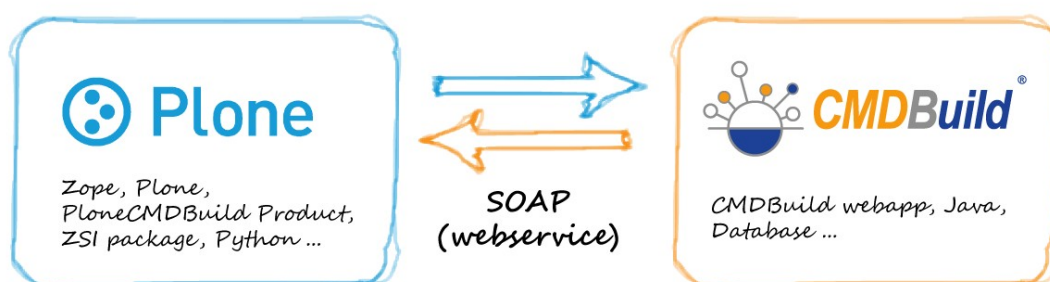


Tecnoteca srl

# PloneCMDBuild

Plone3 Installation guide



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# 1. Introduction

## 1.1 CMDBuild – open source configuration and management database

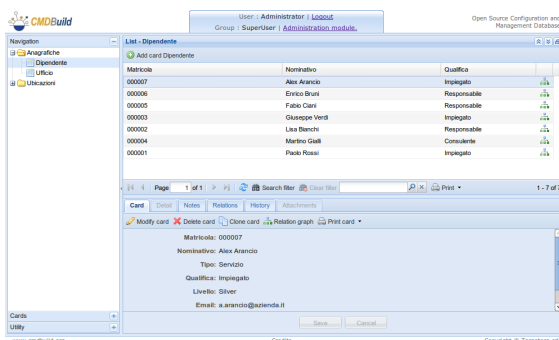
CMDBuild is a configurable web application to model and manage a database containing assets (CMDB stands for "Configuration and Management Data Base") and handle related workflow operations.

The aim is to let the operators have full control of the assets used, knowing exactly composition, dislocation, functional relations and history.

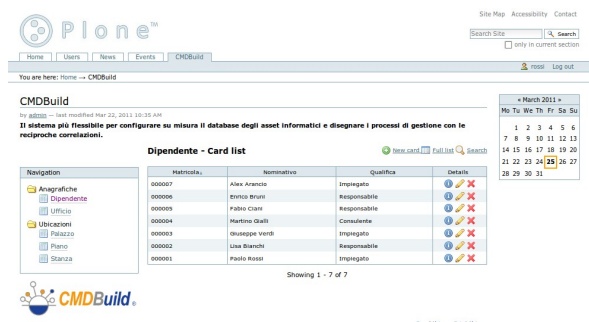
For more informations on CMDBuild please visit [www.cmdbuild.org](http://www.cmdbuild.org)

## 1.2 PloneCMDBuild – Plone 3 product

PloneCMDBuild is a Plone 3 product that interacts with a CMDBuild installation through webservices and allows you to view/edit/delete CMDBuild data (according to user permissions).



*Card list view in CMDBuild*



*Card list view in Plone*

PloneCMDBuild features:

- Dynamic menu: navigation matches CMDBuild settings
- Card management: list, search, detail, create, edit, delete
- Workflow process: list, detail, start new process and add attachment
- Supported locales: Italian, English
- Module parameters available in plone control panel

## 2. Configure CMDBuild 1.3

- Create a "webservice" user
- Add the "webservice" user to the "serviceusers" defined in "/cmdbuild/WEB-INF/conf/auth.conf".
- Edit "/WEB-INF/classes/org/cmdbuild/application-context.xml" and uncomment section "Fix for non-standard webservice clients" (this is actually a ZSI-related fix)
- Restart cmdbuild
- Add the "webservice" user to a group (ie "Users").  
This will be the default group for the Plone users that do not have a CMDBuild account.
- Create a menu entry for the group with the classes and processes you'd like to show in the navigation menu
- Check group permissions (read / write) for the entries you put in the menu
- (Optional) Define a user-filter for your processes.  
Processes can be configured to filter data according to the user that is actually using the product (ie the ticket owner).  
With this feature enabled the user will see only his tickets and will be able to add new ones without specifying the owner (automatically detected).  
This is the sql syntax to add a filter on the "Richiedente" attribute - the ticket owner - for the process called "GestioneModifiche" (mapping through attribute "Email" from "Person" class):

```
INSERT INTO "Metadata"(  
  "IdClass", "Code", "Description", "Status", "Notes")  
VALUES ("Metadata":regclass, 'GestioneModifiche.Richiedente',  
  'org.cmdbuild.portlet.user.id', 'A', 'Person.Email');
```

### 3. Install the custom ZSI python package

The ZSI is a Python package that provides an implementation of SOAP messaging. The package is included in the “extra” folder:

“tecnoteca.plonecmdbuild/tecnoteca/plonecmdbuild/extra/ZSI-2.1-a1.tar.gz”

Untar and install package with the python2.4 used to run zope:

```
tar zxvf ZSI-2.1-a1.tar.gz
cd ZSI
sudo python2.4 setup.py install
```

#### 3.1 A custom ZSI, why?

The included version of ZSI has been patched to handle "multipart/related" messages coming from Apache CXF (CMDBuild).

If you want to take a look at the changes check out the patch file

“tecnoteca.plonecmdbuild/tecnoteca/plonecmdbuild/extra/cmdbuild-zsi.patch”.

## 4. Plone product installation

### 4.1 Installing with buildout

Unzip the product inside the “plone3/src” folder.

Add “tecnoteca.plonecmdbuild” to the list of eggs to install, e.g.

```
[buildout]
develop =
    ...
    src/tecnoteca.plonecmdbuild

[instance]
eggs =
    ...
    tecnoteca.plonecmdbuild
```

Tell the instance recipe to install a ZCML slug:

```
[instance]
recipe = plone.recipe.zope2instance
zcml =
    ...
    tecnoteca.plonecmdbuild
```

Re-run buildout, e.g. with:

```
./bin/buildout -N
```

Start zope

```
./bin/instance fg|start (fg = debug, start = normal)
```

### 4.2 Plone 3 quickinstaller

Login to the ZMI:

```
http://www.mywebsite.it/manage\_main
```

Select ***portal\_quickinstaller*** and install the **Plone CMDBuild** product.

### 4.3 Configure product properties

Go to the control panel (site setup) of the plone site:

`http://www.mywebsite.it/plone_control_panel`

In the “Add-on Product Configuration” section you should click on the **Plone CMDBuild** product, and then configure the parameters according to your installation:

- **Webservice url**  
CMDBuild webservice url (ie: `http://localhost:8080/cmdbuild/services/soap/Private/`)
- **Webservice user**  
The username defined in `auth.conf`
- **Webservice user password**  
Password for the webservice user
- **Lookup DMS**  
The Alfresco lookup name defined in CMDBuild (required for attachments)
- **Results per page**  
Number of results per page in list mode

### 4.4 Create a CMDBuild object in Plone

Navigate to the folder where you want to create the CMDBuild object.  
Click on “Add new” and select “CMDBuild module”, insert a title and a description.  
Congratulations, you should have now a working Plone-CMDBuild installation!

## 5. User mapping - how it works

The Plone username is used to authenticate to the CMDBuild system.

The Plone username might be of a user that:

1. **does not have** a CMDBuild account:

User acts as a guest using the webservice user.

Consequently, the privileges and the navigation menu are those of the webservice user group.

Anyway, processes can be configured to filter data (ie: the ticket owner) using the metadata feature.

Thanks to metadata it's possible to match the current Plone username with a class/attribute value defined in CMDBuild.

If no specific menu is defined for the group, the user will see the default menu filtered according to the permissions of the group.

2. **has** a CMDBuild account:

This time, the user may belong to:

1. **one group:**

The user is authenticated with his group and the navigation menu used will be the one defined for that group.

If no specific menu is defined for the group, the user will see the default menu filtered according to the permissions of the group.

2. **multiple groups:**

User must have a default group, otherwise a "multiple group" error is raised.

If a default group is defined, the user is authenticated with his group and the navigation menu used will be the one defined for that group.

If no specific menu is defined for the group, the user will see the default menu filtered according to the permissions of the group.



## 6. Notes

### 6.1 Session

Plone user session is used to save some data and limit redundant webservice calls; the informations actually stored in the session are:

- Navigation menu
- Flow status lookup
- CMDBuild user card (when metadata found)
- Search form (allows navigation through search results)

Now, suppose you want to reset your session because you changed the navigation menu in CMDBuild.

You have three options:

1) logout / login from Plone

- or -

2) add "reinit" to the url:

[http://localhost:8080/plone\\_site/cmdbuild/reinit](http://localhost:8080/plone_site/cmdbuild/reinit)  
note: "cmdbuild" is the name of the object

- or -

3) click the reinit tab - users allowed to edit the Plone object can use this shortcut

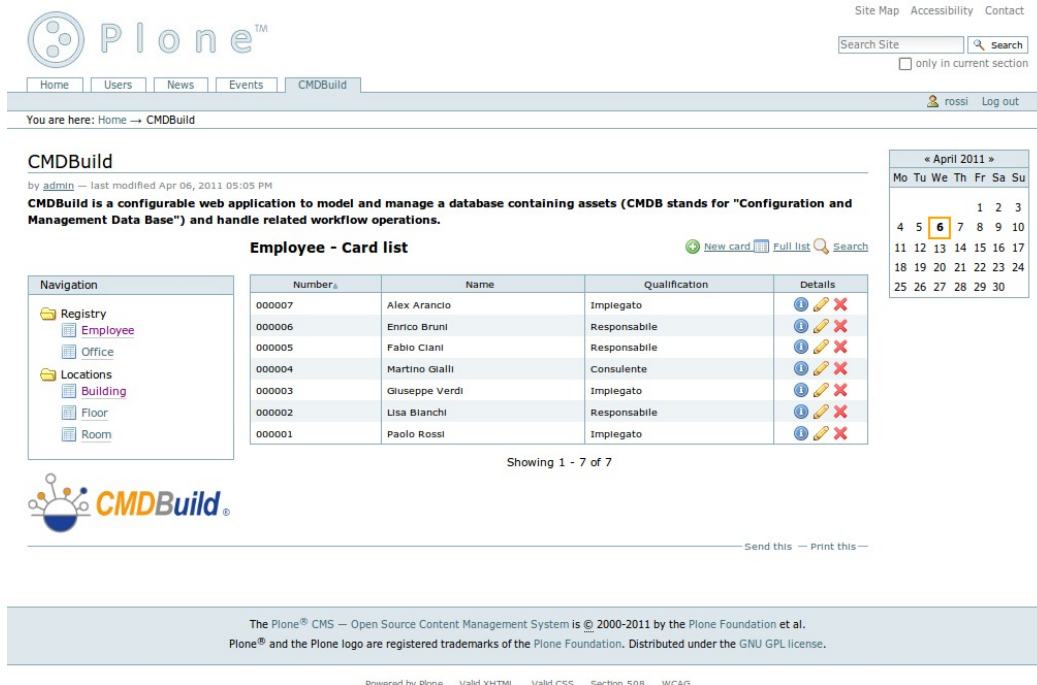


### 6.2 Logging

All the webservice calls and responses are written in a separate log file "plonecmdbuild.log" inside folder "plone/parts/instance/log".

The logger rotates 5 files (2MB for each file).

## 7. Screenshots



Site Map Accessibility Contact

Search Site  Search

☐ only in current section

rossi Log out

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### CMBuild

by [admin](#) — last modified Apr 06, 2011 05:05 PM

**CMBuild is a configurable web application to model and manage a database containing assets (CMBD stands for "Configuration and Management Data Base") and handle related workflow operations.**

[New card](#) [Full list](#) [Search](#)

Navigation	Number	Name	Qualification	Details
Registry	000007	Alex Arancio	Impiegato	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Employee	000006	Enrico Bruni	Responsabile	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Office	000005	Fabio Ciani	Responsabile	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Locations	000004	Martino Gialli	Consulente	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Building	000003	Giuseppe Verdi	Impiegato	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Floor	000002	Uisa Bianchi	Responsabile	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>
Room	000001	Paolo Rossi	Impiegato	<a href="#">i</a> <a href="#">p</a> <a href="#">x</a>

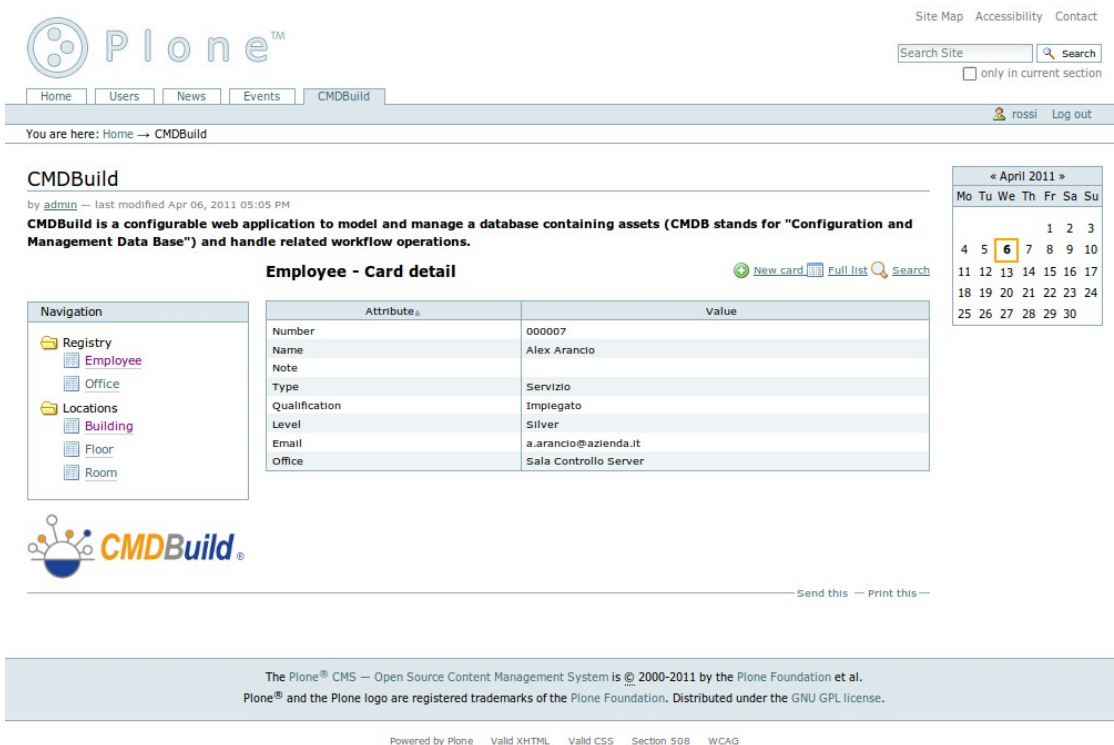
Showing 1 - 7 of 7

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### Card list



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**CMBuild is a configurable web application to model and manage a database containing assets (CMBD stands for "Configuration and Management Data Base") and handle related workflow operations.**

[New card](#) [Full list](#) [Search](#)


Navigation	Attribute	Value
Registry	Number	000007
Employee	Name	Alex Arancio
Office	Note	
Locations	Type	Servizio
Building	Qualification	Impiegato
Floor	Level	Silver
Room	Email	a.arancio@azienda.it
	Office	Sala Controllo Server

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### Card detail



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Registry
 

- Employee
- Office

Locations
 

- Building
- Floor
- Room



Card detail
 

Number
 

String format

Name
 

String format

Note
 

Text format

Type

Qualification

Level

Email
 

String format

Office


« April 2011 »
 

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
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	

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## Card form



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Registry
 

- Employee
- Office

Locations
 

- Building
- Floor
- Room



Employee - Card search
 

Search fields
 

Number
 

Contains

Name
 

Contains

Qualification
 

Equals

« April 2011 »
 

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
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	

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## Card search

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CMBuild

by admin — last modified Apr 06, 2011 05:05 PM

CMBuild is a configurable web application to model and manage a database containing assets (CMBuild stands for "Configuration and Management Data Base") and handle related workflow operations.

**Gestione modifiche - Card form**

New process Full list Search

Navigation

- Apparati di rete
- Monitor
- Gestione modifiche

CMBuild®

Card detail

**Richiedente**

**Descrizione della modifica**

String format

**Motivazione della richiesta**

Text format

**Conseguenze se non eseguita**

Text format

Attachments

**Attachment n. 1** Browse...

Attachment description

**Attachment n. 2** Browse...

Attachment description

**Attachment n. 3** Browse...

Attachment description

More attachments

Submit Reset

Send this — Print this —

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## Process start

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Site Setup

**Plone Configuration**

- Add-on Products
- Calendar
- Collection
- Content Rules
- Errors
- HTML Filtering
- Language
- Mail
- Maintenance
- Markup
- Navigation
- Search
- Security
- Site
- Themes
- Types
- Users and Groups
- Visual editor
- Zope Management Interface

**Add-on Product Configuration**

- Plone CMBuild

**Product settings**

Up to Site Setup

Parameters configuration

**Webservice URL**

(e) http://localhost:8080/cmbuild/services/soap/Private/  
http://localhost:9191/cmbuild

**Webservice username**

Webservice username  
webservice

**Webservice password**

Webservice user password  
webservice

**Dms lookup**

Dms lookup name  
cmbuildCategory

**Results per page**

Number of results per page  
10

Save Cancel

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## Product settings