

# Using Workbench to Improve Drupal Content Management

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*Communications Group, LLC*

# #DrupalCampNJ

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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Published/Unpublished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

My Workbench


Workbench Demo

MY CONTENTCREATE CONTENTFILE LISTMY SECTIONSMY DRAFTSNEEDS REVIEW

Home » Administration

Content I've EditedAll Recent Content

My Profile



admin

edit my profile

Content I've Edited

TITLE	SECTION	TYPE	PUBLISHED	REVISED BY	LAST UPDATED	ACTIONS
Exhibit Staff Info	Exhibits > Exhibits Staff	Article	Yes	admin	2 months 2 weeks ago	edit
Iusto Neo Exhibit	Exhibits	Basic page	Yes	admin	2 months 2 weeks ago	edit
Library Resources	Library Visitors	Article	Yes	admin	2 months 2 weeks ago	edit
My Draft Article Rocks!	Exhibits > Exhibits Staff	Article	Yes	admin	2 months 2 weeks ago	edit
Library Staff News	Museum > Library Staff	Basic page	Yes	admin	2 months 2 weeks ago	edit

view all

All Recent Content

TITLE	SECTION	TYPE	PUBLISHED	AUTHOR	LAST UPDATED	
Exhibit Staff Info	Exhibits > Exhibits Staff	Article	Yes	jill-contributor	2 months 2 weeks ago	edit
Iusto Neo Exhibit	Exhibits	Basic page	Yes	george-editor	2 months 2 weeks ago	edit
Library Resources	Library Visitors	Article	Yes	george-editor	2 months 2 weeks ago	edit
My Draft Article Rocks!	Exhibits > Exhibits Staff	Article	Yes	jill-contributor	2 months 2 weeks ago	edit
Library Staff News	Museum > Library Staff	Basic page	Yes	george-editor	2 months 2 weeks ago	edit
Gift Shop	Museum > Gift Shop	Basic page	Yes	admin	2 months 2 weeks ago	edit
Rusticus Tum 9 so much better	Museum > Library Staff	Basic page	Yes	george-editor	4 months 1 week ago	edit
Commodo Neque	Library Visitors	Basic page	Yes	jill-contributor	5 months 1 week ago	edit

# The Workbench Suite

- **Workbench**  
(<http://drupal.org/project/workbench>)
- **Workbench Moderation**  
([http://drupal.org/project/workbench\\_moderation](http://drupal.org/project/workbench_moderation))
- **Workbench Access**  
([http://drupal.org/project/workbench\\_access](http://drupal.org/project/workbench_access))
- *Workbench Media*  
([http://drupal.org/project/workbench\\_media](http://drupal.org/project/workbench_media))

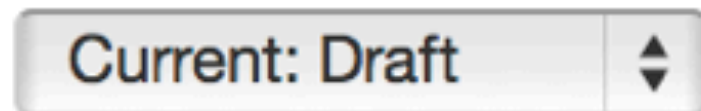
# Initial Setup

- *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**



Set the moderation state for this content.

- Can be customized to provide additional states (eg Last Look, Needs Work)



# Getting Started

<b>Submission form settings</b> Title	<b>Default options</b> <input checked="" type="checkbox"/> Published <input checked="" type="checkbox"/> Promoted to front page <input type="checkbox"/> Sticky at top of lists <input checked="" type="checkbox"/> Create new revision <input checked="" type="checkbox"/> Enable moderation of revisions Revisions must be enabled in order to use moderation. Users with the <i>Administer content</i> permission will be able to override these options. <input checked="" type="checkbox"/> Enforce Workbench Access control Use Workbench Access to enforce editorial control to all content of this type.
<b>Publishing options</b> Published , Promoted to front page , Create new revision , Enable moderation of revisions Revisions must be enabled in order to use moderation.	
<b>Display settings</b> Display author and date information.	
<b>Comment settings</b> Open, Threading , 50 comments per page	
<b>Menu settings</b>	
	<b>Default moderation state</b> 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 typeDelete content type

# States

NAME	MACHINE NAME	DESCRIPTION
<div><div></div><div>Draft</div></div>	draft	<div>Work in progress</div>
<div><div></div><div>Needs Review</div></div>	needs_review	<div>Ready for moderation</div>
<div><div></div><div>Published</div></div>	published	<div>Make this version live</div>
<div><div></div><div><b>New state</b></div><div></div><div>Enter a name for the new state.</div></div>		<div></div> <div>Enter a description of the new state.</div>

Save

# Transitions

FROM		TO	DELETE
Draft	-->	Needs Review	<input type="checkbox"/>
Needs Review	-->	Draft	<input type="checkbox"/>
Needs Review	-->	Published	<input type="checkbox"/>
<b>New transition</b>			
- Choose state -	-->	- Choose state -	

Save

# Check Permissions

## Drupal role

Author

Select a role to check.

