Tutorial and Reference Manual

Edition PieServer for eZ publish 3.4

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1. Summary

Edition PieServer for eZ publish 3.4 is an off-the-shelf web site application build on top of the eZ publish 3.4 Content Management Framework (CMF). Like other pre-built web site applications ("Standard", "Base", "Admin" etc.) which you can find in your respective distribution of eZ publish CMF, Edition PieServer consists of an array of content types, associated with presentational design. The presentation layer is built with eZ template language, XHTML 1.1, CSS ½ and Javascript. Among the highlights of new Edition PieServer for eZ publish 3.4 are its

- advanced menu and toolbar-system with full admin support,

- complete new gallery design with rich user controls,

- simplified and straightforward, xml-based, content model and

- its flexibility in setting up and customizing your site design.

In fact, the new release of Edition Pieserver has been redesigned from scratch to overcome some annoying limitations of its predecessor-versions. Most important in this context is that prior versions of Edition PieServer were not fully supporting XML as the mechanism to describe complex content struture, e.g. in articles. Hence, exporting and re-importing content was almost impossible or at least hard to achieve. With the new release of Edition PieServer, ezxmltext is the datatype "at the very heart" of compex content structure. As a consequence, you are encouraged to use eZ systems' Online Editor to flexibly create your XML-content in WYSIWYG-style. Each standard content-structure offered by eZ systems' Online Editor is backed with a fully XHTML 1.1 and CSS1/2 -compatible design by new Edition PieServer. So unlike many other content management tools in the market, Edition PieServer on top of the eZ publish CMF does render clean and efficient cross-browser XHTML-code and not just assembled html-chaos.

The following list comprises all major new design features of Edition PieServer for eZ publish 3.4, as compared with old Edition PieServer for eZ publish 3.2:

Feature	Edition PieServer 3.4	Edition PieServer 3.2
Full support for Virtual Host (VH) and Non Virtual Host (NVH) setups	yes	no
Support for arbitrary site accesses (multi site support)	yes	no
toolbar and menu system	yes	no
predefined view areas	no	yes
Menu trees	no	yes
Integrated image and gallery system	yes	no
Flexible icon system	yes	no
Frontpage customization tool	yes	no
CSS support for xml-tags	yes	limited
eZ caching mechanism support	yes	limited
template compilation support	yes	limited
eZ Online Editor support	yes	limited

1.1. How to get Edition PieServer

Edition PieServer is an eZ community contribution. As such, it is designed for use under the terms of GPL which is part of eZ systems' licensing model. See http://www.ez.no/ez_publish/licenses for further reference.

Do not expect eZ systems to support your site after having deployed Edition PieServer. Edition PieServer does (still) rely on some minor changes applied to original eZ publish 3.4 code in order to maintain several important features like *secure anonymous posting*.

Edition PieServer is (still) not available in eZ publish package format, because this package format does not yet support all types of files and parametric structures required to deploy Edition PieServer safely on top of the eZ publish CMF.

With these indications in mind, you may now fetch Edition PieServer from the eZ community server. It is recommended to use the WebSVN interface for download. The link below directs you to the download page.

http://pubsvn.ez.no/websvn/listing.php?repname=community&path=%2Fsites%2Fedition_pie server%2F&rev=0&sc=1

Select the tarball of the subdirectory named **edpie_3.4**, as depicted below:

1.2. Operating Edition PieServer

1.2.1. System Requirements and Compatibility

Edition Pieserver for eZ publish 3.4 is designed for use with eZ publish release 3.4.x, where the 'x' covers all minor release numbers of eZ publish 3.4 (at the time of this writing this is minor release 3.4.5). There are no extra system requirements for Edition PieServer beyond those which apply to the eZ publish 3.4 CMF. However, Edition PieServer is optimized for use with Unicode.

1.2.2. Unicode and Databases

Edition PieServer for eZ publish 3.4 is **optimized for use with Unicode (utf8)**. You may run Edition PieServer in environments which rely on specific codepages, too. But then you have to re-configure your eZ publish platform to operate your codepage(s) **after having installed Edition PieServer**, since Edition PieServer's default ini-configuration is taylored to support pure Unicode (utf8) platforms. In particular, Edition PieServer fully supports MySQL 4.1 (beta), which is the first satisfying MySQL release for use with Unicode so far.

MySQL 4.1 (beta) users are encouraged to deploy Edition Pieserver's MySQL 4 – database kernel. This MySQL 4 – database kernel is located in file

../kernel/sql/mysql/cleankernel_ps_mysql4.sql

of your Edition PieServer distribution.

Users of MySQL 3.x.x have to deploy an initial database for Edition Pieserver in 3 steps:

1. Deploy the eZ publish standard kernel ../kernel/sql/mysql/kernel_schema.sql
2. Deploy the add-on ../update/database/mysql/dbupdate-3.x-x-to-pieserver.sql
3. Deploy ../kernel/sql/common/cleandata_ps.sql

PostgreSQL-users should deploy their ordinary eZ publish kernel-schema and follow step 2 and 3 of the MySQL 3.x.x installation procedure.

2. Content Types

The following table provides a comprehensive overview of the pre-built content types which are part of Edition PieServer.

Edition PieServer content types in comparison with the eZ publish standard			
Class Group	Class (Content Type)	Available in	Comparison
		Edition PieServer | eZ publish standard	Ed. Pie. / eZ pub. Standard
Content	**Article**	X	X	Different attributes
UserForm	**Comment**	X	X	Different attributes
Setup	**Common ini settings**	X	X	
Media	**File**	X	X	equal
Media	**File Repository**	X		
Content	**Folder**	X	X	equal
Content	**Forum**	X		
UserForm	**Forum Thread**	X		
UserForm	**Forum Statement**	X		
Media	**Image**	X	X	equal
Media	**Image Repository**	X		
Content	**Link**		X	
Media	**Media Repository**	X		
Content	**Schedule**	X		
Content	**Schedule Item**	X		
Setup	**Template Look**	X	X	equal
Users	**User Group**	X	X	equal
Users	**User**	X	X	equal

If you consider to use further pre-built WCM-packages, you may encounter compatibility problems between the content types of these packages with Edition PieServer types.
However, deployment of the powerful web shop package that ships with your eZ publish CMF distribution should not lead to trouble.

3. Designing a Site with Edition PieServer

Pre-built site design is most favorable, as long as it is flexible enough to make your presentational ideas work. If you compare the new pre-built site design with the one built into Edition PieServer for eZ publish 3.2, you will observe significant changes. Old Edition PieServer's presentational design was triggered by content structure. So you had to decide on content-level where a piece of content would show up on your site. This content-driven management of site layout was, of course, a violation of MVC and only a work-around for the lack of tools to professionally manage presentation layers with eZ publish 3.2. With the new menu- and toolbar management system built into eZ publish 3.4, there is no more need to break principles of MVC-design just to offer content editors a straightforward approach to design a site. So in Edition PieServer for eZ publish 3.4, content structure is – again - completely independent of site design. You manage your site layout by specifying site accesses, menus and toolbars.

The following paragraphs guide you through the standard process of setting up your site with Edition PieServer for eZ publish 3.4.

3.1. Page Layout

Once you have

- deployed the Edition PieServer tarball in your eZ publish web-directory,

- installed the Edition PieServer initial database according to section 1.2 and

- changed respective site.ini-settings to something meaningful in your local environment,

type the URI of your default eZ site in your browser's address field. A plain Edition PieServer user site should show up:
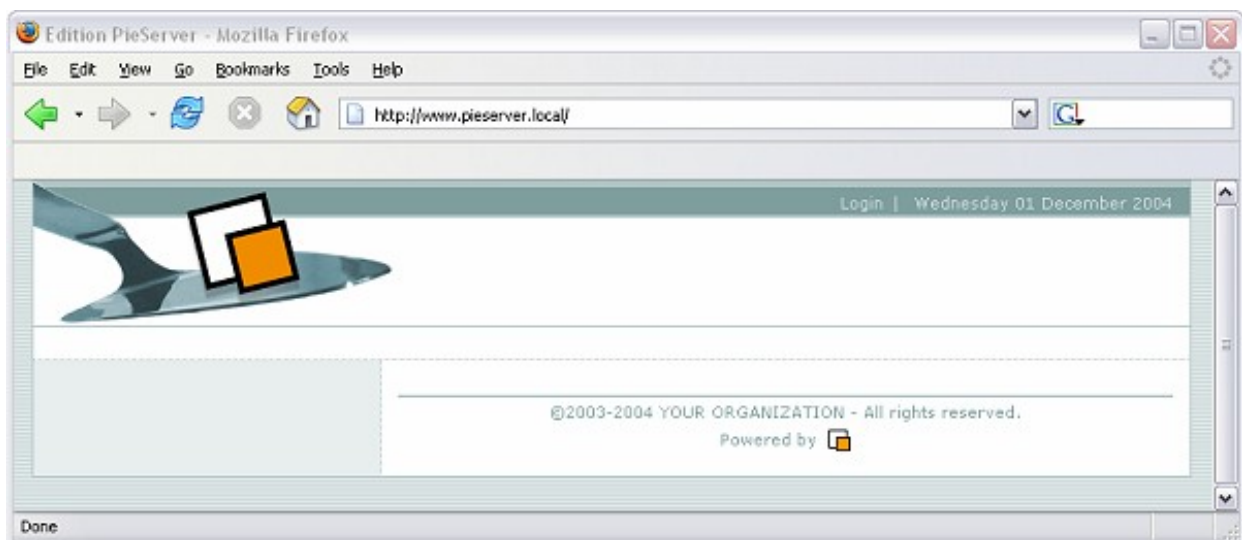
The screenshot above shows the Edition PieServer page layout with no particular site structure defined yet.

