Benefits of using Plone in the Institute of Mathematics, UNAM



Gildardo Bautista gil@matem.unam.mx



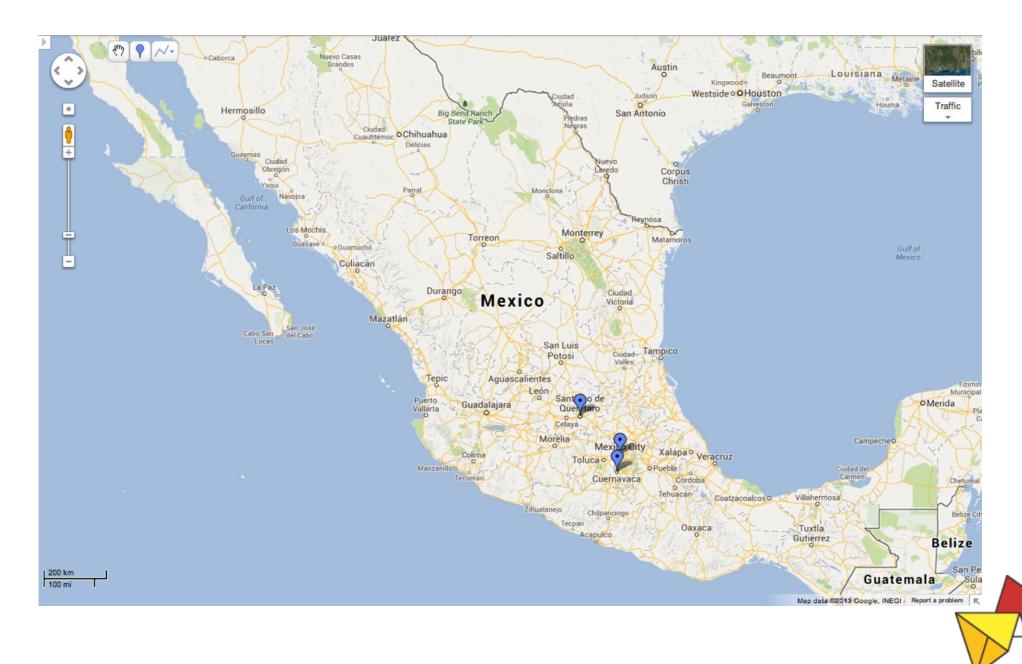
Who are we?

- UNAM (National Autonomous University of Mexico)
- The University Includes high-schools, undergrad colleges, graduate schools, research Institutes
- Over 40% of Mexican research takes place in the University
- We are an Institute, which main activity is research and teaching



Who are we?

The institute have three campuses that are located in different states.



Instituto de Matemáticas

Users

- Researchers
- Postdoctoral
- Students
- Technician Staff
- Administrative Staff



Services

- Manage User personal information
- Provide researchers CV information management
- Generate individual activity reports
- Generate Institutional activity report



Services

- Manage expenses (travel, visitors)
- Manage application forms (students)
- Diffusion of academic activities
- Web site



Background

For some time (2006 - 2013) we have been using Plone as the main CMS for the Institute site.

- First version uses Plone 2.1
- Second version uses Plone 3
- Third version will use Plone 4.3



Why upgrade?

- Stability: codebase improvement and bugs fixing
- Functionality: new features, such as new editing tools and configuration options
- Support
- Add-on Products



Upgrade - Plone 2.1 to Plone 3

Some products were no longer maintained.

When this happens there are two options, maintain the product or look for a better one.

Replacing a products implies a migration step.

- custom script
- collective.transmogrifier



Upgrade - Plone 2.1 to Plone 3

Took too much time developing and testing custom scripts.

Collective.transmogrifier import and export data easily. New content is created in the Database (Data.fs) which takes some time.



Using Plone upgrade facilities saves you a lot of time.

Follow "Plone Upgrade Guide" instructions, they are very straightforward.



When a problem occurs during upgrade:

- Check log files
- Test without customizations
- Test without products
- Ask for help on a mailing list



- Take care of possible Local Persistent Utilities
 - wildcard.fixpersistentutilities
 - @@fix-persistent-utilities
- Products that leave persistent utilities

LinguaPlone

p4a.subtyper



Once the Plone upgrade pass, fix your products and add upgrade steps as necessary.

- profiles/default/metadata.xml
- configure.zcml (gerericsetup:upgradeStep)
- upgrades.py



User management

FacultyStaffDirectory

- It has principally been developed for personnel directories in educational institutions (Weblion).
- Provides content types for creating and organizing details of people.
- It integrates with Plone's users and group infrastructure.



User management

FacultyStaffDirectory ...

- It also provides several content types for grouping people: Classifications, Departments, Specialties and Committees.
- Supports an extension mechanism based on the archetypes.schemaextender library



Person

Basic Information: Id, Password, First Name, Last Name, Image, classifications, Departments

Contact Information: Email, Office Address, Office City, Office State, Office Postal Code, Office Phone

Professional Information: Biography, Web sites, Committees, Specialties

Employment Information: Hire Date, Termination Date



Person extender

- Gender, date of birth, ...
- Position history: Position, Start Date, Termination Date.
- Incentives: type, Start Date, Termination Date.
 - we use DataGridfield, DataGridFieldWidget to solve this user case



What do we have?

- We have a personnel Directory
- A person in the Directory is a Plone user
- We can show or hide information by classification
- Security levels for user data









Buscar en el Sitio

Buscar

solo en la sección actual

Acerca del IM

Comunidad

Investigación

Docencia

Divulgación

Actividades

Servicios Entrar

Usted está aquí: Inicio → Comunidad → Investigadores

- Comunidad
- Investigadores
- CU
- Cuernavaca
- PosDoc
- Técnicos Académicos
- Administrativos
- Becarios
- Becas y Plazas

Investigadores

Subir un nivel

Listado en tabla



Nils Ackermann



Gerardo Acosta



Marcelo Alberto Aguilar



Martha Gabriela Araujo



Hugo Arizmendi













What do we have?

We are interested in answer questions like:

How many researches do you have?

How many researches are women?

How many researches are older than 45 years old?

How many researches are men and older than 45 years old?

How many researches are men work in geometry and are less than 45 years old?



User ... things to improve

- Develop a generic tool to let us construct any question and answer
 - (All feed back is welcome)
- Better way to track positions history
- Better way to track incentives history
- Share user information between two or more Plones sites with the same setup (or more than one fsd per site?)



Curriculum Vitae

Include all reported activities such as publications (articles, proceedings, books, chapters in books), teaching(courses, thesis, tutorship), projects, academic awards, talks, etc...



CV Content types

- Article
- Books
- Courses
- Talks
- Conferences

- Software
- Committees
- Projects
- etc...
- 30 content types



Why not CMFBibliography

We need to report more items than CMFbiblioraphy has

We need more information on items

Article: finished, sent, accepted, published

is this article related to a project? which one?



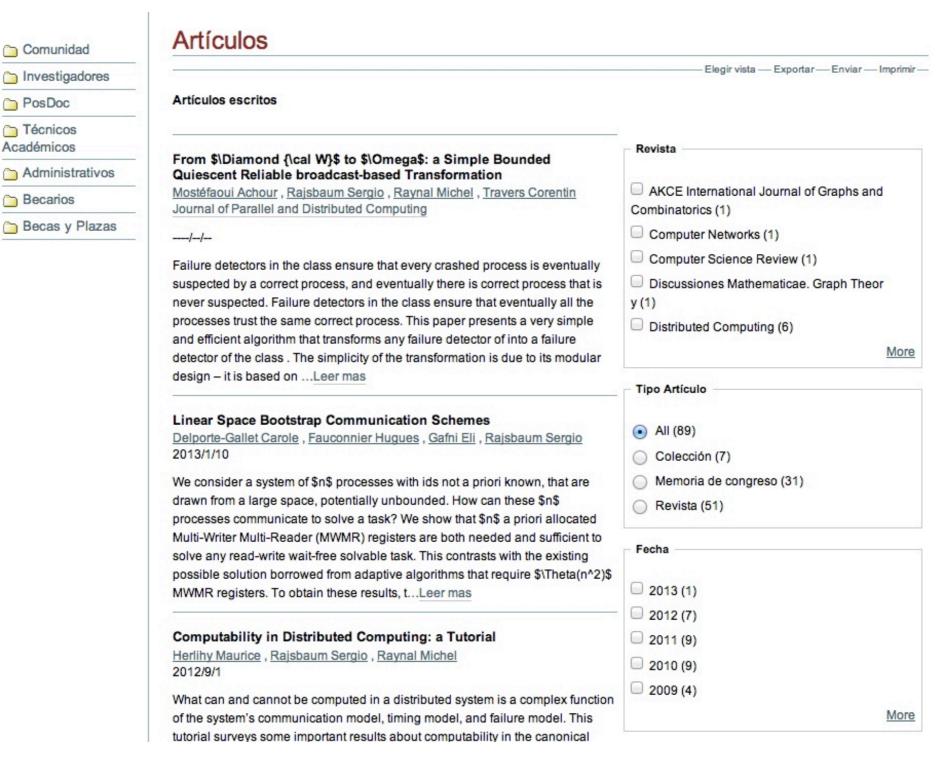
CV Views

Exhibit: Publishing framework for Data-rich interactive Web pages. MIT

EEA Faceted Navigation: very Powerful interface to improve search within large collection of items.



CV View





What do we have?

- Individual activity reports
- yearly reports
- Promotions reports
- Institutional activity report



What do we have?

- How many Articles do we published this year?
- How many Talks do we give this year?
- How many International/National Talks do we give this year?
- How many congress do we organize?
- How many projects are active this year?



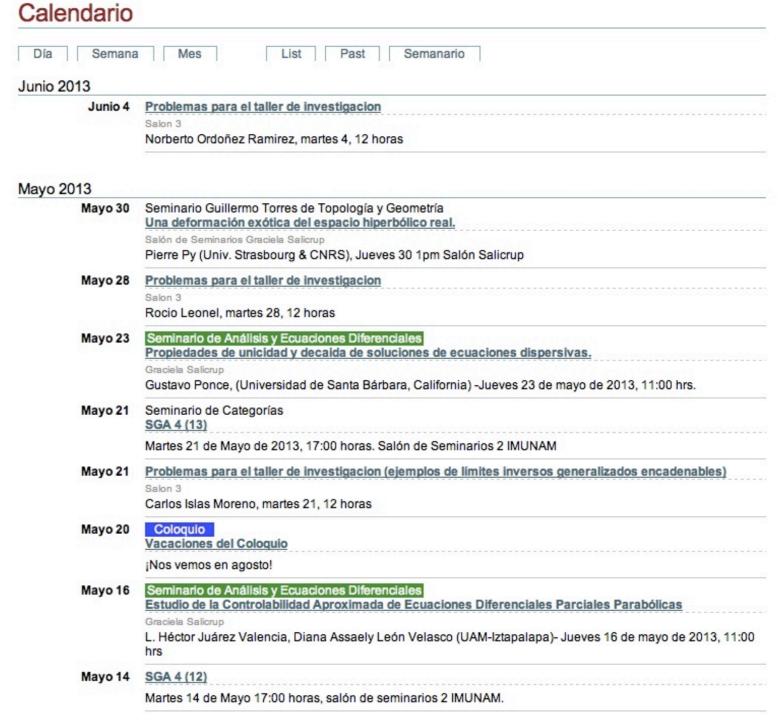
CV ... things to improve

- Clean Code
- Test Code
- Remove static lists
- Collaborate whit the community



Events: p4a.plonecalendar







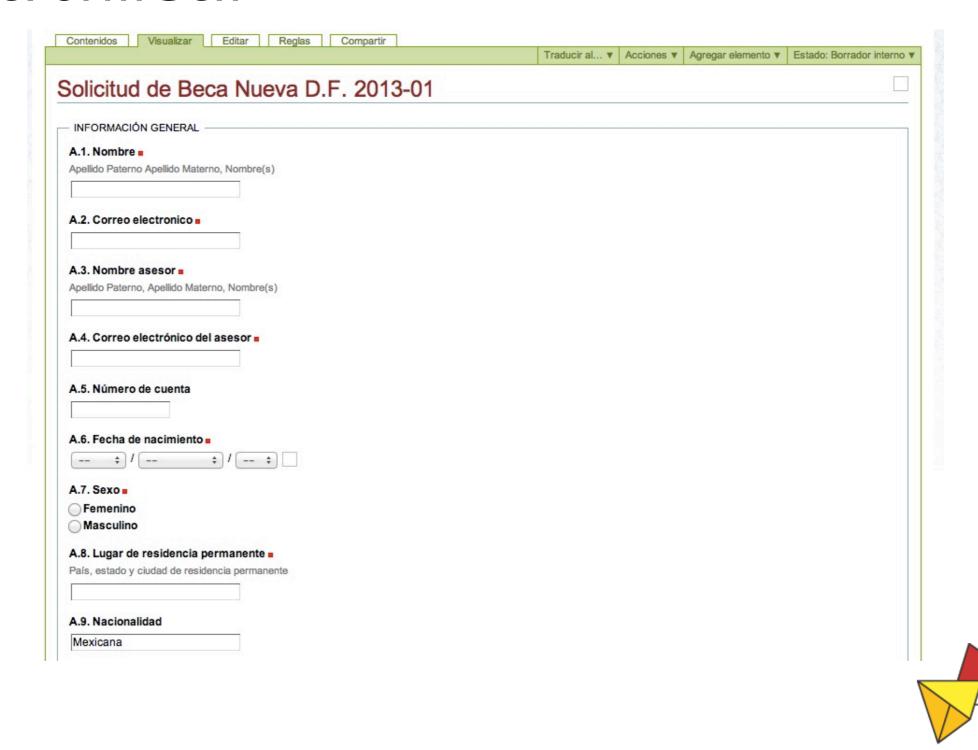
Events

Solgema.fullcalendar



Application Forms

PloneFormGen



Instituto de Matemáticas

Other packages

- Products.Collage
- Webcouturier.dropdownmenu
- Products.LinguaPlone



Pakages for Plone 4

- EEA.Daviz: data visualizations
- plone.app.multilingual
- collective.cover
- collective.mathjax



Plone in Mexico

Almost nobody uses Plone in universities of Mexico.

All sites should follow a similar theme.

The University of mexico has many sites that will benefit from Plone as it ships.

No site has Responsive Design.



Plone in Mexico

plonetheme.unam (Base on beyondskins.responsive)

