Using Workbench to Improve Drupal Content Management

Sean T. Walsh
Co-Founder & CEO
Sean@crowdcg.com

CROWD
Communications Group, LLC

#DrupalCampNJ

@CrowdCG

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Published/Unpublished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- Improves Published/Unpublished States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 ▲▼
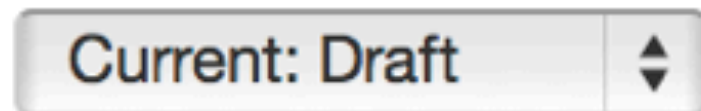
Set the moderation state for this content.

- 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

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

Save

Transitions

FROM		TO	DELETE
Draft	-->	Needs Review	☐
Needs Review	-->	Draft	☐
Needs Review	-->	Published	☐
New transition - 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

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

`Section`

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

Questions?

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