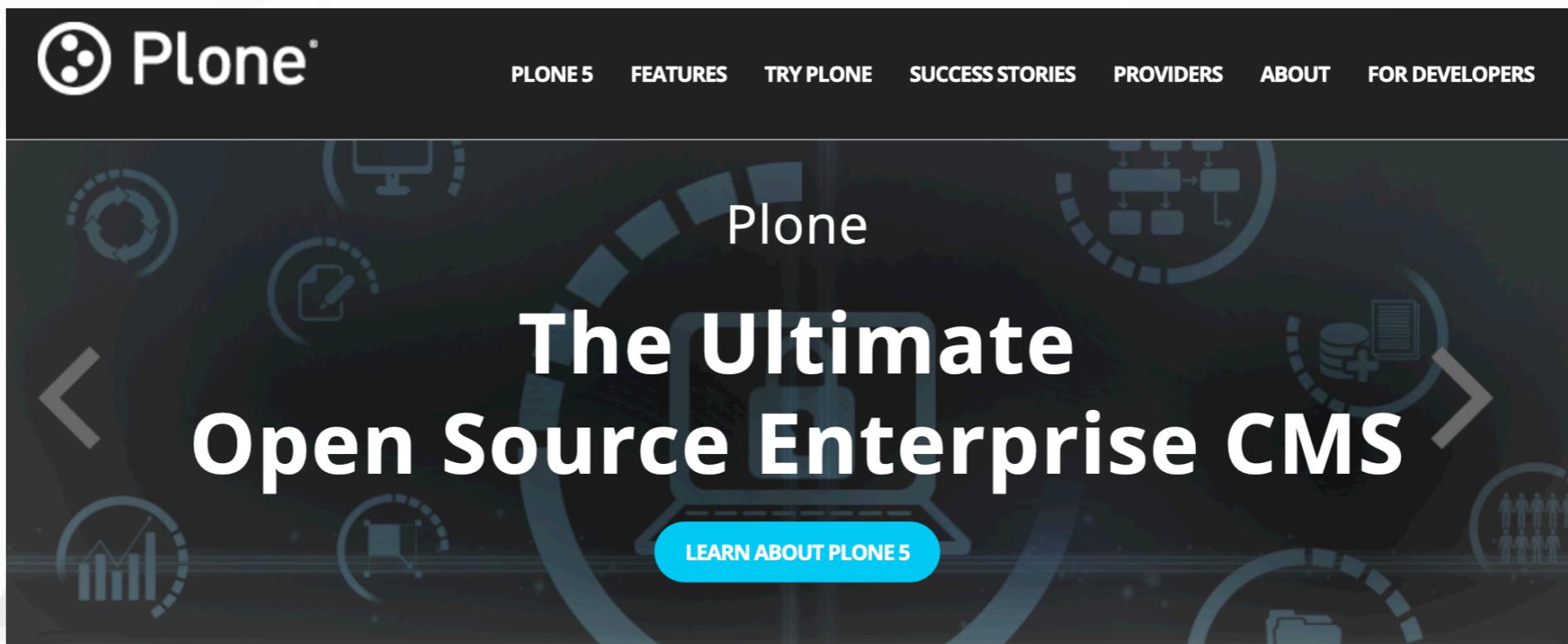
WHAT IS AN INTRANET

- Plone's silent but huge use case: governments, corporations
(Star Alliance, Porsche)
- Document-centric
- Forms, forms data
- Collaboration between teams and individuals
- Access management
- Search
- Dashboards
- Self-service configurability

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PLONE



*Secure, Flexible
Content Management In A Box*

PLONE 6



Volto: React-based Front End

TODAY'S MISSION

- Set up Plone on a new server
- Create a Plone website
- Turn it into an intranet
- Create users & groups
- Grant access
- Create documents, files, and forms
- Talk about search and workflow applications
- Configure a dashboard
- Demonstrate access security

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SET UP PLONE ON A NEW SERVER

- Create an AWS account at <https://aws.amazon.com/>
- Create a new EC2 instance using an AMI
- Follow the step-by-step instructions at the bottom of the training class description page: 2020.pythonwebconf.com/tutorials/how-to-setup-a-plone-intranet-in-half-a-day



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A TOUR OF PLONE

- Viewing a Plone site as the public
- Log in
- The toolbar
- Content types you can add
- The personal menu
 - Dashboard
 - “Site Setup”, control panels

