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# **collective.templates**

***Release 1.0***

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User documentation



## INSTALLATION

You can install the Plone add-on `collective.addons` using `zc.buildout` and the `plone.recipe.zope2instance`. Thus you could add it to the list of eggs to install, e.g.:

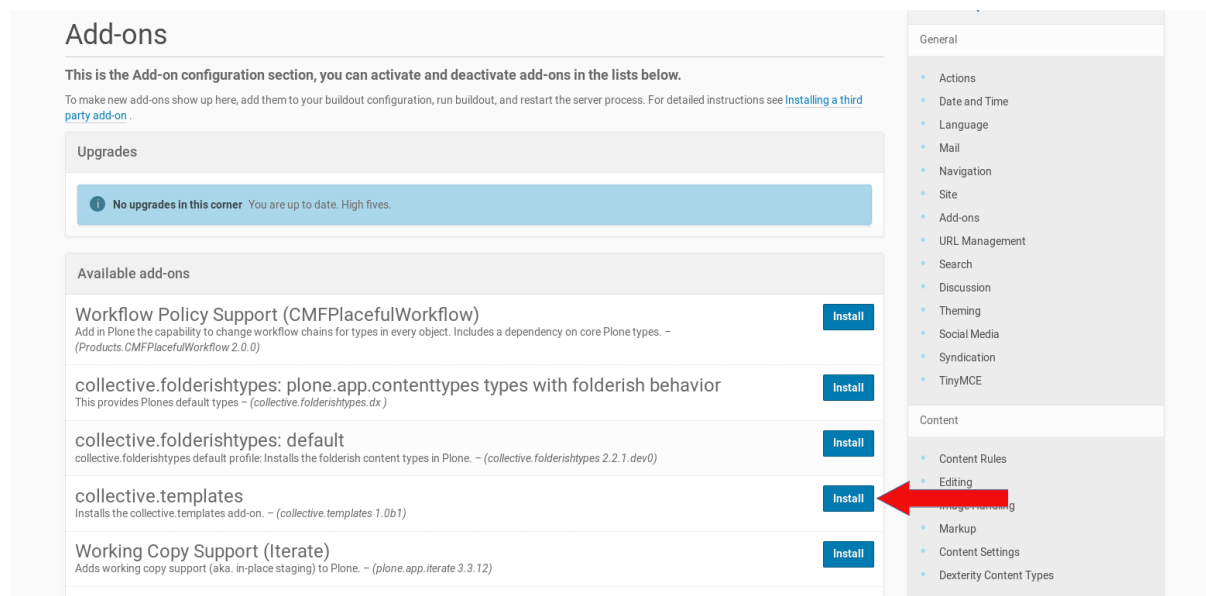
```
[buildout]
...
eggs =
...
    collective.templates
```

Once you have added the add-on re-run buildout, e.g. with:

```
$ ./bin/buildout
```

Once your buildout finished you had to create a new Plone site and then install and activate the Plone add-on inside this new Plone site. Therefor you had to go to the Plone ‘Site Setup’ administration area. If you got administration permissions you find a link to it in the menu entry with your name (or ‘admin’). You could reach it directly by adding ‘/@@overview-controlpanel’ to the URL of your Plone site.

