

# Drupal Workflow: Set it and Forget it!

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# What are we going to talk about?

- How we converted our University from the print version of our Bulletins driving our web content to have the web content drive our print version.
- Using Drupal's workflow system to manage 100 potentially simultaneous users across campus.
- How this process increased our content accuracy, decreased production time, and how we managed to pull it off.

# Agenda

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- Organizational structure and size of RIT
- Short history about our Bulletins
- Implementation
- Training 100+ users
- Challenges and benefits

# About RIT

- 9 colleges and 2 institutes
- More than 17,000 students, 3,600 faculty/staff
- More than 230 programs
- No marketing office, which means maintaining consistency is always a battle across campus.
- We work for University Publications, responsible for many print and web projects.

# Our bulletins (catalogs, etc..)

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- Originally done all on paper
- Edits were hand-written
- Inefficient

# Our bulletins – now in Word

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- 8 years ago, moved to Word documents with word tracking enabled
- After print, we exported the documents as web pages

# Our bulletins – now in Word

- College coordinators were given 3 months to update the Word documents
- Our designers were given 1 month to lay out the files in InDesign
- Multiple layouts go back and forth between the colleges and our office, to make edits. Edits are made by hand on printed copies.

# Our bulletins – now in Word

- After the files go to print, our editor takes a few weeks to update the Word documents with the hand-written edits
- Lastly, the final product is converted to the web over about a month-long process
- The website was static HTML, exported from Word documents, cleaned up in Dreamweaver, then cleaned and styled by hand



# Our bulletins – with database

- 2 years ago, we created a database to house program content, supplement Word documents, and expedite web conversion process
- Similar to using Word documents, but at the website creation phase, instead of static pages, the content was pasted into a custom-built CMS
- This allowed web users to quickly find programs through methods of categorization

# Our bulletins

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- All of these years, print came first, delivered in July, and weeks/months were spent converting to the web
- A step forward, but still was print driving the web

# Our bulletins – in Drupal!

- Last year, moved away from Word documents, to Drupal content management system
- This system allowed the college coordinators to update bulletin content on the web
- At a predetermined date, we disable user login, export the database, and convert it to InDesign files for the printed publication

# Let's do this: Implementing

- 4 user roles for our current workflow system
  - Author
  - Coordinator
  - Editor
  - Site admin

# Video: Coordinator training

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# Modules Needed for Workflow

- Revision
- Workflow
- Trigger
- Other useful
  - Views
  - CCK
  - etc...

# Revision Module

## Configure which revision is loaded when clicking on a view or edit link

This section allows you to configure which revision is loaded when clicking on links for viewing or editing moderated content, that is content for which the check-box **New revision in draft, pending moderation** is ticked on the *admin/content/node-type/<type>* page. If not ticked for this content type, current and latest revisions will be one and the same, so that the options behave identically.

### Links to view content default to:

- ☐ displaying the current revision
- ☒ displaying the latest revision (reverts to current revision, if the user is not permitted to view revisions of the content type in question)

The first option represents default core behaviour.

### Links to edit content default to:

- ☐ editing the current revision
- ☒ editing the latest revision (reverts to current revision, if the user is not permitted to view revisions of the content type in question)

The first option represents default core behaviour.

### ☒ Allow workflow state transistion via content edit form

If unticked, state transitions are only possible via the Workflow tab. Make sure you have enabled the Workflow tab permissions [here](#)

# Workflow Module

## Workflow

[List](#)[Add workflow](#)

Workflow	Operations
Programs Workflow	<a href="#">Add state</a> <a href="#">Actions</a> <a href="#">Edit</a> <a href="#">Delete</a>

State	Operations
(creation)	
in draft (with author)	<a href="#">Edit</a> <a href="#">Delete</a>
in review (with coordinator)	<a href="#">Edit</a> <a href="#">Delete</a>
in review (with editor)	<a href="#">Edit</a> <a href="#">Delete</a>
live	<a href="#">Edit</a> <a href="#">Delete</a>



