



Research Institute  
for Systematic Systems Development

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# OpenSpecs Administrators Manual

Requirements and Specifications capturing tool  
supporting a coherent and unified system development methodology  
based on interacting entities paradigm




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## Plone installation procedure

In OS Windows Plone installation package has name Plone.2.1.1.exe.  
Click it and follow instructions of installation procedure.

**Note.** Entered at installation login (usually, admin) and password gives you Plone manager rights.

## Managing Plone

General functions of Plone managing you can perform using  Plone controller<sup>1</sup> (see figure 1):

1. Start/stop Plone.
2. View Plone interface in a default web-browser.
3. View Zope Management Interface (ZMI)<sup>2</sup>.

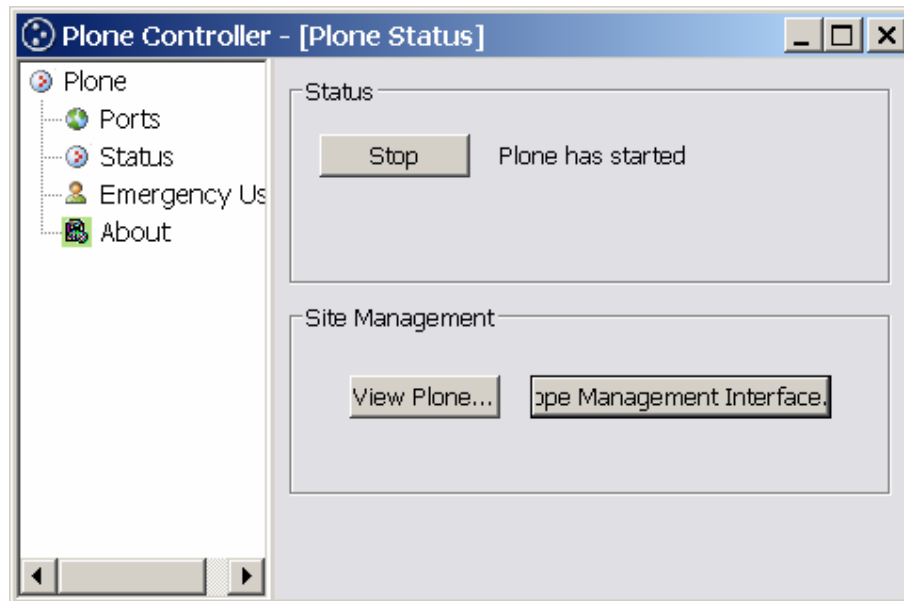


Figure 1. Plone controller

<sup>1</sup> You can also use runzope.bat in \Plone 2\Data\bin\

<sup>2</sup> You can also go to ZMI from Plone interface with URL [http:// <your site name>/manage](http://<your site name>/manage)

## Zope Management Interface

The ZMI is a management and development environment that allows you to control Zope, manipulate Zope objects, and develop web applications.

The Zope Management Interface represents a view into the Zope object hierarchy. Almost every link or button in the ZMI represents an action that is taken against an object.

On figure 2 showed manage page of ZMI (received from <http://localhost/manage>).

