

# BRIDGING DIVIDES FOR WATER

at the



5<sup>th</sup> WORLD WATER FORUM  
ISTANBUL 2009

## How to create and manage a project website using the freely available IW:LEARN Toolkit

**(Advanced: Part I)**

19-20 March 2009

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# Aim

To learn about more advanced features of the Toolkit

- ◆ to demonstrate how the Toolkit can be readily customised to meet project needs.
- ◆ useful products will be demonstrated and participants will have opportunity for further practice.



# Outline

## PART I

- ◆ Content panels (provides multi-panel page layout)
  - ◆ Project introduction
  - ◆ Project area map (simple image and Google Map)
- ◆ Tabbed subpages
- ◆ Smart folders
- ◆ Adding partner logos (left column)
- ◆ Adding a 'spotlight' (left column)
- ◆ Photo and video galleries
  - ◆ Adding an image and Google video
- ◆ Restricting access (intranet)

# Outline

## PART II

- ◆ Syndicating (disseminating) content
- ◆ Feedback/Contact Us form
- ◆ Web Design (logo/banner, colour, font)
- ◆ Changing footer details
- ◆ Additional Plone add-on products
  - ◆ Simple Poll / Plone Survey
  - ◆ Message board/forum
  - ◆ Newsletter
  - ◆ Creating a multilingual site
- ◆ Website statistics – AWSTATS and Google Analytics

## PART III: WebGIS – based on GeoNetwork Opensource



# Your Banner

Banner/  
logo

Project  
introduction

Arabic

Translate

## Navigation

### Home

- About the project
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Photos/Videos
- E-Newsletter
- Online Forums
- Instant Messaging
- Feedback/Contact us

## Our Partners



## In The Spotlight



## Welcome To Project Website



Partner  
logos

This area can be used to add a welcome message, short project introduction and key project objectives. Adding images to the page improves the look of the content and is recommended.

You have a choice of **two rich text editors** to add content to pages - Kupu and FCKeditor - which are selected from the Plone Control Panel: [Preferences > Personal Preferences > Select Content Editor](#). Your preferred settings for FCKeditor can be modified through 'FCKeditor Configuration' in the left column of the Plone Control Panel.

Edit this content by clicking on 'contents' tab > 'Welcome to Project Website' page > edit tab

Events panel

## Upcoming Events

(Example) UNEP/IW:LEARN Regional IT Workshop (LAC)

02-Jun-2008

(Example) UNEP/ IW:LEARN Regional IT Workshop (Africa)

## Project Area Map



Project  
area map

Content  
panels  
allow  
complex  
layout of  
boxes/  
panels in  
page

News panel

(Example) How to write a news story

24-Aug-2006

(Example) News Item 2

24-Aug-2006

(Example) News Item 1

24-Aug-2006

http://plone25.iwlearn.org/sites/toolkitver2

Home

- About the project
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Photos/Videos
- E-Newsletter
- Online Forums
- Instant Messaging
- Feedback/Contact us

**Our Partners**

UNDP

UNEP

**In The Spotlight**

**Photo/Video Galleries**

Introduction and key project objectives. Adding images to the page improves the look of the content and is recommended.

You have a choice of **two rich** editors to add content to pages - Kupu and FCKeditor - which can be configured in the Plone Control Panel: Preferences > Personal Preferences > Select Content Editor. Your preferred settings for FCKeditor can be modified through 'FCKeditor Configuration' in the lower left column of the Plone Control Panel.

Edit this content by clicking on 'contents' tab > 'Welcome to Project Website' page

**Design (colours and font)**

**RSS syndication**

POWERED BY Google

Map data ©2008 Europa Technologies - Terms of Use

Click to view in Google Maps Click to open in Google Earth

RSS Events RSS News

**Upcoming Events**

(Example) UNEP/IW:LEARN Regional IT Workshop (LAC)	Miami, USA, 02-Jun-2008
(Example) UNEP/IW:LEARN Regional IT Workshop (Africa)	Nairobi, Kenya, 13-Nov-2010
(Example) UNEP/IW:LEARN Regional IT Workshop (Asia)	Beijing, China, 05-Dec-2010
Upcoming events...	

**'In the spotlight' feature**

**News**

(Example) How to write a news story	24-Aug-2006
(Example) News Item 2	24-Aug-2006
(Example) News Item 1	24-Aug-2006
(Example) UNEP/IW:LEARN Launches Website Toolkit	24-Aug-2006
More news...	

**Footer = project contact details**

Project PCU, Physical address, City, Country  
Tel:+countrycode citycode phonenumber, Fax:+countrycode citycode faxnumber, E-mail:pcu@projectsite.org

Supported by IW GEF IW:LEARN



# Content panels

- ◆ Content panels allows development of complex web pages
- ◆ Adding a panel
  - ◆ Click on *layout tab*

you are here: home

Navigation

Home

About the project

Information and Publications




Maps & GIS

News & Events

Links

Feedback / Contact us

Our Partners






Rcooper | My Folder | Preferences | Undo | My Links | Log Out |

contents | view | edit | properties | layout | templates | sharing | links

translate into | display | add to folder | state: public draft

Welcome To Project Website Demo




This area should be used to add a welcome message, website functionality description, short project introduction and/or any major highlight. Adding images to the page improves the look of the paragraph and makes it more friendly to the eyes. As there is no image used in top header, adding good images here is highly recommendable.

