University of Bristol
Information Services

Maintaining a Zope template website using the Simplified Control Screens

Reference guide

Aims and Learning Objectives

The aim of this guide is to enable you to access and maintain a Zope based departmental website using the Simplified Control Screens.

After reading this guide, you will be able to:

- log in to your Zope site directory;
- navigate through the site's folder structure;
- rename, delete, copy and paste objects (eg web pages, folders, images, etc);
- create new folders and web pages;
- import images and other files (Word, PDF, etc);
- edit page content using the in-browser editor 'edit-on Pro';

Document information

This document is available on the web. To find this, go to www.bristol.ac.uk/is/learning/resources and in the **Keyword** box, type the document code given in brackets at the top of this page.

Related documentation

Other related documents are available from the web at:

http://www.bristol.ac.uk/is/learning/resources

Contents

Introduction

As the name suggests, the Simplified Control Screens (SCS) are a simplified interface of the Zope Management Interface (ZMI).

The SCS were designed to provide a user-friendly system that could be used by anyone, including non-HTML savvy users, to manage and maintain web content easily on a website using the University Zope templates.

In order to make this goal a reality, an in-browser, WYSIWYG (What You See Is What You Get) web editor was embedded in the SCS to provide a Word-like editing facility.

Prerequisites

Basic computer skills (use of keyboard and mouse, file management, and so on), some word processing (eg, MS Word) and web browsing experience.

Some experience of web page creation and HTML are useful but not essential.

1. Introduction to the Simplified Control Screens and 'edit-on Pro'

Objectives   To give an overview of the Simplified Control Screens (SCS) and 'edit-on Pro'.

What are the Simplified Control Screens (SCS)?

The SCS are a simplified alternative to the Zope Management Interface (ZMI). You access them through your preferred web browser and you use them to build and maintain your Zope site.

They are particularly suitable for web content maintainers with the role of **Section Editor** and **Section Updater** (you should have been assigned one of these roles by your department **Site Manager**), who have no or little knowledge of web technologies such as XHTML and stylesheets.

They provide:

- An **environment** that enables you to manage (add, move, delete, and so on) folders, web pages, images and other file types (eg, Word, PDF, and so on) in the site – in the same way that you use Windows Explorer to manage files and folders on your computer. Note that Section Updaters can only edit existing web pages.

- An **in-browser editing tool** that enables you to easily edit web content, through a Word-like interface.
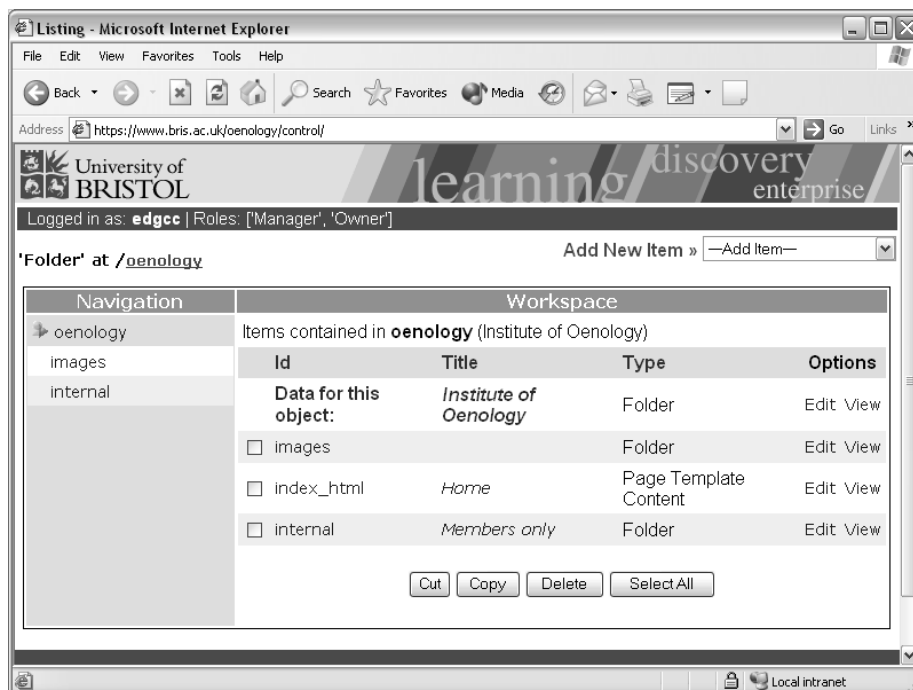

Figure 1-1 - the Simplified Control Screens (SCS)

Figure 1-1 shows the SCS default view of a typical department website (in this case, the imaginary Institute of Oenology). On the left, the **Navigation** frame shows the local root folder (**/oenology/**) and all its subfolders. The **Workspace** frame shows the object you are currently managing. When you

first log into the SCS the Workspace displays the content of your department root folder.