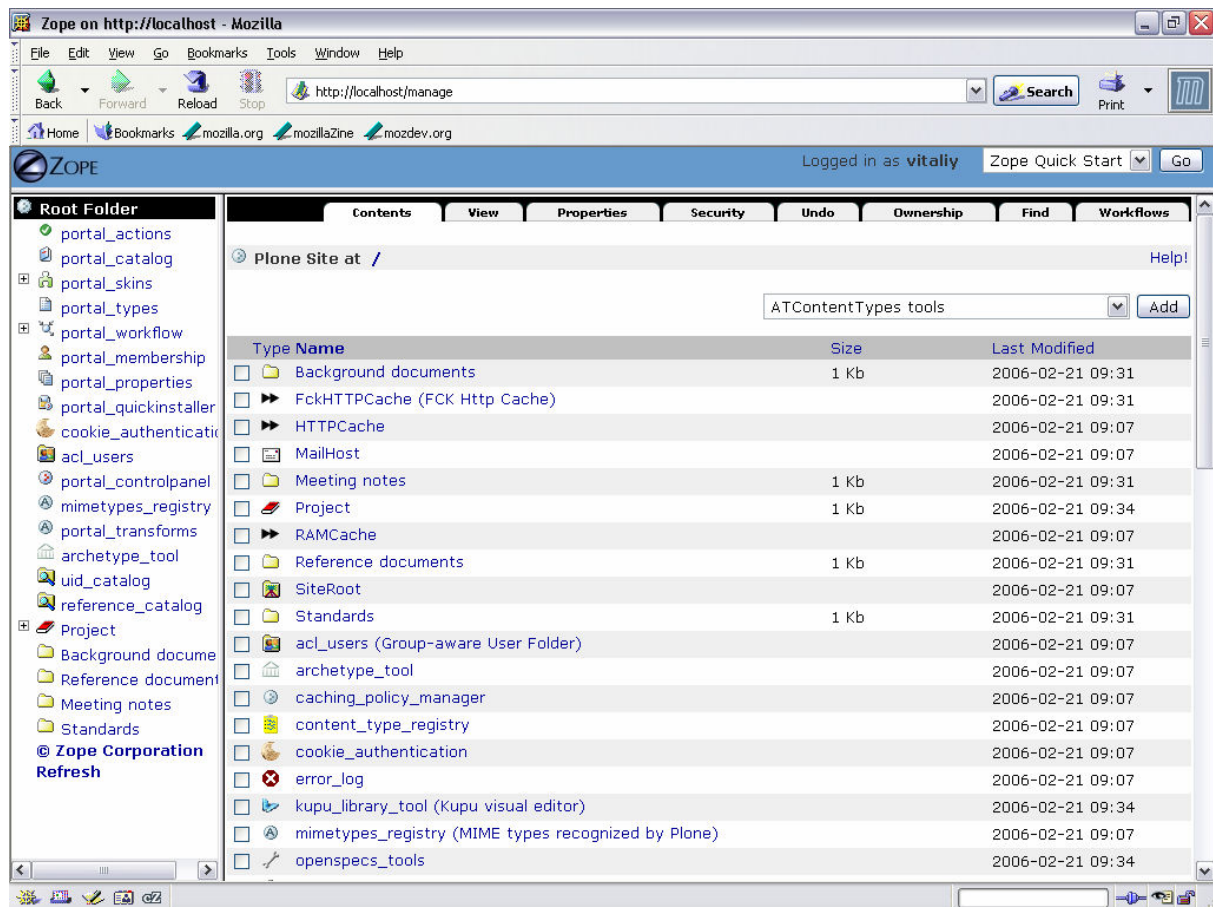


Figure 2. Zope Management Interface

Unlike a webserver like Apache or Microsoft IIS, Zope does not "serve up" HTML files that it finds on your server's hard drive. The objects that Zope creates are not stored in files that have an ".html" extension on your server's hard drive. There is no file hierarchy on your server's computer that contains all of your Zope objects.

Instead, the objects that Zope creates are stored in a database known as the ZODB, which stands for (unsurprisingly) the "Zope Object DataBase". "Out of the box", the



ZODB creates a file named "Data.fs" in which Zope stores its objects. The Zope Management Interface is the primary way that you interact with Zope objects that are stored in this database.

The ZMI uses **three browser frames**. The left frame is called the **Navigator Frame**, and using it you may expand and contract a view into the Zope object hierarchy. The right frame is called the **Workspace Frame**, and it displays a particular view of the object you're currently managing. The top frame is called the **Status Frame**, and it displays the name of the user who you are currently logged in as well as a select list that allows you to perform various actions.



## OpenSpecs installation procedures

All installation procedures suppose that you have Plone manager rights.

### *Installation OpenSpecs*

1. Unpack ATSchemaEditorNG in 'Products' folder inside Plone.
2. Unpack FCKeditor in 'Products' folder inside Plone.
3. Unpack OpenSpecs (or just copy 'OpenSpecs' folder) in 'Products' folder inside Plone.
4. Restart Plone.
5. Install ATSchemaEditorNG through portal\_quickinstaller in Zope Management Interface.
6. Install FCKeditor through portal\_quickinstaller in Zope Management Interface. Choose FCKeditor in field Content editor of your Personal Preferences page inside Plone.
7. Install OpenSpecs through portal\_quickinstaller in Zope Management Interface.

### *Upgrading OpenSpecs*

1. Clear catalog (to do it go to ZMI and choose Plone Catalog Tool, click Advanced Page and press clear catalog button).
  2. Uninstall old version of OpenSpecs (through portal\_quickinstaller in Zope Management Interface).
  3. Stop Plone.
  4. Delete OpenSpecs from Products folder inside Plone.
  5. Copy new version of OpenSpecs into Products folder inside Plone.
  6. Start Plone.
  7. Install OpenSpecs through portal\_quickinstaller in Zope Management Interface.
- Note.** Some browsers cache changes. To see real picture you have to clear browser cache.