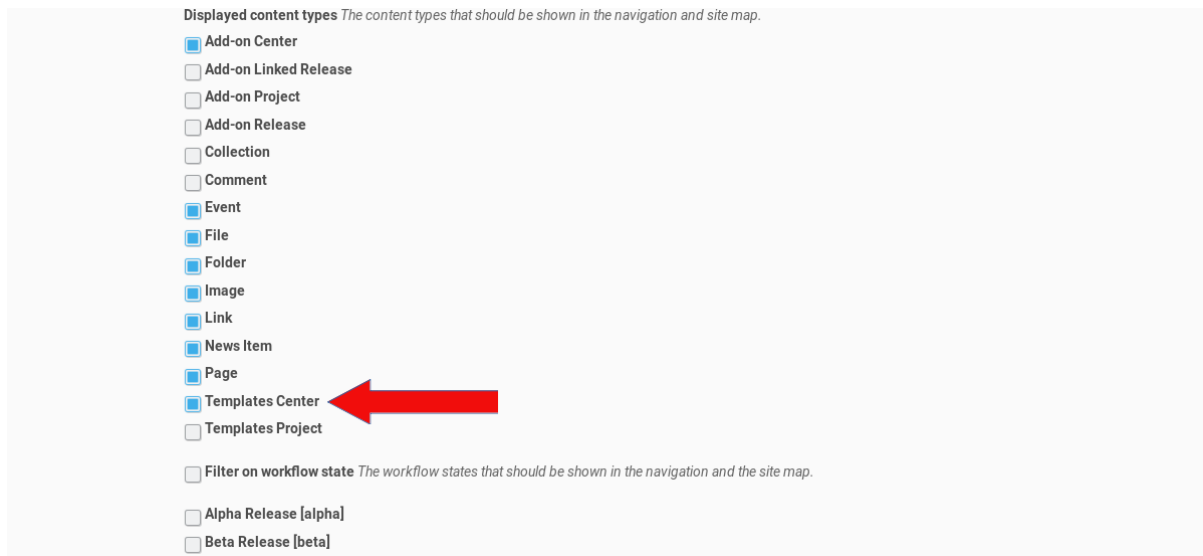
In the ‘Site Setup’ page click on ‘Add-ons’ and you get a list of the Plone add-ons which are available in your Plone site.



You will get a list like in the above screenshot. Click on the ‘install’ button next to the ‘collective.templates’ list entry and the add-on will be installed in your Plone site.

## 1.1 Navigation configuration

Next you need to go to the ‘Navigation’ configuration inside the ‘Site Setup’. Thus click on the corresponding button and you get to the configuration menu in the screenshot below.



Displayed content types *The content types that should be shown in the navigation and site map.*

- ☒ Add-on Center
- ☐ Add-on Linked Release
- ☐ Add-on Project
- ☐ Add-on Release
- ☐ Collection
- ☐ Comment
- ☒ Event
- ☒ File
- ☒ Folder
- ☒ Image
- ☒ Link
- ☒ News Item
- ☒ Page
- ☒ Templates Center
- ☐ Templates Project

☐ Filter on workflow state *The workflow states that should be shown in the navigation and the site map.*

