



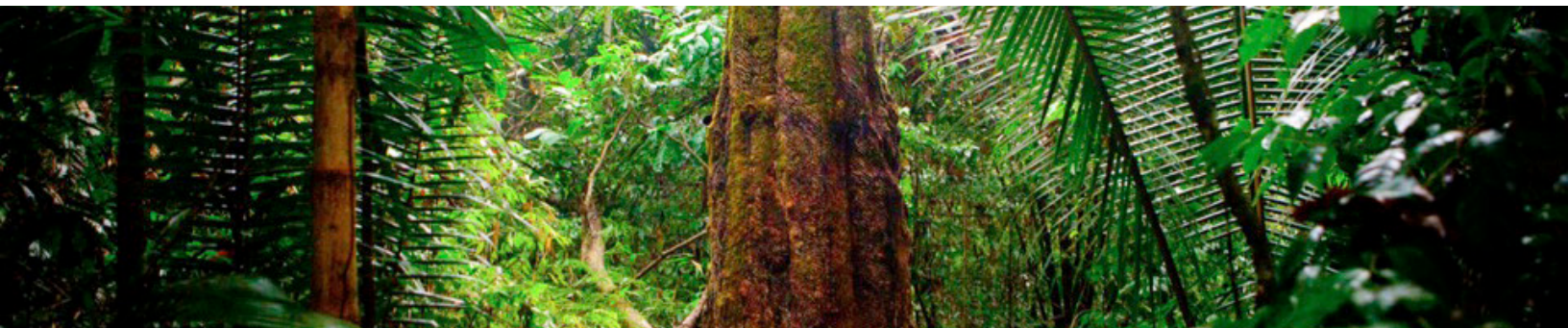
# Partnership for the Conservation of Amazon Biodiversity (PCAB)

## CONTENT MANAGEMENT MANUAL



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DECEMBER, 2017



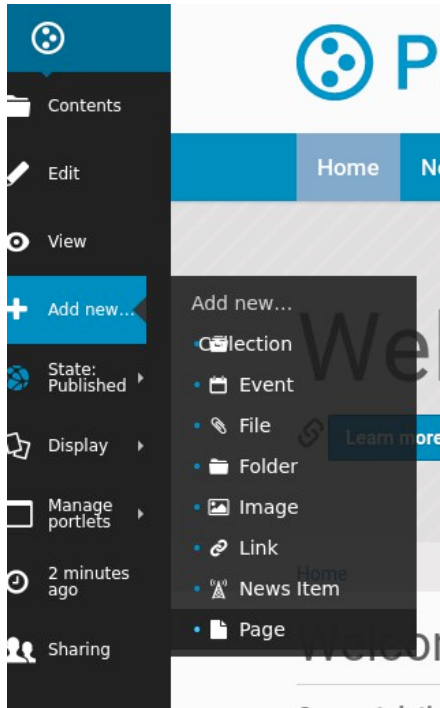
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# Adding New Content

A general overview of how to add new content items in Plone, including definitions of each standard content type

New content items are added via the **Add New . . .** drop-down menu:



Adding content in Plone is done *peacefully*, which means you should navigate to the section of your Plone website where you want 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 needed at any later time.

## 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 content type specifically for posting information about an event (such as a fundraiser, meeting, barbecue, etc). This content type has a function which allows the site visitor to add the event to their desktop calendar. This includes applications such as: Google Calendar, Outlook, Sunbird and others. To add a single event to your calendar, click on the iCal link next to the "Add event to calendar" text in the main view of the event item.

## Plone Conference 2015

The annual Plone worldwide gathering, this year in Bucharest, Romania.

### This year's goals

- affirm the performance, innovation and team spirit surrounding the Plone community
- experience a fun and productive event that's packed with insightful lectures and unforgettable parties
- welcome Romania, a Plone Conf. debutant, and its Plone enthusiasts among the more established members

- **When**  
Oct 12, 2015 to Oct 18, 2015  
(Europe/Berlin / UTC200)
- **Where**  
The Intercontinental Hotel, Bucharest
- **Attendees**  
A wide variety of Plone enthusiasts
- **Web**  
[Visit external website](#)
- **Add event to calendar**  
 [iCal](#)

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 or collection containing the events. For example, if you want to get all the events from the `events` folder in the root of your site, go to `http://example.com/events/@@ics_view`.