To alter the look and feel of this default page layout (e.g. replacing the pieserver image with your favourite site logo etc.), you have to edit the cascading style sheets (../design/pieserver/stylesheets/) of your Edition PieServer distribution.

However, it is recommended that you postpone your work on styles unless you feel familiar enough with the design styles offered in Edition PieServer. A practical approach to custom site design based on Edition PieServer styles is that you set up a test site with rich content according to this manual and apply you custom design to this site later on.

3.2. Basic Site Structure and Menu Management

First and foremost, your plain user site needs site access partitioning and a top level navigation. Log in to your eZ publish admin interface with the default eZ publish admin credentials:

Login Name	**admin**
Password	**publish**
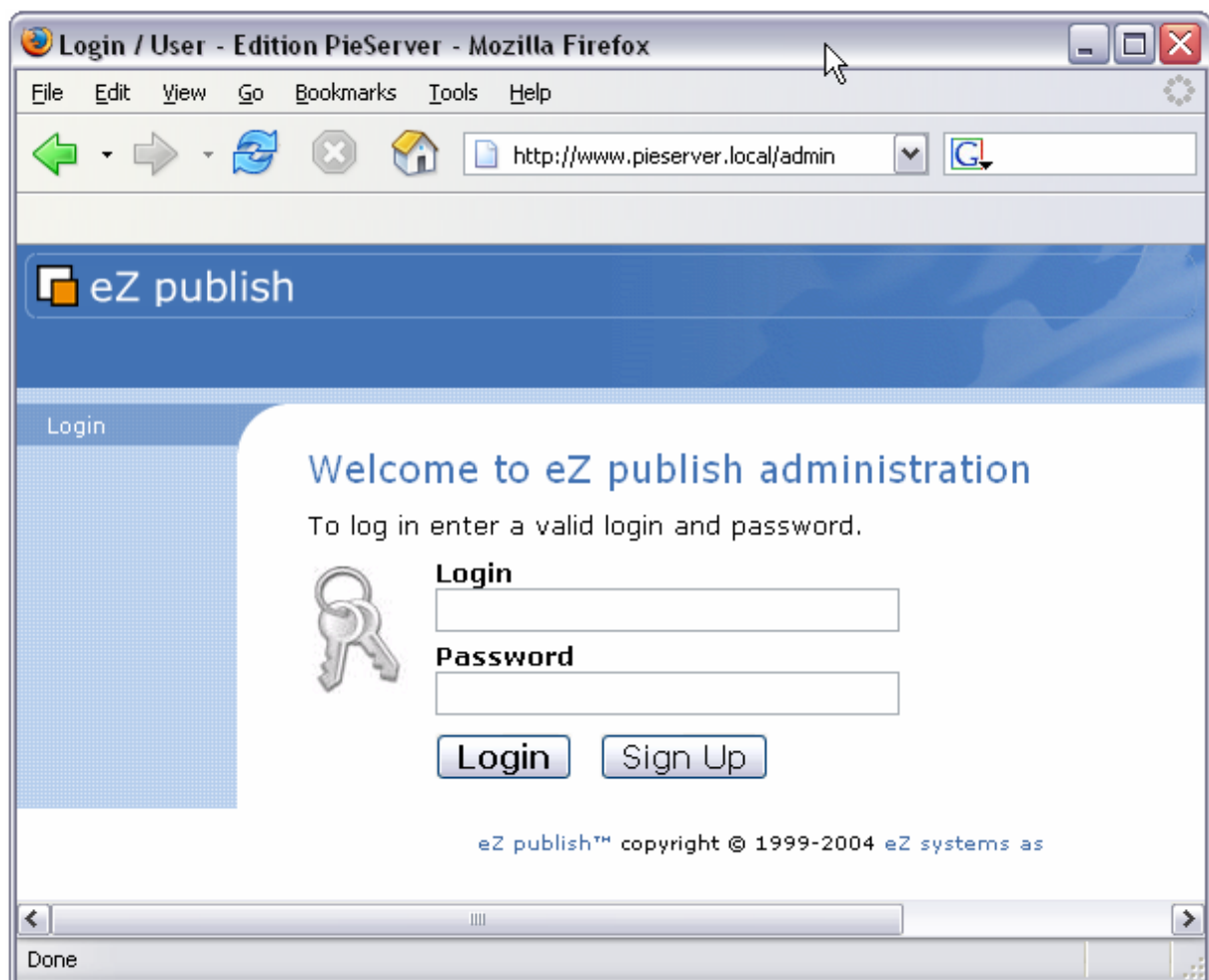
After being logged in, switch to the setup-tab.
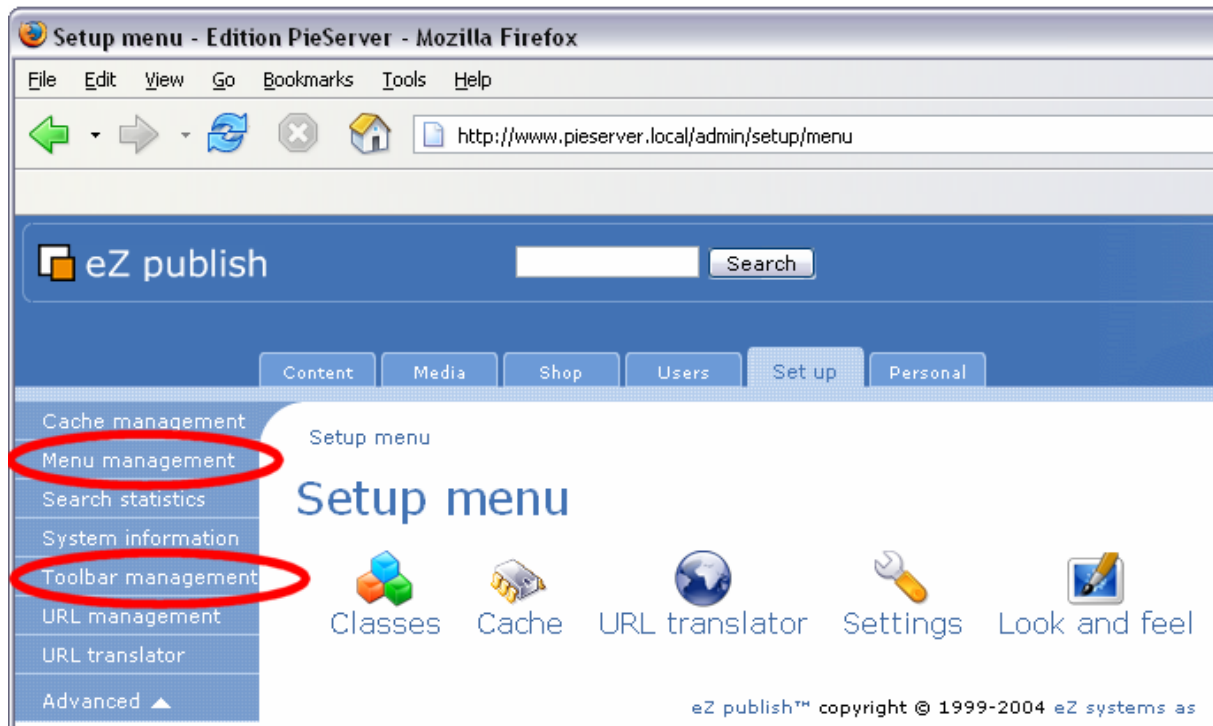
The left menu column of your setup section gives you access to two services which control site setup, i.e. **menu management** and **toolbar management.**

