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NSM Publish Plus v1.1.1

Improve your ExpressionEngine workflow with drafts, revisions, notes and fine-grained member publishing privileges.

Collaborative workflow with entry drafts, live in-template previews, workflow state, revision notes and advanced email notification.

Need to assign weblog posting privileges to members rather than groups? Create, proof and approve existing entry drafts before they go live? Leave notes for fellow editors and publishers? NSM Publish Plus is the can't-live-without extension for collaborative publishing!

Purchase a commercial license for a single domain (unlimited sub-domains) and receive email and forum support while feeling good about supporting independent ExpressionEngine developers.

Only ~~\$149.95~~ **\$89.95 (holiday special)** per license. [Register to purchase!](#)

Entry state

Workflow state will not restrict an entry being shown in a `{weblog:entries}` tag. The `entry_state` tag restricts your publishing workflow.

Entry state:

Drafts

Drafts are just like [revisions](#) except changes are not made live until they have been published.

| State | ID | Title | Date |
|-------|-----|---------|---------------------|
| | 281 | Draft 6 | 2009-01-19 02:15 PM |
| | 280 | Draft 5 | 2009-01-19 02:15 PM |
| | 279 | Draft 4 | 2009-01-19 02:15 PM |
| | 278 | Draft 3 | 2009-01-19 02:14 PM |

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Enjoy NSM Publish Plus v1.1.1?

Bookmark and share it with others.



1. Overview [Top](#)

NSM Publish Plus is a [Multi-Site Manager](#) compatible [ExpressionEngine extension](#) that improves [ExpressionEngine's](#) native publishing workflow.

1.1. The problem [Top](#)

There is no doubt that [ExpressionEngine](#) is an excellent publishing system, but it does lack workflow concepts such as drafts, live previews and fine grain member publishing permissions. These omissions make it difficult to implement a smooth collaborative publishing workflow.

The major issue most users have with the current [ExpressionEngine](#) workflow is that there is only a simple approval process for entries. The recommended way requires the publisher to switch the status of an entry between open and pending while editing. This technique is fine for unpublished entries, but can "break" the site if a previously published entry is being edited; ie: the entry is not rendered in the default `{weblog:entries}` tag unless the status parameter is set accordingly.

What is needed is a way to have the most recent, open version of an entry visible on the site, but have the most updated version (draft) awaiting approval and hidden from general viewing until approved. The draft should also be available to [preview in it's final template context](#). Publish Plus adds this functionality plus much much more.

1.1.1. Common publishing scenarios NSM Publish Plus solves [Top](#)

Time for a couple of common publishing scenarios which are not possible with a standard [ExpressionEngine](#) install. They are all possible with NSM Publish Plus:

1. Marketing (publishers) manages the content on the website. They want to allow someone from another department, say human resources (editors), to edit their own entries. Marketing wants to be able to approve human resources content changes before they show up on the site.
2. A website has many members who contribute articles (editors). The website owner (publisher) needs to preview and approve articles before they "go live". If an article does not meet the website's submission requirements and is denied, the website owner needs to leave a note for the contributor and notify them via email regarding the entries state.
3. A website has many members assigned to a different member groups. The website owner only wants a small



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Page created on: Jan 19, 2009
Last updated on: Jun 24, 2009

number of those members to have publishing rights, regardless of their group permissions.

- The "publisher" needs to be notified when an "editor" makes a change so they can decide wether to approve or deny the article.

2. Features

Top

NSM Publish Plus has many features to enhance [ExpressionEngine](#)'s native workflow. They include:

- **Fine grained weblog assignment** - Assign weblog posting privileges to members not only member groups.
- **Publishing Roles** - Assign roles (publisher, editor) to members further limiting a members weblog posting privileges.
- **Entry drafts** - Create and edit drafts for published entries without updating the live site.
- **In-Template Previews** - View standard previews, drafts and old revisions in template context (requires [LG Live Look](#)).
- **Entry specific notes** - Easily communicate updates with other team members through entry specific notes.
- **Draft specific notes** - Track individual draft edits with draft specific notes.
- **Workflow states** - Assign states to entries to track their position in the workflow.
- **Filter entries by workflow state** - Easily see which entries are approved, pending approval, denied.
- **Advanced notification system** - Send email notifications when various actions are taken by members.
 - Notifications can be sent to any combination of the following:
 - entry editor
 - draft authors
 - member groups
 - NSM Publish Plus editors (filter by weblog)
 - NSM Publish Plus publishers (filter by weblog)
 - comma-separated list of emails
 - When:
 - an entry is created (further filter using workflow state / entry status)
 - an revision is created (further filter using workflow state / entry status)
 - a new draft is created (further filter using workflow state / entry status)
 - an entry is submitted for approval (further filter using workflow state / entry status)
 - an entry is deleted
 - a new note is created

