



Real World Intranets

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Real World Intranets

1.1 Introduction

1.1.1 Our Goals

- Plone tricks for content creation
- Content management for intranets
- Add-On products often used
- Theming tips
- Deployment and training expectations

1.1.2 Characteristics of Intranets

- High percentage of logged-in users
- Large number of content contributors
- Structured, in-house content types
- Typically, simple trusting workflows
- Multiple deployment of content

1.1.3 Challenges of Intranets

- Under-staffed
 - No one “signs up for”
- Under-resourced
 - Expect less technical resources than public site
- Under-valued
 - Hard to get real use from senior staff

1.1.4 Typical Stories

- “Shared space for files”
- “Effective way to share announcements”
- “Tools for applications (sick day requests, etc)”
- “Staging for our ‘real’ site”

1.2 Content Editing

1.2.1 Content Presentation

- Presentation mode
- Table of contents
- Folder previous/next feature

1.2.2 Collections

- “10%” rule for creating collections

About 10% of your content creators should normally be able to create or modify collections.

- Have a folder of “template” collections they can copy from
- Have pre-written collection “reports” they can use

These are registered in *portal_types/Topic*, as available views.

1.2.3 Dashboard

- Add collection portlets
 - For “content by me”, “things to review”, etc
- Can hook into member creation to set dashboard by default

1.2.4 Default Pages

- One of the trickiest things
 - “Which am I editing?”
- Common case: “a folder with a rich body field”
 - Make as a new Archetype, a “section”

1.3 Content Management

1.3.1 Content Rules

- “When X happens, do Y”
 - Send email on content submission
 - Update staff on new content creation
 - Log deletions
- Excellent for distributing responsibility
- Mail sending is much too weak
 - *collective.contentrules.mail* offers more options

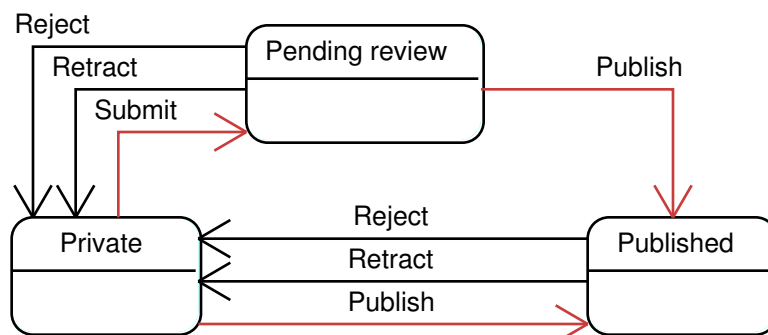
1.4 Workflows / Approval

1.4.1 Files & Images

- Files & Images don’t ship with assigned workflow
 - Fixes common case of forgetting to publish
 - * Leading to “broken” links/images
- Can easily assign to a workflow

1.4.2 Simple Publication Workflow

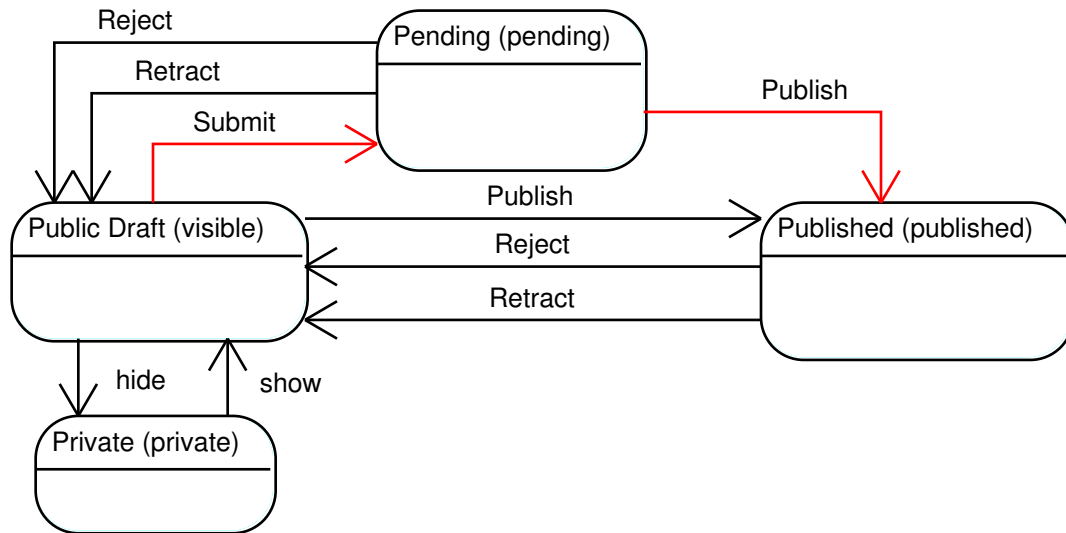
- Simple Publication Workflow



- Owners retract, reviewers reject
- Things start out as private

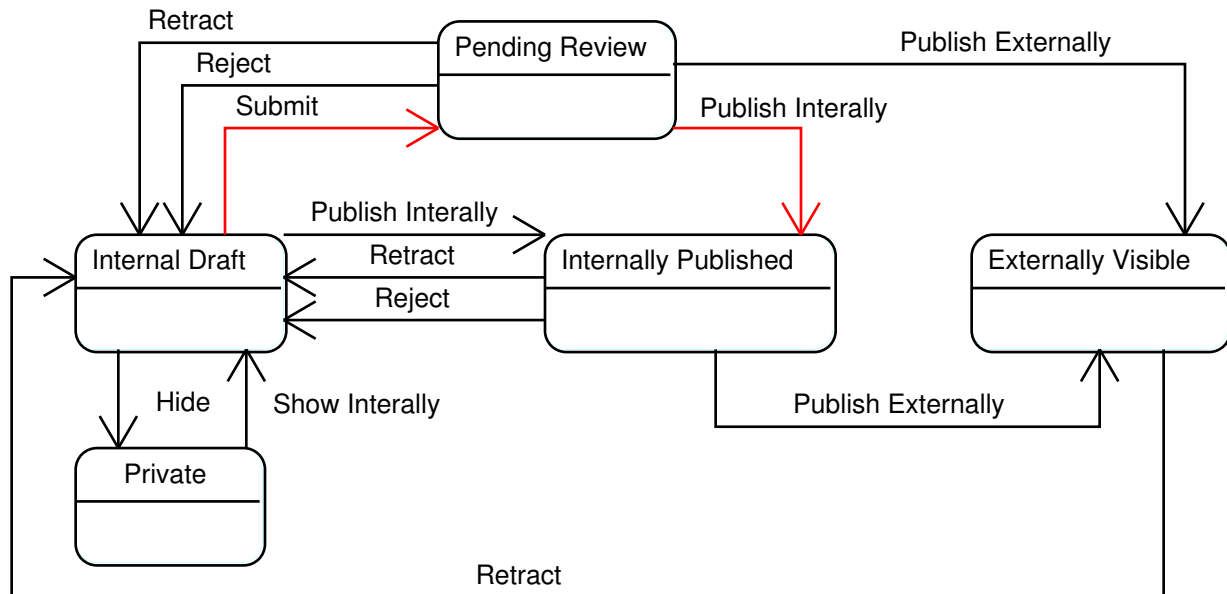
- No more “public draft”
- Owner can edit things when published
 - No more “CNN case”
 - Putting real stuff in workflow transitions

1.4.3 Community Workflow



- Almost same as Plone 2 “Plone Workflow”
 - Immediately visible in public draft
 - “CNN case”
 - * Owner cannot edit while published

1.4.4 Intranet/Extranet Workflow

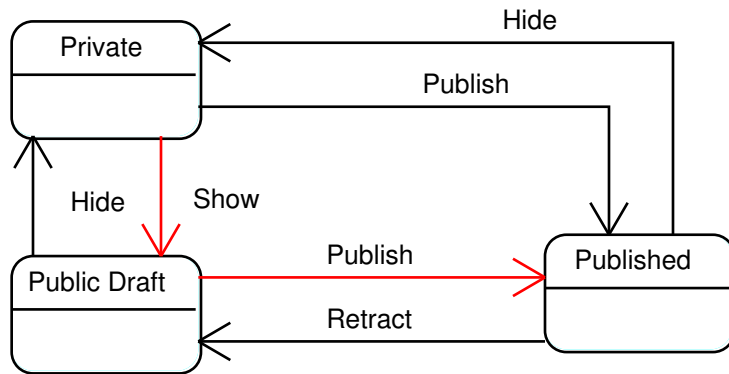


- “Externally visible” is only anon can see
- Has “CNN case” (must retract to edit)
- Initial state is internally-viewable
- Generally, 2.5 Plone workflow + internal-only stuff
- Not particularly common case

1.4.5 Folder-Specific Workflows

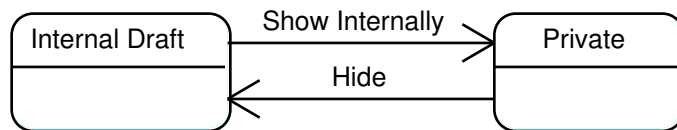
- Confuses users who think of folders as “content”
 - Having a different process is unexpected
- Makes it very hard to keep folders & default pages in sync

1.4.6 Community Folder Workflow



- Same as 2.5 “Folder Workflow”

1.4.7 Intranet Folder Workflow

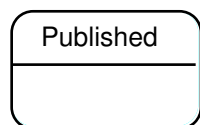


- For folders in Intranet workflow
 - Just private and internal states
- Often better: use Intranet Workflow

1.4.8 Do You Want Workflow at All?

- “Joel’s Rule of Reviewer Attention”:
 $quality = 1 / 2 ^ n$
- The more things you review, the less quality you add, and *fast*
- Our job: reduce things that need review

1.4.9 One State Workflow

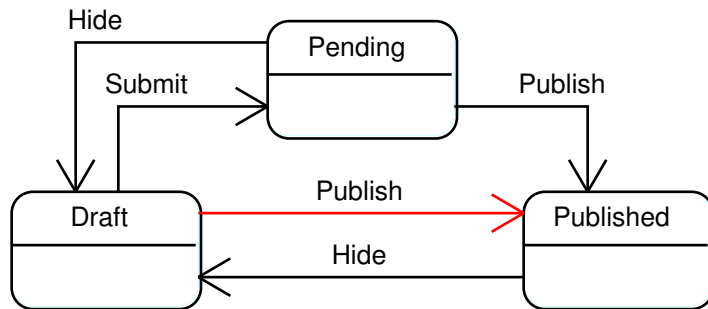


- Single, published state
 - More useful than “no workflow”

- * We can control security
- * Things looking for “published” will find

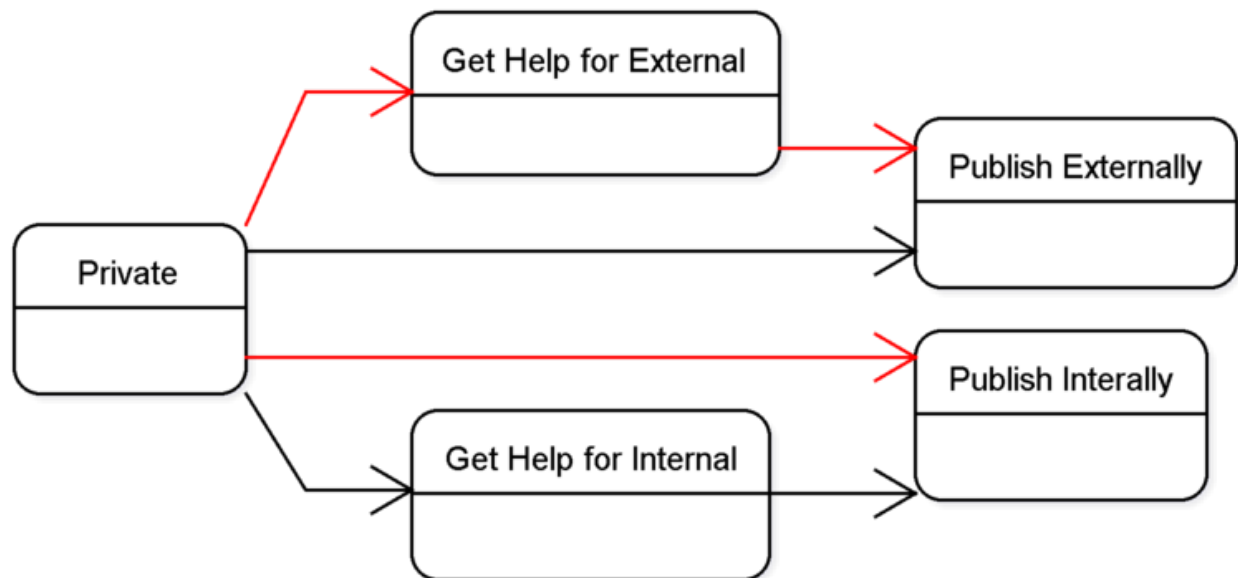
1.4.10 Simple Workflow

- Simple and trusting



- Allow most people to publish & hide

1.4.11 Better Intranet/Extranet Workflow



1.4.12 Workflow Challenges

- People forget to submit content
 - Help them with a content rule
 - Find with admin collection
- Content doesn't get reviewed

