DRUPALCON LONDON

Workbench:
Managing Content Management

Presented by George DeMet and Ken Rickard

"What do you do."

"We build websites for institutional non-profits."*

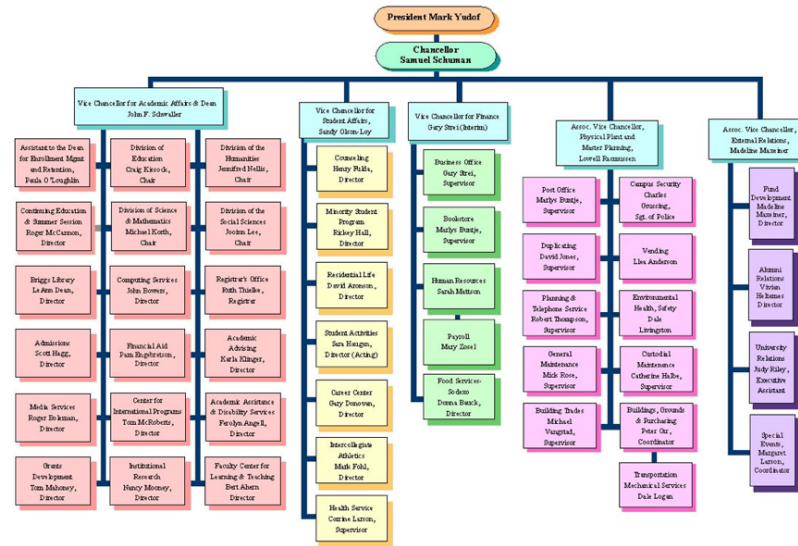— **How I explain my job at cocktail parties with non-geeks present**

***** **(we do more than that).**

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1 min. Colleen.

How this type of client impacts our approach to building Drupal sites and why Workbench was conceived.

(February 2002)

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Barnard

- Electronic communications
- IT department
- 50 academic departments and programs
- 30 section owners
- 200 Web site editors

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BARNARD

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NEWS & NOTES

Facebook Executive to Barnard Graduates: "This world needs you to run it"

Barnard's 2011 Fulbright Recipients Announced
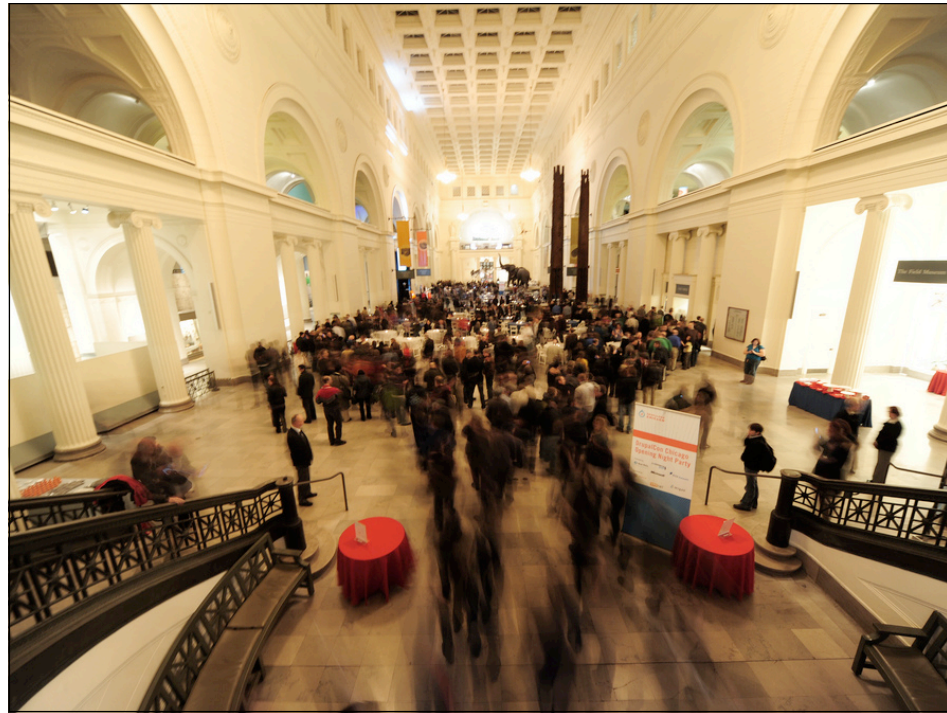
Reviews of "Barnard Dances at Miller"

Traci Brimhall Awarded Barnard Women Poets Prize

Edwidge Danticat '90 documents truth about her native Haiti

CONGRATULATIONS CLASS OF 2011!