The Workspace:

Workspace			
Items contained in oenology (Institute of Oenology)			
Id	**Title**	**Type**	**Options**
Data for this object:	*Institute of Oenology*	Folder	Edit View
☐ images		Folder	Edit View
☐ index_html	*Home*	Page Template Content	Edit View
☐ internal	*Members only*	Folder	Edit View
Cut Copy Delete Select All			

Figure 1-2 - default root department folder view in the SCS

The Workspace provides information on the objects contained in the current folder:

- **Id** is a concise reference (name) to the object and appears in the URL of your web page, folder or other object type;
- **Title** provides a description of the corresponding object and is used to identify the object in a number of automated features, such as the title of web pages, breadcrumb trail, the main heading of web pages, and so on;
- **Type** shows the object type: **File**, **Image**, **Folder** or **Page Template Content**;
- **Options** allow you either to edit the object or to view it in a browser;
- The checkbox to the left of each object allows you to select them in order to manipulate them using the buttons at the bottom of the frame (**Cut**, **Copy**, **Delete**); **Select All** allows you to select all the objects at once.

What is 'edit-on Pro'?

'edit-on Pro' is a Java-based in-browser, WYSIWYG (What You See Is What You Get) web editor, allowing users to easily create, edit and publish web content on a Zope site. It has an easy-to-use, intuitive interface which provides Word-like features, empowering non-technical users to become web content contributors without knowing XHTML and style sheets. Nonetheless, it makes it possible for those familiar with XHTML to edit the source code if they want to.

Being a Java-based application, you need to ensure that the Java Plug-in (version 1.4 +) is installed on your computer. To check this:

➢ Open the **Start** menu (bottom left of your screen) and select **Settings** followed by **Control Panel** (**Start / Control Panel** if using Windows XP (2002). Look for the **Java Plug-in** icon as shown opposite.

If the Java Plug-in icon is not there, you need to install it (or, if you don't have administrator rights on your computer, ask your computer support officer to do it for you):

> ➢ The Java Plug-in can be downloaded from:
> http://java.sun.com/j2se/1.4.2/download.html
> ➢ Choose the **J2SE Java Runtime Environment (JRE)** option.

For help on using 'edit-on Pro', refer to the document **editonpro-r1** (Editing web content using 'edit-on Pro'), at the URL in the **Related documentation** section.

Site structure

Even if you do not have to create the site structure yourself, it is useful to understand how websites are organised.

Just as information files are stored in a meaningful directory structure (ie, in folders and sub-folders) for ease of access and retrieval, web files (eg, content pages, images, etc) are organised in a similar hierarchical tree structure.

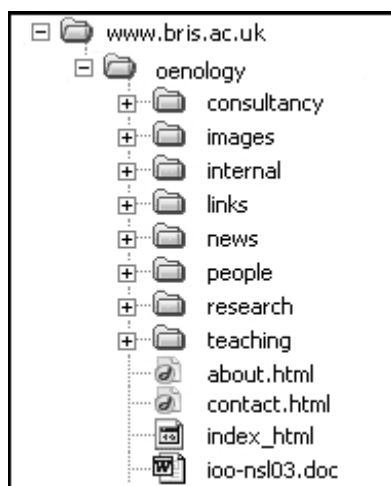Figure 1-3 shows how things are organised at the University:

Figure 1-3 – Example site structure

Right at the top of the tree, we have the **absolute root**, ie, **www.bris.ac.uk**.

In the first level, immediately below the absolute root, we have the **local root** folders corresponding to the folders allocated to individual departments (for example **oenology**).

This means that departments have a top level URL, such as:

www.bris.ac.uk/oenology/.

Consequently, the path to the contacts page (**contact.html**) is:

www.bris.ac.uk/oenology/contact.html.