## File

A File in Plone is any binary file you wish to upload with the intent to 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 with the visual editor on pages or other content types. 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 a Page, only a 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 the basic content types. 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 spaces. **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 spaces 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

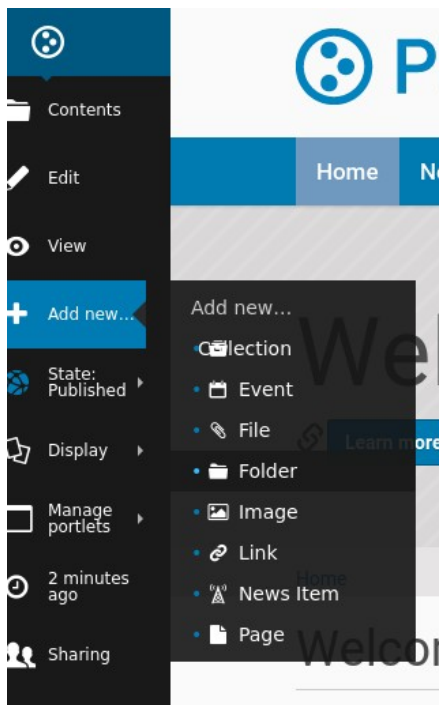
The **Description** appears at the top of pages, just under the Title. Descriptions are often used to conjunction with a variety of Folder and Collection views (such as Standard and Summary). The Description also appears in search results via Plone's native search engine.

The Description is just plain text, without any form of mark-up.

# Adding Folders

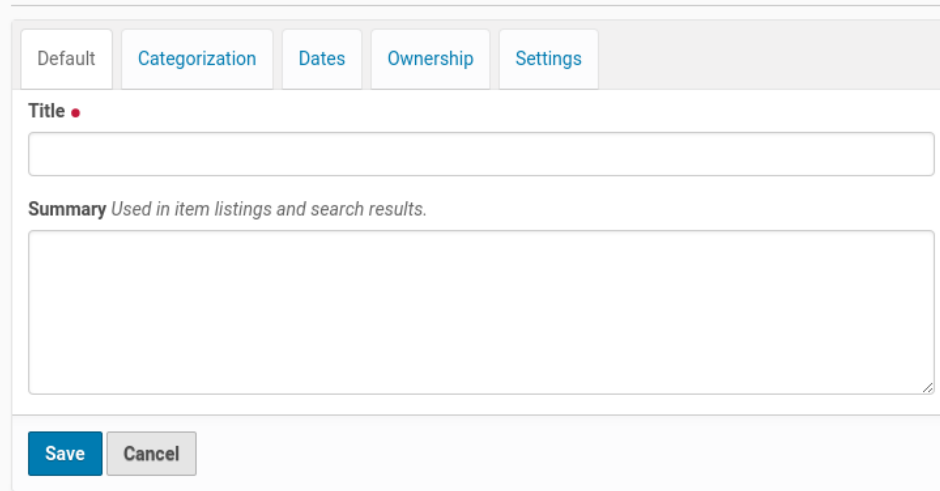
Adding folders to a Plone web site is the basic way of controlling the organization of content. You have undoubtedly created folders (directories) on your computer's hard drive. Personal computers use a hierarchy of folders to structure and organize the programs and files on the hard drive. In Plone 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:



You should now see the *Add Folder* screen:

## Add Folder



The screenshot shows the 'Add Folder' form. At the top, there are five tabs: 'Default', 'Categorization', 'Dates', 'Ownership', and 'Settings'. The 'Default' tab is selected. Below the tabs, there is a 'Title' field with a red dot next to the label, indicating it is required. Below the 'Title' field is a 'Summary' field with a placeholder text 'Used in item listings and search results.' At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

Fill in the **Title**, which is required, as indicated by the red dot. The **Summary** is optional; you can always come back to the edit panel if you need to add a description of the folder. Summaries are useful when a site visitor uses the search tool included with Plone - results will display with both the Title and Summary of the item.

You 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, enabling Next/Previous Navigation, 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.

## What's in a Web Name?

Individual content items on a Plone web site have discrete web addresses. Plone creates these automatically, based on the Title that you supply.

## What's in a Web Name?

The **Title** of content items, including folders, images, pages, etc., can be anything you want -- you can use any keyboard characters, including spaces. **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 spaces 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.

To illustrate, let's take each of these two web addresses and split them out into their component parts:

`www.mysite.com/about/personnel/sally/bio`

^

website name

^

a folder named About

^

a folder named Personnel

^

a folder named Sally

^

a folder named Bio

In this example, Plone changed each folder title to lowercase, e.g., from Personnel to personnel. You don't have to worry about this. Plone handles the web addressing; you just type in titles however you want.