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PLONE WORKFLOW

- States and transitions
- Applies to all content
- Add one of each content type
- What transitions and states are possible on each item?
- Special cases: Folders, Image, and File content types

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WORKFLOW DETAILS

- “Site Setup” → “Management Interface” → “portal_workflow”
→ “Contents”
- Choose “Simple Publication Workflow”
- “States” tab
- “Transitions” tab
- “Security” tab

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OTHER PLONE WORKFLOWS

- Workflows are also listed at “Site Setup” → “Content Settings” control panel
- Single State Workflow
- No Workflow
- Intranet/Extranet Workflow
- Intranet Workflow for Folders

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CREATE USERS

- Create some users and groups to test site access
- “Site Setup” → “Users and Groups”
- Add groups: team1, team2, externalgroup1
- Add users: staffuser1, staffuser2, supervisoruser1, supervisoruser2, externaluser1 ...
 - ... while adding each to the following groups: staffuser1 & supervisoruser1 to team1; staffuser2 & supervisoruser2 to team2; externaluser1 to externalgroup1



TEST PUBLIC (ANONYMOUS) ACCESS

- Not being logged in = “anonymous” = the public
- To mimic being another user or being logged out, do one of the following:
 - Open another browser (e.g. Safari, Firefox, Chrome, Edge)
 - or open an “incognito” or “private” window
- Browse to your site
 - How is it different?



TEST STAFF ACCESS

- Use a 3rd browser (or 2nd browser's incognito/private window) to log in as staffuser1
- Browse to your site
 - How is it different?
- Install the “impersonate” add-on via “Site Setup” → “Add-ons”
- Use personal menu (bottom of toolbar) → “Impersonate”



MAKE THE ENTIRE SITE AN INTRANET

- Change the site's default workflow to Intranet/Extranet Workflow
- View the site anonymously
- View the site as staffuser1
 - What is different from admin's view?
- Revert the site's default workflow back to Simple Publication Workflow
 - note the Old State → New State mappings



CREATE FOLDER WORKSPACES

- Folders organize content
- Folders as team workspaces
- Add some folders:
 - “Public”
 - “Intranet”
 - “Teams”
 - “Team1”, “Team2”
 - “Clients”
 - “Client1”

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SELECTIVELY SET PER-FOLDER WORKFLOW

- You can create and assign workflow policies on a folder
- “Site Setup” → “Add-ons”, install “Workflow Policy Support”
- Navigate to home; State → Policy... toolbar button
- Navigate to “Intranet”, State → Policy..., set “Intranet” for folder and below
- What transitions and states are now possible on the folder?
- In another browser or incognito/private window, browse to your site as anonymous, then as staffuser1. How does this differ from our earlier approach?



INTRANET/EXTRANET WORKFLOW ON ITEMS

- Navigate to “Intranet” folder
- Add a new Page
- What transitions and states are possible on the page?



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SECURING OTHER FOLDERS

- How to secure the “Teams” folder?
- In Plone, items inherit security from their container
- Instead of applying workflow policy to this folder, just move it into the “Intranet” folder
 - Navigate to “Teams” folder
 - Actions → Cut, navigate to “Intranet” folder, Actions → Paste
- “Clients” folder: could do either



GRANT ACCESS TO FOLDERS AND ITEMS

- Use the “Sharing” toolbar button to control which users and groups can add, edit, review, and view
- Navigate to the “Intranet” → “Teams” → “Team1” folder
 - In another browser window, (try to) view that folder as “staffuser1”
- Use “Sharing” to grant “can edit” to the group “Team1”
 - In the other browser window, view that folder as “staffuser1”
- Add a new page in the “Team1” folder
 - In the other browser window, can you edit the new page?



SUBMIT AND REVIEW ITEMS FOR PUBLICATION

- While viewing the page in the “Team1” folder:
- Use “State” → “Submit for publication”
 - In the other browser window, can you edit the page?
- Navigate up to the “Team1” folder
- Use “Sharing” to grant “can review” to “supervisoruser1”
 - In another browser window:
 - Log in as “supervisoruser1”
 - Navigate to the page
 - What can you do to it?