## Moderation task

- ☒ Author moderated content
- ☐ Edit moderated content
- ☐ Moderate content
- ☐ Publish moderated content

at the role should be able to perform.

## Content types

- ☒ Article

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

Check permissions

# Moderate

Test draft title 2 History

VIEW PUBLISHED

VIEW DRAFT

EDIT DRAFT

MODERATE

DEVELOP

[Home](#) » [Test draft title 2](#)

Moderate

Schedule

Workbench Access: Museum

REVISION	TITLE	DATE	REVISION ACTIONS	MODERATION ACTIONS
31	Test draft title 3 Edited by admin. Revised by admin	08/26/2011 - 16:51	<a href="#">view</a>	<div><div>This is the current revision. The current state is Draft.</div><div>Moderate: Needs Review <div>Apply</div></div><div><ul style="list-style-type: none"><li>From Published --&gt; Draft on 08/26/2011 - 16:51 by admin</li></ul></div></div>
30	Test draft title 2 Edited by admin. Revised by admin	08/26/2011 - 16:51	<a href="#">view</a>   <a href="#">revert</a>   <a href="#">delete</a>	<div><div>This is the published revision.</div><div><a href="#">Unpublish</a></div><div><ul style="list-style-type: none"><li>From Needs Review --&gt; Published on 08/25/2011 - 17:49 by admin</li><li>From Published --&gt; Needs Review on 08/25/2011 - 17:37 by admin</li><li>From Needs Review --&gt; Published on 08/25/2011 - 17:37 by admin</li><li>From Published --&gt; Needs Review on 08/25/2011 - 15:19 by admin</li></ul></div></div>
29	Test draft title 2 Edited by admin. Revised by admin	08/25/2011 - 15:19	<a href="#">view</a>   <a href="#">revert</a>   <a href="#">delete</a>	<div><ul style="list-style-type: none"><li>From Draft --&gt; Published on 08/25/2011 - 15:18 by admin</li><li>From Published --&gt; Draft on 07/29/2011 - 12:49 by admin</li></ul></div>
3	Test draft title Created by admin. Revised by admin	07/29/2011 - 12:49	<a href="#">view</a>   <a href="#">revert</a>   <a href="#">delete</a>	<div><ul style="list-style-type: none"><li>From Draft --&gt; Published on 07/28/2011 - 18:03 by admin</li><li>From Draft --&gt; Draft on 07/14/2011 - 17:17 by admin</li></ul></div>

# 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](#).

SECTION	EDITORS
Article Type	0 editors
– Column	1 editor
– Feature	1 editor
– Web Exclusive	0 editors



# Roles

## Editorial assignments by role

The following sections are currently active. You may [enable](#) or [disable sections](#).

SECTION	ROLES
Article Type	1 role
- Column	0 roles
- Feature	0 roles
- Web Exclusive	1 role

# 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.

### ▼ ARTICLE TYPE

- ☒ All of Article Type
- ☒ - Column
- ☒ - Feature
- ☒ - Web Exclusive

# 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

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

☒ Automated section assignment

Enable all sections automatically for the active scheme.

☐ Allow multiple section assignments

Let content be assigned to multiple sections.

☒ 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

Content Type	Draft	Needs Review	Published
Blog	Bloggers	Bloggers, Editor	Editor

# “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

Section	Draft	Needs Review	Published
Community	Comm, Board, Members	Exec, Comm	Exec
Education	Program	Comm	Exec
Leadership	Exec, Board	Exec	Exec

# Benchmark Society

## 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

Section	Draft	Needs Review	Needs Work	Last Look	Published
Issue	Asst →	Dir ↔	Asst ↔	Pub →	Dir
Feature	Dir, Asst →	Dir ↔	Dir, Asst ↔	Pub, Dir →	Dir
Column	Asst, Auth →	Dir ↔	Asst, Auth ↔	Dir →	Dir
Web Exclusive	Asst, Auth →	Dir, Asst ↔	Asst, Auth ↔	Dir, Asst →	Dir

# 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 the an organization
- Using other modules you can further extend the effectiveness of the Workbench suite

A blue silhouette of a crowd with many hands raised in the air, some making peace signs, framing the central text.

# Questions?

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