How to: Plone Basic Instructions

# http://sjoseph.ucdavis.edu/

# Login Information

There are two types of login, CAS Login and Login. CAS Login uses a student’s UC Davis Kerberos username and password. As of now, 1/21/2016, there is a problem with CAS Login because it logs the user out randomly. The regular Login is managed by Plone which is working but you have to first create an account and get approve by the web administrator. This Login works and everyone is using this now until CAS Login is fixed by DSSIT.

# How to Edit a page.

Click on a page that you want to edit. This includes editing the text or any content of a page. Then click on “Edit” on the highlighted bar. The title section will be shown on the navigation bar. You don’t need to add anything in the “Summary Used… “ section. The body is the content of the web page. If you want to add a pdf or image please look at the instructions below. Note: you must first upload the pdf or image to plone before using it.

# Where to put things

To keep things organized, make sure you AT LEAST follow these guidelines, if not enforce stricter organization.

* PDF’s go into the Main Project Assets > Files folder.
* Images go into the Main Project Assets>Images folder.
* Plone Folders and Plone Pages go in their appropriate Project Folders.

# How to Add a File to Plone (e.g. PDF)

1. Go to the page you would like to add the file to and on the green bar click Edit.
2. In the WYSIWYG Editor, Highlight the text or picture you would like to link to the document/file.
3. On the Insert/Edit Page, see the “you\_are\_here” bar, and navigate back to the top level for your project. For example “you\_are\_here: Home > BCBCB > Assets > Files” Choose BCBCB.
4. Go to Assets > Files
5. Press the Upload Button
6. Scroll the window to the right
7. Browse for desired file, press ok
8. Press the upload button.
9. Wait until file is uploaded, it is already selected, so press ok.
10. The file should be visible in the WYSIWYG Editor now.

# How to Add a Picture/Display a Picture to Plone or Plone Page

1. Go to the page you would like to add the picture to and on the green bar click Edit.
2. In the WYSIWYG Editor, click the Insert Image Icon in the toolbar.
3. On the Insert/Edit Page, see the “you\_are\_here” bar, and navigate back to the top level for your project.
4. Go to Assets > Images
5. Press the Upload Button
6. Scroll the window to the right
7. Browse for desired file, press ok
8. Press the upload button.
9. Wait until file is uploaded, it is already selected, so press ok.
10. The file should be visible in the WYSIWYG Editor now.

# To Resize an Image

1. Highlight the image, and go into Insert/Edit Image on the WYSIWYG Editor Toolbar.
2. Scroll Right, the image should already be selected and previewed there.
3. Choose your preferred size from the dropdown menu, i.e. “Original 221x441”
   1. Choosing a new size will not create a new file, it will just resize the image.
4. Click Okay, the image should now be resized.

# How to Add a new Page to Plone

1. If you want it to be in the dropdown menu, make sure you have already made a folder with the appropriate name.
2. Go to the desired subdirectory/place on dropdown list.
3. Click “Add New V” > Page
4. Title the Page the same name as the Folder it is in.
5. Use the WYSIWYG Editor (What you see is what you get Editor) to edit the contents
6. **IMPORTANT**: Make sure to PUBLISH the page by going to the page and to the far right of the green bar selecting State: PUBLISH.
7. **ALSO IMPORTANT**: The page won’t be visible from the dropdown until you set it as the default view for the folder.
   1. Select Folder from Main Dropdown Menu.
   2. On the Green Bar, Display > Select a content item as default view…
   3. Select the page that you want visible upon clicking the dropdown menu item. Press save.
   4. Now the Page with the same name as the folder will act as the frontend for the folder. NOTE that this also eliminates the Page from Navigation. The folder now shows the page directly, but can still hold other things.

# Publish and Private

Private folder and files will only be available to administrators and site editors. If you want your files to be viewable by users:

NOTE: Public folders, files, and pages can be WITHIN private folders and still be published and viewable.

Example situation, make Files and Images within Assets publicly viewable, but leave Assets private.

1. Go to the Project Main page from the Dropdown menu.
2. Go to Contents on the Green Bar.
3. Click on Assets, which should be red to signify private.
4. Check boxes on Files and Images, which are currently red.
5. Press button “Change State”
6. Select radio button Publish. You don’t have to change anything else. Make sure appropriate items are selected.
7. Press Save.

Add New Item

1. Go to main/home page of site.
2. Go to Contents on the GreenBar.
3. On the GreenBar of the Contents Page, Add New > Folder
4. Title the Folder Appropriately.
   1. Leave Exclude from Navigation unchecked!
5. Publish the New Folder.
   1. There is now a new item in the Dropdown Menu visible to users!
6. To rearrange the ordering of the items, go back to MainPage > Contents.
7. Drag and Drop the new ordering.
8. The item is now in the order you left it in Contents.

SJ Website Hidden pages

1. On occasion, most likely due to informal protocol, hidden pages on Plone may suddenly appear.
2. If this occurs:
   1. If they are still needed – check the publishing and expiration dates and check if they need to be updated.
   2. If they are no longer needed – check with Kelley before deleting them.

Plone Bootstrap Theme

The current theme we are using is titled “Twitter Bootstrap”

CSS Guidelines:

* [This is a fantastic resource](http://cssguidelin.es/) for general CSS guidelines. Probably the most important thing from here is: use the !important tag as little as possible.
* This is not browser tested! Works well on Chrome, but it is probably a good idea to test on all the other browsers as well…

Strange Issue:

For some reason, the current theme will not update to live, even though it says it will. The current workaround is to do the following:

1. Go back to the control panel (or from Site Setup, just click “Theming”).
2. “Copy” the current theme, naming it whatever you’d like. Make sure to check “Immediately enable new theme”.
3. After creating the new theme, reactivate the Twitter Bootstrap theme by clicking “Activate”.
4. Finally, delete the copy theme to keep this area as clean as possible.

# Editing the Theme

Please make changes in /assets/theme.css. There are some changes that were made directly in /bootstrap/css/bootstrap.css, but only use that when necessary.

/assets/theme.css

* In general, use this to make CSS changes to the page.
* Currently, it is organized in sections. If you need to make changes, make them in the appropriate areas.
* Navigation Bar
  + Lots of size and color stuff.
  + The way you get the drop down menu to appear is under the tag:  
    #tabs > li:hover > ul  
    It only appears when the parent element is hovered over.
* Media Queries
  + [Here is a quick resource](https://css-tricks.com/snippets/css/media-queries-for-standard-devices/) on how these work.
  + Basically, these are useful for changing the way the website looks when the window size is changed.

/assets/theme.js

This is the file for our theme’s Javascript. Currently, it does the following after the page is rendered:

* Adjust column widths based on how many columns there are on the current page.
* Adjusts the user tool size based on whether or not the user is logged in.

/theme.html

* This is the bare bones layout for the theme, which shows the placement of global elements, like columns, footer, logo, etc.
* This is also where the Google Analytics script is. It should be placed right before the closing </body> tag.