And, for the second example:

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

^

website name

^

a folder named Images

^



a folder named Butterflies  
^  
a folder named Skippers  
^  
a folder named Long-Tailed Skippers

This example is similar to the first, illustrating how there is a lowercase conversion from the title of each folder to the corresponding part of the web address. Note the case of the folder named Long-tailed Skippers. Plone kept the dash, as that is allowed in both title and part of the web address, but it changed the blank between the words Tailed and Skippers to a dash, in the web address, along with the lowercase conversion.

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.

### What's in a Title?

The title of a content item not only affects the **short name** that is used in the URL of the item. It is also displayed, with a twist, in the title bar of the browser window, or in the browser tab. The twist consists in the fact that what is displayed consists of the *item title* and the *site title*, separated by an Em dash. The site title is set in the *site control panel* (<http://yoursite.com/@@site-controlpanel>), but for the purposes of this section it is not necessary to have the permissions to access it.

For example, the title for the item at <https://www.cia.gov/about-cia> shows in the browser tab or title bar as:

*About CIA — Central Intelligence Agency.*

The part to the left of the Em dash, **About CIA** is the *item title*, while the part to the right, **Central Intelligence Agency**, is the *site title*. The site title is appended to the item title, with an Em dash, automatically. Technically, this is what the <title> HTML element is set to. Why is this important? In and of itself, this behavior of a Plone site might often be overlooked. However, it becomes important when looking at the results provided by a search engine, such as Google. When Google lists a page from a Plone site, the title used is the same one just described (*item title — site title*).

Often, you might want the homepage of your site to be listed in Google search results with just the site title. But you can not leave the homepage item title empty, so how to achieve this? Thankfully, there is an easy solution: make the homepage title **exactly identical** to the site title. In the CIA example above, if the homepage title were set to *Central Intelligence Agency*, then Google would list it simply as:

*Central Intelligence Agency*

# Adding Images

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

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.

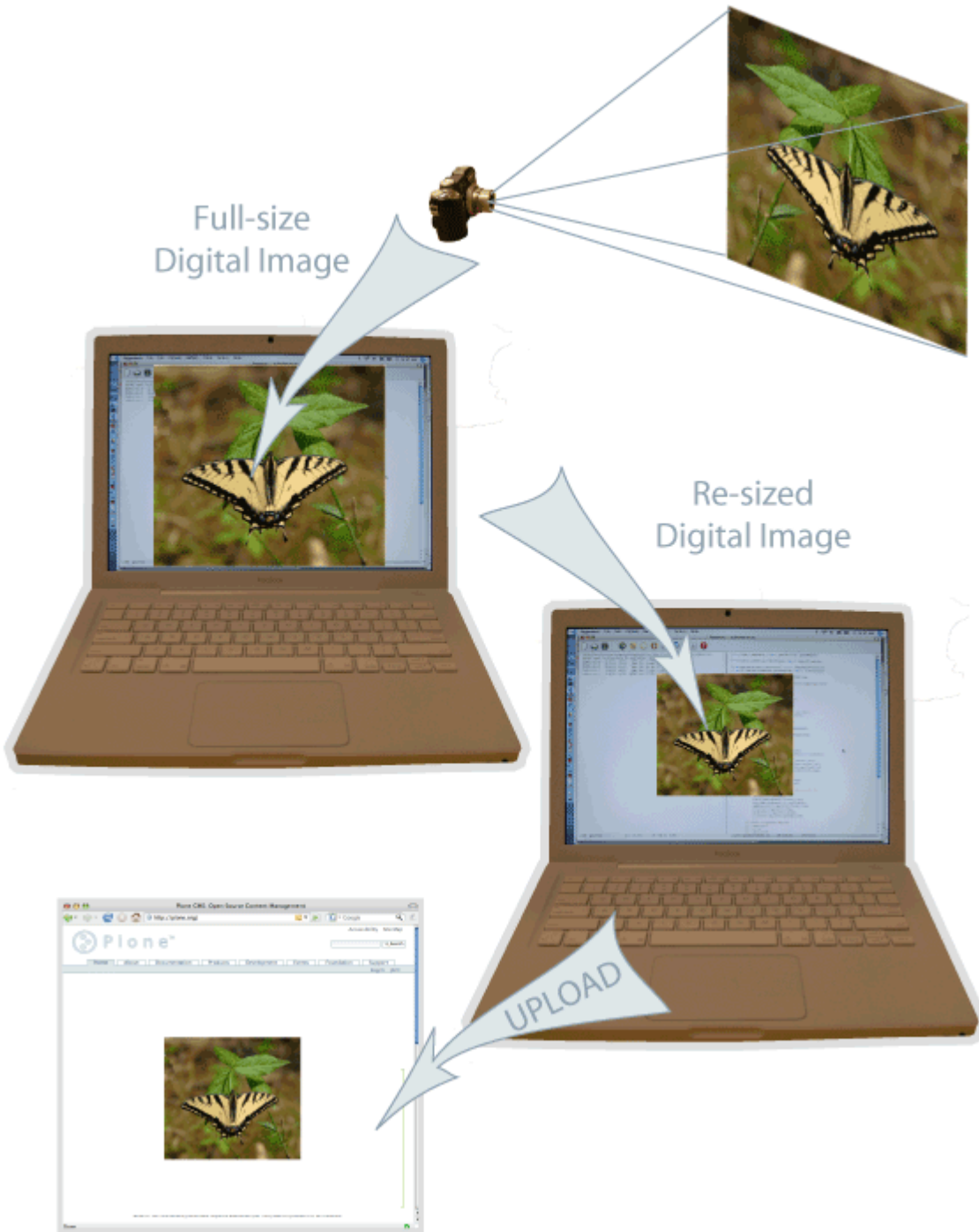
Many people source photographs taken with a digital camera, but they can also be scanned images, graphical illustrations made with software, and other specialized images. Let's take a look at the case of a butterfly photo taken with a digital camera.