Edit


Project Area Map

click the map below to view the project area




Edit

Upcoming Events

 IW: LEARN IT Workshop

Beijing, China,

News

 News from Beijing Workshop

2007-11-16

# Advanced features: content panels

Click to add new panel

Note: column and row spacing

Click to insert panel  
e.g.,  
calendar

The screenshot displays a web application interface for a 'Project website demo'. At the top, there are 'Page parameters' including 'Page Title: Untitled page', 'Row spacing: 5', and 'Column spacing: 6'. A 'save' button is located to the right. Below the parameters, there are two columns of content panels. The left column is titled 'Upcoming Events' and lists 'IW: LEARN IT Workshop' and 'LAC IW: LEARN Workshop'. The right column is titled 'News' and lists 'News from Beijing Workshop' and 'Sample News 3'. A 'Recent changes' sidebar on the left lists files like 'Project Area Map', 'Large Project Area Map', 'LWMEA banner', 'test page', and 'Introduction to Workshop'. A 'Panel configuration' dialog box is open in the foreground, showing options for 'Related Content', 'Viewlet', and 'Viewlet settings'. The 'Viewlet' section includes a list of panels: 'Folder related', 'Site wide' (with 'Calendar' highlighted), and 'Personal related'. The 'Viewlet settings' section shows 'Skins' set to 'Default'. The bottom of the screen shows a status bar with 'Project PCU, Phys', 'Tel: +countrycode citycode phonenumber, Fax: +cc', 'Done', '1.954s', and '100% (iwlearn.org)'.



# Content panels

Can add panel in main area of page (as here) or in left or right column (create new CP and select particular option in *edit* tab)

Event items displayed in calendar – click to display event

The screenshot displays a web application interface with several content panels. On the left, there is a 'Recent Changes' panel listing items like 'Project website demo' and 'Project Area Map'. The main area features an 'Upcoming Events' panel with a calendar for December 2007. A callout points to the date 2007-12-06, which is highlighted in the calendar and linked to an event titled '2007-12-06 IW:LEARN IT Workshop'. To the right, there is a 'News' panel displaying a list of news items, including 'News from Beijing Workshop' and 'Sample News 1'. Below the news panel is a 'Recent Additions' panel showing items like 'News from Beijing Workshop' and 'LAC IW:LEARN Workshop'. The interface also includes a top header with a banner image and a right sidebar with a large image and an 'Edit' button.

**Upcoming Events**

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

**Recent Changes**

- Project website demo 2007-11-20
- Project Area Map 2007-11-20
- Large Project Area Map 2007-11-19
- LWMEA banner 2007-11-19

**News**

- News from Beijing Workshop 2007-11-16
- Sample News 1 2006-11-03
- Sample News 2 2006-11-03
- Sample News 1 2006-11-03
- Sample News 1 2006-11-03
- More news...

**Recent Additions**

- News from Beijing Workshop 2007-11-16
- 2007-12-06 IW:LEARN IT Workshop 2007-11-14
- LAC IW:LEARN Workshop 2007-11-14
- All recent changes...

# Content panels

- ◆ Event item displayed after clicking calendar data

The screenshot shows a web application interface with a dark blue header bar containing user information and navigation links. Below the header, a breadcrumb trail indicates the current location is 'home'. A left sidebar provides a 'Navigation' menu with links to Home, About the project, Information and Publications, Maps & GIS, News & Events, Links, and Feedback / Contact us. The main content area displays 'Search results' with a message suggesting the use of 'Advanced Search' if results are not found. It reports '1 items matching your criteria.' and lists a single result: 'IW:LEARN IT Workshop [1%] by rcooper, 2007-11-13 10:40', with a sub-line 'Asia Regional Workshop held in'.

you are here: home

**Navigation**

- Home
- About the project
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Feedback / Contact us

**Search results**

Did you not find what you were looking for? Try the [Advanced Search](#) for more precise search options.

**1 items matching your criteria.** [RSS](#)

**IW:LEARN IT Workshop** [1%] by rcooper, 2007-11-13 10:40  
Asia Regional Workshop held in

# Content panels (project introduction panel)



## RTC's Demo Logo

all

Search



Rcooper

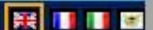
My Folder

Preferences

Undo

My Links

Log Out



you are here: home

### Navigation

#### Home

- About the project
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Feedback / Contact us

### Our Partners



### In The Spotlight



contents

view

edit

properties

layout

templates

sharing

links

translate into

display

add to folder

state: public draft

### Welcome To Project Website Demo



This area should be used to add a welcome message, website functionality description, short project introduction and/or any major highlight. Adding images to the page improves the look of the paragraph and makes it more friendly to the eyes. As there is no image used in top

header, adding good images here is highly recommendable.