# Workflow Module

From / To →	in draft (with author)	in review (with coordinator)	in review (with editor)	live
(creation)	<input checked="" type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin
in draft (with author)		<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input checked="" type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin
in review (with coordinator)	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input checked="" type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin		<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input checked="" type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin
in review (with editor)	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin		<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin
live	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input checked="" type="checkbox"/> Author <input checked="" type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input checked="" type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	<input type="checkbox"/> author <input type="checkbox"/> anonymous user <input type="checkbox"/> authenticated user <input type="checkbox"/> Author <input type="checkbox"/> Coordinator <input checked="" type="checkbox"/> Editor <input checked="" type="checkbox"/> Site Admin	

# Workflow Module

## ***Author*** may do these transitions:

From		To
in draft (with author)	→	in review (with coordinator)
live	→	in draft (with author)

## ***Coordinator*** may do these transitions:

From		To
in review (with coordinator)	→	in draft (with author)
in review (with coordinator)	→	in review (with editor)
live	→	in draft (with author)
live	→	in review (with coordinator)

# Trigger Module

**Trigger: When *program* moves from *Programs Workflow: in review (with editor)* to *Programs Workflow: live***

**Name**

**Operation**

Publish the most recent pending revision

unassign

Choose an action



Assign

# Additional Modules

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- Diff
- Pathauto
- Views
- CCK
- Smart menus, Smart tabs
- Taxonomy Access Control

# Check your permissions!

Permission	anonymous user	authenticated user	Author	Coordinator	Editor	Site Admin
<b>revisioning module</b>						
access Pending tab	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
edit revisions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
publish revisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
unpublish current revision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
view revision status messages	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
view revisions of any image content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of any minor content	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
view revisions of any page content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of any program content	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
view revisions of any story content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of any webform content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of own image content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of own minor content	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
view revisions of own page content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
view revisions of own program content	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



# Training 100+ users

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- Trained Coordinators
- Created videos
- Coordinators trained authors, used videos
- Added videos to the site
- Provide support (rare)

# XML output for InDesign

## XML Program Listing

Use the options below to select the programs, and display them in XML format

College:  Degree Level:

## XML Program Listing

Use the options below to select the programs, and display them in XML format

College:  Degree Level:

### College of Applied Science and Technology

```
<program>
  <title>Civil Engineering Technology</title>
  <degree_level>BS</degree_level>
  <college>College of Applied Science and Technology</college>
  <hegis>0925</hegis>
  <website>http://www.rit.edu/cast/cetems/</website>
  <person><p class="person">John Morelli, Department Chair <br />(585) 475-7213, john.morelli@rit.edu</p></person>
  <body_text><h3>Program overview</h3><p>Using the language of codes, working drawings, and specifications,
</program>
<program>
  <title>Computer Engineering Technology</title>
  <degree_level>BS</degree_level>
  <college>College of Applied Science and Technology</college>
  <hegis>0925</hegis>
  <website>http://www.rit.edu/cast/ectet/bs-in-computer-engineering-technology.php</website>
  <person><p class="person">Michael Eastman, Department Chair<br />(585) 475-7787, mgelee@rit.edu</p></person>
  <body_text><h3>Program overview</h3><p>Embedded systems are at the heart of devices and systems used every
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  <hegis>0925</hegis>
  <website>http://www.rit.edu/cast/ectet/bs-in-electrical-engineering-technology.php</website>
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  <degree_level>Undeclared</degree_level>
  <college>College of Applied Science and Technology</college>
  <hegis></hegis>
  <website>http://www.rit.edu/cast/mmetps/</website>
  <person><p>Elizabeth Dell, Undeclared Program Coordinator<br />(585) 475-6577, emdmet@rit.edu</p></person>
```



# Challenges moving to Drupal

- Drupal was not available as a university-wide CMS until 2010
- Many owners of program content are non-technical
- Our office has 2.5 web developers, so time is always a problem

# Benefits

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- Content owners keep content up-to-date year round
- Time savings for designers and web developers
- Consistency between programs

# Conclusion

- Workflow in Drupal can be done mainly with 3 modules
- Test thoroughly before going live, it's very complex
- If it doesn't work, check your permissions!
- Use custom blocks, views, and CSS to make the interface easy for novice users
- With large sets of users, videos help keep training times down

# Questions?