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 Adobe Photoshop 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. Some also have a special "save for web" command.

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.

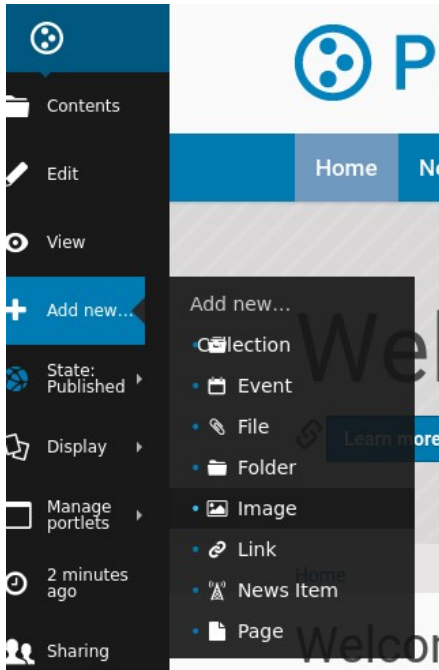


**To summarize:**

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

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, and can lead to slower websites

When you are ready to upload an image, use the *Add new...* drop-down menu.



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

A screenshot of the 'Add Image' panel. The title 'Add Image' is at the top. Below it, a subtitle reads 'Images can be referenced in pages or displayed in an album.' There are five tabs: Default, Categorization, Dates, Ownership, and Settings. The 'Default' tab is active. The panel contains a 'Title' text input field, a 'Description' text area, and an 'Image' section with a 'Choose File' button and the text 'No file selected'. At the bottom, there are 'Save' and 'Cancel' buttons.

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:

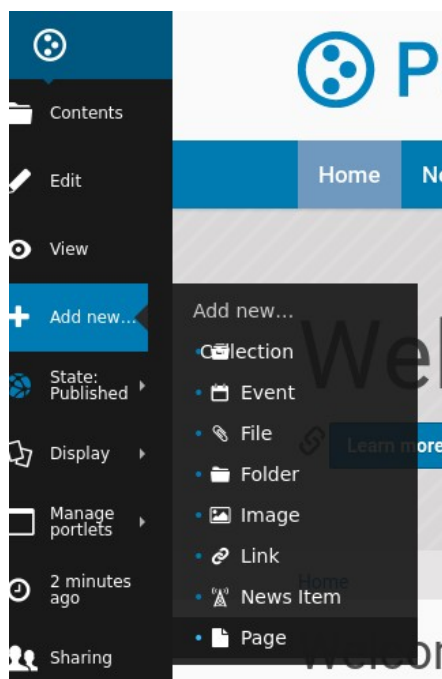
- *Title* - Use whatever text you want, even with blanks and punctuation (Plone handles web addressing).
- *Description* - Always a good idea, but always optional. Leave it blank if you want.
- *Image* - The Image field is a text entry box along with a Browse... button. You don't have to type anything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

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. A preview of the uploaded image will be shown when the upload has finished.

Images and files that you upload into Plone have their IDs (URLs) based on the title that you give to the image (instead of the file name of the image or file). However, if you leave the title empty, the name of the item will default to the name of the file.

