# phase:d 

THE LEADER IN DRUPAL PLATFORM DESIGN AND DEVELOPMENT

# XAILTHETHINES TOTAL CONTENT CONTIROL 

## IOE TURAEON x TIM COSAROVE

## WHO THIS IS FOR

- Developers
- Project Owners
- Multilingual Site Creators
- Content Developers
- Site Builders


## Phase: / ITMAKES <br> THE LEADER IN DRUPAL PLATFORM DESIGN AND DEVELCDiENT WEBSITES



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## THE CLIENT

## "BRAND $Z^{"}$

- Large multinational consumer products company
- $\$ 9.7$ billion in sales annually
- Nearly $\$ 1$ billion in online sales
- Operates in about 150 countries, about 50 online
- Sites in about 30 languages


## EXISTING WEB SOLUTION

- Custom-written commerce engine
- Also serves static content
- No CMS of any kind
- Non-commerce pages static HTML


# BRAND ZWANTS ALL THE THINGS! 

## ALL THE

## THINGS!

## DRUPAL-BASED PUBLISHING PLATFORM

- Multi-market
- Multi-lingual
- Multiple brands
- Interfaces with existing ecommerce system


BRAND ZPLATFORM CONCEPT

## PLATFORM OBIECTVES

## ALL THE CONTENT!

- Subject to workflow

Able to be translated

- Able to be saved to multiple revisions, including drafts


## all the things?




## BATCHED CONTENT MANAGEMENT

- Preview whole groups of content updates together
- Publish, unpublish, and manage the workflow state of whole groups of content en masse

BMW Owners
■ Sign in to the Owners' Circle My BMw
Creato a My BMW account to save configurations, rate videos \& more. , Sign In . Sign Up

## Build Your Own

- Start now

START STOP

| 2011 BMW Alpina B7 Sedan <br> + Learn More | Quote On Demand <br> - Start now |
| :--- | :--- |


BMw TV

- Start Watching



## FLEXIBLE LAYOUTS

- Select different templates to use for the same content type
- Allow users to define complex inputs for the output of structured content
- Allow users to build basic templates themselves and to reuse them



## CONSISTENT, INTUITIVE UI

CMS users with only basic training

- CMS will be used worldwide



## + Add content

## Home » Aarministration » structure

Blocks ©
BARTIK

This page provides a drag-and-drop interface for assigning a block to a region, and for controlling the order of blocks within regions. Since not all themes implement the same regions, or display regions in the same way, blocks are positioned on a per-theme basis. Remember that your changes will not be saved until you click the Save blocks button at the bottom of the page. Click the configure link next to each block to configure its specific title and visibility settings. Demonstrate block regions (Bartik)

+ Add block

Show row weights


Highlighted
No blocks in this region

Featured
phase:Il
No blocks in this region

## PLATFORM GOALS

- Content layout is flexible
- All content is translatable
- Content is subject to workflow
- The CMS UI is consistent and intuitive



## LAYOUT ALL THE THINGS!

## OBJECTIVES

## MULTIPLE LAYOUTS IN CONTENT

- Layouts are independent of content type
- Multiple layouts can be used in one content type
- Editors can define own layouts in CMS


## WHY ROBIN HOOD?

"THERE IS LITERALLY NO FOUNDATION, NO AGTIVITY, THAT IS MORE EFFEGTIVE."

## We are the largest povertr-fighting organization in nyc

At Robin Hood, 100\% of every donation goes directly to fighting poverty. We make grant decisions to maximize impact, much like a financial manager chooses investments to maximize profit. The upshot: a 15:1 return on your investment dollar.


## SOLUTION: TEMPLATE FIELD

- Allows a single field to contain many pieces of data
- Each template has HTML, optional CSS \& JS
- Can be in code, or DB; can be overridden
- Because it's a field, can be revisioned



## APPLES TO ORANGES...TO PLUMS.

Finding and selecting the most effective organizations to fund is a challenging task. How do you choose between programs that offers job training to the unemployed, to programs that focus on children's health, to programs that help the homeless?
To compare apples to oranges to plums, Robin Hood has developed a disciplined system for comparing the impacts of dissimilar programs by measuring them on this same scale: how much the program is going to increase future earning and income. Watch how we utilize metrics to select the top programs in New York City.


MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER
Ph.D, Economics, Massachusetts institute of Technology
Editorial Board and economics columnist, The New York Times

We put in the time and the know-how to help our partners succeed.

## SITE VISITS Q1,600

MANAGEMENT ASSISTANCE - $\$ 6.7 \mathrm{M}$

## REAL ESTATE ASSISTANCE

苗 1.3 M

| Top |
| :--- |
| Middle Left |
| Middle Right |
| Bottom |



Bubbles
A collection of pulsing bubbles. Seven bubbles can have content associated with them. Four additional bubbles can have customized images.


City Stats
A city skyline graph. This interactive template has 29 bar graphs which can each have associated information.


## Select



## NEW YORKERS IN NEED FAGE A DALLY STRUGGLE.

Chronic illness that causes school absences, lagging performance and lost income for care-taking parents. It's interconnected challenges like these that increase the gap between those in poverty and those on a path to succeed. Sometimes attacking poverty can be something as simple as recognizing the domino effect caused by childhood asthma and providing inhalers to those who need them.


SEE HOW OUR PROGRAMS FIGHT POVERTY

## OTHER BENEFITS

Allows node-specific layouts, even within one content type
Layouts can be shared across content types

## MULTIPLE LAYOUTS IN PAGES

- Layout of a single content type may change significantly from node to node or even revision to revision
- Layouts need to be attached to node for workflow, etc.


## CONTROL OVER BLOCKS

- Content editors need to create blocks freely
- Need to be able to place blocks as part of page content
- Need to be able to embed blocks in other content


## SOLUTION: BLOCK REFERENCE

- Insert blocks into nodes as field content
- In combination with a content block solution, allows reusable block content to be laid out in arbitrary layouts


## Bottom Blocks

The three columns of blocks at the bottom of the homepage main column.



Find information about your town or city.


HAVE YOUR SAY
Did you visit the 2011 Solar Decathlon on the National Mall's West Potomac Park? We want to hear your thoughts! Tell us which team's house was your favorite and why.

## E130



## BLOG

SunShot Initiative Researcher Wins National Medal of Technology and Innovation
Last week, President Obama recogrized D. Rakesh Agrawal, who is currently a searcher with the Departments SunShot Initiative, with the Nationa unsh I Tedal of Technology and Innovation.

| POPULAR TOPICS | NEWS |
| :--- | :--- |
| Tax Credits, Rebates, Savings | ocroubr s. 2011 <br> Socrotry of Energy Chu <br> Congratulates 2011 Chemistry Nobel <br> Laureate |
| Heating and Cooling | Ocrober s. 2011 <br> Obama Administration Announces <br> Job-Creating Grid Modernization <br> Pillot Projocts |
| Industrial Heating \& Cooling |  |
| Solar | Home Weatherization |
| Appliances \& Electronics |  |

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SAVINGS
Kansas City Powor \& Light.
Commerciallindustrial Enorgy Efficioner Robato Program
Saho Power - Resididential Energy Efficiono obsto Programs Coubiana Stato Building Energy Code
Vow All Savings ©

HOW MUCH DO YOU SPEND?


Compare your stato's per capta amual erergy costs in a stato-by-state map of average evergy experstures.

HOW MUCH DO YOU USE?


## SOLUTION: EMBEDABBLES

Allows block content to be placed into rich text contexts

- Effectively allows revisioning of block placement within that context



## APPLES TO ORANGES...TO PLUMS.

Finding and selecting the most effective organizations to fund is a challenging task. How do you choose between programs that offers job training to the unemployed, to programs that focus on children's health, to programs that help the homeless?
To compare apples to oranges to plums, Robin Hood has developed a disciplined system for comparing the impacts of dissimilar programs by measuring them on this same scale: how much the program is going to increase future earning and income. Watch how we utilize metrics to select the top programs in New York City.

OREAD MORE ABOUT ROBIN HOOD METRICS.


MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER
Ph.D. Economics, Massachusetts institute of Technology Editorial Board and economics columnist, The New York Time

WE PUT IN THE TIME AND THE KNOW-HOW TO HELP OUR PARTNERS SUCCEED.