Open the menu management UI. Unlike ordinary eZ publish 3.4, Edition PieServer will display a customization screen for site navigation menus based on site accesses:
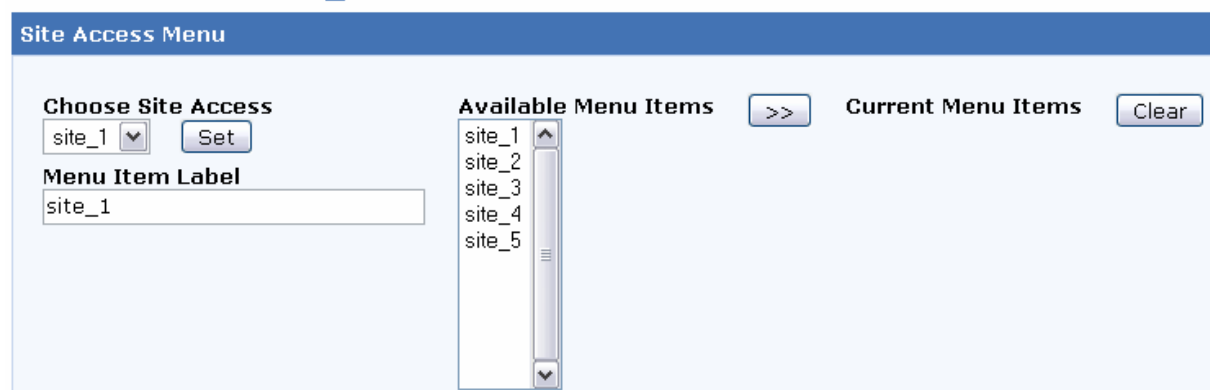
There are five pre-defined site access names (*site_1,...,site_5*) in Edition PieServer's default site.ini.append – file (settings/override/site.ini.append). These pre-defined site accesses are – by default - displayed in the configuration screen above. If you deploy custom site access settings, your custom site access names will show up on the configuration screen instead. Edition PieServer takes **site access definitions as the major context of navigation available on your user site.** As in ordinary eZ publish, site access definitions are logical realms to bind e.g. user login requirements, specific design guidelines, virtual hostnames and the like. Here in Edition PieServer, **you directly link your site access definitions to main**

navigation controls on your user site. That's what the configuration screen depicted above is for.

3.2.1. Example 1

Say, you have defined a site access named *site_1* in your site.ini.append-file. You may write many interesting settings to control your site's behaviour in a particular site.ini.append-file for this site access, e.g. a site access-URI like http://www.pieserver.local. Now let us assume that you are done with your site access definitions for *site_1* and that you want to create a main menu item on your user site which points to this site access.

The first thing you have to do on your configuration screen is to choose and set a particular site access for further customization tasks:
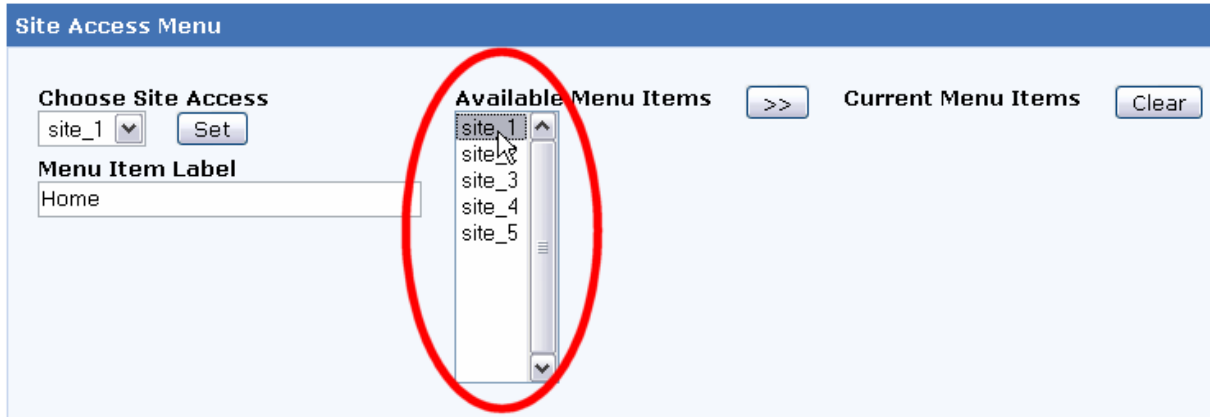
Next, you have to choose a label for the menu item on your user site which points to this site access. Let's choose *Home* as our menu label for site access *site_1.* If we are too lazy to choose menu labels, site access names are chosen as menu labels by default.
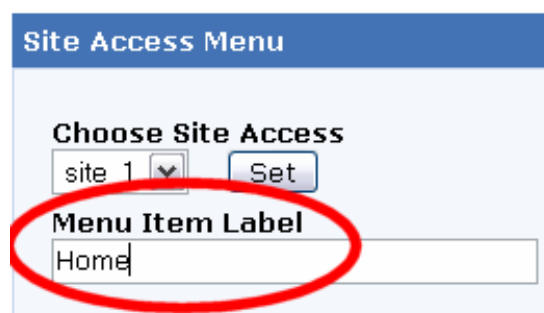
However, our chosen site access *site_1* is not just capable of a single menu item on the user site which points at itself. As it was mentioned before: Each site access forms a major context of navigation on your user site. Thus, it must be capable of a complete main menu pointing at arbitrary site accesses, including itself.
So in order to **complete** our definition of a main menu for our site access *site_1,* we have to select all navigation targets (site accesses), **which we want to be accessible** from the main navigation menu we create for site access *site_1*:
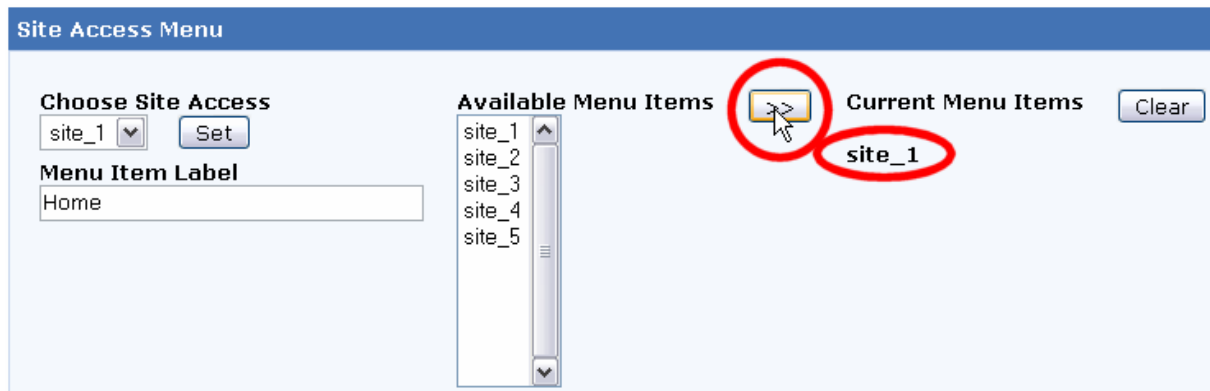
In this example, we confine ourselves to creating a main menu with only one item (a pointer to site access *site_1*). This is of course not a very interesting menu, but the most straightforward way to complete our first example.

Finally press the STORE-button at the bottom of the configuration screen. Now you have accomplished your first main navigation context for your user site. Call your user site **by typing the URI associated with your site access *site_1*** in the address bar of your favourite web browser to verify your result:

In the horizontal main navigation area at the top of your user site, you should now see a menu item *Home,* which is selectable as a link to the URI of our site access *site_1.*

3.2.2. Example 2: Introducing further site accesses and cross-linked main menus

Now let us do something more realistic. Let us assume that on our future site you want to offer 3 major contexts for user navigation, e.g **Home, News** and **Member Zone.**
As you may already imagine from the previous example, you need to have a site access definition for each of these major navigation contexts in your eZ publish site settings (site.ini.append).
Let us assume that you are reasonably lazy and decide to use 3 of the pre-defined site accesses that are already part of your Edition PieServer distribution, namely *site_1, site_2* and *site_3.*
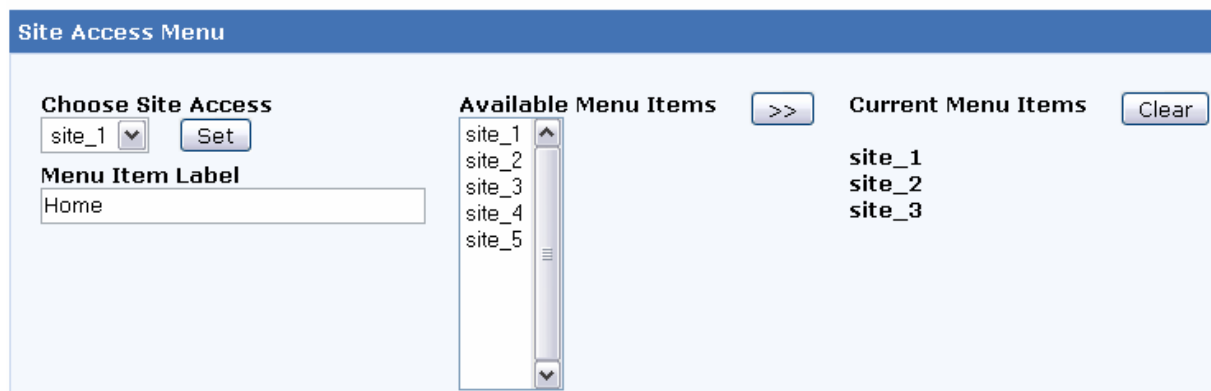
So the first thing to do is to give these 3 site accesses the menu names you need as it was shown in the previous example. The second thing to do is to select all three site accesses as menu items in order to make them accessible as navigation spots on your user site. Your menu management settings for *site_1*, *site_2* and *site_3* should then look like the ones depicted below. **Do not forget to always press the Store-button** at the bottom of the page in order to preserve your settings when switching from one site access configuration menu to another.