## Import and export procedures

1. To import (or export) FULL Plone portal you need use port 8080. That means you need enter URL like: `http://localhost:8080`

2. Go to [Zope Management Interface](#)

You will see in “Folder at /” (it is the root Plone folder) button “Import/Export”. To export the Plone portal check it and press “Import/Export” button.

3. You will see new page with options:

- Download to local machine (will show standard save dialog).
  - Save to file on server (will save in **var** directory of your Plone installation).
- (There is also an option allowing saving in XML format).

4. To **import** object write the file name in field “Import file name”.

This is the file you previously had to move in "Import" directory of your Plone installation.

**Note.** Before project import you have to clean portal catalog (else you can see the errors like 'The id "Project" is invalid - it is already in use').

5. To import/export the OpenSpecs project only (it is file like “project.2006-01-25.9529210663”) go to [Zope Management Interface](#) from usual URL (e.g. `http://localhost/`).

6. You will see in “Plone Site at /” button “Import/Export”.

The form for Project Import/Export is the same with Portal Import/Export.

**Note.** You cannot import in Plone the database filled in other version of OpenSpecs.



## Virtual hosting

Virtual hosting is a way to serve many web sites with one Zope server.


**Virtual Host Monster** allows you to customize the URLs that are displayed within your Zope application, allowing an object to have a different URL when accessed in a different way. This is most typically useful, for example, when you wish to "publish" the contents of a single Zope Folder (e.g. /FooFolder) as a URL that does not actually contain this Folder's name (e.g. as the hostname `http://www.foofolder.com/`).

The Virtual Host Monster performs this job by intercepting and deciphering information passed to Zope within special path elements encoded in the URLs of requests which come in to Zope. If these special path elements are absent in the URLs of requests to the Zope server, the Virtual Host Monster does nothing. If they are present, however, the Virtual Host Monster decipheres the information passed in via these path elements and causes your Zope objects to generate a URL that is different from their "default" URL.

To use it go to ZMI with port 8080. That means you need enter URL like:

`http://<your site name>:8080/manage`

Choose:

 [virtual\\_hosting](#) and click Mapping tab

**Note.** You don't need to use this tab if you are using Apache or some other front-end server to rewrite requests. This is only for simple virtual hosting in a bare Zope server

Each line in the form represents a path mapping for a single host (host/path), or a set of hosts (\*.host/path).



## Administering Users

One of the most common tasks you'll need to do as an administrator of a Plone site is to deal with the members of your site. Administration usually involves recovering passwords and changing member rights. The key concepts in Plone are users and their roles.

### Users

Each person visiting a Plone site is referred to as a user.

The user may or may not be authenticated by Plone, and users who are not authenticated are called anonymous users. Users who are authenticated are logged into an existing user account.

Anonymous users are the lowest level of users in that they usually have the most restrictions. Once users log in, they gain the roles their accounts give them.

### Roles

A Plone site has a series of roles; a role is a logical categorization of users. Instead of setting every user's permissions individually, each role is assigned permissions individually. Every user can be assigned from zero to many roles; for example, a user can be a member and a manager.

A Plone site has five predefined roles, split into two groups: assignable roles and not-assignable roles. Assignable roles are roles you can give to users so that when they log in, they have this role. Not-assignable roles are roles you don't grant specifically to a user but that occur within a Plone site. For example, you don't assign the anonymous role to a user.

#### **The following are the not-assignable roles:**

**Anonymous:** This is a user who hasn't logged into the site. This could be a user who has no account or one who has merely not logged in yet.

**Authenticated:** This role refers to any user who is logged into the site, whatever their role. By definition a user is either anonymous or authenticated; the two are mutually exclusive. Because the authenticated user doesn't provide much in the way of granularity, it isn't recommended for most applications.

#### **The following are the assignable roles:**

**Owner:** This is a special role given to users when they create an object. It applies to a user for that object only; the information is stored on the object. You don't normally explicitly assign someone as an owner. Plone does that for you.

**Members:** This default role for a user who has joined your site. Anyone who joins using the join button in the Plone interface has this role.

**Reviewer:** This is a user with more permissions than a member but less than a manager. Reviewers are users who can edit or review content entered by a member; they can't change the site's configuration or alter a user account.

**Manager:** Managers can do almost anything to a Plone site, so you should give this role only to trusted developers and administrators. A manager can delete or edit content, remove users, alter a site's configuration, and even delete Plone site.