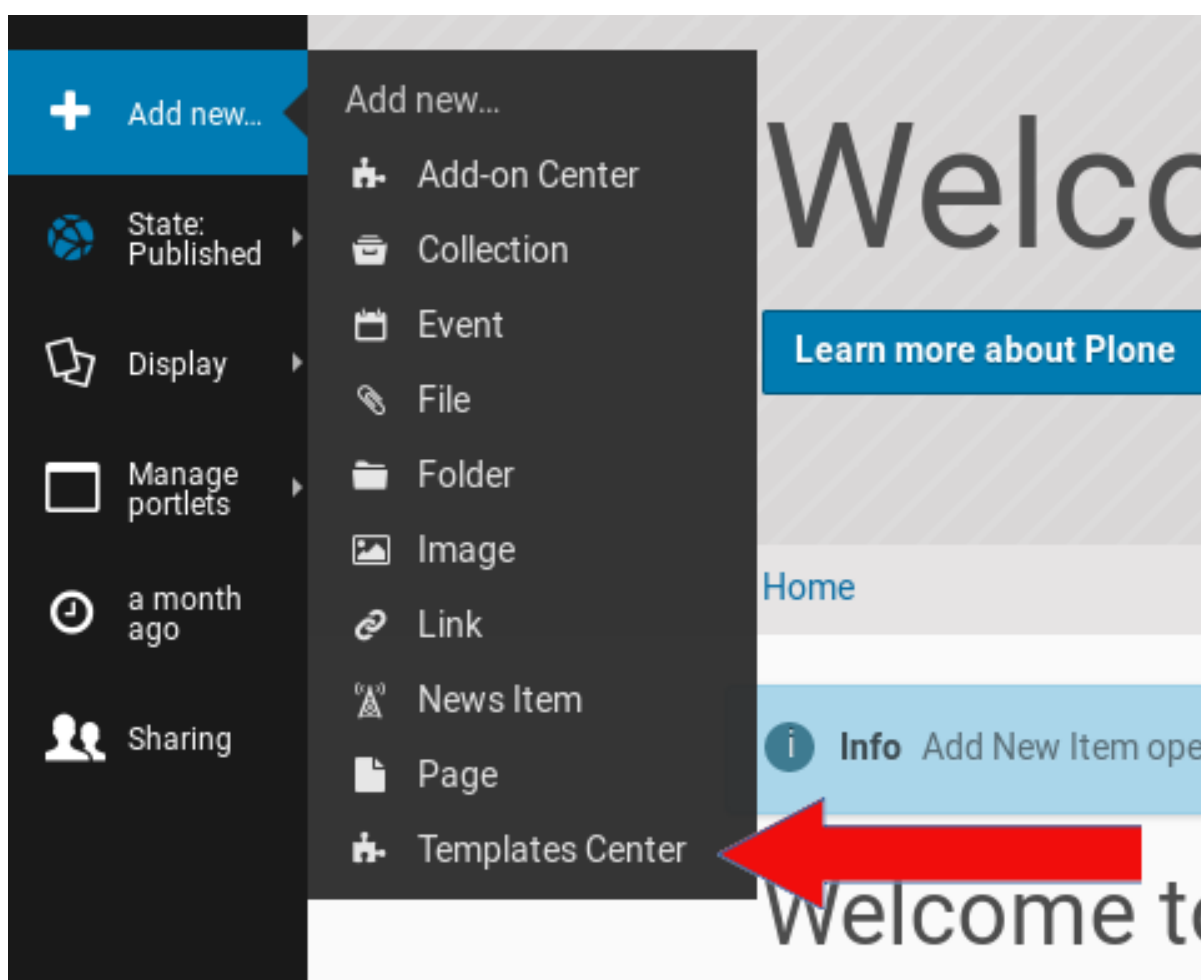
- ☐ Alpha Release [alpha]
- ☐ Beta Release [beta]

Tick the checkbox in front of the entry ‘Templates Center’ and save your changes. The necessary steps are done to go to the homepage of your Plone site (or a subdirectory of the site, where you want to create a new template center).



## ADD A NEW TEMPLATE CENTER TO YOUR PLONE SITE

I assume you want to add the center to the Plone site root ('Home'). Therefore go to this site root and choose from the Plone menu on the left 'Add new'. You get in this menu an entry to create a new 'Template Center' (see the screenshot below).



Click on this entry and you get the form below. This is the edit form to create and configure a new Template Center in your Plone site.

## Add Templates Center

A center for templates

Default Categories et al Allowed file extensions Instructions Legal Disclaimer Special email addresses Settings Dates

Name of the Templates Center •

Description of the Templates Center •

Description of the features of templates •

Template Product Name • Name of the Template product, e.g. only Templates

Save Cancel

Fill in the fields in the edit form of the Template Center. All fields has a description of their expected values. Don't miss to go through the register of the edit form dialog. The fields on the register 'Allowed file extensions' need your input about the allowed file extensions for the templates and the image file extensions (screenshot). If there are different file extensions allowed for this file categories you could enter this file extensions seperated by a pipe into the form fields, e.g.: 'png|jpg' for image files. Once you are finished with adding values to the edit form, save the form. If you missed to edit a form field, you will get an error message and could fill in the necessary information into the appropriate form field.

## 2.1 Publish The New Add-on Center

Once you finished with the edit form of the Add-on Center and saved your changes you need to publish the center. You could do this by a click on the entry 'State: Private' in the menubar on the left site. Choose the entry 'Publish' and you are done.

## 2.2 Sharing: Enable Members To Add Projects

The logged in users are not able to add projects to the Template Center yet. You could enable this by a mouse click on the entry 'Sharing' in menubar on the left site (see screenshot below). This shows the edit menu for sharing and you could tick the checkbox 'Can add' for 'logged-in-users' (see screenshot below) to enable the members of the Plone site to add their template projects to the center.