Field Museum

- Hundreds of scientists and researchers spread across dozens of departments
- Massive amounts of content and digital assets
- Small centralized Web staff
- "Content bottleneck"

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Colleen. AIC is a great example of this. They have an editorial team that help maintain and preserve "voice" on all content in the site. Do they work in word? How do they edit a long piece of content, and have it submitted for review?"

Common Challenges

- Access and Permissions
  - Permissions by "Sections", not just content types
  - Hierarchal permission inheritance
- Extensible workflow states
- Single repository for media management
- Modify published content without it going live immediately

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2-3min. Colleen.

We've worked with a variety of clients at Palantir with different business needs or goals for their sites. However there are a few **common assumptions about the CMS** we're going to use that every client we've worked with has shared.

Large institutions like Colleges and Universities who want to **decentralize** the managing of **content** but REALLY don't need to teach Drupal.
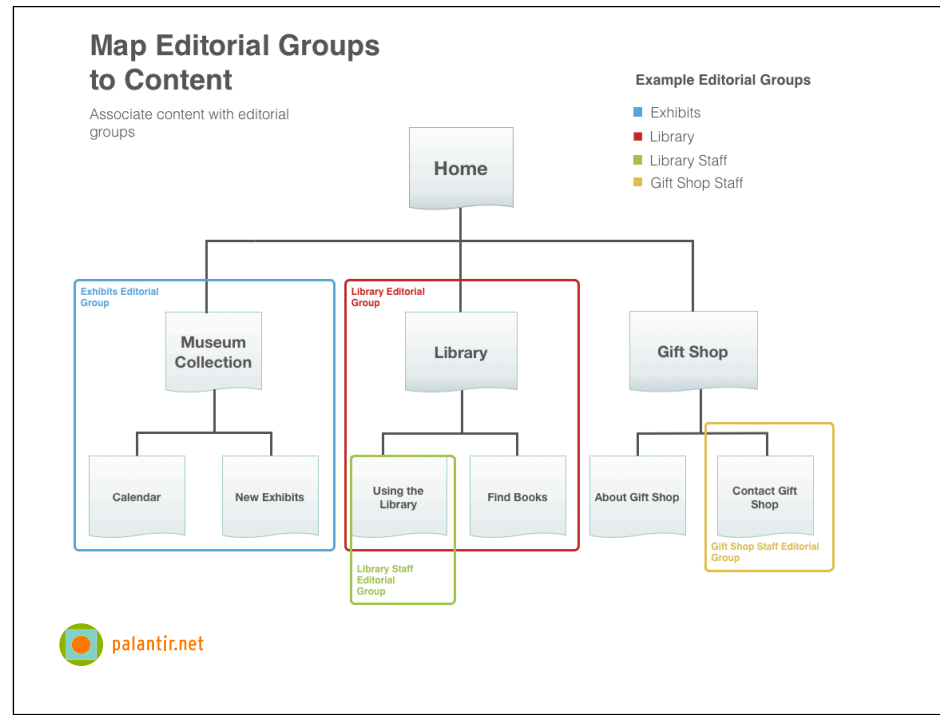
Robin.

Then you map the editorial groups to your site content.

Hierarchical Access

Identify editorial groups for your site
and assign editors and/or roles to
those groups

Example Users & their Roles

- Jill is a contributor
- George is an editor
- Kelly is an editor

Museum

Exhibits

Library

Gift Shop

Exhibits Staff

Exhibits Visitors

Library Staff

Library Visitors

Gift Shop Staff

Gift Shop Visitors

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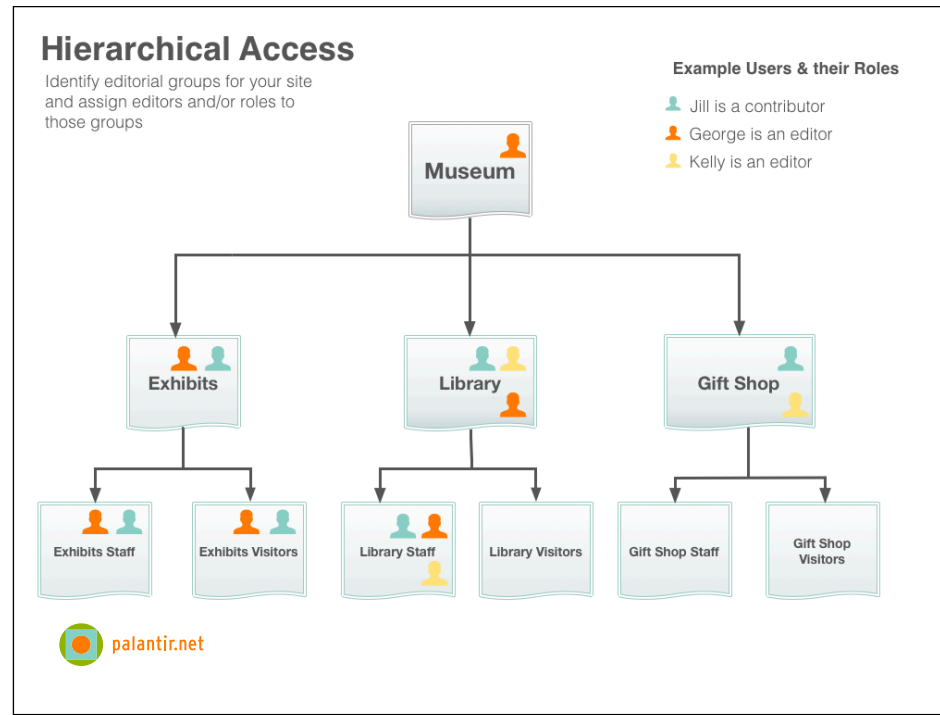
Robin.
It's the structure of the organization (not the web site).
OR of the people who will maintain the site
First you have to setup the terms as a hierarchy and assign users or roles.