Similarly, the path to the research index page in the Institute of Oenology would be **www.bris.ac.uk/oenology/research/**.

Note | Notice that **research** is a folder, and as such must contain a page named **index_html** that the browser will default to if no filename is included in the path.

2. Accessing your site in the SCS

Objectives   To log into your site's root directory using the SCS.

Logging into the SCS

To view your site in the SCS:

➢ Using a web browser (Internet Explorer or Firefox) enter the URL to the directory in the **Address** box as follows:
www.bristol.ac.uk/mydepartment, replacing ***mydepartment*** with the folder name allocated to your department.

➢ With the cursor at the end of the URL, type: ***/control***.
Using the example above, the path in the **Address** box should read:

   http://www.bristol.ac.uk/mydepartment/control.

Note   If you have been given permission to modify documents in a sub-folder rather than in the department root folder, you will need to include the name of the sub-folder(s) in the path. For example, supposing you have been given the role of Section Editor in the sub-folder **/research/** on your department site, the URL to access the SCS will be:
http://www.bristol.ac.uk/mydepartment/research/control.

➢ Press the **<Enter>** key (click **OK** if you get a **Security Alert** pop-up message).

➢ Enter your ***UoB username*** and ***password*** when prompted, and click **OK**.

Figure 2-1- the ZMI login dialogue box

After logging in you will be able to view your site in the SCS. Notice that the URL in the **Address** box has changed to **https** instead of **http**. This means you have been redirected to a secure connection and that everything you do cannot be seen by non-authorised users.

By default, the Workspace (see Figure 1-2) contains a number of objects that have been created for you:

images folder: a folder to store all the images associated with your site, it contains the customised title banner image (banner.gif) which appears in the header.

index_html: this is the default home page of your site. However, because of the way Zope works you must create one in each sub-folder contained in your site.

internal folder: any file (or sub-folder) contained in this folder will be encrypted and transmitted through a secure connection (https) and prompt the user for authentication. Its content is viewable by group members only. Note there are other methods for restricting access to certain files, all described in document **zopetemp-r1** (Managing a Zope website using the corporate template), at the URL in the **Related documentation** section.

Note A standard Zope template-based website contains other objects than those visible through the SCS. These objects tend to control elements of the template itself, for example links in the header and footer, as well as the left hand side navigation links.
They are only accessible through the Zope Management Interface, and unless you are a Site Manager yourself, you should seek the assistance of your department Site Manager if you need to edit these objects.

3.   Managing objects

Objectives   To manipulate (copy, cut, paste and delete) objects and navigate around the site

Manipulating objects

To manipulate objects, first you need to select the object you want to move or delete, and then you use the **Cut**, **Copy** and **Delete** icons at the bottom of the Workspace.

Selecting the object(s)

➢ Select the object(s) by checking the box to the left of their **Id**, as shown opposite.

☑ newpage.html

If you want to select all objects in the current folder, use the **Select All** button at the bottom of the Workspace.

Deleting the selected object(s)

➢ Click on the **Delete** icon.

Moving the selected object(s)

➢ Click on the **Cut** or **Copy** icons – after a few seconds a **Paste** icon will appear.

Note   If you can't see the **Paste** icon, this is probably because the Temporary Internet files folder on your system is full. To clear it, go to **Start [> Settings] > Control Panel > Internet Options**. Under the **Temporary Internet files** box in the **General** tab, click on the **Delete Files** and **Delete Cookies** buttons.

➢ At this point you can navigate to the folder or sub-folder where you want to move the object(s).

➢ Click on the **Paste** icon.

Renaming an object

➢ Under the **Options** column, click on **Edit** in the row corresponding to the object you want to rename

➢ On the next screen, edit the object's name in the **Id** field box – you can also change the object's description by editing the text in the **Title** field box.

Navigating through the site

To navigate through the site you have a number of options.

➢ You can use the linear navigation trail above the navigation and Workspace frames (as shown opposite).

'Folder' at /oenology/images

It shows how deep you are in the site and enables you to go back up the hierarchical tree by clicking on the folder whose content you want to see in the Workspace frame.

> ➢ You can also use the **Navigation** frame on the left which shows the folder hierachical structure of the site. Just click on the folder name whose content you want to see in the Workspace frame,

OR:

> ➢ use the Workspace itself, which enables you to drill down the site but not to go back up.