Plone

only in current section

Search Site Search

Home News Events Users Add-on Center Templates

Home Templates

### Sharing for "Templates"

You can control who can view and edit your item using the list below.

Search for user or group Search

Name	Can add	Can edit	Can review	Can view
Logged-in users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☒ Inherit permissions from higher levels

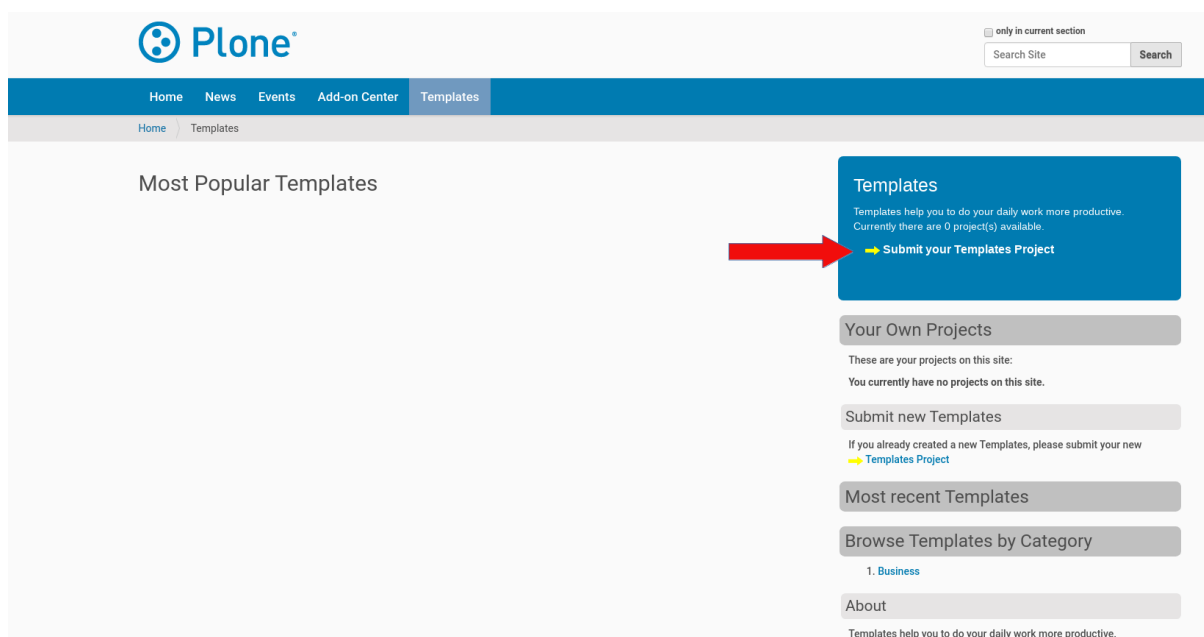
By default, permissions from the container of this item are inherited. If you disable this, only the explicitly defined sharing permissions will be valid. In the overview, the symbol indicates an inherited value. Similarly, the symbol indicates a global role, which is managed by the site administrator.

Save Cancel

## ADD A NEW TEMPLATE PROJECT TO THE TEMPLATE CENTER

A member of the Plone site (logged-in user) could add own template projects to the ‘Template Center’ once he called the appropriate form for new such projects and fill in the necessary data.

He has to click with the mouse first on the link in the box on the right side (see screenshot below).



This mouse click opens the form for providing new templates. The form dialog consists of several registers. The form fields in the first register ask for more general information about the project. It's possible to edit and change the content of the fields later, if the focus or the features of the project varies.

### 3.1 The First Register ‘Default’

The new template project needs its own title with a length from 5 to 50 characters. This title has to be unique inside the ‘Template Center’. If there is already another template project with the same title the member will get an error message with the appropriate information. Thus he had to choose another title for his template project.

## Add Templates Project

A Templates Project

Default Legal **Category / Categories** Screenshot Compatibility File Upload Optional Further File Upload Ownership Dates Categorization

**Information** The Dialog to create a new project consists of different register. Please go through this register and fill in the appropriate data for your project or choose one of the options that are provided. You could upload one or more files to your project on the register 'File Upload' and 'Optional Further File Upload'.