As a result, your user site will now support 3 major navigation contexts and a top menu bar for each of them to navigate between them:
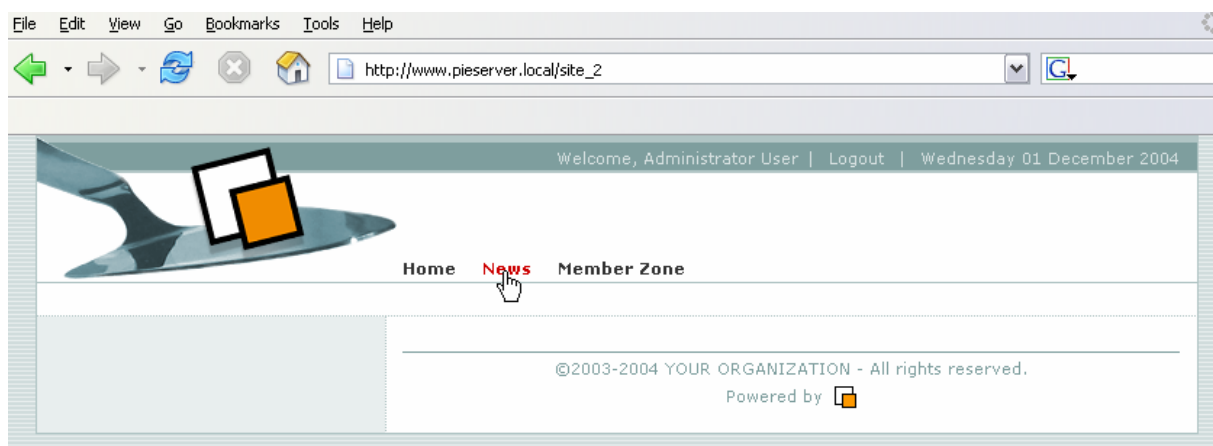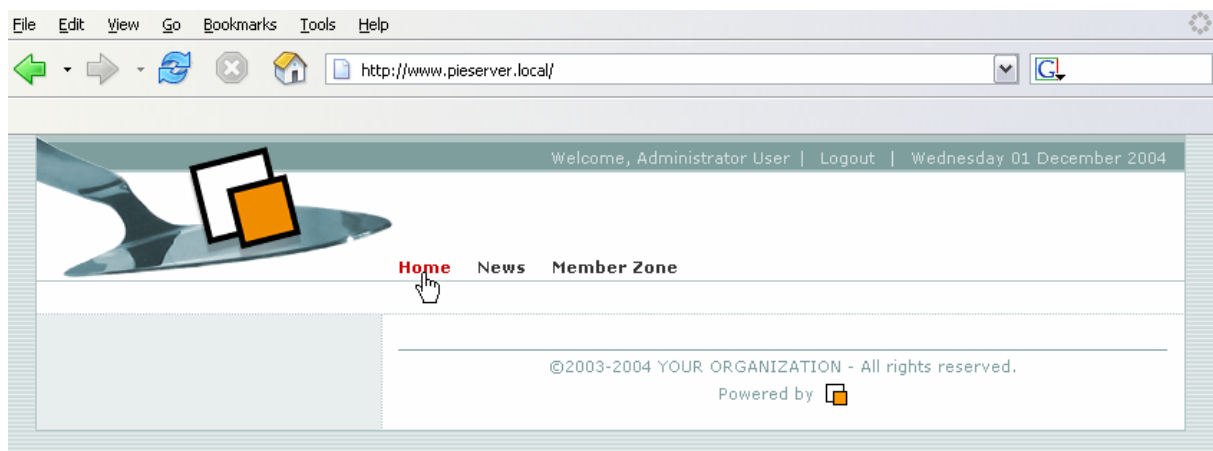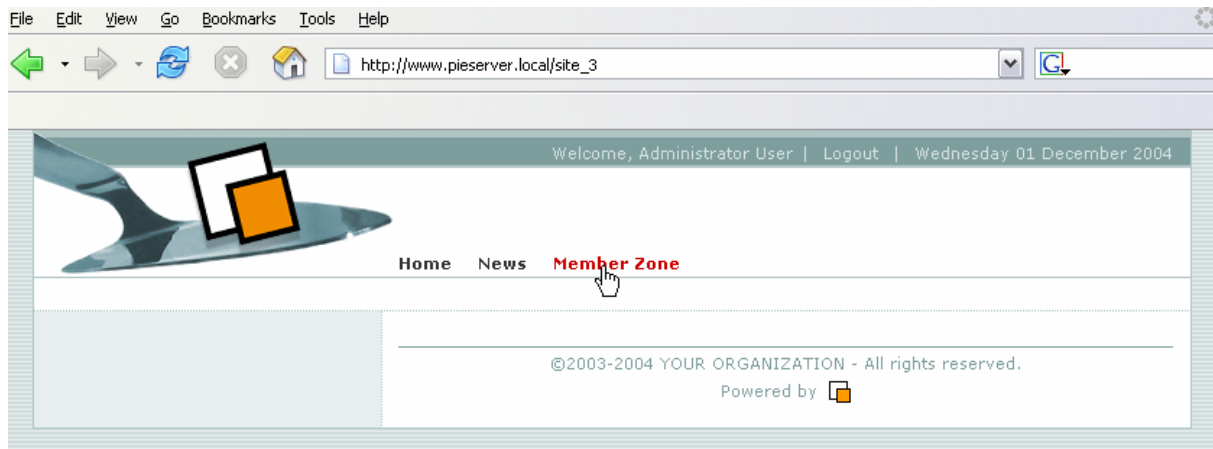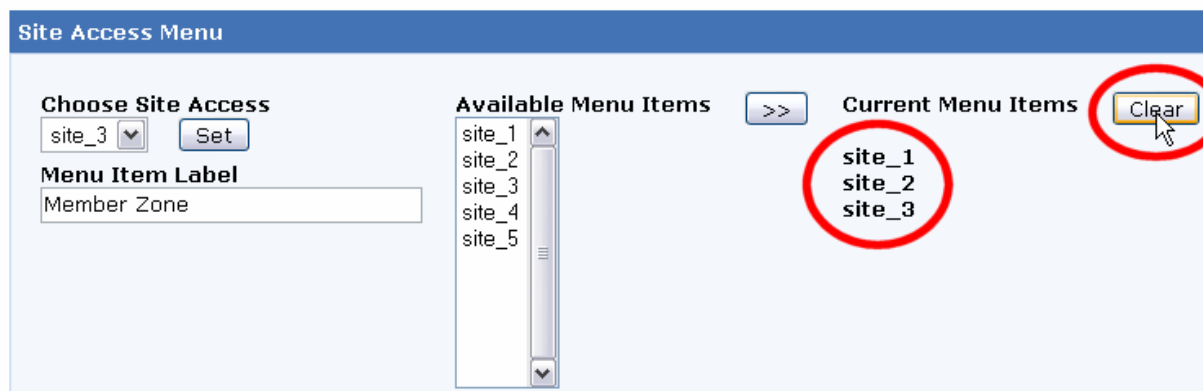
Now assume that in your *Member Zone* you do not like to have a link which points at your *News*-context. To drop that link, open your menu configuration screen for your site access *site_3 (Member Zone)* again. Clear the visible menu items you have chosen for this site access by pressing the Clear-button:
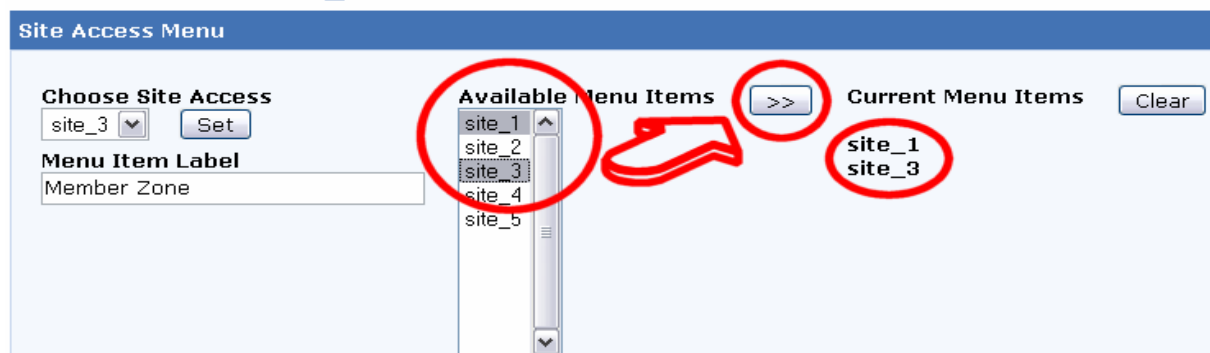