## Adding Pages

Pages in Plone vary greatly, but are single "web pages," of one sort or another. To add a page, use the *Add new...* menu for a folder:



Select **Page** from the menu, and you'll see the *Add Page* screen:

## Add Page

Default Settings Categorization Dates Ownership

**Title** •

**Summary** *Used in item listings and search results.*

**Text**

Insert ▾ Format ▾ Edit ▾ Table ▾ Tools ▾ View ▾

← → Formats ▾ **B** *I* [List Icons] [Link Icon] [Image Icon]

p Words: 0

text/html ▾

**Change Note** *Enter a comment that describes the changes you made.*

**Save** **Cancel**

The **Title** and **Description** fields are there 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.

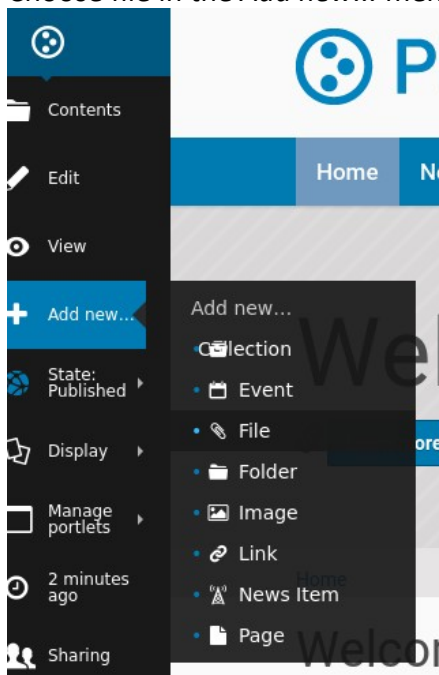
The middle panel, **Body Text**, is where the action is for pages. The software used for making Pages in Plone, generically called *visual editor* and specifically a tool called TinyMCE, is a most important feature allowing you to do WYSIWYG editing. WYSIWYG editing -- *What You See Is What You Get* -- describes how word processing software works. When you make a change, such as setting a word to bold, you see the bold text immediately.

People are naturally comfortable with the WYSIWYG approach of typical word processors. We will describe later in this manual.

## Adding Files

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:



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

# Add File

Lets you upload a file to the site.

The screenshot shows a web form titled "Add File". At the top, there is a horizontal bar with five tabs: "Default", "Categorization", "Dates", "Ownership", and "Settings". Below this bar, the form is divided into sections. The first section is labeled "Title" and contains a single-line text input field. The second section is labeled "Description" and contains a larger, multi-line text area. The third section is labeled "File" and contains a button labeled "Choose File" followed by the text "No file selected". At the bottom of the form, there are two buttons: "Save" (in blue) and "Cancel" (in grey).

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.

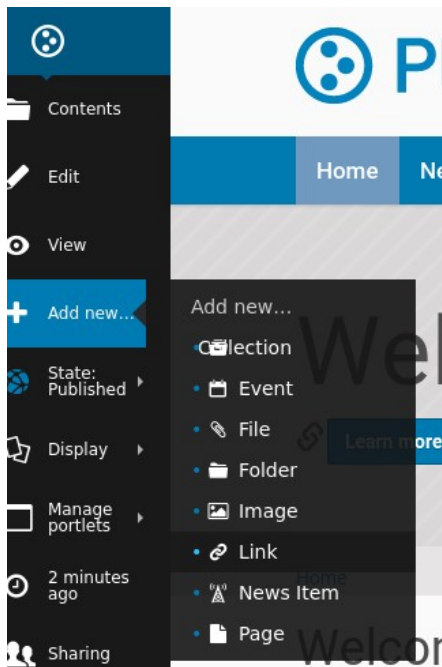
There are specialized add-on tools for Plone web sites that search the content of files, or can provide a preview of for instance PDF or Office files. If you are interested in this functionality, ask your Plone web site administrator.

## Adding Links

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:



You will see the Add\*Link\* panel:

# Add Link

Default Settings Categorization Dates Ownership

**Title** ●

**Summary** *Used in item listings and search results.*

**URL** ● *The link is used almost verbatim, relative links become absolute and the strings "\${navigation\_root\_url}" and "\${portal\_url}" get replaced with the real navigation\_root\_url or portal\_url. If in doubt which one to use, please use navigation\_root\_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 large numbers links held in a folder or collection.

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.