**Title** • Project Title - minimum 5 and maximum 50 characters

**Project Summary** •

**Full project description**

Edit - Insert - View - Format - Table - Tools -

Formats - B I [Text Alignment Icons] [List Icons] [Link Icon] [Image Icon]

0 WORDS POWERED BY TINYMCE

text/html

**Contact email-address** • Contact email-address for the project.

**Versions Number** • Version Number of the Template File (up to twelf chars) which you upload in this project.

1.0

Save Cancel

A new project needs also a summary and could get a full description of its purpose and features. The latter one is optional (only form fields with a red point behind the title are mandatory).

It's also necessary that the member provides an email-address. This address will be used to get in contact with the project (owner). The 'Template Center' sends e.g. messages if the status of the project changes (e.g. it was published by a reviewer). Users of the project / template could send feedback to the author within a form. The content of this form will be send by email to the project (owner) (The feedback provider will not see the email address of the project).

The last field contains the version number of the template project. The field starts with a value of '1.0'. But the project owner could change this value to the appropriate version number of the template file. The number '1.0' means that the template file is ready for production. If this is not the case this version number should have a leading zero.

If the project owner replaces the template file(s) with a newer one, she / he have to change the value of the version field. But there is no reminder / error message yet for this task yet. It's on her / his own responsibility not to forget to update the version number in that case.

## THE SECOND REGISTER ‘LEGAL’

The Second register shows the necessary fields for the legal statements about the template project / files. It starts with the license for the template file(s). It is possible to check more than one license for a template file(s). This declaration need to be in accordance with the license declaration inside the template file(s) (if there is one).

The screenshot shows the 'Add Templates Project' form with the 'Legal' tab selected. The form has a header 'A Templates Project' and a navigation bar with tabs: Default, Legal, Category / Categories, Screenshot, Compatibility, File Upload, Optional Further File Upload, Ownership, Dates, and Categorization. The 'Legal' tab content includes a section 'License of the uploaded file' with a red dot icon and a note: 'Please mark one or more licenses under which you publish your file(s)'. Below this are several license options, each with a checkbox: GNU-GPL-v2 (GNU General Public License Version 2), GNU-GPL-v3+ (General Public License Version 3 and later), LGPL-v2.1 (GNU Lesser General Public License Version 2.1), LGPL-v3+ (GNU Lesser General Public License Version 3 and later), BSD (BSD License (revised)), MPL-v1.1 (Mozilla Public License Version 1.1), MPL-v2.0+ (Mozilla Public License Version 2.0 or later), CC-by-sa-v3 (Creative Commons Attribution-ShareAlike 3.0), CC-BY-SA-v4 (Creative Commons Attribution-ShareAlike 4.0 International), and AL-v2 (Apache License Version 2.0). Below the licenses is a section 'Legal Disclaimer and Limitations' with a text area for the disclaimer and a checkbox labeled 'Accept the above legal disclaimer' with a red dot icon and a note: 'Please declare that you accept the above legal disclaimer.' At the bottom are 'Save' and 'Cancel' buttons.

There is also a read-only form field which contains the text of the legal disclaimer that has to be accepted by the template project owner. The text of the legal disclaimer will be set by the site admin inside the ‘Template Center’.

### 4.1 The Third Register ‘Category / Categories’

The template projects were assigned to one or more categories. The creator of the template project could choose on this register one or more categories, the new template project matches. The list of categories in this register had been created by the Plone site administrator within the ‘Template Center’.

The screenshot shows the 'Add Templates Project' form with the 'Category / Categories' tab selected. The form has a header 'A Templates Project' and a navigation bar with tabs: Default, Legal, Category / Categories, Screenshot, Compatibility, File Upload, Optional Further File Upload, Ownership, Dates, and Categorization. The 'Category / Categories' tab content includes a section 'Choose your categories' with a red dot icon and a note: 'Please select the appropriate categories (one or more) for your project.' Below this is a checkbox labeled 'Business'. At the bottom are 'Save' and 'Cancel' buttons.