PUBLISH ITEMS

- “internal” vs “internally published” vs “externally published” states
- Use the Management Interface → “portal_workflow” → “Contents” → “intranet_workflow” → “States”
- For each of “internal”, “internally_published”, “external” open the “Permissions” tab and compare



PREVENTING ACCESS FROM OTHER TEAMS

- In another browser window, log in as “staffuser2”
- Can you navigate to the page in the “Team1” folder?
- What happens if you copy and paste the URL to that page?
- Caveat: the Intranet/Extranet Workflow lets all logged-in users view items in the “internal” state
- To restrict access from other logged-in users, set the folder to the “private” state
 - Verify this using the other browser
 - Did we catch everything?



PREVENTING ACCESS FROM EXTERNAL USERS

- Extranets include external users
- How to secure folders and items from these (legitimate) external users?
- Anything you need to keep from external logged-in users must be in the “private” state
- Is allowing external users access to your intranet worth the risk / trouble?
- Could customize the workflow or create a separate site for client access
- Important: TEST

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FORMS USING EASYFORM

- “Site Setup” → “Add-ons”, install EasyForm
- Navigate to the “Intranet” folder
- “Add new...” → “EasyForm”
- Example: Your Lunch Order
- “Actions” → “Define form fields”
- “Actions” → “Define form actions”
- “Actions” → “Saved data”



CUSTOM CONTENT TYPES

- Content types define the structure of information to store
- Example: a form that a website visitor can fill out to ask a question
 - “Question” content type
- Use “Site Setup” → “Dexterity Content Types”
- See step by step example at [training.plone.org/5/ttw/
workflow.html#use-dexterity-to-build-a-content-type-and-
form](http://training.plone.org/5/ttw/workflow.html#use-dexterity-to-build-a-content-type-and-form)

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WORKFLOW APPLICATIONS

- Forms + workflow = a very powerful use of Plone
- Create custom forms and apply a custom workflow
- Formerly done with PloneFormGen, uwosh.pfg.d2c, `plone.app.workflowmanager`
- PloneFormGen & uwosh.pfg.d2c have been replaced by Dexterity
- See training.plone.org/5/ttw/workflow.html,
www.slideshare.net/tkimnguyen/easy-online-business-processes-with-plone-forms-and-workflow



SEARCH

- Built-in search uses pre-built catalog indexes
- Search is part of many Plone features (content reuse/display)
- “Site Setup” → “Management Interface” → `portal_catalog` → Indexes
- Searches all content items by title, description, keywords, rich text body
- You can develop custom indexes and collection criteria
- You can include custom content type fields in search
- Solr, Elasticsearch add-ons

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COLLECTIONS

- Use collections to group and display content based on a set of criteria you set
- Collections work much like a query does in a database
- Look at the examples:
 - in “News” folder
 - in “Events” folder



PORTLETS

- Placed in columns or footer
 - Navigate to the page in the “Team1” folder
 - Use the “Manage portlets” toolbar button, choose “All...”
 - Portlets can be defined on items and folders
- Group portlets
 - Use “Site Setup” → “Users and Groups”, “Groups” tab
 - Select “Team1” group, “Group Portlets” tab
 - Content type portlets...



CONTENT TYPE PORTLETS

- Portlets display per content type
- “Site Setup” → “Content Settings”, choose “Page”
- Click “Manage portlets assigned to this content type” link
- Example: add a static text portlet that displays on all Pages



USER DASHBOARDS

- Each user can have a dashboard
- Personal menu (bottom of toolbar) → “Dashboard”
- Click “Edit” tab to modify the dashboard
- Click “Dashboard” to view it

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GROUP DASHBOARDS

- Each group also can have a dashboard
- Group dashboards are shown in addition to the user's, when visiting their dashboard
- Configure group dashboards via “Site Setup” → “Users and Groups”, “Groups” tab
 - Example: select “Team1” group, “Group Dashboard” tab



IN SUMMARY...