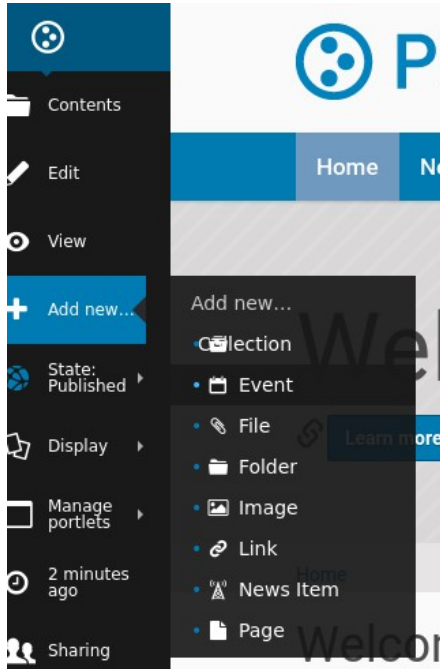
- **If you have the ability to edit the link object**, when you click on the link object you'll be taken to the object itself so that you can edit it (otherwise you'd be taken to the link's target and could never get to the edit tab!)
- **If you don't have the ability to edit the link object**, when 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 Events

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:



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

## Add Event

Events can be shown in calendars.

Default **Categorization** Dates Ownership Settings

**Title** \*

**Summary** *Used in item listings and search results.*

**Event Starts** \* *Date and Time, when the event begins.*  
March 1, 2017 7:00 a.m.

**Event Ends** \* *Date and Time, when the event ends.*  
March 1, 2017 8:00 a.m.

**Whole Day**  
*Event lasts whole day.*

**Open End**  
*This event is open ended.*

**Recurrence** *Define the event recurrence rule.*  
 Does not repeat.

**Location** *Location of the event.*

**Attendees** *List of attendees.*

**Contact Name** *Name of a person to contact about this event.*

**Contact E-mail** *Email address to contact about this event.*

**Contact Phone** *Phone number to contact about this event.*

**Event URL** *Web address with more info about the event. Add http:// for external links.*

**Text**

Insert **Format** Edit Table Tools View

Formats **B** / [Icons]

Words: 0

text/html

**Change Note** *Enter a comment that describes the changes you made.*

From the top, we have the following fields:

- Title - REQUIRED**
- Summary**
- Event starts - REQUIRED**
- Event ends - REQUIRED**
- Whole Day**
- Open End**

- Recurrence*
- Event Location*
- Attendees*
- Contact Name*
- Contact Email*
- Contact Phone*
- Event URL*
- Event body text* (visual editor panel)
- 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. Both these can be set using a handy pop-up calendar. This will show when you click on the date. Setting an event to be "Whole day" will remove the start and end times.

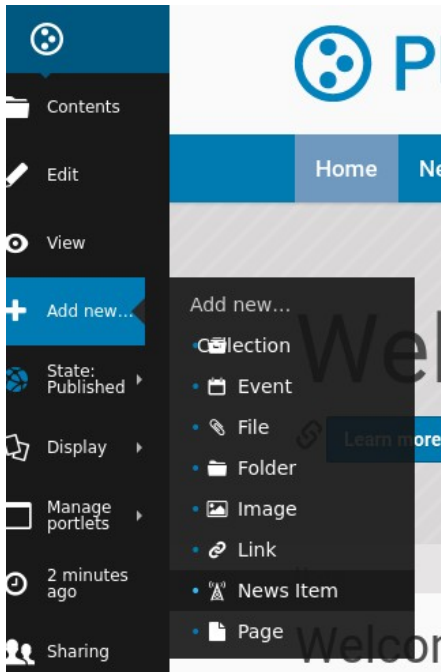
But there are many more options: you can set an event to be "Open-ended" if you don't know when the end date is, or if it is an ongoing activity that you would still like to show as an event. For repeating events, use the "recurrence" link. You can set when, and how often, your event will repeat: daily, weekly, every third Tuesday of the month until 2017, etcetera. You can specify that an event should repeat a certain number of times, or until a certain date.

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

## Adding News Items

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:

A screenshot of the 'Add News Item' form. The form has tabs for 'Default', 'Categorization', 'Dates', 'Ownership', and 'Settings'. The 'Default' tab is active. The form contains fields for 'Title', 'Summary' (with a note: 'Used in item listings and search results.'), and a rich text editor for 'Text'. The rich text editor has a menu with 'Insert', 'Format', 'Edit', 'Table', 'Tools', and 'View'. Below the text editor is a 'Lead Image' section with a 'Choose File' button and a 'No file selected' message. There is also a 'Lead Image Caption' field and a 'Change Note' field with a note: 'Enter a comment that describes the changes you made.' At the bottom are 'Save' and 'Cancel' buttons.

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.