Edit

### Project Area Map

click the map below to view the project area



Click *edit* link (beneath text)

Edit

### Upcoming Events

- IW: LEARN IT Workshop  
Beijing, China,  
2007-12-05
- LAC IW: LEARN Workshop  
Havanna, Cuba,  
2008-01-21
- Upcoming events...

November 2007						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10

### News

- News from Beijing Workshop  
2007-11-16
- Sample News 3  
2006-11-03
- Sample News 2  
2006-11-03
- Sample News 1  
2006-11-03
- More news...

### Recent Additions

News from Beijing Workshop

Find:





## Content panels (inserting project area map)

### ◆ Insert **image file into existing page**

- ◆ create map image of project area, for example using screencapture at <http://gis.iwlearn.org>, Google Maps, Google Earth (e.g., LWMEA banner)
- ◆ Create map with dimensions needed
  - ◆ e.g., 300 x 300 pixels
  - ◆ Minimise size of file
- ◆ Go to home > project area map > edit tab
- ◆ Delete current map and insert new map image

### ◆ Insert interactive **Google Map**

## Content panels (inserting project area map image)

- ◆ Examples of inserting map image (jpg, gif)
  - ◆ Click on layout tab
  - ◆ Insert new panel
    - ◆ Add existing 'Project Map'

OR

- ◆ Click on 'Home' (related content section)
- ◆ Select 'Images' folder > select 'sample\_map.jpg'
- ◆ Select 'image' (content related section)
- ◆ 'select this panel'



# Content panels (inserting project area map image)

**Navigation**

- Home
- About the project
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Feedback / Contact us
- Project Area Map**

**Our Partners**



UNEP



UNDP



**In The Spotlight**



**Recent Changes**

back page

view edit properties sharing links

translate into actions add to folder state: published

## Edit Page

by [deepaiani](#) — last modified 2007-11-16 10:01 [History](#)

A page in the site. Can contain rich text.

**Title** ■

Project Area Map

**Description**

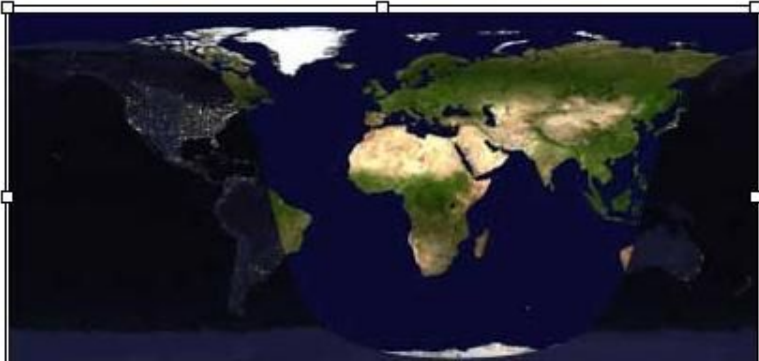
A short summary of the content

**Body Text** ■

Text Format HTML

Source

click the map below to view the project area



Click icon  
to insert  
new image

# Content panels (inserting project area map image)

## ◆ Browse and select image

UN DP



**In The Spotlight**



**Recent Changes**

LWMEA banner	2007-11-19
test page	2007-11-19
Introduction to Workshop	2007-11-19
RTC contents	2007-11-19
Project Area Map	2007-11-16

All recent changes...

click the map below to view the project area

http://rtc.lwlearn.org - Image Properties - Mozilla Firefox

### Image Properties

**Image Info** Link Upload Advanced


URL:  **Browse Server**

Alternative Text: LWMEA banner

Width: 300 Height: 300

Border:  HSpace:  VSpace:  Align:

Preview



OK Cancel

# Content panels (inserting project area map image)

## ◆ Add link to image

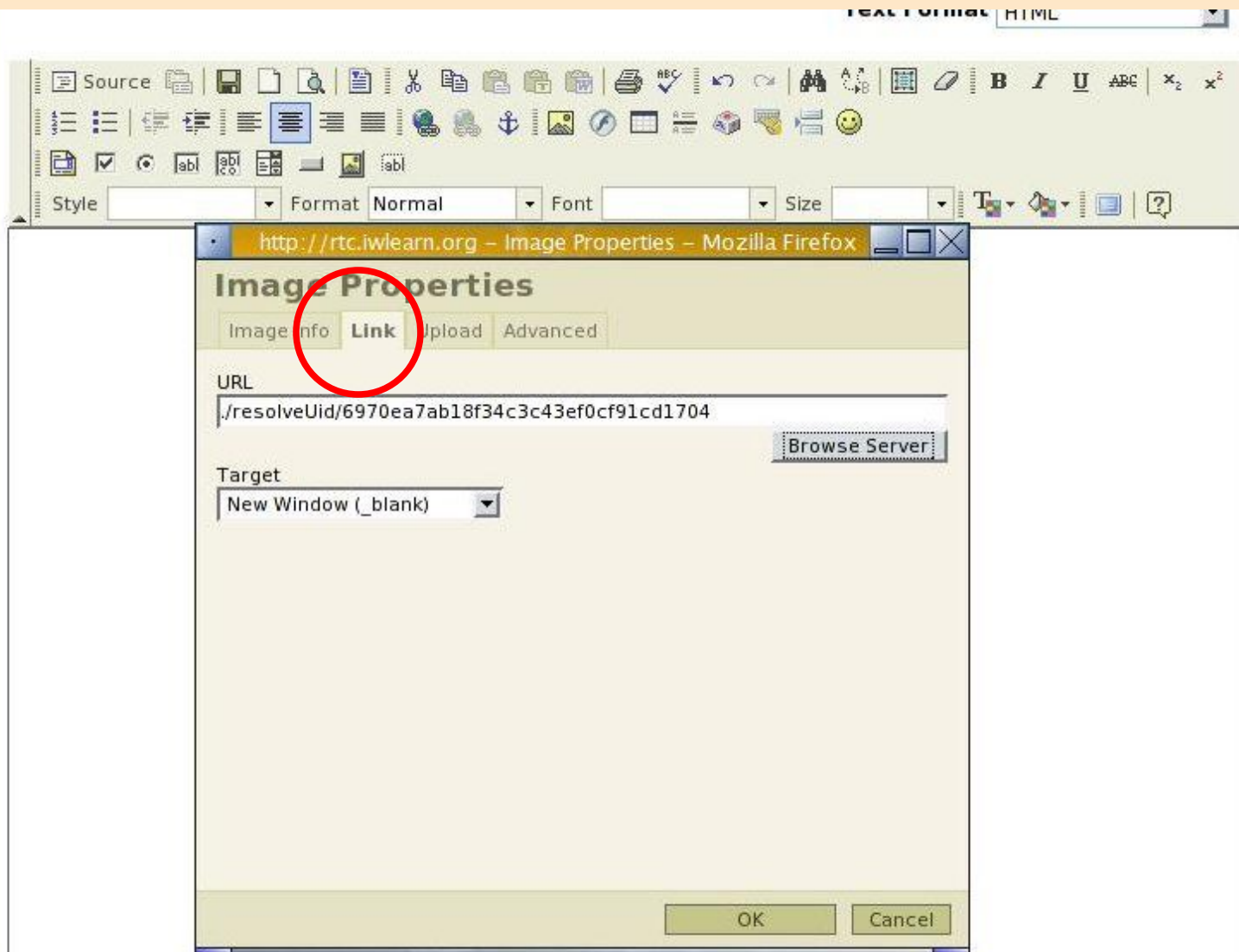


**In The Spotlight**



**Recent Changes**

- LWMEA banner 2007-11-19
- test page 2007-11-19
- Introduction to Workshop 2007-11-19
- RTC contents 2007-11-19
- Project Area Map 2007-11-16





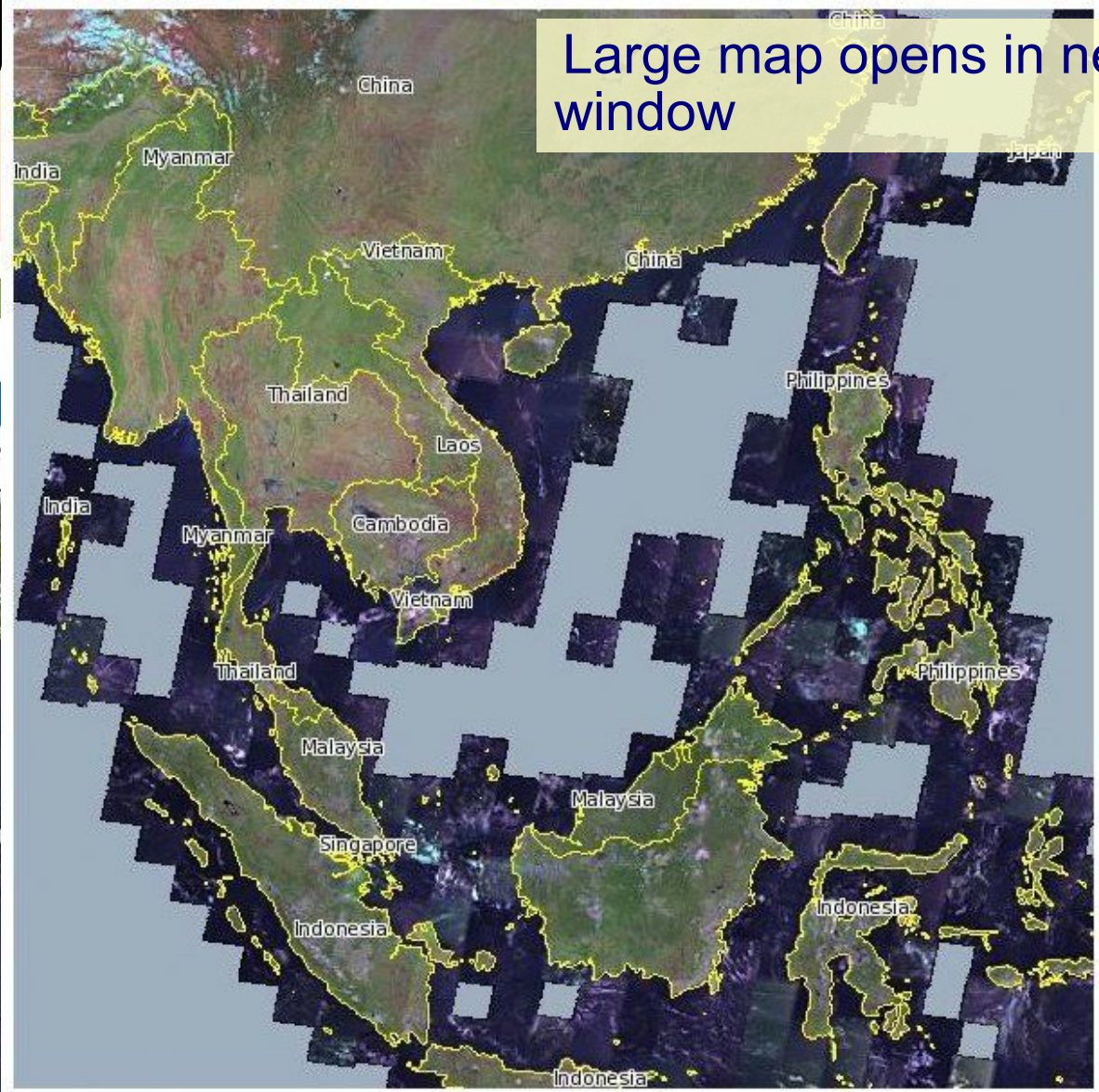
Click on home page map to display larger map of project area