4.   Adding new objects

Objectives   To add **Folder**, **Page Template Content**, **File** and **Image** objects to a site.

Comments   The SCS allow you to add four different types of objects: **Folder**, **Page Template Content**, **File** and **Image**. This is far fewer than the number of object types available in the Zope Management Interface, but these are all you need to create content for your site.

Adding Folder objects

Folders provide the framework around which you build your website. Essentially, they are similar to directories on your computer. They contain other objects that make up your site, such as web pages, document files (Microsoft Office, PDF, and so on), images, and other folders.

➢ From the **Add Item** dropdown box in the top right-hand side, select **Folder** from the list, as in Figure 4-1:
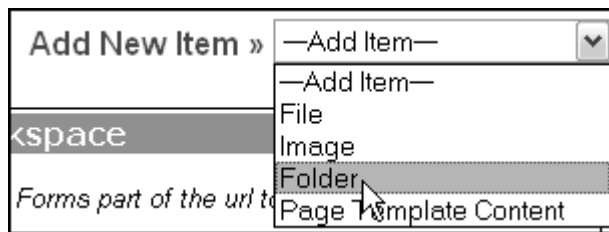
Figure 4-1 - adding a folder object

The next screen, shown in Figure 4-2 prompts you for an **Id** and **Title** for your new folder:

Figure 4-2 - add folder dialogue box

➢ The **Id** field is the name of the folder as it will appear in the URL (web address). You should follow the following rules when creating ids:

● keep it short and meaningful (easier to remember);

● only use lower-case characters;

● do not use spaces: use a hyphen (–) to separate words instead,

eg:

2004projects ✓ , **2004-projects** ✓ ,

04pjts ✗ , **2004 projects** ✗ , **2004Projects** ✗ .

➢ The **Title** field contains a brief description of the folder and is used by the template in a number of automated functions (for example in the breadcrumb trail). You can use a mix of lower and upper cases as well as spaces, but try to keep it relatively short (ideally 2 to 3 words, and not more than 5).

➢ Leave the **order_position** field as it is (**0**) and the **Make Private?** box unchecked.

➢ Click the **Save** button and see your new folder listed in the Navigation frame.

Adding Page Template Content objects

If **Folder** objects provide the framework of your site, **Page Template Content** objects are the bricks and mortar that make up its content. This is where the content of your web pages go.

➢ From the **Add Item** dropdown box in the top right-hand side, select **Page Template Content** from the list, as in Figure 4-3:
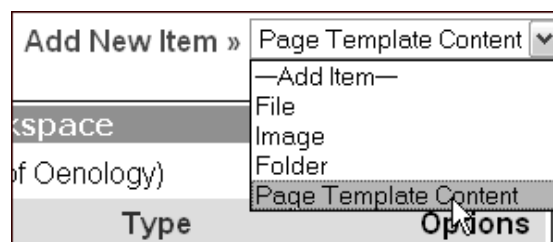

Figure 4-3 - adding a page template content object

You get the same dialogue box as for a **Folder**, prompting you to enter an **Id** and **Title** for the new object.

➢ The **Id** field is the name of the **Page Template Content** object you are creating. Since the **Id** will be part of the URL, we recommend that you follow the same rules as for folders:

- keep it short and meaningful (easier to remember);

- only use lower-case characters;

- do not leave spaces – use a hyphen (-) to separate words if you wish.

In addition:

- include the **.html** extension (although this is not required by Zope, it will help you identify the actual web pages in your site).

➢ Leave the **order_position** field as it is (**0**) and the **Make Private?** box unchecked.

➢ Click the **Save** button.

Note	If you create an index file using this method, make sure that it is called **index_html**, NOT **index.html**.
	Remember that you need to create a **Page Template Content** named **index_html** in each folder or sub-folder.