It's also:

- [LG Live Look compatible](#) - Preview entries, drafts and revisions from the [Publish Form](#)
- [Multi-Site Manager compatible](#) - Independent extension settings for each site
- [LG Addon Updater compatible](#) - Stay up-to-date with the latest versions of NSM Publish Plus
- **Actively developed** by the ["ExpressionEngine developer of the Year"](#)

3. Screenshots

Top

The screenshots show the following interface elements:

- Entry state:** A form showing the current workflow state as 'Approved' with a dropdown menu.
- Drafts:** A table listing drafts with columns for State, ID, Title, and Date. One draft is shown with ID 281 and Date 2009-01-19 02:15.
- Publish Form:** A form for creating or editing entries, including fields for Title, URL Title, and various options.
- Notifications:** A section showing 'Notes' and 'Preview' for a specific entry.
- Workflow Summary:** A summary box indicating 'This entry has unpublished drafts' and 'You are currently viewing the latest revision.'

| | | | |
|--|-----|---------|------------------|
| | 280 | Draft 5 | 2009-01-19 02:15 |
| | 279 | Draft 4 | 2009-01-19 02:15 |

Publish Form - Workflow tab

Add note Preview note

Publish Form - Notes tab

revision_3

Buttons: [Moderate](#) [Close](#) [Normal](#)

Publish Form - Informative feedback

Workflow + Drafts (7) Show All

review Save Draft Quicksave Revision Save Revision

Upload File

Modules My Account Admin

Workflow + Drafts (0) Show All

Preview Save Draft Submit for Approval

Upload File

Order 50 results

Search

| Weblog | Status | State | |
|----------|--------|-------|--------------------------|
| weblog_1 | Closed | | <input type="checkbox"/> |
| weblog_1 | Open | | <input type="checkbox"/> |

Submit Edit Selected

Publish Form - Publisher button customisation

Accept Private Messages sent to you by other members

NSM Publish Plus

Weblog 1 Member group default

Weblog 2 Member group default

Weblog 3 Member group default

NSM Clipmarks No Access

Update

Publish Form - Editor button customisation

Group. Roles can be assigned on a per user basis in their member preferences.

Weblog 1 Publisher

Weblog 2 Editor

Weblog 3 Publisher

NSM Clipmarks No Access

Weblog 1 No Access

Weblog 2 No Access

Weblog 3 No Access

NSM Clipmarks No Access

Weblog 1 No Access

Weblog 2 No Access

Edit Tab - Filter by entry state

Filter

Enable notification

Weblogs: Weblog 1, Weblog 2, Weblog 3

Action: Create Entry

When status changes (optional):

From: To:

When state changes (optional):

From: To:

Subject: (action), (site), (action), (status), (old state), (state), (old state), (entry), (weblog), (weblog), (auth), (title), (URL), (entry), (entry)

Configuration - Member publishing privileges

Configuration - Group publishing privileges

Configuration - Advanced notification templates

4. Publishing roles and workflow Top

4.1. Publishing roles Top

NSM Publish Plus introduces the concept of publishing roles. Each member must be assigned a default publishing role for every weblog. Publishing roles can be set explicitly in the [member's preferences](#) or implicitly through [member group roles](#).

Members are assigned one of the following roles:

- **Publisher** - Publishers can update an entry's state and status, create notes and create entry previews, drafts and revisions (approving entries).
- **Editor** - Editors can preview entries, save drafts and submit them for approval. They cannot publish to the live site or change an entry's status or state.
- **No Access** - Members are restricted from posting in this weblog.

These roles override the standard [ExpressionEngine publishing privileges](#).

4.2. Revisions & drafts Top

4.2.1. Revisions Top

[Entry versioning](#) is required when using NSM Publish Plus.

Revisions allow publishers and editors to store previously published versions of an entry and review them at any time. They can be accessed from the Revisions Tab in the publish form.

When a previous revision is selected from the Revisions Tab the data will be loaded into the Publish Form which can

then be edited. If any changes are saved, a new revision will be created which does not affect the previously loaded revision.

Revisions are created when:

1. A publisher explicitly saves a revision by updating an entry
2. An editor creates a new entry (unsaved) and then saves it as a draft or submits it for approval

In the later case the revision is **assigned the default entry status** of the weblog. This revision is then used as a base for all future drafts and revisions. See: [User Guide > Configuration > Default entry status](#) for more information.

4.2.2. Drafts

[Top](#)

Drafts perform the exact same way as revisions but with two major differences — **both publishers and editors can create drafts** and saved drafts are not shown on your public site until approved by a publisher.

If an entry has drafts that were created after the last revision, the latest draft content will be automatically loaded into the Publish Form the next time the entry is edited. The latest draft will continue to be loaded until a new revision is saved by a publisher.

Drafts are created when:

1. An editor or publisher explicitly saves a draft
2. An editor submits any entry for approval

4.3. Entry lifecycle

[Top](#)

4.3.1. New entries

[Top](#)

Every entry starts as a blank publish form. The first time an entry is saved, either as a draft, submitted for approval or published a new revision is created.

If an editor creates a new entry (unsaved) and then saves it as a draft or submits it for approval the new revision is **assigned the default entry status** of the weblog. This revision is then used as a base for all future drafts and revisions. See: [User Guide > Configuration > Default entry status](#) for more information.

4.3.2. Saving drafts

[Top](#)

When an entry is saved as a draft the data is stored separately from the last revision. The live entry is not updated and the site will continue to serve the last saved revision. The most recently created draft will be automatically loaded into the edit form every time the entry is edited until a publisher creates a new revision.

If an editor saves the new draft the workflow state will automatically be set to *changed*.

4.3.3. Submitting for approval

[Top](#)

Once an entry has been edited the editor may choose to either [save the entry as a new draft](#) or submit it for approval. Submitting an entry for approval will create a new draft and set the workflow state to *pending*.

4.3.4. Approving drafts

[Top](#)

Only publishers can approve drafts and it is their responsibility to check every aspect of the entry before it is saved as a new revision.

To approve a draft:

1. Check all the entries data is correct
2. Check the entries status, drafts created by editors are automatically set to the **default entry status assigned to the weblog**
3. Set the entries state to *approved*
4. Save the entry as a draft (optional)
5. Save the entry as a new revision

5. Demonstration screencast

Top

Now you know all the features of; and concepts behind collaborative workflow with NSM Publish Plus see it in action. [Fullscreen HD version](#) available on [Vimeo](#).



6. User guide

Top

6.1. Requirements

Top

NSM Publish Plus is an [ExpressionEngine extension](#) that has been tested on version [1.6.5+](#). Live in-template previews require [ExpressionEngine 1.6.7+](#) and [LG Live Look 1.1.0+](#)

[Entry versioning](#) must be enabled for every weblog in the site. Entry versioning preferences can be found under Weblog Preferences in you sites CP.

To function correctly javascript must enabled and the [jQuery javascript library](#) must be loaded in the [control panel](#). jQuery can easily be included using [CP jQuery](#) which is packaged with ExpressionEngine 1.6.6+

The user must also be using a [modern web browser](#) (any thing better than IE6).

6.1.1. Important core hack

Top

This extension requires one small modification of the ExpressionEngine core files.

In `/system/cp/cp.publish.php` search for:

```
if (is_numeric($version_id))
{
    $entry_id = $IN->GBL('entry_id');
    $revquery = $DB->query("SELECT version_data
                            FROM exp_entry_versioning
                            WHERE entry_id = '{$entry_id}'
                            AND version_id = '{$version_id}'
                            ");

    if ($revquery->num_rows == 1)
    {
        $_POST = $REGX->array_stripslashes(@unserialize($revquery->row[ 'version_data' ]));
        $_POST['entry_id'] = $entry_id;
        $which = 'preview';
    }
    unset($revquery);
}
```

```
}
```

and append:

```
if (is_numeric($IN->GBL("draft_id"))  
{  
  $which = 'preview';  
}
```

6.2. Compatibility

[Top](#)

3rd party extensions which do not support previewing, quick saving or versioning entries may be incompatible with the draft functionality of NSM Publish Plus. If you are using an incompatible extension contact the extension author and inform them of the issue.

6.3. Download

[Top](#)

NSM Publish Plus can only be downloaded from your [member account](#) after it has been purchased.

6.4. Installation

[Top](#)

To install NSM Publish Plus follow the instructions below:

1. Purchase and [download](#) the latest version of NSM Publish Plus
2. Extract the .zip to your desktop or similar folder where you can find it easily
3. Copy `/system/extensions/ext.nsm_publish_plus_ext.php` file to your ExpressionEngine `/system/extensions/` directory
4. Copy `/system/languages/english/lang.nsm_publish_plus_ext.php` file to your ExpressionEngine `/system/languages/english/` directory
5. Copy the contents of `/themes/site_themes/cp_themes/default/` to your ExpressionEngine `/themes/site_themes/cp_themes/default/` directory
6. Copy the contents of `/themes/site_themes/cp_global_images/` to your ExpressionEngine `/themes/site_themes/cp_global_images/` directory
7. Apply the [required core hack](#) to your ExpressionEngine files

6.5. Activation

[Top](#)

1. Open the [Extensions Manager](#) in your sites control panel
2. Enable Extensions if not already enabled
3. Enable NSM Publish Plus
4. [Configure](#) and save the extension settings for each of your sites
5. [Update the default entry status for each weblog](#)

6.6. Configuration

[Top](#)

6.6.1. Extension settings

[Top](#)

Extension access

Enable Publish Plus for this site? [required]

Yes | No

Enabling NSM Publish Plus will add a new "notes" and "workflow + drafts" tab in the publish / edit form.

Group settings

Each member group must assigned a default publishing role for every weblog. Publishing roles include:

- **No Access** - Group members are restricted from posting in this weblog.
- **Publisher** - Publishers can update an entries state and status, create notes and create entry drafts.
- **Editor** - Editors can save drafts and create entries, they cannot update the status of an article. If an editor creates a new entry, the entry is saved with the **default entry status assigned to the weblog** and a new draft is created.

Entry notification templates

Email notifications can be sent when a member "actor" performs any of the following actions:

- an entry is created (further filter using workflow state / entry status)
- an entry is edited (further filter using workflow state / entry status)
- a new draft is created (further filter using workflow state / entry status)
- an entry is submitted for approval (further filter using workflow state / entry status)
- an entry is deleted
- a new note is created

When an action is performed notifications can be sent to any combination of the following members:

- the entry editor
- the entries draft authors
- members of specific ExpressionEngine member groups
- members assigned the "Publisher" role in specific weblogs
- members assigned the "Editor" role in specific weblogs
- comma-separated list of "other" email recipients

The following variables can be used notification subject and message:

| | | | |
|----------------------|----------------|------------------|---------------------|
| {site_id} | • {site_title} | • {action} | • {actor_name} |
| {status} | • {old_status} | • {state} | • {old_state} |
| {entry_id} | • {weblog_id} | • {weblog_title} | • {weblog_url} |
| {weblog_description} | • {author_id} | • {author_name} | • {title} |
| {url_title} | • {entry_date} | • {edit_date} | • {expiration_date} |
| {edit_entry_url} | | | |

Note: *{weblog_id}*, *{weblog_title}* and *{weblog_description}* will respect your [ExpressionEngine](#) settings. For example, if you have changed your [ExpressionEngine](#) settings to use "section" instead of weblog the variables will be: *{section_id}*, *{section_title}* and *{section_description}*

URL triggers

URL triggers tell NSM Publish Plus to load a specified draft or revision based on the segment after the trigger. The following url will load the draft, with an ID of 7 for the related entry:

<http://yoursite.com/blog/entry/18/draft/7/>. Naming a url trigger the same as an existing template may cause unexpected behaviour and should be avoided.

Draft url trigger [required]

```
draft
```

Revision url trigger [required]

```
revision
```

Preview url trigger [required]

preview

For more information about url triggers see: [Viewing drafts, revisions and entry previews in template context](#).

Check for updates

Would you like this extension to check for updates and display them on your CP homepage? [required]

yes|no

If you allow it NSM Publish Plus can call home and check for recent extension updates. This feature requires [LG Addon Updater](#).

6.6.2. Member preferences

Top

Roles can also be assigned on a per member basis allowing even more fine grain control over weblog posting privileges. Super admins can assign roles to members in their [account preferences](#) under the my account tab.

6.6.3. Default entry status

Top

The following has been previously mentioned many times in the documentation:

If an editor creates a new entry (unsaved) and then saves it as a draft or submits it for approval **the revision is assigned the default entry status of the weblog**.

NSM Publish Plus protects your sites security by setting the revisions status to "closed" if the weblogs default entry status is "open".

Default entry status can be set per weblog under: [Weblog Management > Edit Preferences](#).

Setting a default status of "Pending" or "Draft" is recommended so that new drafts can be previewed using [LG Live Look](#).

6.7. Viewing drafts, revisions and entry previews in template context.

Top

When enabled on an [ExpressionEngine 1.6.7+](#) install, NSM Publish Plus allows publishers and editors to view their changes before saving saving a draft or revision.

This is achieved by replacing the entries content with the preview, draft or revision content before it is rendered in the template. This approach has the following pro and cons:

Pros:

1. Changes can be previewed in template context before a new draft or revision has been saved.
2. Drafts can be previewed in template context before a publisher approves the entry.
3. Only the entry that matches the [preview, draft, or revision id](#) will be modified with applicable data.
4. No need to change an entries status to pending to make changes before approval.
5. All standard [ExpressionEngine custom field types](#) and many third party extensions can be previewed.
6. Transparent [LG Live Look](#) integration

Cons:

1. **The entry must requested by the template before the existing data can be replaced by the preview, draft or revision data.** This can make previewing unpublished entries difficult if the entry status is set to closed or pending, [more on that later](#).
2. There is some advanced ExpressionEngine functionality is not triggered until a new revision has been saved and therefore cannot be previewed. This is the case with Solspace's Tag module and LG Better Meta.

6.7.1. URL structure

Top

Preview, draft and revision urls are created by appending the corresponding [url trigger segment](#) followed by a preview,

draft or revision id. [URL trigger segments](#) are defined in the [extension settings](#).

Preview id's are stored internally which means that LG Live Look is required to view them, however you can view drafts and revisions without LG Live Look. The revision and draft id's are displayed in the "Workflow + Drafts" tab and Revisions tab respectively.

Example URL's constructed using trigger segments assuming that the trigger segments are draft, preview and revision:

1. http://yoursite.com/blog/post/my_url_title/draft/18/ - Loads draft 18 for entry with the url title equalling "my_url_title" in a single entry template
2. <http://yoursite.com/business/details/36/revision/5/> - Loads revision 5 for entry 36 in a single entry template
3. <http://yoursite.com/news/preview/55/> - Loads preview 55 for the entry associated with the preview in an index template.

In the last example NSM Publish Plus is smart enough to load the preview data for the correct entry. Using traditional ExpressionEngine [template group/template conventions](#) the url would render the "preview" template in the "news" template group. NSM Publish Plus removes the last two segments from ExpressionEngine's template parsing so the parsed url is <http://yoursite.com/news/>. This allows you to preview entries in both the single entry context and index page context.

6.7.2. LG Live Look

[Top](#)

The good news is that if you are using LG Live Look to preview your entries or drafts you do not need to worry about the url structure! LG Live Look will automatically create the urls for previews, drafts and revisions.

It's important to remember that **NSM Publish Plus requires that the entry is visible in the template before the existing data can be replaced by the preview, draft or revision data.**

More information about setting up Live Look templates can be found in the [LG Live Look documentation](#).

Still having trouble? You should [contact support](#) 😊.

6.8. Upgrade notes

[Top](#)

There are no upgrade notes available for this version.

7. Release notes

[Top](#)

7.1. Version 1.1.0

[Top](#)

- LG Live Look integration!
- Added preview saving for LG Live Look integration
- Added revision id to revisions table
- Fixed localisation bug

7.2. Version 1.0.4

[Top](#)

- Changed the edit_entry action to create_revision
- New drafts are automatically created when a new revision is created, but email notifications are not sent

7.3. Version 1.0.3

[Top](#)

- Fixed notification bug regarding members who had not had roles specifically assigned

7.4. Version 1.0.2

[Top](#)

- Added draft specific edit notes.

7.5. Version 1.0.1

[Top](#)

- Changed all references of "dirty" to "changed".

7.6. Version 1.0.0

[Top](#)

- Initial Release w/ documentation

8. Other topics

[Top](#)

8.1. Support

[Top](#)

Technical support is available primarily through [my contact form](#) (I'll reply with an email) and the [ExpressionEngine forums](#). Leevi Graham and Newism do not provide direct phone support. No representations or guarantees are made regarding the response time in which support questions are answered.

8.2. Upgrades

[Top](#)

Although we are actively developing NSM Publish Plus, Newism makes no guarantees that this extension will be upgraded within any specific timeframe.

8.3. Refunds

[Top](#)

Not happy with NSM Publish Plus? Don't worry this extension is covered by a 30 day money back guarantee. If you having any problems with the extension please [contact me](#) to report the issues and your payment will be refunded.

9. License

[Top](#)

NSM Publish Plus is a commercial product and therefore is subject to the [commercial license agreement](#).



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