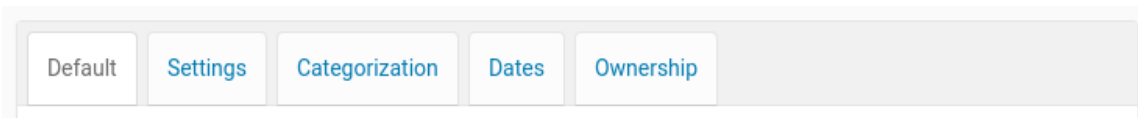
The *Lead Image* and *Lead Image Caption* fields are for adding an image to be used as a representative graphic for the news item, for posting in news item listings. The image will be automatically resized and positioned. Use the **Body Text** to insert an image in the actual body of the News Item.

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

## Setting Basic Properties

The tab panels available on each content item has fields for basic information. The more data you can provide, the better Plone can help in making the content available to the relevant visitors.

Any content item, when clicked by a user with edit rights for the item, will show a set of tabs at the top for setting basic properties:



These basic properties tabs are:

- *Default* - shows the main data entry panel for the content item
- *Settings* - shows a small panel for setting whether or not the item will appear in navigation menus and if comments are allowed on the item
- *Categorization* - shows a panel for creating and setting tags (keywords) for the item
- *Dates* - shows the publishing date and expiration date for the item
- *Ownership* - shows a panel for setting creators, contributors, and any copyright information for the item

The input fields under these tabs cover basic descriptive information called **metadata**.

Metadata is sometimes called "data about data." Plone can use this metadata in a multitude of ways.

Here is the *Categorization* panel, shown for a page content item (would be the same for other content types):

The screenshot shows a web interface for content management. At the top, there are five tabs: 'Default', 'Settings', 'Categorization', 'Dates', and 'Ownership'. The 'Categorization' tab is active. Below the tabs, the main section is titled 'Tags' with a subtitle 'Tags are commonly used for ad-hoc organization of content.' There is a large text input field for entering tags. Below this is a 'Language' dropdown menu currently set to 'English'. The 'Related Items' section contains a search bar with a magnifying glass icon and a home icon, with the text 'Search:'. At the bottom of the panel are two buttons: 'Save' (highlighted in blue) and 'Cancel'.

The main input field for the panel is for specifying *Tags*, sometimes also known as *Categories*. Create them, just by typing in words or phrases. Plone will automatically search for existing tags while you type, so you can select already existing tags. If you want to create a new tag, just hit "enter" after your word (or phrase).

The *Related Items* field lets you set links between content items, which will show as links at the bottom, when a content item is viewed. This is useful when you don't want to use explicit tags to connect content.

The *Location* field is a geographic location, suitable for use with mapping systems, but appropriate to enter, for general record keeping. Note that this field may not always be present, this is a setting that your site administrator has to enable.

The *Language* choice normally would default to the site setting, but on multilingual web sites, different languages could be used in a mix of content.

The *Dates* panel has fields for the publishing date and the expiration date, effectively start and stop dates for the content if you wish to set them:



Default Settings Categorization Dates Ownership

**Publishing Date** *If this date is in the future, the content will not show up in listings and searches until this date.*

Enter date... Enter time...

**Expiration Date** *When this date is reached, the content will no longer be visible in listings and searches.*

Enter date... Enter time...

Save Cancel

The publication and expiration dates work like this:

- When an item is past its expiration date, it's marked "expired" in red in its document byline when viewed.
- An item whose publication date is before the current date doesn't get extra text in its byline.
- In both cases, the item is "unpublished", which is not to be confused with a workflow state.
- It merely means the item doesn't show up in listings and searches.
- These listings include folder listings.
- However, the owner of the item will keep seeing it, which is handy because you like to know what you have lying around in your site.
- The permission that controls this is Access inactive portal content.
- Expired items in a folder are marked as such when viewing the folder\_contents.
- There's no quick way of seeing if items in a folder listing are not yet published.
- When you set an unpublished item as the default view for a folder, that item will be shown.
- Unpublishing an item doesn't have any effect for admins. They will always see unpublished items in their listings and searches.
- Giving another regular users rights ("can add", "can edit", "can review") on the item doesn't make it any less unpublished for those users.
- A practical way for a non-admin user to access an unpublished item is directly through its URL.