Next, choose only menu items *site_1* and *site_3* from the selection box *Available Menu Items* for your site access *site_3 (Member Zone):*

While your menus for *site_1 (Home)* and *site_2 (News)* continue to display all three navigation contexts on your user site, the link to *News* vanishes from the main navigation menu of site access *site_3 (Member Zone)*:
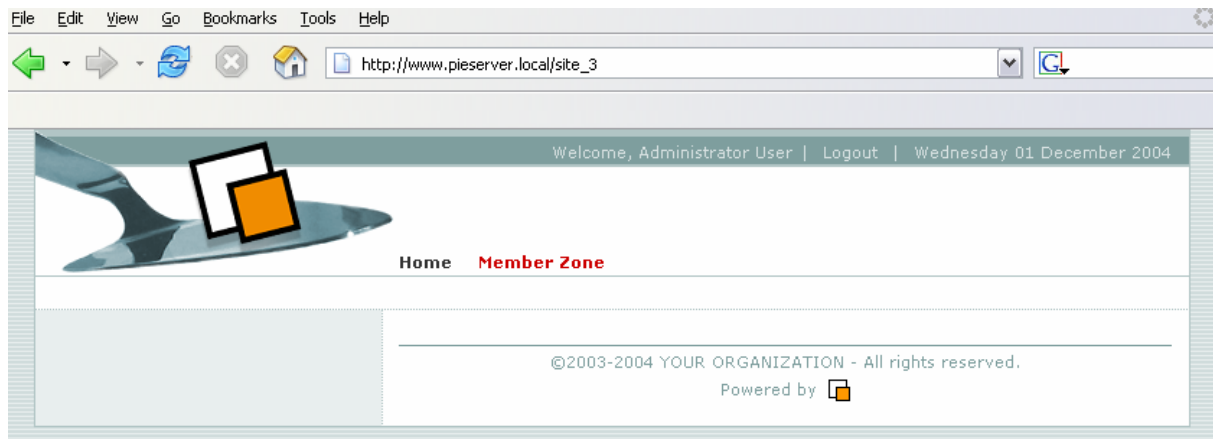
Similarly, if you want to alter the order in which your menu items appear in your main menus. Assume that you want to flip the menu order *Home-News-Member Zone.* to obtain the order *Member Zone-News-Home* for site access *site_1 (Home)* as depicted below:
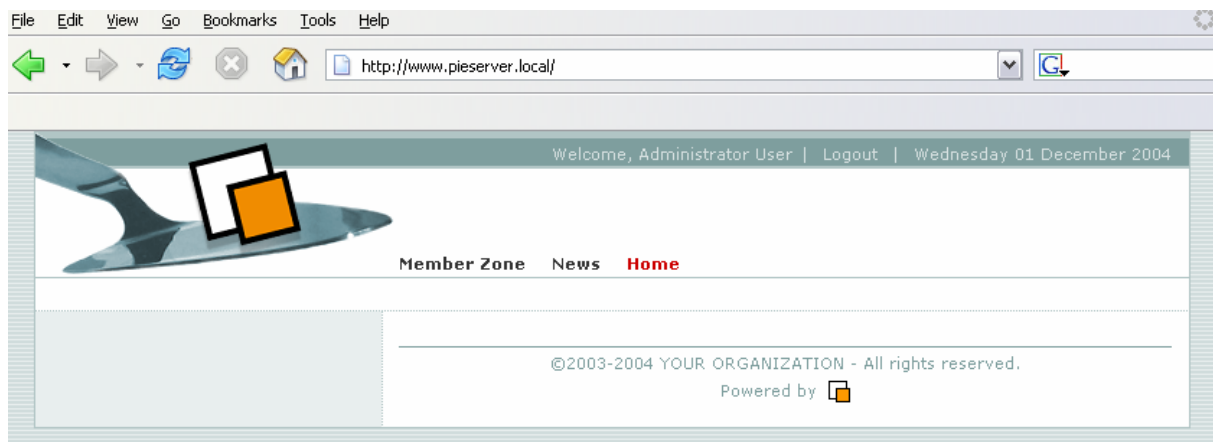
To achieve this reordering of menu items, open your menu configuration screen for site access *site_1 (Home)* and clear the existing list of current menu items. Then **select and assign each menu item individually** to make your *Current Menu Items* – list reflect your intended order:

Site Context Menu Management

for Site Access: site_1

3.2.3. Partitioning the Content View

In the lower half of your menu configuration screen, you can choose between two partitioning schemes for your site content canvas:

As a result of the fixed and centered page layout chosen for the new version of Edition PieServer, a formerly available three-column-partitioning scheme for the canvas has been abandoned, since this scheme was found to produce too much congestion on the site. Now, **for each site access, you can individually choose** between 2 variants of the classical 2-column partitioning scheme:

2 content columns with a left-hand vertical menu bar, looking like this:
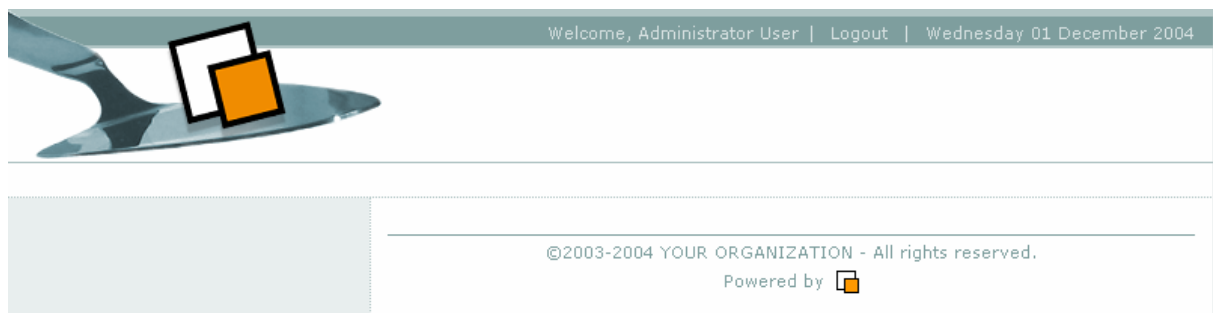
2 content columns with a right-hand vertical menu bar, looking like this:

3.3. Toolbars and Tools

Although we have not created any piece of content so far, we are now ready to deploy typical services on our site by virtue of toolbars and tools.

Edition PieServer for eZ publish 3.4 fully supports the great new toolbar system as it was introduced with eZ publish 3.4. Editon PieServer offers some minor enhancements to this toolbar system in order to provide an array of tool-based services as they are typically required on sites. These minor enhancements cover two topics:

- Edition PieServer toolbars are free of html-code snippets. They are just logical collections of tools stored as ini-settings.

- When using Edition Pieserver, the admin interface of eZ publish 3.4 supports additional configuration options for toolbars and tools.

From within the setup section of your eZ publish administration interface, press the *Toolbar management* menu item to access your toolbar configuration area:
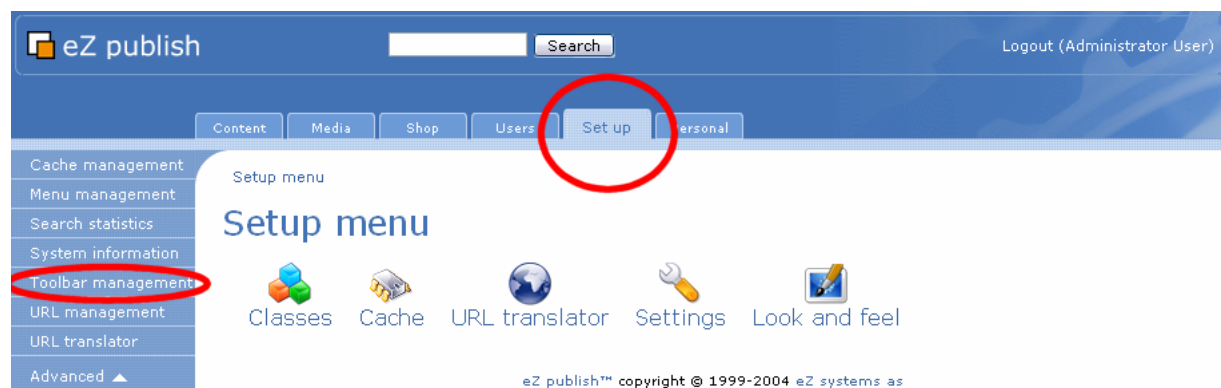
The first screen which appears after you have selected the link to the toolbar management system is a selector screen for site access contexts:

eZ publish 3.4 treats **toolbars as navigational children of the major navigational contexts represented by site accesses**, as they were introduced in the previous chapter.

