Using Workbench to Improve Drupal Content Management

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Agenda

• Default Content Management in Drupal
• Using the Workbench Module Suite
  • Setup and UI
  • Case Studies
  • Extending Functionality
• Q&A
Default Content Management in Drupal

A Tale of Two States
Published/Unpublished

Too Simplistic

Permissions by Content Type
What is Workbench

A suite of modules to improve content management in Drupal
Developed by Palantir - Initially built for large institutions
The Workbench Suite

- **Workbench**
  (http://drupal.org/project/workbench)

- **Workbench Moderation**
  (http://drupal.org/project/workbench_moderation)

- **Workbench Access**
  (http://drupal.org/project/workbench_access)

- **Workbench Media**
  (http://drupal.org/project/workbench_media)
Initial Setup

- *Once the modules are installed...the fun begins*
- Understanding your organization and content
  - What types of content do you have?
  - Who/what roles can add, edit, delete, approve, decline content?
  - What does the content workflow look like?
Workbench Moderation

• Improves Published/Unpublished States
• Sets an extended group of states for content: Draft, Needs Review, Published

**Moderation state**

Current: Draft

Set the moderation state for this content.

• Can be customized to provide additional states (eg Last Look, Needs Work)
Getting Started

Submission form settings
Title

Publishing options
Published, Promoted to front page, Create new revision, Enable moderation of revisions. Revisions must be enabled in order to use moderation.

Display settings
Display author and date information.

Comment settings
Open, Threading, 50 comments per page

Menu settings

Default options
- Published
- Promoted to front page
- Sticky at top of lists
- Create new revision
- Enable moderation of revisions
  Revisions must be enabled in order to use moderation.
Users with the Administer content permission will be able to override these options.

- Enforce Workbench Access control
  Use Workbench Access to enforce editorial control to all content of this type.

Default moderation state
Draft
Set the default moderation state for this content type. Users with additional moderation permissions will be able to set the moderation state when creating or editing nodes.

Save content type  Delete content type
## States

<table>
<thead>
<tr>
<th>NAME</th>
<th>MACHINE NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>draft</td>
<td>Work in progress</td>
</tr>
<tr>
<td>Needs Review</td>
<td>needs_review</td>
<td>Ready for moderation</td>
</tr>
<tr>
<td>Published</td>
<td>published</td>
<td>Make this version live</td>
</tr>
<tr>
<td><strong>New state</strong></td>
<td></td>
<td>Enter a description of the new state.</td>
</tr>
</tbody>
</table>

Enter a name for the new state. Enter a description of the new state.

Save
Transitions

<table>
<thead>
<tr>
<th>FROM</th>
<th>TO</th>
<th>DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Needs Review</td>
<td></td>
</tr>
<tr>
<td>Needs Review</td>
<td>Draft</td>
<td></td>
</tr>
<tr>
<td>Needs Review</td>
<td>Published</td>
<td></td>
</tr>
<tr>
<td><strong>New transition</strong></td>
<td>&lt;!--&gt;</td>
<td></td>
</tr>
</tbody>
</table>

Save
Check Permissions

Drupal role

Author

Select a role to check.

Moderation task

- Author moderated content
- Edit moderated content
- Moderate content
- Publish moderated content

Content types

- Article

Select any content types on which the user should have the ability to perform the moderation task.

Check permissions
Moderate
Workbench Access

- Used to structure permissions in a hierarchical fashion
- Can use menus, taxonomies, or custom structure
- Limits users access to edit content in certain editorial sections
Workbench Access Example

• Small Business

• Editorial Areas = Sales, Support, Education, Human Resources, Leadership

• Content Types = Blog, Page, Job, Profile

• Menu Structure = About, Pricing, Resources, News/Events, Careers
Editors

Editorial assignments by editor

The following sections are currently active. You may enable or disable sections.

<table>
<thead>
<tr>
<th>SECTION</th>
<th>EDITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Type</td>
<td>0 editors</td>
</tr>
<tr>
<td>Column</td>
<td>1 editor</td>
</tr>
<tr>
<td>Feature</td>
<td>1 editor</td>
</tr>
<tr>
<td>Web Exclusive</td>
<td>0 editors</td>
</tr>
</tbody>
</table>
# Roles

## Editorial assignments by role

The following sections are currently active. You may enable or disable sections.

<table>
<thead>
<tr>
<th>SECTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Type</td>
<td>1 role</td>
</tr>
<tr>
<td>- Column</td>
<td>0 roles</td>
</tr>
<tr>
<td>- Feature</td>
<td>0 roles</td>
</tr>
<tr>
<td>- Web Exclusive</td>
<td>1 role</td>
</tr>
</tbody>
</table>
Sections

Active editorial sections

Below is a list of the editorial sections defined for your site.

All sections are set to be active automatically. Disable the Automated section assignment option to make changes.

