

How To Create A New Portal Type

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This tutorial explains how to create a new portal type in ERP5. In our example we will create the Discussion Post type-a new Content type in Discussion Threads Module.

Agenda

- How to create a Discussion Post type
- How to allow Content types
- How to create Threads and Posts

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Add Base Type

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We have seen previously how to create a new module. It is now time to see how to create the new portal type which can be contained by the module.

You must go to the **portal type list**, in order to access that first **put your instance ID and then /portal_types/view** like it's written on the slide. You will then be able to see all portal types which have already been created in your ERP5 instance. They are used by the modules which are installed on your instance.

If you filter the list of available Portal Types by putting %Discussion% in the ID listbox, you will see the previously created documents. We have the Discussion Thread Module, which is a **folder**, then a Discussion Thread which is an ERP5 **default** document. We need to create the **"Post" portal type**.

Once you are on this list, you can create a new Base Type. **Click on "Action..." menu and choose "Add Base Type"**.

Edit portal type

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Once the portal type has been created, you must now set up its properties. The **Base Type ID** is "Discussion Post". The **Class** is the class that your Discussion Post will inherit from. In our case we will use "XMLObject" which stands for ERP5 base XML objects. The **Property Sheets** is the property which will define the type of the object, and give it all its default values and properties. In our case we will select "XML object". If required we could have add more property sheets.

Once the changes have been made don't forget to save them thanks to the floppy disk icon.

Create View action for the object to be rendered

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We now have to create an action for the object to be rendered. Create an action named "View" by clicking on the menu **"Actions..." and then "Add action information"**. It's the default action which is called when the object has to be shown on a page.

Here the two important values are Action and Permission. **Action** defines what form will be used to render the object and **Permission** defines what permission will be associated with this action. Here we use **string:\${object_url}/DiscussionPost_view** as Action. Also **set Category to object_view**.

When this action is added, all the Discussion Post object acquire a **method** View. This method is the one which is called when you try to display the object with a web browser. With these settings, ERP5 will call the **DiscussionPost_view form** in a tab call View if you put the "View" permission on the action.

We now need to **create the DiscussionPost_view form**, otherwise ERP5 will raise an error when we will try to view a Discussion Post object.

Create the view well-rendered

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In order to **create the DiscussionPost_view form**, we have to access to Portal Skin Folder of the Discussion Threads module. Every code about how to render the elements of your module is contained in the **Portal Skin Folder of this module**. If you remember the Portal Skin Folder associated with the **Discussion Threads module** that you created before was named **erp5_forum**. You should access it through a URL like `INSTANCE_ID/portal_skins/erp5_forum/manage_main` (manage_main allows you to access the zope management interface - ZMI).

This folder contains all the elements of your module. You can see that ERP5 has put here the views of your Discussion Thread and Discussion Thread Module objects: they were automatically created when you created the module. You can put many other things such as scripts, templates, CSS, images, etc.

In our case we need another view form, very similar to the one which have been created for the Discussion Thread. This is why the fastest way to create the view is to **copy/paste** the existing view.

Copy/paste the "DiscussionThread_view" and rename it to "DiscussionPost_view".

Edit the view renderer

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Once the form has been renamed, we must change some settings.

You can easily do the basic operations on each object if you access it by the **/manage method**. Every object in erp5 can be managed. For the basic objects you will be able to **add/delete/modify contents** of this object and for advanced object such as workflows, there will be special actions to modify them.

In ERP5 titles are for "User Only" usage, you can't use titles in any script because it's just a rendering option (see coding crimes). You can correct the title of the form to "Discussion Post".

Carefully correct the **Form Name** and the **Title** in **Settings tab** of the DiscussionPost_view form and **click on "Change"**.

Allowed Content Types

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Before creating a Post object, you must **verify that "Discussion Post" is a kind of object which can be contained in your Thread-the existed object in your Discussion Threads module**.

You must go back on the **Discussion_Thread Portal Type** in order to check it. The URL should be `INSTANCE_ID/portal_types`.

In the **Allowed Content Type** field, you must write "Discussion Post" and save the document. It will then **allow your Discussion Thread to contain Posts**. Portal types are allowed to contain any other objects, but most of the time content types are filtered.

Create Thread and Post

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At this step of the Tutorial, you must have a "Discussion Threads" Module in which you can create "Discussion Thread" documents, in which you can also create "Discussion Post" documents.

Go to **Modules tab** (as shown in the slide) and choose **Discussion Threads**.

After that, **click on "Action..." then choose "Add Discussion Thread"** (In that module you can see a **list of Threads** which have been created).

From a Discussion Thread document, **click on "Action..." then choose "Add Discussion Post"**. You then land on a new post, to which you can give a title.

If you go back to the Discussion Thread document, you cannot see the **list of Posts** which have been created yet. We will now see how to **associate a workflow to the Discussion Thread and Posts**