Large map opens in new window

templates sharing links  
translate into display add to folder

**Project Area Map**

click the map below to view the pr



## Content panels (inserting project area Google map)

- ◆ Create KML file with markers.
  - ◆ Open Google Earth, add markers and save as kml file
- ◆ Upload kml file to your Plone site (e.g., see Toolkit)
- ◆ In your browser append the path of the KML file to <http://maps.google.com/maps?q=>  
E.g., (all one line): <http://maps.google.com/maps?q=http://toolkitver2.iwlearn.org/unep-iw-learn-project-offices.kml>
- ◆ Click on 'Link to this page'
- ◆ Click on 'Customize and preview embedded map'
- ◆ Customise map as required (e.g., size, view)
- ◆ Copy html code and paste html code into 'simple text' content panel on home page.



## Tabbed subpages

- ◆ Example of usage in Toolkit:
  - ◆ 'Photos/Videos'
  - ◆ 'News & Events'
  - ◆ Two pages added to tabbed subpage
- ◆ To insert a tabbed subpage:
  - ◆ *add item > select tabbed subpages > insert title > browse to add sub-pages > save*
  - ◆ Note that pages, smart folders and other types of content can be added as sub-pages, but NOT ALL content types will work (you need to experiment).



## Smart folders

- ◆ A 'smart folder' is not a normal folder!
- ◆ You **do not add items** to a smart folder – you add **search criteria** and the smart folder automatically updates and displays the results. Useful for grouping information by keyword, type of content, etc
- ◆ Example of usage in Toolkit:
  - ◆ 'News' and 'Events'
- ◆ Creating a smart folder
  - ◆ *add item* > select *smart folder* > insert title > *save* > select *criteria* tab > *add* search criteria > *save*
- ◆ More guidelines:  
<http://learnplone.org/documentation/tutorial/smart-folders/tutorial-all-pages>

# Smart folders

## Navigation

- Home
- About the project
- Information and Publications
- Maps & GIS
- News & Events
  - News**
  - Events
- Links
- Photos/Videos
- Online Forums
- Instant Messaging
- Feedback/Contact us
- Calendar

## Our Partners



## In The Spotlight



field	criterion details
<input type="checkbox"/> Item Type An item's type (e.g. Event)	A portal_types criterion A portal_types criterion <b>Value</b> ■ One of the available content types: <div>mxm Contacts Organization</div> <div>mxm Contacts Person</div> <div>mxm Contacts Resource</div> <div><b>News Item</b></div> <div>Newsletter</div>
<input type="checkbox"/> State An item's workflow state (e.g.published)	A simple string criterion A simple string criterion <b>Value</b> ■ (Required) A string value. <div>published</div>

Select state

Select item type

Add your search criteria

### Add New Search Criteria

#### Field name

List Available Fields

Creation Date

#### Criteria type

Criteria does match

Relative date

Set sort order of searched items

### Set Sort Order

#### Field name

List Available Fields

Effective Date

#### Reverse

Reverse display order

☒

## Partner logos

- ◆ *Add item > select partner profile*
- ◆ *Complete edit tab fields*
  - ◆ Browse and upload logo (check dimensions, e.g., 70 x 70 pixels)
- ◆ *Publish item*
- ◆ You can rearrange order of logos by dragging and dropping under 'contents' tab
  
- ◆ NOTE: as a site 'member' you will only see your partner logos when logged in – they will not be publically visible in left column.



upload files contents view edit properties sharing links

translate into actions display add item state: published

## Customising Toolkit content: partner logos

Partners

▲ Up one level

Projects's partner

<input type="checkbox"/>	title	size	modified
<input type="checkbox"/>	 United Nations Development Programme	12.3 kB	2007-11-20 10:06
<input type="checkbox"/>	 test partner	13.9 kB	2007-11-20 10:12
<input type="checkbox"/>	 United Nations Environment Programme	18.5 kB	2007-10-30 09:50
<input type="checkbox"/>	 World Bank	12.7 kB	2007-11-20 10:13
<input type="checkbox"/>	 Plone logo	1.8 kB	2007-11-20 10:16

copy cut rename paste delete change state

- article
- bookmark folder
- calendarx
- content importer
- contentpanels
- dynamicpage
- event
- event
- feed folder
- file
- folder
- @ form mailer
- google video
- help center
- iwproject
- image
- in the spotlight
- link
- mailing list
- map
- member exporter
- member importer
- multipage article
- news item
- news item
- newslettertheme
- organization
- page
- partner profile
- person

Add partner profile

## Advanced features: partner logos

- ◆ Key fields: title, description and link, and upload logo

### Navigation

- Home
- About the project
  - Project Factsheet
  - Background
  - Project Structure
  - Project Components / Initiatives
  - Partners
    - United Nations Development Programme
    - test partner
    - United Nations Environment Programme
    - World Bank
    - Plone logo
  - Participating Countries
  - Funding
- Information and Publications
- Maps & GIS
- News & Events
- Links
- Feedback / Contact us

view

edit

properties

links

actions ▼

add to folder ▼

state: public draft ▼

**Partner Profile has been created.**

### Edit Partner Profile

by [rcooper](#) — last modified 2007-11-20 10:51

Partner Profile

**Title** ■

**Description** ■

A short description of the partner

**Link** ■

Link to the partner website

**Logo**

Full size logo of the Partner

Browse...

**About the Partner**

A more detailed description of the Partner

partnersprofile\_2007-11-20\_0648457107

Previous

Next

Print

Full screen

Help

2007-11-20 10:51

2007-11-20 10:51

2007-11-20 10:51

2007-11-20 10:51

## Adding a *spotlight*

- ◆ Create image (e.g. image dimensions – 100x133px)
- ◆ *add item > select in the spotlight*
- ◆ *Add title > browse for image > add image's URL > save > publish*
- ◆ To display one spotlight - set status of one spotlight to 'published' and make the others 'private'

NOTE: as a site 'member' you will only see your spotlight when logged in – they will not be publically visible in left column.



## Your Banner

all

Search



Richard Cooper

My Folder

Preferences

Undo

Log Out

you are here: home → photos/videos

### Translate English To:

Arabic

Translate

### Navigation

Home

About the project

Information and  
Publications

Maps & GIS

News & Events

Links

### Photos/Videos

Photo Gallery

Video Gallery

E-Newsletter

Online Forums

Instant Messaging

Feedback/Contact us

### Our Partners



### In The Spotlight

contents

view

edit

properties

translate into

actions

display

add to folder

state: published

## Photos/Videos

by [Richard Cooper](#) — last modified 15-May-2008 07:59 PM [History](#)

Photo Gallery

Video Gallery

### Photo Gallery

Upload photographs from your project (select 'add item' > select 'image') and display as small images (select 'display' > 'thumbnail view')



analysis.jpg



marine.jpg



meetings.jpg



presentations.jpg



studies.jpg



sample\_map.jpg



doc img1



doc img2

## Photo/video galleries

- ◆ Adding a photo
  - ◆ Click on Photo Gallery in navigation tree
  - ◆ *Add item > image*
  
- ◆ Adding Google video
  - ◆ Click on Video Gallery in navigation tree
  - ◆ *Add item > google video*
  - ◆ Add video 'docId' number (this is the video id number from <http://video.google.com/>)

## Restricting site access

- ◆ You want to **restrict access** to certain parts of your site
- ◆ Need to understand three key publication states of content (of page/folder/object):
  - ◆ **published (visible to everyone)**
    - ◆ can retract (i.e., unpublish) a published item to public draft state
  - ◆ **private** (only visible to users with permission)
  - ◆ **public draft** (may or may not be visible to everyone)
    - ◆ initial state of all newly added content
    - ◆ events and news items **must** be published
    - ◆ other items may be visible to all
- ◆ **give it private status if you want to limit access!**



## Restricting site access

- ◆ Users can have different *roles* which means they have certain permissions
- ◆ Four standard permissions:
  - ◆ **Manager** - can publish content, change anything in site
  - ◆ **Member** – cannot publish content, can only add content to own 'my folder' area
  - ◆ **Reviewer** – defined on a per-folder basis (local role), can edit/publish content
  - ◆ **Owner** – defined on a per-folder basis (local role), owner is creator of folder/page/object, cannot publish content

## Restricting site access

### Example: to restrict access to '*PMO Documents*' folder

#### STEPS

1. Create new group
2. Add users to group (add new users if not already members)
3. Make '*PMO Documents*' folder *private*
4. Change sharing permission of '*PMO Documents*' folder by assigning *manager* status to new group

# Restricting site access


## 1. Create new group

- ◆ Go to Plone control panel > click on *Users and groups administration*
  - ◆ Select *groups* tab and add *new group*
  - ◆ Give new group name, e.g., 'PMO staff'
  - ◆ Assign *member* role to group



# Restricting site access

[Site Map](#) | [Accessibility](#) | [Contact](#) | [Site Setup](#)



# RTC's Demo Logo

all


Search

[Rcooper](#) | [My Folder](#) | [Preferences](#) | [Undo](#) | [My Links](#) | [Log Out](#) | 

you are here: home


**Site Setup**

**Plone Configuration**

 Add/Remove Products


 Error Log

 Keyword Manager


 Language Settings


 Mail Settings


 Navigation Settings

 Placeful Workflow

 Portal Settings

 Search Settings

 Skins

 Smart Folder Settings

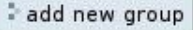
 Users and Groups Administration

[users](#) | [groups](#)

**Groups Overview**


▲ Up to Site Setup

Groups are logical collections of users, such as departments and business units. Groups are not directly related to permissions on a global level, you normally use Roles for that - and let certain Groups have a particular role.



group search

Search

group name	roles					remove group
	groupmember	member	reviewer	weblogauthorrole	manager	
 Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Reviewers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**Roles Management**


Roles are collections of permissions. The most common role is the Member role, which is any member of the portal. You can define additional roles, but you normally only do that when you need to create a new discrete unit of permissions that you can combine to make up a Group.

Currently, if you want to add a new role, you must use the Zope Management Interface, as adding roles is considered a development task.

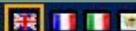
Add new group

# Restricting site access

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# RTC's Demo Logo

[Rcooper](#) | [My Folder](#) | [Preferences](#) | [Undo](#) | [My Links](#) | [Log Out](#) | 

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## Site Setup

### Plone Configuration

- Add/Remove Products
- Error Log
- Keyword Manager
- Language Settings
- Mail Settings
- Navigation Settings
- Placeful Workflow
- Portal Settings
- Search Settings
- Skins
- Smart Folder Settings
- Users and Groups Administration
- Zope Management Interface

### Add-on Product Configuration

- Analytics for Plone
- External Site Catalog
- FCKeditor configuration

[group members](#) | [group properties](#)

### Create a Group

[▲ Up to Groups Overview](#)

Groups are logical collections of users, like departments and business units. They are not directly related to permissions on a global level, you normally use Roles for that - and let certain Groups have a particular role.

#### Group Properties

**Name** ■  
A unique identifier for the group. Can not be changed after creation.

**title**

**description**


Users with access to 'PMO Docs' folder

**email**

Add name, title, description and email

# Restricting site access


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# RTC's Demo Logo

all














Search

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users | **groups**




 **Group PMO Staff has been added.**


### Groups Overview

[Up to Site Setup](#)

Groups are logical collections of users, such as departments and business units. *Groups are not directly related to permissions on a global level, you normally use Roles for that - and let certain Groups have a particular role.*

 [add new group](#)

group name	roles					remove group
	groupmember	member	reviewer	weblogauthorrole	manager	
 Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 PMO Staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Reviewers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

 [apply changes](#)

### Roles Management

Roles are collections of permissions. The most common role is the Member role, which is any member of the portal. You can define additional roles, but you normally only do that when you need to create a new discrete unit of permissions that you can combine to make up a Group.

Currently, if you want to add a new role, you must use the Zope Management Interface, as adding roles is considered a development task.

Assign *PMO Staff* group with **member** permission



## Restricting site access

2. Add users to group (add new users if not already members)

# Restricting site access

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Portal

Rcooper | My Folder | Preferences | Undo | My Links | Log Out

all

Search

users groups

**You have been registered.**

**User added.**

**Users Overview**

▲ Up to Site Setup

Click the user's name to see and change the details of a specific user. Click the envelope icon to send a mail to the user. You can also edit the e-mail addresses, and add/remove users.

Note that roles listed here apply directly to a user. They do not reflect additional roles users may have due to group memberships.

add new user

user search:  **Search** **Show All**

Enter a username to search for, or click 'Show All'

Add PMO Staff members to site if not already users

Add new user

# Restricting site access

Site Map | Accessibility | Contact | Site Setup | Portal

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## Navigation

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## Our Partners

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- 
- 
- 
- 

## Registration Form

### Personal Details

**Full Name**  
Enter full name, eg: John Smith.

**User Name** ■  
Enter a user name, usually something like 'jsmith'. No spaces or special characters. Usernames and passwords are case sensitive, make sure the caps lock key is not enabled. This is the name used to log in.

**E-mail** ■  
Enter an email address. This is necessary in case the password is lost. We respect your privacy, and will not give the address away to any third parties or expose it anywhere.

**Password** ■  
Minimum 5 characters.

**Confirm password** ■  
Re-enter the password. Make sure the passwords are identical.

☐ **Send a mail with the password**

Registration form  
for user –  
complete fields  
and save






# Restricting site access

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**Site Setup**

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**Add-on Product Configuration**

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group members | group properties

### Members of the PMO Staff group

▲ Up to Groups Overview







You can add or remove groups and users from this particular group here. Note that this doesn't actually delete the group or user, it is only removed from this group.

