

Plone Content Rules Cheat Sheet

Triggers (When does the rule activate?)

A trigger is the event that starts a content rule. Here are the most common ones:

- **Content is added** – When a new item is created.
- **Content is modified** – When an existing item is edited.
- **Content is removed** – When an item is deleted.
- **Content is moved** – When an item is relocated within the site.
- **Content is copied** – When an item is duplicated.
- **Content is transitioned** – When an item's workflow state changes (e.g., from 'Private' to 'Published' or vice versa).
- **Comment is added** – When someone adds a comment to a page.

Conditions (When should the rule apply?)

Conditions allow you to limit when a rule runs. These are some key options:

- **Content type is...** – Only apply to certain types (e.g., only for News Items).
- **Workflow state is...** – Only trigger if content is in a specific state (e.g., 'Published' content only).
- **Path is...** – Only apply if the content is in a specific folder (e.g., '/blog/').
- **User has role...** – Only trigger if the user is an Editor, Contributor, etc.

- **File extension is...** – Only apply to specific file types (e.g., PDF uploads only).
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Actions (What happens when the rule runs?)

Actions define what happens when the rule is triggered:

- **Move content to another folder** – Automatically sort new content into the right place.
 - **Change workflow state** – Publish, archive, or return content to draft.
 - **Send an email notification** – Alert editors, admins, or teams.
 - **Copy content** – Duplicate an item to another section.
 - **Delete content** – Automatically remove outdated or unnecessary content.
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Example Rules

1. Publish Notification Rule

- **Trigger:** *Content is transitioned* – when workflow state changes from 'Private' to 'Published'.
- **Action:** Send an email notification to the editor team.

2. Event Wrap-Up Rule

- **Trigger:** *Content is transitioned* – when workflow changes from 'Published' to 'Private'.
- **Condition:** Content type is 'Event'.
- **Action:** Move the item to the 'Past Events' folder.

3. Editor Alert Rule

- **Trigger:** *Content is modified* – when a page is updated.

- **Condition:** Content type is 'Page'.
- **Action:** Send an email to the site administrator.

4. Auto-Filing Rule

- **Trigger:** *Content is added* – when a new item is created.
- **Condition:** Path is '/news'.
- **Action:** Move the item to the '/news/published' folder.

5. Press Release Review Rule

- **Trigger:** *Content is added* – when a new item is created.
- **Condition:** Content type is 'Press Release'.
- **Action:** Change workflow state to 'Needs Review'.

6. PDF Collector Rule

- **Trigger:** *Content is added* – when a new file is uploaded.
- **Condition:** File extension is '.pdf'.
- **Action:** Move it to the '/resources/pdfs' folder.

For Advanced Users

If you're comfortable using TALES expressions or custom scripts, Plone's content rules engine can go even further. Here are a few advanced rule ideas to explore:

- **Auto-archive by age** – Move or unpublish items older than 6 months using a TALES condition like `python: (context.creation_date - DateTime()).days > 180`.
- **Stuck-in-draft reminders** – Trigger notifications when items stay in 'Draft' too long.

- **Auto-tag based on content** – Use a script to apply tags based on body text or keywords.
- **Dynamic metadata enforcement** – Fill in empty fields automatically using a script.
- **Custom approval routing** – Tailor notifications and workflows based on department or author role.

These require a bit more setup but open the door to powerful, tailored automations.

✨ Final Thoughts

Plone's content rules are powerful tools that can save time, reduce errors, and keep your website organised. Whether you're automating basic tasks or setting up straightforward workflows, these rules help you **work smarter, not harder**.

Want to experiment with content rules on your own? Start with small automations, test them, and watch how they make your content management more efficient!

🚀 **Happy automating!**