You will now see the **Page Template Content** object you just created listed in the Navigation bar, as showed in Figure 4-4:
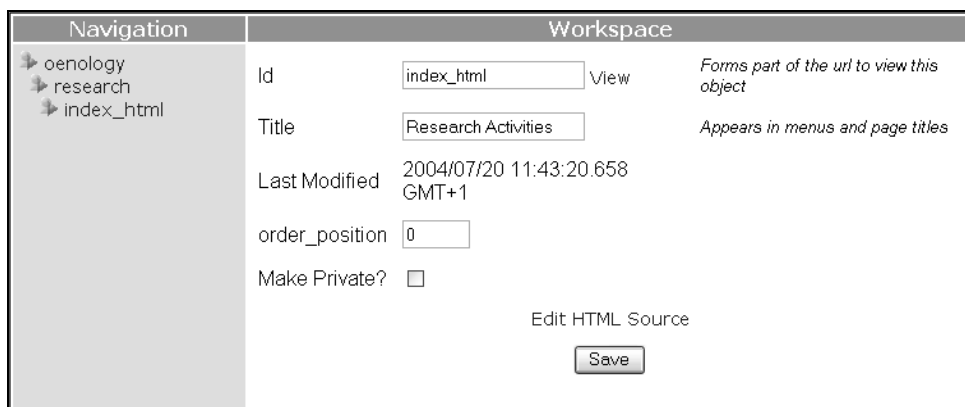

Figure 4-4 - page template in edit view

➢ You can preview your page by clicking on the **View** link in the Workspace. This will open a new browser window showing the composed page.

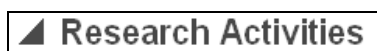Notice how the description you entered in the **Title** field has been used in three different places:
- o the status bar at the top of the browser window;

- o the 'breadcrumb trail' at the top of the content area;

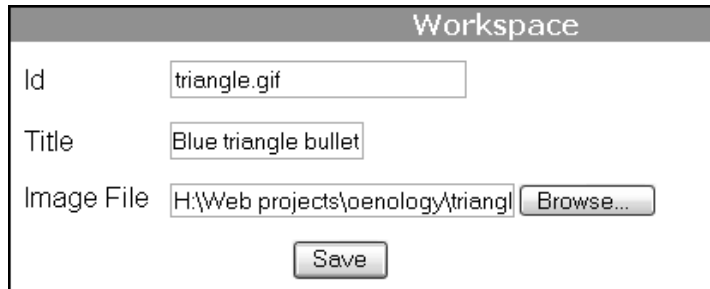- o the main page heading.

Adding File and Image objects

It's easy to upload all kinds of files, such as Microsoft Office documents, PDF files and images into Zope using the SCS. The only hitch is that you can only upload them one at a time, so if you have a batch of files to upload, the process can be slow and cumbersome.

Note	To make the upload of batches of files quicker, you can use WebDrive, a WebDAV client that will enable you to map a drive letter on your PC (for example, **M:**) to your department root folder on the Zope server. For more on WebDrive, see document **webdrive-i1** (Using WebDrive to transfer files between a Windows computer and Zope), at the URL in the **Related documentation** section.

To upload a file or an image:

- ➢ Navigate to the folder where you want to upload your file or image (use the **images** folder that has been created for you to store your image files)
- ➢ From the **Add Item** dropdown menu, select **File** or **Image** from the list.

The following dialogue box (Figure 4-5) will appear:

Figure 4-5 - add file dialogue box

- ➢ Click on the **Browse…** button and locate the file you want to upload on your PC or local network drive in the pop-up window and click **Open** (Internet Explorer) or **OK** (Firefox, Mozilla).

  Notice that the path to the file now fills the **File / Image File** field.

- ➢ In the **Id** field, enter the filename. At this stage you can rename your file following the same rules as for **Folder** and **Page Template Content** objects; make sure though that you include the appropriate file extension (for example,**.doc** in the case of a Word file, **.pdf** for a PDF file, **.gif** or **.jpg** for an image file).

- ➢ In the **Title** field, you may want to enter a short description (up to 5 words) for the file using a mix of upper and lower cases. Note that this field is optional.

5.   Editing page content

Objectives   To add content to a **Page Template Content** object using 'edit-on Pro'.

Comments   Page Template Content objects are where you add and edit the content of your web pages. Using the SCS with 'edit-on Pro' is the preferred (and easiest) method for editing web page content.

Opening a Page Template Content object in 'edit-on Pro'

➢ Navigate to the **Folder** containing the **Page Template Content** object you want to edit.

➢ In the Workspace click either on the object **Id**, **Title** or on the **Edit** link under **Options** (Figure 5-1).