So you ordinarily have to select a site access context to which you can apply your toolbars. Edition Pieserver offers 4 kinds of toolbars. i.e.
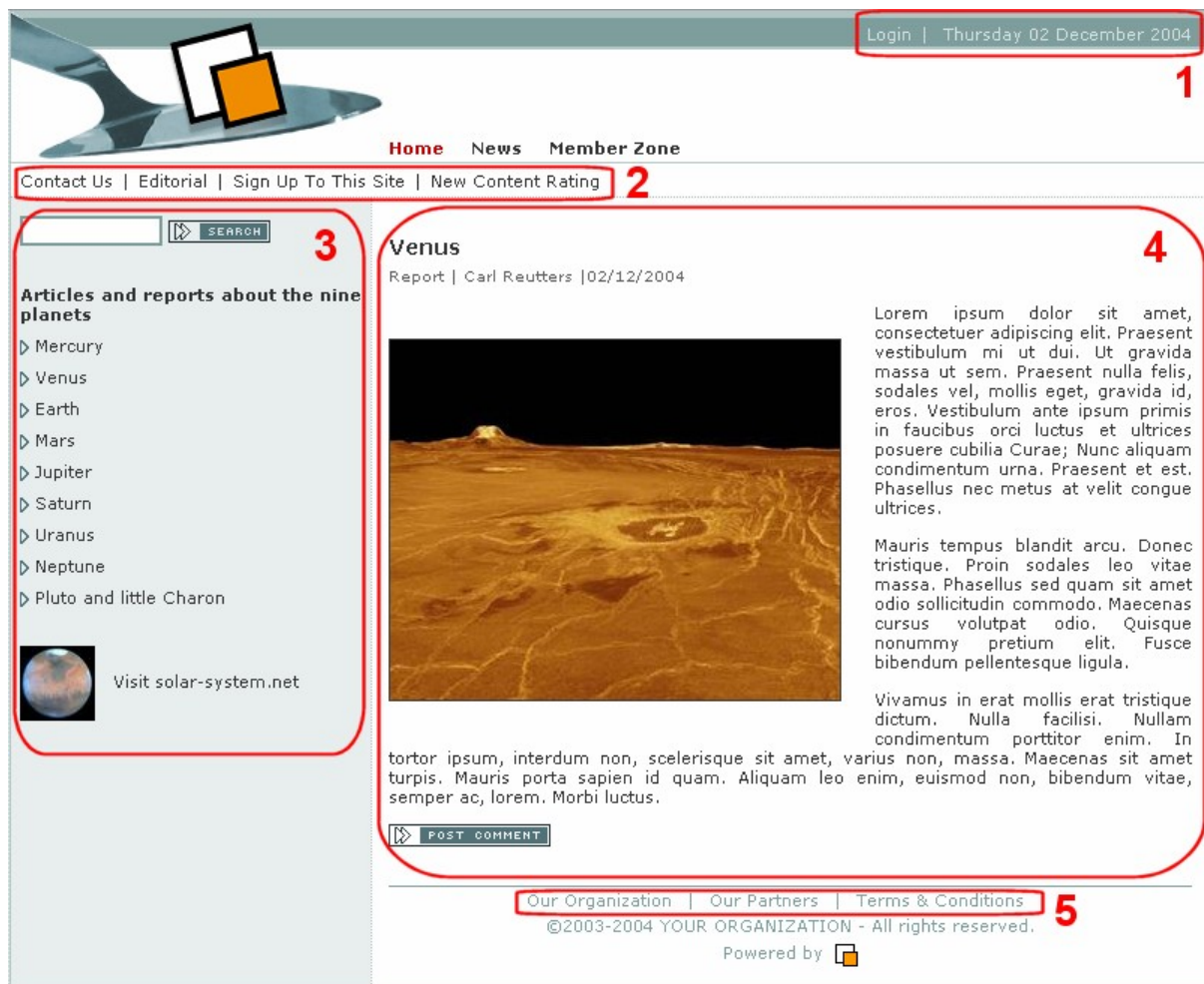
- subheader toolbar

- menu column toolbar

- frontpage toolbar

- footer toolbar

Beyond these 4 ordinary toolbars, Edition PieServer offers a special toolbar GlobalHeader, which you should only read, but not edit via our admin interface. The GlobalHeader toolbar is discussed later on here.

3.3.1. Toolbars and their page locations

For each individual site access that you offer on your site by virtue of a main navigation menu item, toolbars are logical placeholders for particular locations on the user page. Toolbars are your instrument to assign content and services to the presentation layer of a site access context.

The following screenshot depicts the screen-locations of 5 toolbar types, which you may use to populate your site with menus and frontpage content:

Position Number	Toolbar type
1	Global Header
2	Subheader
3	Menu Column
4	Frontpage
5	Footer

Now let us discuss these toolbars and the respective tools (service modules) to populate them in detail.

3.3.2. Toolbars and their sets of tools

Edition PieServer's enhanced toolbar system allows you to create a setup which controls the subset of tools you want to unlock for use with a particular toolbar. **Toolbars and their subsets of tools are specified in your toolbar.ini-file:**

Have a look in your ../settings/toolbar.ini-file to understand how tools are made available either globally or locally:

```
[Tool]
AvailableToolArray[]
# AvailableToolArray[]=basket
# AvailableToolArray[]=best_seller
# AvailableToolArray[]=create_object
# AvailableToolArray[]=calendar
# AvailableToolArray[]=content_link
# AvailableToolArray[]=content_link_list
# AvailableToolArray[]=content_link_tree
# AvailableToolArray[]=content_view_full
# AvailableToolArray[]=content_view_list
# AvailableToolArray[]=currentdate
# AvailableToolArray[]=drafts
AvailableToolArray[]=external_link
# AvailableToolArray[]=formtrigger
# AvailableToolArray[]=login
# AvailableToolArray[]=mailto
# AvailableToolArray[]=notification
# AvailableToolArray[]=printpage
# AvailableToolArray[]=searchbox
# AvailableToolArray[]=users

[Toolbar_GlobalHeader]
ExtraToolArray[]
ExtraToolArray[]=content_link
ExtraToolArray[]=currentdate
ExtraToolArray[]=login
ExtraToolArray[]=mailto
ExtraToolArray[]=printpage
Tool[]

[Toolbar_SubHeader]
ExtraToolArray[]
ExtraToolArray[]=content_link
ExtraToolArray[]=content_link_list
```

As in standard eZ publish 3.4, you can set a tool's scope to *global* by appending the tool's name to the global tool array **AvailableToolArray[ ]** in your template.ini-file. Tools which are mentioned in **AvailableToolArray[ ]** can be used in arbitrary toolbars. On the other hand, Edition PieServer offers a local tool array **ExtraToolArray [ ]** in the domain of each individual toolbar. Tools which are **not** mentioned in the global tool array, can be used only in toolbars which have the tool's name mentioned in their **ExtraToolArray[ ].**

In its standard shipping configuration, Edition PieServer has only one tool unlocked for global application in arbitrary toolbars: *External link*.

3.3.3. Toolbars Subheader and Footer

Apart from the main navigation menu for site access contexts, *Subheader* and *Footer* toolbars provide two additional horizontal menus on your user site. In current Edition PieServer page layout, horizontal menus are kept slim for aesthetical considerations. As a result, the tools which are "unlocked" by default for use in horizontal toolbars are simple and text-based only. If you dislike this restrictive design, you may of course increase the horizontal toolbar's vertical CSS-width in order to unlock further tools and services to be used with horizontal toolbars according to the explanations given in the previous paragraph.

3.3.3.1. Example: Deployment of a contact-link in your user site's subheader

In our first example to populate our user site with services via tools, we deploy a default mailto-link in a subheader of our example site which we have created in the previous chapter. In particular, we put this mailto-link to the subheader menu of site access **site_1 (Home)** to offer e.g. our site visitors an email-contact to our firm's communications-department from our *Home*-section.