### Current group members

There is no group or user attached to this group.

### Search for new group members

quick search:

<input type="checkbox"/>	group/user name
<input type="checkbox"/>	 christoffer
<input type="checkbox"/>	 rcooper
<input type="checkbox"/>	 rcooper_member
<input checked="" type="checkbox"/>	 staffm1
<input checked="" type="checkbox"/>	 staffm2
<input checked="" type="checkbox"/>	 staffm3

Add colleagues to PMO Staff group

## Restricting site access

3. Ensure 'PMO Documents' folder has ***private*** status
4. Change sharing permission of 'PMO Documents' folder by assigning *manager* status to new group

## Restricting site access

- ◆ Go to folder 'PMO Documents' directory > *sharing* tab

Search Term

---

**Add sharing permissions to groups**

Groups are a convenient way to share items to a common set of users. Select one or more groups, and a role to assign.

Available Groups

<input type="checkbox"/>	title	description
<input checked="" type="checkbox"/>	PMO Staff	Users with access to 'PMO Docs' folder

Role to assign

- GroupMember
- Manager**
- Member
- Owner
- Reviewer
- WeblogAuthorRole

Assign manager role to 'PMO Staff' group

### Advanced settings

Advanced Settings

☒ **Inherit roles from higher levels**



# Restricting site access




upload files contents view edit properties sharing links  
 translate into actions display add item state: private

## Local roles changed.

### Current sharing permissions for PMO Documents


You can share the rights for both entire folders and single items. These users have privileges here:


#### Assigned Roles for PMO Documents

<input type="checkbox"/>	name	type	inherited role(s)	local role(s)
<input type="checkbox"/>	 rcooper (rcooper)	User	Manager , Owner	Owner
<input type="checkbox"/>	 PMO Staff	Group		<input type="checkbox"/> Manager
<input type="checkbox"/>	 bovor	User	Owner	

#### Roles to assign to selected user(s)/group(s)

☐ GroupMember ☐ Manager ☐ Member  
☐ Reviewer ☐ WeblogAuthorRole

 assign selected role(s) to selected user(s)/group(s)

 delete selected role(s) and user(s)/group(s)

Confirmation of  
'PMO Staff' group  
assigned manager  
role

### Add sharing permissions to users

Sharing is an easy way to allow others access to collaborate with you on your content. To share this item, search for the person's name or email address in the form below, and assign them an appropriate role. The most common use is to give people Manager permissions, which means they have full control of this item and its contents (if any).

# Restricting site access

- ◆ Check folder is restricted to PMO staff
  - ◆ Log out and check 'PMO Documents' folder is not visible to anonymous visitors
  - ◆ Log in PMO Staff member and check contents of 'PMO Documents' folder is accessible...

The screenshot displays the 'RTC's Demo Logo' website. The top navigation bar includes links for 'Staffm2', 'My Folder', 'Preferences', 'Undo', 'My Links', and 'Log Out'. A search bar is also present. The main content area shows the 'PMO Documents' folder, which is restricted to PMO staff. A callout bubble points to the 'PMO Documents' folder in the navigation tree, stating 'Private content visible to member in navigation tree'. Another callout bubble points to the 'PMO Documents' folder in the main content area, stating 'PMO Staff member logged in'. The main content area also shows a list of files, including 'Example file' by 'rcooper' last modified on 2007-11-20 14:33.

you are here: home — pmo documents

**Navigation**

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- Photos
- PMO Documents**
- Example file

**PMO Documents**

- ▲ Up one level
- PMO documents with restricted access**
- Example file** — by [rcooper](#) — last modified 2007-11-20 14:33  
description about file add here

upload files | contents | view | edit | properties | sharing | links | translate into | actions | display | add item | state: private

## Restricting site access

- ◆ The following is **optional** but may make navigation easier for logged in users (this is already done for workshop site).
- ◆ Make private content visible in navigation tree (i.e., visible to logged in users)
  - ◆ By default only published items are visible in the navigation tree

## Restricting site access

- ◆ Make private content visible in navigation tree (i.e., visible to users with permissions) [optional – but makes it easier to navigate when logged in]
  - ◆ Go to Plone control panel > Preferences > Navigation Settings
  - ◆ Scroll down and tick *private* box in *Filter on workflow state*
    - ◆ *See next slide*



# Restricting site access

## ☒ Filter on workflow state

The workflow states that should be shown in the navigation tree and the site map.

☐ draft

☒ published

☐ Being created

☐ Closed for submissions

☐ Confirmed

☐ Draft

☐ In progress

☐ Obsolete

☐ Open for submissions

☒ Open for submissions

☐ Pending

☐ Private

☒ Public

Tick *Private* to ensure private content included in navigation tree

## Restricting site access

- ◆ More information on restricting access to content:

<http://learnplone.org/documentation/tutorial/creating-a-private-board-section/tutorial-all-pages>

<http://www2.le.ac.uk/plonedocs/userguide/part1-basic/permissions>