<table>
<thead>
<tr>
<th>ARTICLE TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ All of Article Type</td>
</tr>
<tr>
<td>✔️ Column</td>
</tr>
<tr>
<td>✔️ Feature</td>
</tr>
<tr>
<td>✔️ Web Exclusive</td>
</tr>
</tbody>
</table>
Settings

Workbench Access settings

Active access scheme *

- Menu
  Uses the menu system for assigning hierarchical access control.
- Taxonomy
  Uses taxonomy vocabularies for assigning hierarchical access control.

Select the access scheme to use for the site.

TAXONOMY SCHEME SETTINGS
Changing this value in production may disrupt your workflow.

Editorial vocabulary
- Article Type
- Tags

Select the vocabularies to be used for access control.

ENABLED CONTENT TYPES
- Article
- Issue
- Basic page

Only selected content types will have Workbench Access rules enforced.

Workbench Access message label
Section
Text that will be shown in front of Workbench Access messages.

Automated section assignment
Enable all sections automatically for the active scheme.

Require a Workbench Access form element
If not selected, Workbench Access settings will inherit from the standard node form.

Save configuration
Case Study #1

“On the Bench” Blog
“On the Bench” Blog

• Daily Blog

• Small Staff consisting of an Editor & several Bloggers

• No need for Workbench Access
## “On the Bench” Blog Content Workflow

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Draft</th>
<th>Needs Review</th>
<th>Published</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blog</td>
<td>Bloggers</td>
<td>Bloggers, Editor</td>
<td>Editor</td>
</tr>
</tbody>
</table>
“On the Bench” Blog

SITUATION:
A player gets traded two hours after a blog post about his options is published, and the initial blogger has no internet access.

SOLUTION:
Another blogger creates a revision of the post and the Editor reviews and publishes it within 15 minutes of the news.
Case Study #2

Benchmark Society
Benchmark Society

- Membership organization
- Twice weekly blog
- Weekly webinar event
- Monthly update

- Mostly Volunteer Staff & Content Creators
- Executive Director
- Community Manager
- Program Manager
- Board
- Members
## Benchmark Society Content Workflow

<table>
<thead>
<tr>
<th>Section</th>
<th>Draft</th>
<th>Needs Review</th>
<th>Published</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Community</strong></td>
<td>Comm, Board, Members</td>
<td>Exec, Comm</td>
<td>Exec</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td>Program</td>
<td>Comm</td>
<td>Exec</td>
</tr>
<tr>
<td><strong>Leadership</strong></td>
<td>Exec, Board</td>
<td>Exec</td>
<td>Exec</td>
</tr>
</tbody>
</table>
SITUATION:
A board member drafts a private update for the leadership in the community section.

SOLUTION:
The community manager changes the section so the executive director can review and publish the update.
Case Study #3
Bench Press
Bench Press

- Magazine publisher
  - 3 titles
  - Monthly issues
    - Features
    - Columns
  - Weekly web exclusive

- Paid Staff & Content Creators
  - Publisher
  - Editorial Directors
  - Editorial Assistants
  - Multiple Writers
  - Multiple Authors
## Bench Press

<table>
<thead>
<tr>
<th>Section</th>
<th>Draft</th>
<th>Needs Review</th>
<th>Needs Work</th>
<th>Last Look</th>
<th>Published</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue</strong></td>
<td>Asst</td>
<td>Dir</td>
<td>Asst</td>
<td>Pub</td>
<td>Dir</td>
</tr>
<tr>
<td><strong>Feature</strong></td>
<td>Dir, Asst</td>
<td>Dir</td>
<td>Dir, Asst</td>
<td>Pub, Dir</td>
<td>Dir</td>
</tr>
<tr>
<td><strong>Column</strong></td>
<td>Asst, Auth</td>
<td>Dir</td>
<td>Asst, Auth</td>
<td>Dir</td>
<td>Dir</td>
</tr>
<tr>
<td><strong>Web Exclusive</strong></td>
<td>Asst, Auth</td>
<td>Dir, Asst</td>
<td>Asst, Auth</td>
<td>Dir, Asst</td>
<td>Dir</td>
</tr>
</tbody>
</table>
Bench Press

SITUATION:
An issue is drafted by an assistant and reviewed by the director, however important information is missing.

SOLUTION:
The publisher catches the error and changes the state to “Needs Work” so that the editorial director can fix this before being published.
Extending Workbench

• Rules
  (http://drupal.org/project/rules)

• Scheduler
  (http://drupal.org/project/scheduler)

• Views
  (http://drupal.org/project/views)

• Panels
  (http://drupal.org/project/panels)
Conclusions

- Workbench is an improvement for any Drupal site that requires more refined content moderation.
- The key to its successful implementation is understanding the roles, responsibilities, and content of an organization.
- It is flexible and can be configured to meet the specific needs of an organization.
- Using other modules you can further extend the effectiveness of the Workbench suite.
Questions?

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