You can manage new users by preferences → Users and Groups Administration form

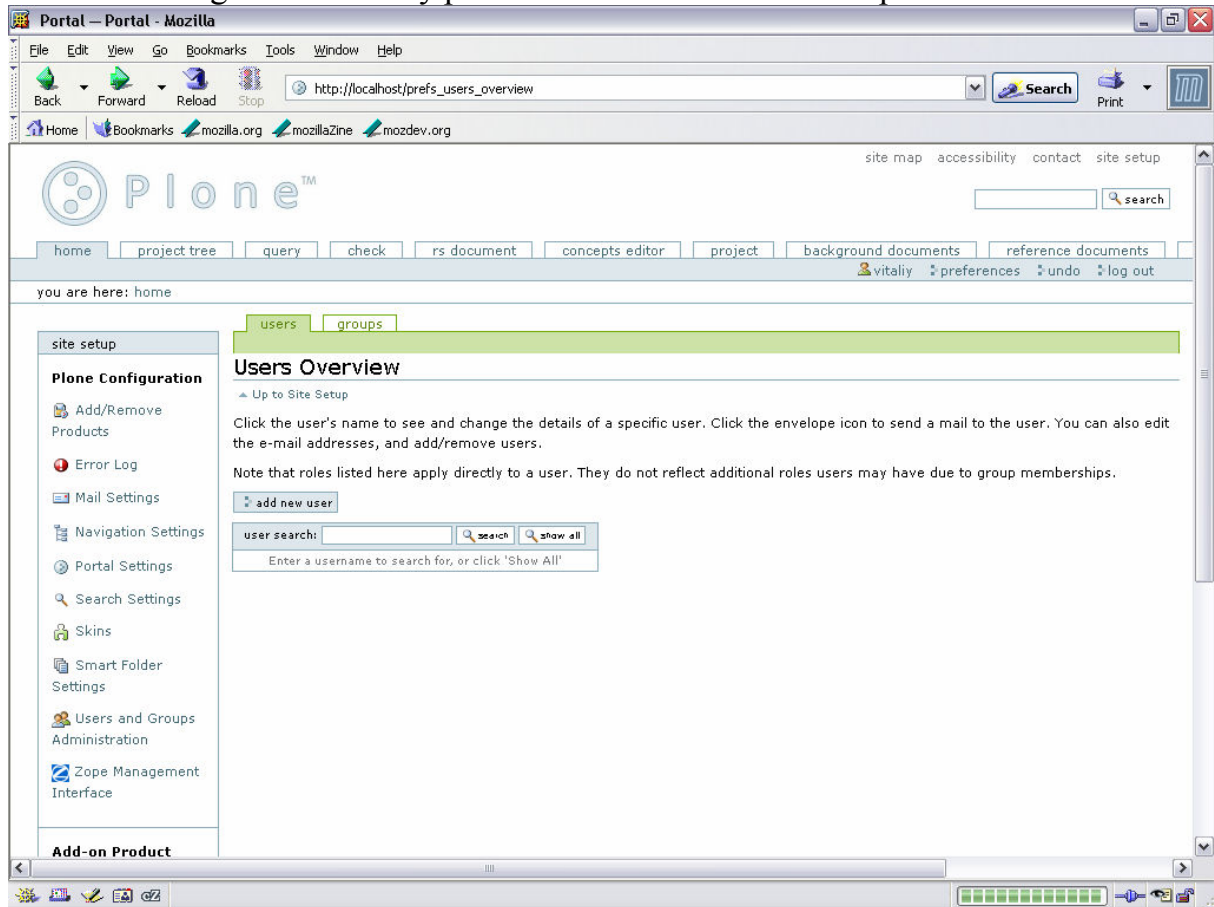


Figure 3. Users and Groups Administration form

## Workflows managing

*Workflow* is a chain of actions or events that occurs on something to achieve an objective. E.g. each content item of OpenSpecs has status which reflects progress in time of concepts development:

Status IS

In_Work OR	// On progress of elaboration
Frozen_for_Review OR	// To be discussed before approving
Frozen_and_Approved	// Accepted as system attribute

So each content item has workflow. Workflow standardizes the way of thinking about RS changes.

Each Plone content item has own standard workflow: private, publish, submit.

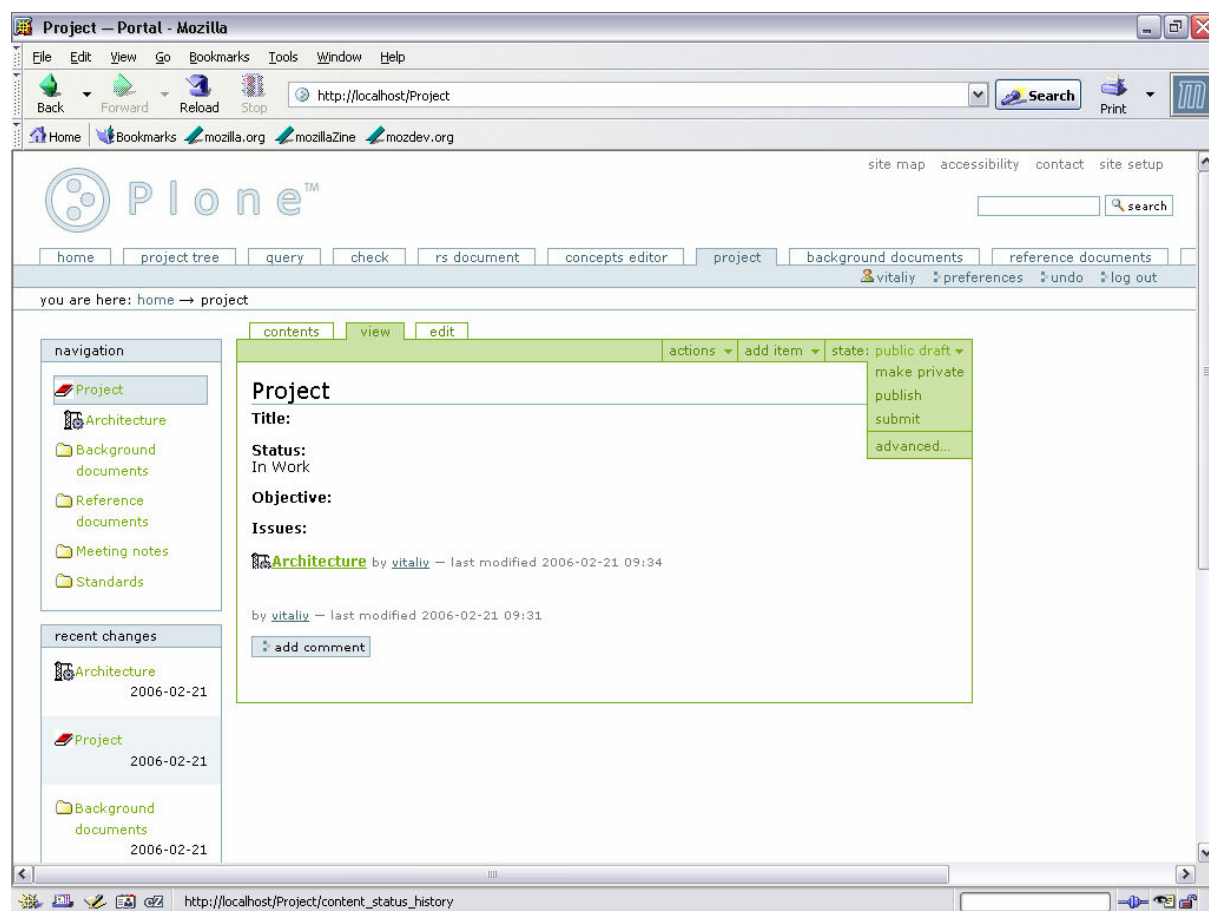


Figure 3. Managing workflows

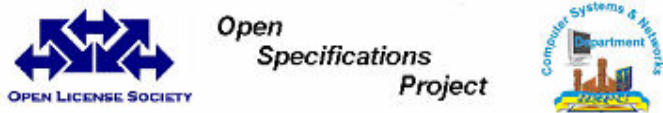
## Changing Plone interface

Changing logo image of Plone

Standard logo of Plone is:



You can change it as you want e.g. on:



To do it go to ZMI ([Zope Management Interface](#))

Choose [portal\\_skins \(Controls skin behaviour \(search order etc\)\)](#).

Choose [plone\\_images](#).

Choose [logo.jpg \(Plone\)](#).

Press **Customize** button (this moves [logo.jpg](#) image from

[/portal\\_skins/plone\\_images/](#) to [/portal\\_skins/custom/folder](#)).

Press **Browse** button to select new logo image file from your local computer.

Press **Upload** button to update the contents of the image.

**Note.** Some browsers cache changes. So to see new image you have to empty browsers cash.