Client Expectations

- **Often unstated assumptions!**
- Drupal learning curve
- Where is "my content"?
- Content can be reviewed before publication
- *Changes* to live content can be reviewed
- Media *is* regular content
- "Our old CMS did it"

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Just use...

- Organic Groups
- Scheduler
- Revisioning
- Content Access
- Workflow
- *Module X*

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Workflow Features	Module
• 1 Hierarchical editing of content	Menu Node Edit / TAC / RIAT
• 1.1 Pluggable hierarchies	None
• Default is workbench owned taxonomy	
• 1.2 Editorial access CRUD by hierarchy	Menu Node Edit
• 1.3 Editorial access CRUD by node type by hierarchy	Menu Node Edit
• 1.4 Theme / menu / context adjustments by hierarchy (?)	Context / Menu Node Section
• 1.5 Exclude content types from hierarchies (media, esp.)	Menu Node Edit
• 1.6 Assign subedtiors	Menu Node Edit
• 2 Extensible workflow states	Workflow / Flag
• 2.1 Tied to actions / rules	Workflow / Flag Actions
• 2.2 Tied to Views (admin views)	VBO / Flag
• 2.3 Tied to notifications / email	Workflow / Flag / Actions
• 3 Version control	
• 3.1 Revisions	Core
• 3.2 Untrusted users publish in draft mode only	Actions / Palantir custom action
• 3.3 Live / draft moderation status	Revision Moderation / Actions
• 3.4 Logging	Core
• 3.5 Diffs	Diff
• 3.6 Scheduled publishing	Scheduler
• 3.7 Page owner notified of changes, may not be author	
• 4 Editorial dashboards	
• 4.1 Workflow state lists	Views / VBO / Flag / Workflow
• 4.2 Editor flags (flag for review)	Flag
• 4.3 Dashboard list of content per user	
• 4.4 Pages I own	
• 4.5 Pages I can edit	
• 4.6 Pages that have changes	
• 4.7 Pages that have been flagged	
• 5 Media Handling / integration	Core / ?
• 6 Additional features	
• 6.1 Related content	Calais / CCK / Flag
• 6.2 Geotagging	Location
• 6.3 Autotagging	Calais
• 6.4 Standard features	
• Subhead	CCK
• Lede	CCK
• Multiple Authors	CCK
• Page Owners	CCK
• 6.5 Contact the page owner	Custom
• 6.6 Contact the page author	Custom
• 6.7 Subscriber-only content	Custom / OG

"Workbench" for Drupal 7

- Workbench Access:
  - Extensible editorial access for the Workbench suite. Assignment by section.

- Workbench Files:
  - Single view of all files (images, video, audio, word, pdf, etc.) uploaded into the site.

- Workbench Moderation:
  - Extensible workflow states and ability for live content to move to draft without being unpublished.