### 4.2 The Fourth Register ‘Screenshot’

This is the place to submit a project screenshot. This is mandatory.

The allowed file extensions are displayed next to the button to call the file dialog. The Plone site administrator choose this allowed file extensions within the ‘Template Center’.

**Add Templates Project**

A Templates Project

Default Legal Category / Categories Screenshot Compatibility File Upload Optional Further File Upload Ownership Dates Categorization

The following file extensions are allowed for screenshot files (upper case and lower case and mix of both):  
jpg,png,gif

**Screenshot of the Template** • Add a screenshot by clicking the 'Browse' button. You could provide an image of the file format 'png', 'gif' or 'jpg'.

File auswählen Keine ausgewählt

Save Cancel

### 4.3 The Fifth Register ‘Compatibility’

This register contains a form field to choose the versions of the program the release is compatible with. The list of program versions will be created by the site admin within the ‘Template Center’. It is possible to choose multiple program versions for the template file(s) compatibility.

**Add Templates Project**

A Templates Project

Default Legal Category / Categories Screenshot Compatibility File Upload Optional Further File Upload Ownership Dates Categorization

**Compatible with versions of the product** • Please mark one or more program versions with which this uploaded file is compatible with.

☐ Product 1.0

Save Cancel

### 4.4 The Sixth Register ‘File Upload’

This register is the place to upload the template file and declare which platform it is compatible with.

**Add Templates Project**

A Templates Project

Default Legal Category / Categories Screenshot Compatibility File Upload Optional Further File Upload Ownership Dates Categorization

**The first file you want to upload** You need only to upload one file to your project. There are options for further two file uploads if you want to provide files for different platforms.

The following file extensions are allowed for template files (upper case and lower case and mix of both):  
ott, ots, otp, otg

**The first file you want to upload.** • Please upload your file.

File auswählen Keine ausgewählt

**First uploaded file is compatible with the Platform(s)** • Please mark one or more platforms with which the uploaded file is compatible.

☐ All platforms  
☐ Linux  
☐ Linux-x64  
☐ Mac OS X  
☐ Windows  
☐ BSD  
☐ UNIX (other)

Save Cancel

If there are versions of the template file for different platforms (e.g. one for MS Windows and another one for Linux only) this further template files could be uploaded using the following register (‘Optional Further File Upload’).

The list of platforms in the listing below the the upload field will be created by the site admin inside the ‘Template Center’. She / he is able to expand this list at any time if desired.

## **PUBLISH A TEMPLATE PROJECT**

Once the project owner has finished the edits in the form and save it, she / he could submit the template project for publication. This could be done within the menubar on the left side. She / he had to click on the menu entry 'Private' and than click on the entry 'Submit for publication' in the opening drop down menu. The menu entry will change from 'Private' to 'Pending'.

The project owner will get an email with an information about this change of the workflow state. A corresponding email will be send to the administrator or a configured email address for this task (configured inside the 'Template Center'.

The project has been forwarded into the review queue of the 'Template Center'. Once the administrator, site-administrator or a reviewer changed the workflow state again, e.g. published the project, the project owner will get a further email with this new state.





## MESSAGING

The collective.template Plone add-on use some of the Plone messaging implementations to create messages to the site admin, reviewers and the owner / creator of teplate projects.

### 6.1 Messages To The Site-Admininstrator / Administrator

- The site-administrator / admiinstrator get an e-mail once a new template project have been added to the template center.
- If the project owner submit her / his project for publication, the site-administrator / administrator get an e-mail about this event.

If the form field 'contactForCenter' in the templatnen center contains an e-mail address the above messages will be send to this address. Otherwise the e-mail goes to the e-mail address of the Plone site.

### 6.2 Messages To The Project Owner

- Once a workflow status of his project(s) change the project owner will get a message (e-mail) which inform her / him about this new status.
- Once the site-administrator / administrator of the Plone site adds a new product version to the form field 'Available Versions' the owner of a project will get an e-mail to inform her / him about this event. The message ask the owner to update the versions list of his project(s).