Login to your eZ publish admin interface, turn to the Setup-tab and select *Toolbar management* in the left menu column. **eZ publish prompts you with an entry dialog to choose a site access and a respective toolbar location where you want to deploy content.** We select our *site_1 (Home)* and the *SubHeader* toolbar according to the activities 1-3 as shown in the diagram below:

This choice directs us to the tool assignment dialog for our **subheader menu in the Home-context (site_1):**
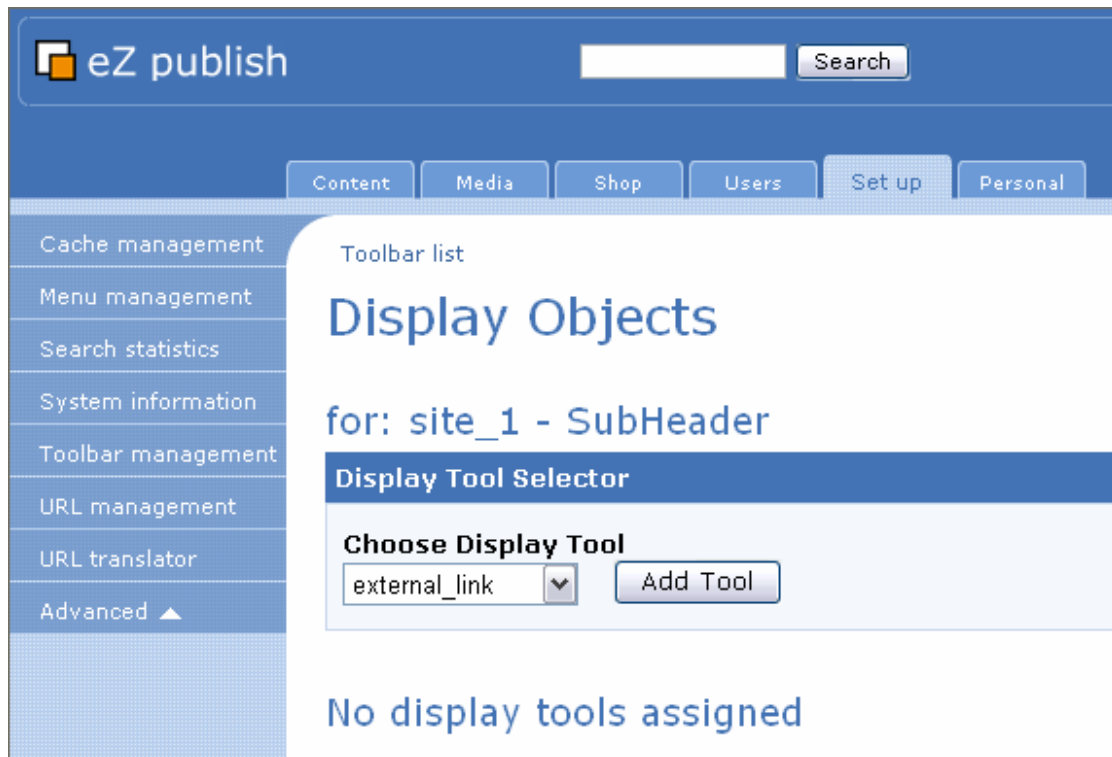
The Edition PieServer tool assignment dialog informs us that our subheader menu is still empty. Now we are going to change this and select a *mailto-tool* from the selection menu:
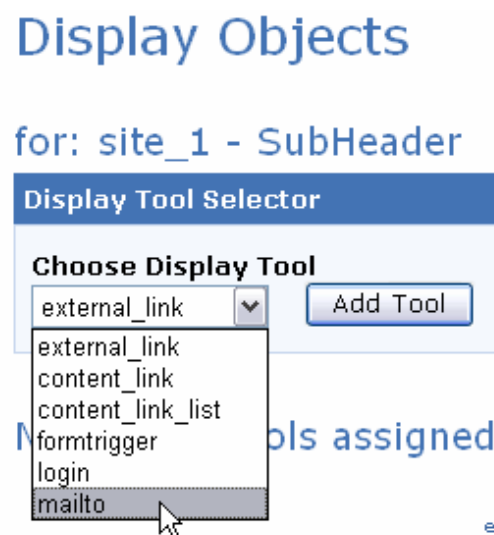
After having pressed the Add Tool –button to confirm our choice, a configuration form for our mailto-tool appears on the screen:

We enter the specification data for our *Contact Us –* link into this form and press the Store button:

If you do not set the check-box value for menu separators to false (activity 3 in the diagram above), Edition PieServer will append a vertical bar behind your subheader item to separate it from menu items that may follow. If everything went the way it should, our *Home*-section should now offer visitors a contact link in the subheader menu. Pressing this link should trigger-start a visitor's mail client with an initial mail form to be sent to our info@our_firm.com:
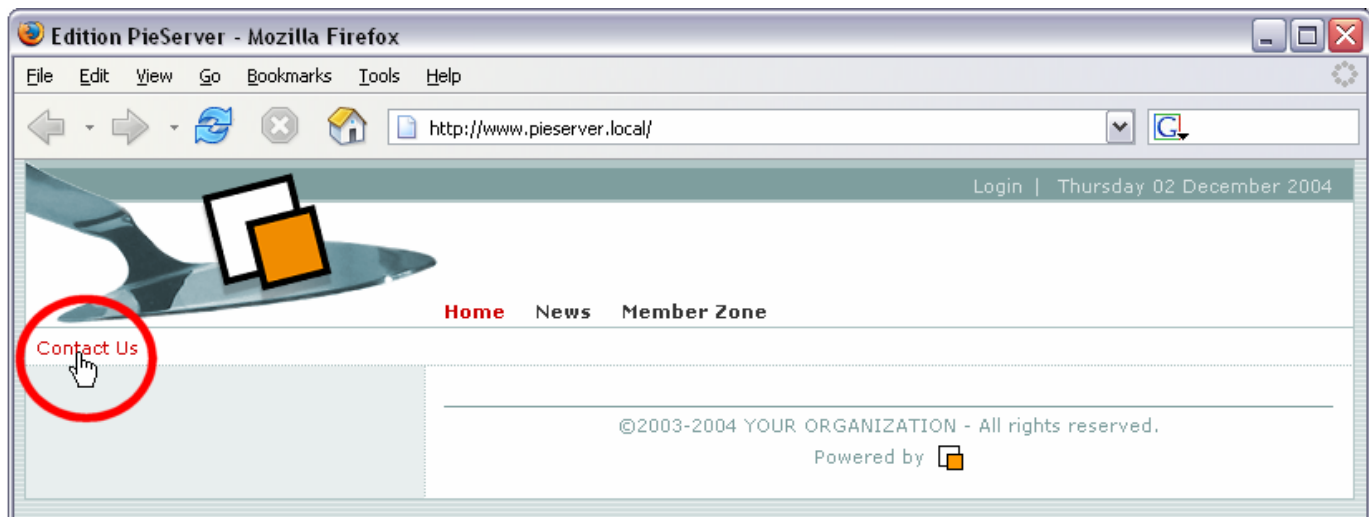
At least on the author's box everything works fine ;-)
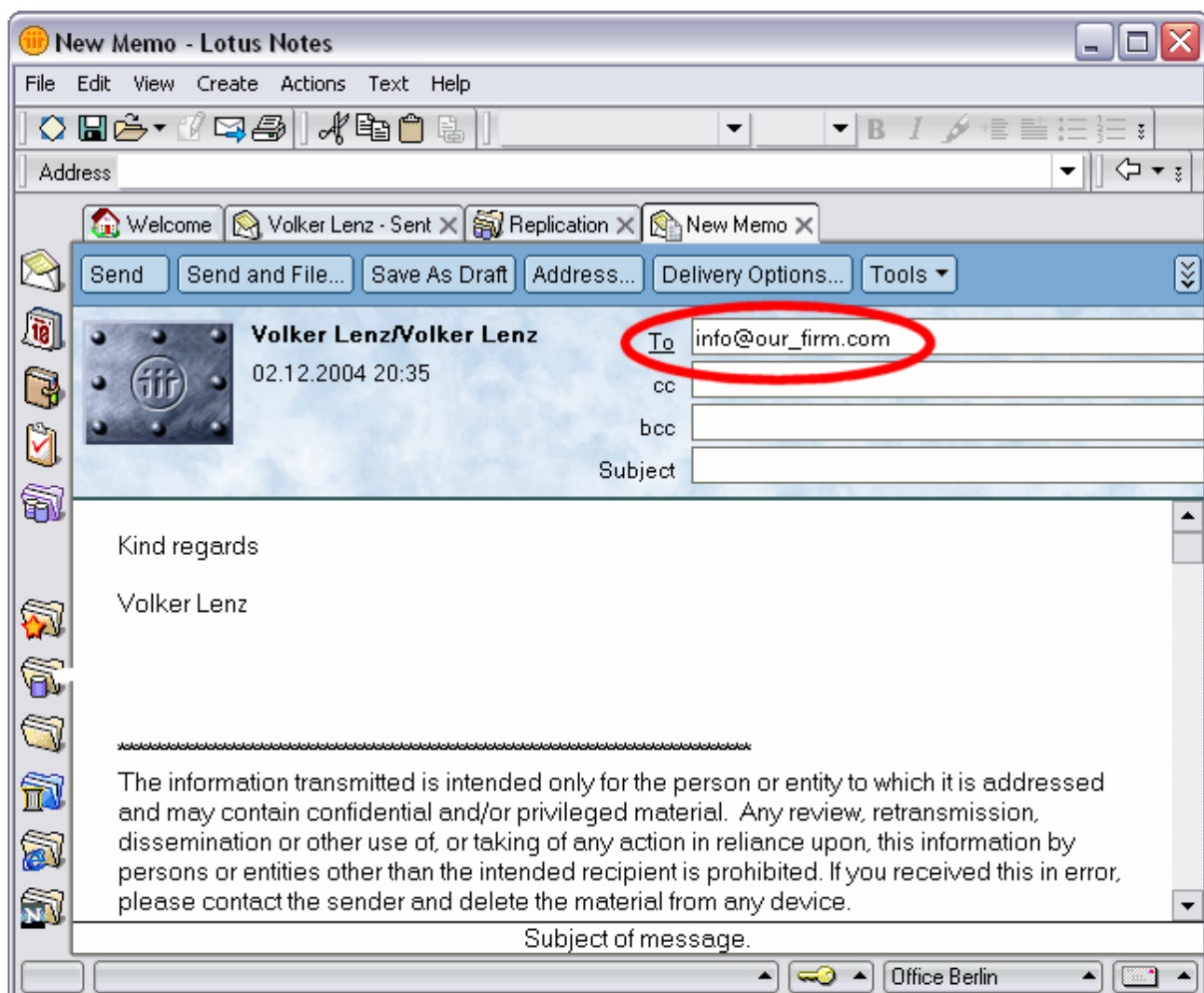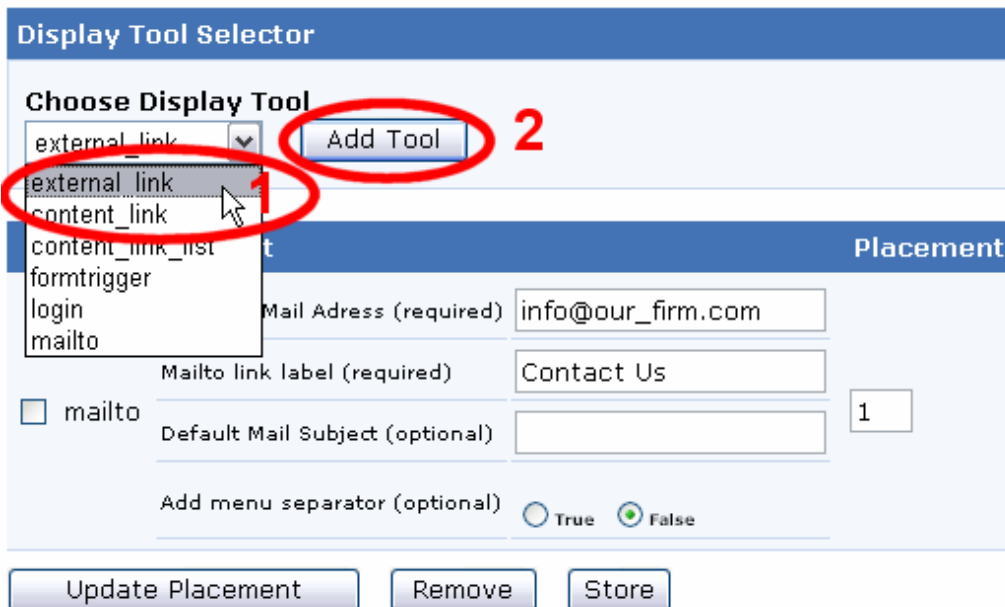
3.3.3.2. Example: Adding an external link to a subheader