- Notify reviewers with rule
- Find with admin collection

- Don't understand workflow
 - Show in site with DCWorkflowGraph

1.5 Placeful Workflow

1.5.1 About Placeful Workflow

- Different workflow behavior in different areas of site
 - eg, one department is paranoid, one isn't

1.6 Features

1.6.1 Forms

- Bread and butter of many intranets
 - *PloneFormGen* allows for end-user creation
 - * Or better, end-user *maintenance*
 - * Can email results or store as spreadsheet
 - Recipes on plone.org for creating content from PFG forms

1.6.2 Project Management

- *Poi* can be a lightweight bug/request/feature tracker
 - Intended for software, but not specific to this

1.6.3 Content Rating

- *plone.contentratings* provides common Likert-style ratings

1.6.4 Weak Areas

- Calendaring and shared events
- Large, efficient binary object storage
- Wikis
 - Both ZWiki and wicked are undermaintained

1.7 Theming

1.7.1 Theming for Intranets

- Sometimes, less “designed” than public site
 - And, often, *could be*
 - * Benefits the most from using our templates

1.7.2 Designer Differences

- Automatically get CSS class for departments

```
body.section-chemistry #portal-column-one {  
    background-color: red; }
```

```
body.section-biology #portal-column-one {  
    background-color: blue; }
```

- *CSSManager* can allow for different style spreadsheets per section
- Allows easy, high-level color/font/style choices

1.8 Security

1.8.1 Security/Authentication

- “Single Sign On”
 - Shared password?
 - Log on just once?

1.8.2 Shared Passwords

- Easiest to let other system be canonical storage
 - LDAP: often preferred, but quite tricky
 - Relational Database: much simpler

1.8.3 Log on Just Once

- One system authenticates, others trust
 - Often, Apache (which has many add-ons for this)
 - * Plone can then be told to trust Apache

1.8.4 Useful PAS Plugins

- Useful PAS Plugins
 - Users/groups/roles from SQL: [SQLPASPlugin](#)
 - LDAP: [PAS LDAP Docs](#)
 - Role for in-network people: [AutoRole](#)
 - Can't login twice at same time: [NoDuplicateLogin](#)
- Many others: [Authentication Add-Ons](#)

1.9 Migration

1.9.1 Migration

- Migration by hand? Or automated?
 - Weigh carefully the costs of “ossified” structures
 - * Can you develop a “moving” spreadsheet?
- *gsxml* current represents best effort for content import/export

1.10 Deployment

1.10.1 Setup

- Minimal, for 100 daily users
 - One box, one ZEO, two Zopes
 - \$100/month or \$1000/hardware
- Average, for 500 daily users
 - Two boxes/cores, one ZEO, four Zopes
 - Proxy cache (Squid/Varnish) in front
 - \$300/month or \$3000/hardware
- Performance, for 5000 daily users
 - Three really serious boxes, each dual-core
 - One ZEO, ~10 Zopes
 - Proxy cache (Squid/Varnish) in front
 - Expensive and often in-house

1.10.2 Performance

- “It’s just our intranet”
 - But *everyone* is logged in!
 - * Limits ability to cache
 - * Can you keep people from having to log in?

1.10.3 Caching

- Either teach users to accept lag in editing
 - Or get them to not log in
 - Or provide an “edit.” domain
 - Or get lots of hardware

1.10.4 Performance Setup

- “High Performance Plone” offers overview of setup
 - ZEO
 - CacheFu

1.11 Training

1.11.1 End User Training

- 1-2 hours of material
 - Navigating site
 - Finding resources
- Often most successful as screencasts

1.11.2 Content Contributors

- 4-6 hours of material
 - Where to put things
 - Workflow on site
 - Your taxonomy & keywords
- Typically, delivered as small groups

1.11.3 Developers

- 4-6 days of material
 - Must learn power-user material
 - Building custom content types
 - Skinning (making the HTML)
 - Customizing the workflows/security

1.11.4 Themers

- 2-3 days of material
 - A bit about PageTemplates and viewlets
 - How to integrate CSS into Plone

1.11.5 System Administrators

- 1-2 days of material
 - Additional software: proxies, caches, balancers
 - Backup
 - Performance analysis

1.12 Questions?

1.12.1 Questions?

- Handouts at plonebootcamps.com/resources
- You can reach me at joel@joelburton.com