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My Workbench
- Your Content
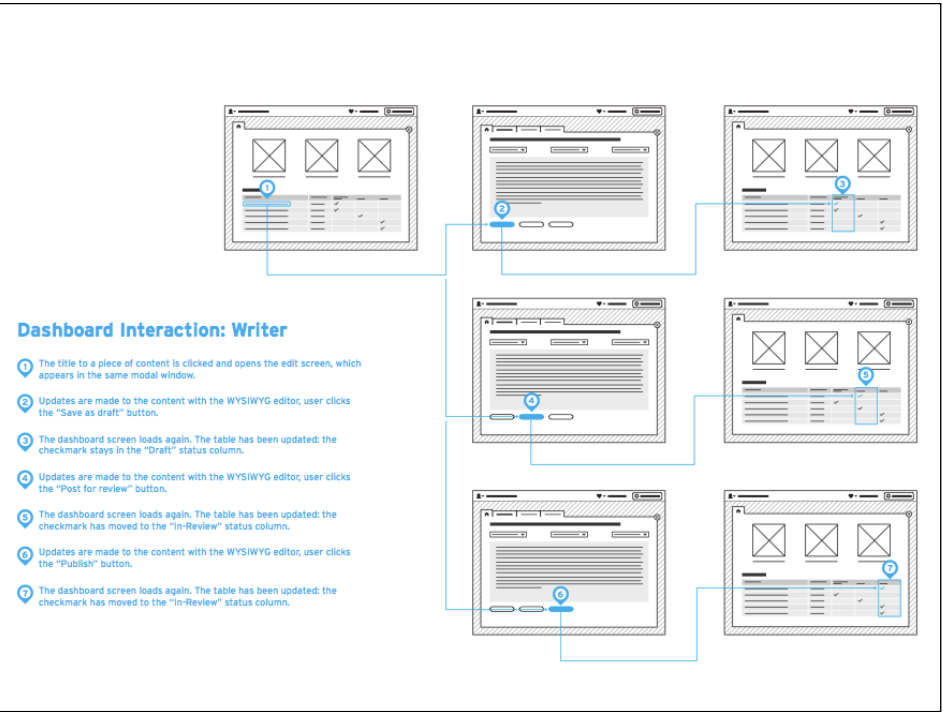- Your Profile
- Recent Content

Create Content

File List

Access (My Sections)

Moderation (My Drafts, Needs Review)

Moderation in Action
- show tabs
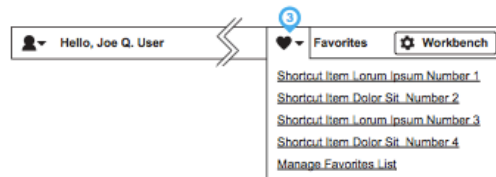- create/edit a node
- moderate

Dashboard Interaction: Writer

1. The title to a piece of content is clicked and opens the edit screen, which appears in the same modal window.

2. Updates are made to the content with the WYSIWYG editor, user clicks the "Save as draft" button.

3. The dashboard screen loads again. The table has been updated: the checkmark stays in the "Draft" status column.

4. Updates are made to the content with the WYSIWYG editor, user clicks the "Post for review" button.

5. The dashboard screen loads again. The table has been updated: the checkmark has moved to the "In-Review" status column.

6. Updates are made to the content with the WYSIWYG editor, user clicks the "Publish" button.

7. The dashboard screen loads again. The table has been updated: the checkmark has moved to the "In-Review" status column.

Toolbar Interaction

| 👤▾ | Hello, Joe Q. User | 》》 | ♥▾ | Favorites | ⚙ Workbench |

| 👤▾ | Hello, Joe Q. User | 》》 | ♥▾ | Favorites | ⚙ Workbench ① |

The workbench modal overlay can be toggled on and off with this button.

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② | 👤▾ | Hello, Joe Q. User | 》》 | ♥▾ | Favorites | ⚙ Workbench |

Edit Profile
Sign Out

This dropdown contains links to profile management and sign out.

| 👤▾ | Hello, Joe Q. User | 》》 | ♥▾ ③ | Favorites | ⚙ Workbench |

Shortcut Item Lorum Ipsum Number 1
Shortcut Item Dolor Sit Number 2
Shortcut Item Lorum Ipsum Number 3
Shortcut Item Dolor Sit Number 4
Manage Favorites List

This dropdown contains links to favorite pages. This list is currently tied to user type but would be a more useful feature if each user could manage his or her own shortcuts.

Feature Roadmap

- Native form element handling
- Access rules per content-type
- Moderation rules by content type
- Edit default states (Draft and Published)
- Scheduled state transitions
- Non-linear approval workflow

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Colleen

Feature Roadmap

- Assigned Reviewers
- Scheduled Content Publication
- Workflow Notifications
- Files -> Asset Management
  - *Check the Issue Queue*

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Colleen.
we wanted it to be modular, keep the footprint smaller, framework. It's one small part of a distro.

Robin.
Bring it back to the beginning...Scenarios we found...what have you found?

More Info & Questions

- http://drupal.org/project/workbench

- Feel free to ping us in IRC too!

- Robin Barre = robeano

- Colleen Carroll = caroltron

- Ken Rickard = agentrickard

- George DeMet = gdemet (don't ping him in IRC)

- Questions?

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What did you think?

Locate this session on the
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Click the "Take the survey" link

THANK YOU!