The *Ownership* panel has three free-form fields for listing creators, contributors, and information about copyright or ownership rights to the content:

Default Settings **Categorization** Dates Ownership

**Creators** *Persons responsible for creating the content of this item. Please enter a list of user names, one per line. The principal creator should come first.*

**Contributors** *The names of people that have contributed to this item. Each contributor should be on a separate line.*

**Rights** *Copyright statement or other rights information on this item.*

The *Settings* panel has fields that may vary a bit from content type to content type, but generally there are input fields controlling whether or not the item appears in navigation, or if there are comments allowed, and other similar controls:

Default Settings **Categorization** Dates Ownership

**Allow discussion** *Allow discussion for this content object.*

**Exclude from navigation**  
*If selected, this item will not appear in the navigation tree*

**Short name** *This name will be displayed in the URL.*

**Table of contents**  
*If selected, this will show a table of contents at the top of the page.*

You can allow users to edit the "Short name" of content items.

The "Short Name" is part of the URL of a content item. That means that no special characters or spaces are allowed in it. For experienced web editors, it can be handy to manipulate the Short Name directly in order to generate more memorable or shorter URL's.

## Recommendations

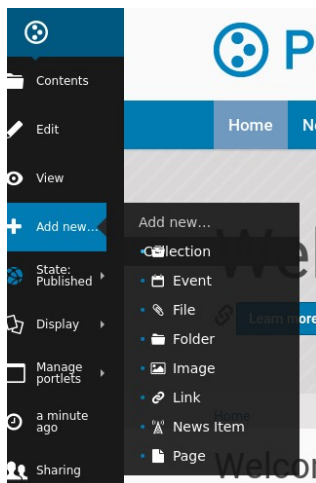
There is no requirement to enter the information specified through these panels, but it is a good idea to do so. For the *Ownership* panel, providing the data is important for situations where there are several people involved in content creation, especially if there are multiple creators and contributors working in groups. You don't always need fields such as publishing and expiration dates, language, and copyrights, but these data should be specified when appropriate. A content management system can only be as good as the data completeness allows.

Specifying tags requires attention, but if you are able to get in the habit, and are committed to creating a meaningful set of tags, there is a big return on the investment. The return happens through the use of searching and other facilities in Plone that work off the categorization. The same holds for setting related items. You'll be able to put your finger on what you need, and you may be able to discover and use relationships within the content.

# Adding collections

Collections (formerly called Smart Folders) are virtual containers of lists of items found by doing a specialized search.

Choose "Collection" in the *Add new...* menu for a folder to start defining your collection:



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

### Add Collection

Default Settings Categorization Dates Ownership

**Title** \*

**Summary** *Used in item listings and search results.*

**Search terms** *Define the search terms for the items you want to list by choosing what to match on. The list of results will be dynamically updated*

✕ Select criteria

Sort on   Reversed Order

**Preview**

Preview of at most 10 items

No results to preview

**Limit** *Limit Search Results*

**Item count** *Number of items that will show up in one batch.*

**Table Columns** *Select which fields to display when 'Tabular view' is selected in the display menu.*

total_comments	→	Title	↑
author_name	←	Creator	↓
commentators		Type	
exclude_from_nav		ModificationDate	
id			

**Text**

Insert Format Edit Table Tools View

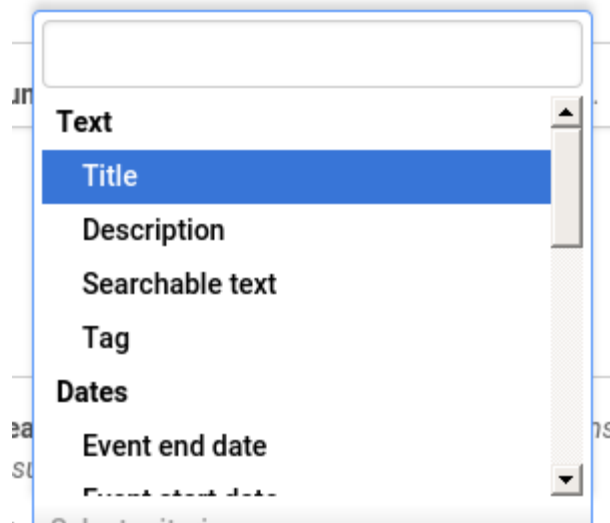
Formats **B** *I* [List Icons]

p Words: 0

text/html

Save Cancel

Apart from the usual fields, the interesting part starts with the **Search terms**



You can pick all *meta-data* that Plone has on content items as criteria. By combining more criteria, you can create sophisticated queries, which will be automatically updated.

So your collection can search for all items of types Page and News Item that have a Tag of Sport, created in the last 3 months. Or all Events that have a Start date in the next month.

The possibilities are endless, and Plone will always show the results according to the criteria. So if you create a new content item later with the tag of "Sport", it will automatically show up in the collection you have just defined.