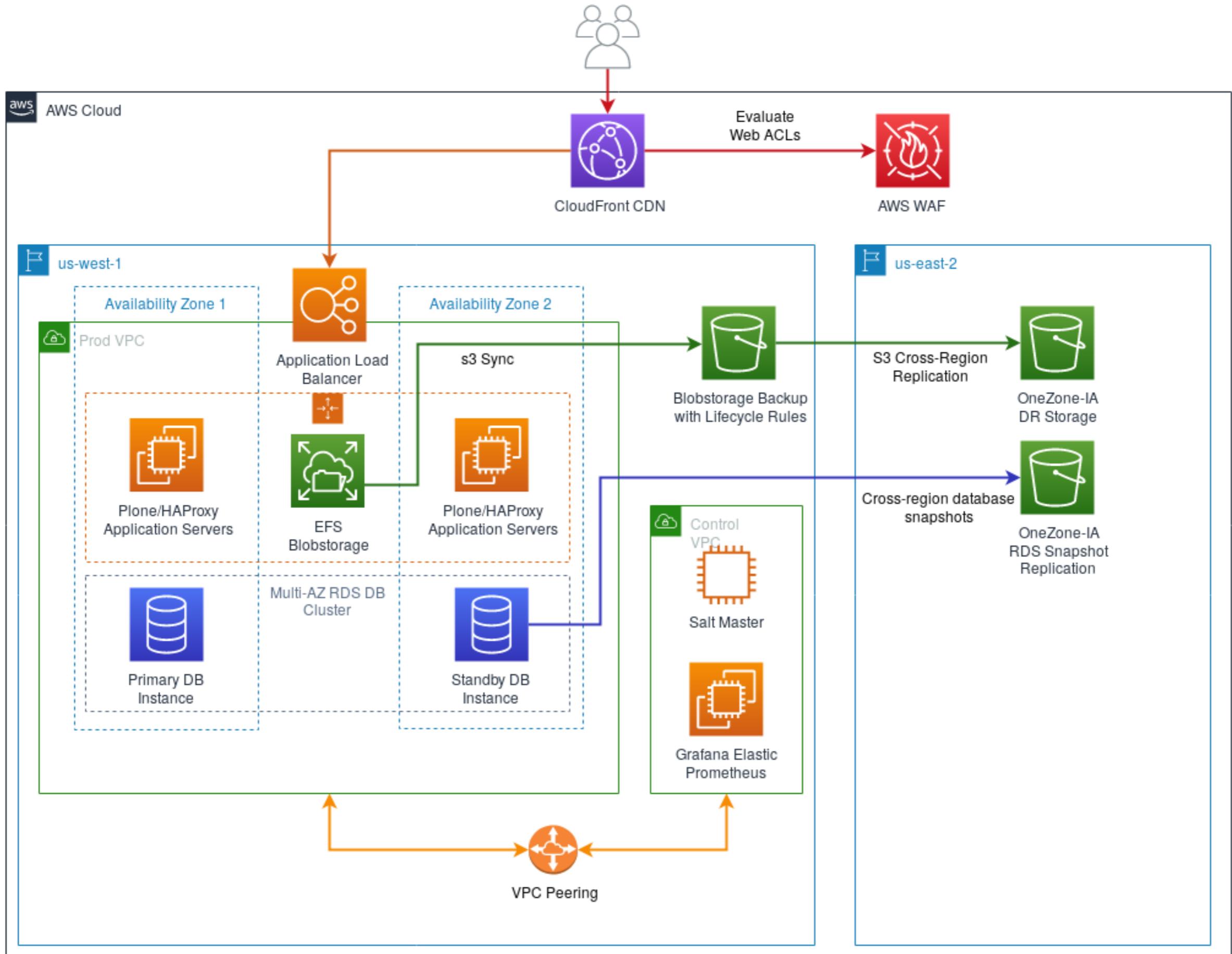
- You set up your own Plone site
- You learned how to use Plone: content types, workflow, security, managing content, collections, portlets, dashboards
- You used Plone control panels to examine and change settings
- You used Plone's out of the box features to create an intranet
- You installed some Plone add-ons (forms, impersonation)
- You tested Plone's content and site security under various settings



PRODUCTION DEPLOYMENT

- Use ZEO installation, Plone backups
- Consider ZODB → RelStorage & PostgreSQL / RDS
- Centralized authentication (LDAP, ActiveDirectory, OAuth)
- web server, SSL
- caching in Plone, varnish, Cloudflare/Cloudfront CDN
- system-level backups, log rotation, monitoring





NEXT STEPS

- Learn more at plone.com and plone.org
- See documentation at docs.plone.org
- Get self-paced Plone training at training.plone.org
- Join the Plone forum community.plone.org
- Attend the annual Plone conference ploneconf.org
- Let us know how you'd like to use Plone! sixfeetup.com
- See quaive.com for a Plone-based “social intranet” solution
(open source version at ploneintranet.org,
docs.ploneintranet.org)



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QUESTIONS? PLEASE ASK!

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