In analogy to the steps we took before to create a mailto-link, we now add an external link to the same subheader toolbar. Let us assume we want to give our site visitors the opportunity to visit one of our partners' pages, say http://our.partner.org.

On the eZ admin interface, we simply resume our previous tool assignment dialog, select an *external_link* tool from the tool options menu and press the Add Tool button:

This activity opens another configuration form for an external link. Again, we enter our data which specify the particular link to our partner site:

In activity 3 we have chosen to trigger a new browser window if a site visitor presses the link to our partner site. Note that **hotspot images**, which you can use in combination with or even as substitutes for link texts, **are ignored in horizontal toolbars due to Edition PieServer's slim horizontal toolbar layout.** So it makes no sense to add an image to a subheader menu item unless you have decided to alter Edition PieServer's horizontal toolbar design.

Our user site shoud now offer two subheader menu items in our major navigation context *Home:* Our external link to our partner's page should point to the URI that we have defined before. Watch your browser's status bar.
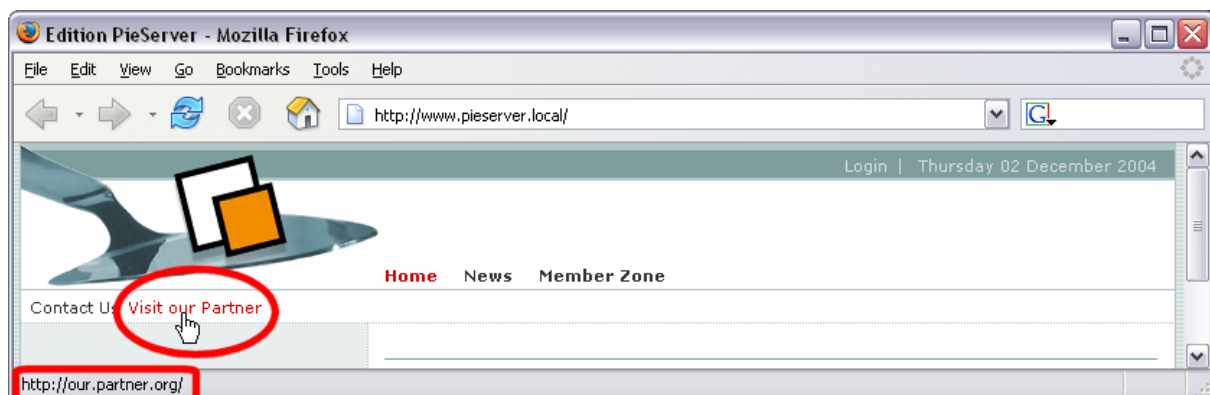
Now that our subheader menu contains two items, we may well consider to place a menu separator between them to make things look better. Lets resume our tool assignment dialog to accomplish this:

We simply add a menu separator to our first menu item. Our user site will then separate our to subheader menu items with a vertical bar:
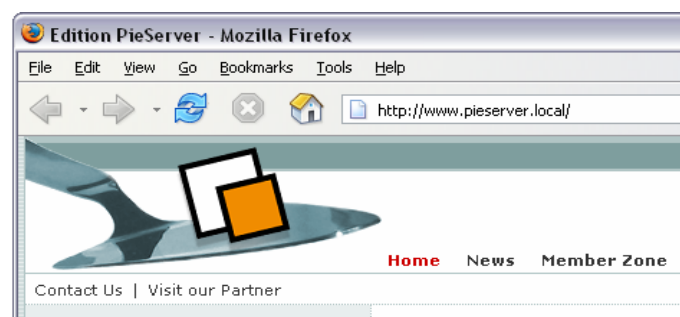
3.3.4. Toolbar MenuColumn

With toolbar *MenuColumn* you control the content of the left-hand or right-hand vertical view area on your user site, which is capable of menu structures and service utilities. Contrary to the space limits which affect our horizontal toolbars, the vertical menu column is designed wide enough to admit of all tools being deployed here.
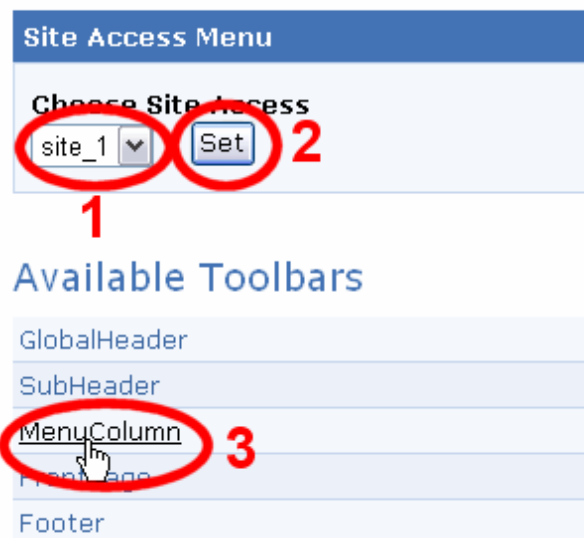
3.3.4.1. Example: Deployment of a site search utility

Only few sites can do without site search. In Edition PieServer, site search is a tool designed to be deployed in vertical menus. So let us deploy site search as the first item in the Home-section of the site we have constructed in this tutorial.

Enter your eZ publish administration and call the Toolbar management dialog. This time we want to add service to our *MenuColumn* in our site access context *site_1 (Home):* So we first have to select the following options to be directed to this place:

In the following dialog for tool assignment, we select the search utility. The dialog displays a tool configuration form for our search utility which we can store as is:

This results in a search form displayed in the menu column of our site access context *Home*: