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

- 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..)

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

Our bulletins – now in Word

- 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 handwritten 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

- 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

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:

- Odisplaying 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:

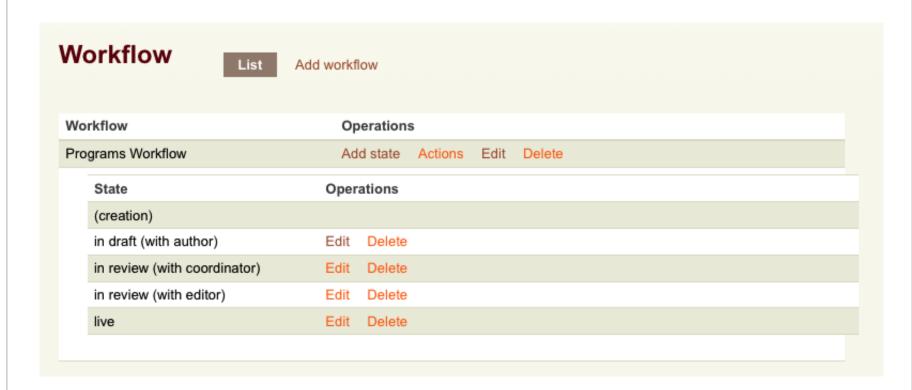
- o editing the current revision
- editing the latest revision (reverts to current revision, if the user is not permitted to view revisions of the content type in question)

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 Module

From / To →	in draft (with author)	in review (with coordinator)	in review (with editor)	live	
(creation)	✓ author	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ▼ Editor ▼ Site Admin	
in draft (with author)		□ author □ anonymous user □ authenticated user ☑ Author □ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	
in review (with coordinator)	□ author □ anonymous user □ authenticated user □ Author ☑ Coordinator ☑ Editor ☑ Site Admin		author anonymous user authenticated user Author Coordinator Editor Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	
in review (with editor)	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin		□ author □ anonymous user □ authenticated user □ Author □ Coordinator ☑ Editor ☑ Site Admin	
live	□ author □ anonymous user □ authenticated user ☑ Author ☑ Coordinator ☑ Editor ☑ Site Admin	□ author □ anonymous user □ authenticated user □ Author ☑ Coordinator ☑ Editor ☑ Site Admin	author anonymous user authenticated user Author Coordinator Editor Site Admin		

Workflow Module

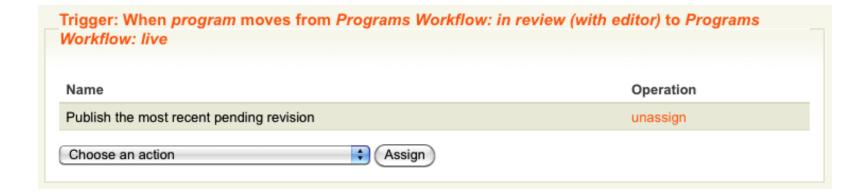
Author may do these transitions:

From		То
in draft (with author)	\rightarrow	in review (with coordinator)
live	\rightarrow	in draft (with author)

Coordinator may do these transitions:

From		То
in review (with coordinator)	\rightarrow	in draft (with author)
in review (with coordinator)	\rightarrow	in review (with editor)
live	\rightarrow	in draft (with author)
live	\rightarrow	in review (with coordinator)

Trigger Module



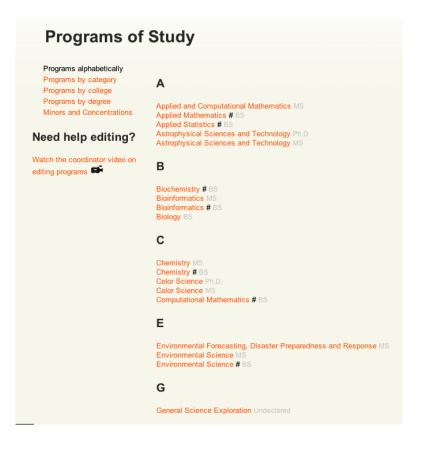
Additional Modules

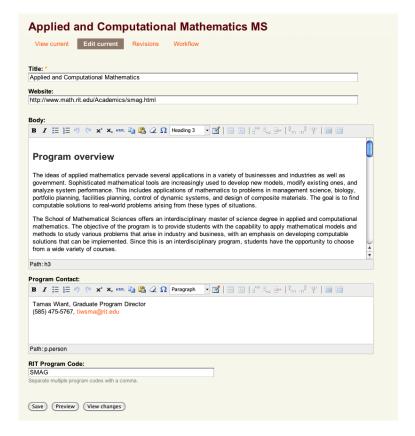
- Diff
- Pathauto
- Views
- CCK
- Smart menus, Smart tabs
- Taxonomy Access Control

Check your permissions!

Permission	anonymous user	authenticated user	Author	Coordinator	Editor	Site Admin
revisioning module						
access Pending tab				lacktriangledown	$ \overline{\checkmark} $	
edit revisions				☑	☑	☑
publish revisions						
unpublish current revision					☑	✓
view revision status messages				lacktriangledown	\checkmark	
view revisions of any image content						
view revisions of any minor content				lacktriangledown	$ \overline{\checkmark} $	$ \overline{\checkmark} $
view revisions of any page content						
view revisions of any program content				✓		
view revisions of any story content						
view revisions of any webform content						
view revisions of own image content						
view revisions of own minor content			\blacksquare	✓	✓	\blacksquare
view revisions of own page content						
view revisions of own program content					☑	

Styling the users views





Training 100+ users

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

XML output for InDesign



Use the	options below to select the programs, and display them in XML format
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	<pre><website>http://www.rit.edu/cast/cetems/</website></pre>
	<pre><person>John Morelli, Department Chair (585) 475-7213, john.morelli@rit.edu<pre><pre>/p<<pre><pre>person</pre></pre></pre></pre></person></pre>
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	<pre><person>Michael Eastman, Department Chair (585) 475-7787, mgeiee@rit.edu</person></pre>
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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

- 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?