Figure 5-1- editing a page template content object (screen 1)

➢ The next screen (Figure 5-2) gives you the opportunity to change the object's id and title if you wish; just replace the content of the **Id** and **Title** fields.
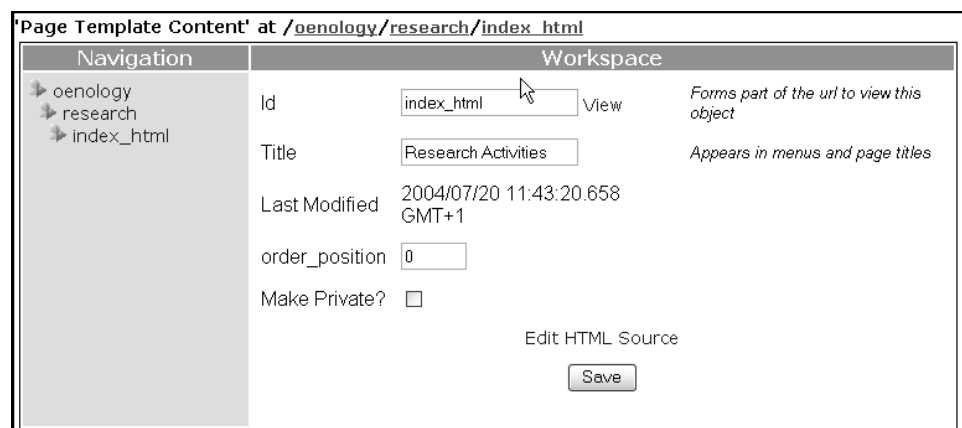

Figure 5-2 - editing a page template content object (screen 2)

➢ Click on the link **Edit HTML Source** at the bottom of the Workspace to view the page in 'edit-on Pro'.

This will fire up the Java plug-in and open 'edit-on Pro' (Figure 5-3) within the Workspace frame.

Note The first time you use the application, you will be prompted twice to accept the licence conditions. Click on **Always** so that you are not asked again in the future.
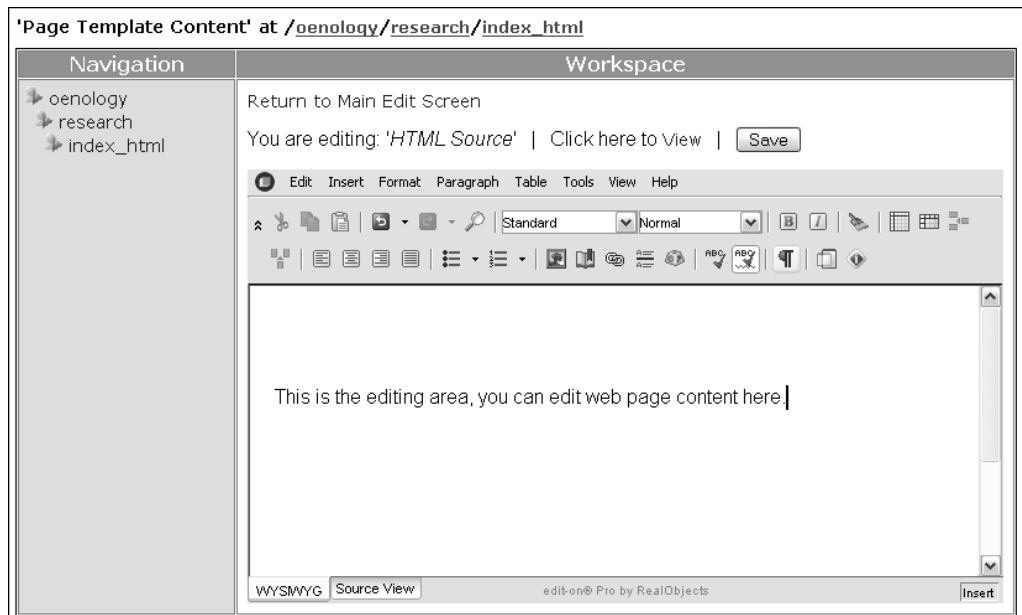

Figure 5-3 - editing a page template content object (screen 3)

For help on using 'edit-on Pro', refer to document **editonpro-r1** (Editing web content using 'edit-on Pro'), at the URL in the **Related documentation** section.