MANAGEMENT ASSISTANCE


REAL ESTATE ASSISTANCE
A 1.3 M

## Middle Right

##  

## MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER

BLOCK: MW approach video

Ph.D., Economics, Massachusetts Institute of Technology
Editorial Board and economics columnist, The New York Times

MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER


Ph.D., Economics, Massachusetts Institute of Technology
Editorial Board and economics columnist, The New York Times

## Middle Right

##  

## MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER

BLOCK: TEST Take Action Bean (Large Circle)

Ph.D., Economics, Massachusetts Institute of Technology
Editorial Board and economics columnist, The New York Times

## MICHAEL WEINSTEIN, CHIEF PROGRAM OFFICER




## TRANSLATE

## ALL THE THINGS!

## OBJECTIVES

## ALL CONTENT IS TRANSLATABLE

- Body content, block content, menu items, form labels, and any other visible text
- Related translations grouped and accessible from the source node


## 

- Subscribed content adopts a specific piece of content from another language
- Localized content begins as a copy from another language, but can be edited independently and diverge


## EACH TRANSLATION IS DISTINCT

- Translations may not be literal
- The version of content for a particular market/language should be managed separately from other markets/ languages





## SOLUTION: CONTENT TRANSLATION + I18N

Translations of a piece of content are managed with translation sets. Each translation set has one source post and any number of translations in any of the enabled languages. All translations are tracked to be up to date or outdated based on whether the source post was modified significantly.

| LANGUAGE | TITLE | STATUS | OPERATIONS |
| :--- | :--- | :--- | :--- |
| English (source) | English article | Published | edit |
| French | French article | Published | edit |
| German | German article | Published | edit |

## SELECT TRANSLATIONS FOR ENGLISH ARTICLE

Alternatively, you can select existing nodes as translations of this one or remove nodes from this translation set. Only nodes that have the right language and don't belong to other translation set will be available here.

| French | French article [nid:2] |
| :--- | :--- |
| German | German article [nid:3] |

## Update translations

# SOLUTION: CUSTOM EXTENSION FOR SUBSCRIPTIONS + UI ENHANCEMENTS 

Translations of a piece of content are managed with translation sets. Each translation set has one source post and any number of translations in any of the enabled languages. All translations are tracked to be up to date or outdated based on whether the source post was modified significantly.

| COUNTRY-LANGUAGE | TITLE | WORKFLOW STATUS | LOCALIZATION STATUS | ACTIONS |
| :--- | :--- | :--- | :--- | :--- |
| US - English | About Us | Published | Localized Original | edit |
| US - Spanish | Sobre | Published | Localized Copy | edit |
| Switzerland - German | Übersicht | Published | Localized Copy | edit |
| Switzerland - French | A propos | Published | Localized Copy | edit |
| Switzerland - Italian | Sommario | Published | Subscrized Copy | edit |
| Canada - English | About Us | Published | Subscribed to Switzerland - French | - Localize from ... |
| Canada - French | A propos | Published |  |  |

## SOLUTION: DOMAIN

+ Create domain

The following domains have been created for your site. The currently active domain is shown in boldface. You may click on a domain to change the currently active domain. Your default domain is bmw-usa.com, which will be used for all requests that fail to resolve to a registered domain.

| ORDER | NAME | DOMAIN | ID | ACTIVE | DEFAULT | OPERATIONS |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| + | BMW USA | bmw-usa.com | 23 | V | $\bigcirc$ | edit domain |
| $\pm$ | BMW France | bmw.fr | 3 | V | $\bigcirc$ | edit domain |
| $\pm$ | BMW Germany | bmw.de | 5 | $\checkmark$ | $\bigcirc$ | edit domain |
| \$ | BMW Switzerland | bmw.ch | 9 | $\checkmark$ | $\bigcirc$ | edit domain |

Save

## SOLUTION: DOMAIN CUSTOM EXTENSION

## POTENTIAL DRUPAL 8 IMPROVEMENTS

- Integrate more functionality from i18n in core
- Make entities translatable
- Simplify UI for managing content translations


## REVISION THE THINGS!

ALL



# REVISION ALL THE THINGS! 

## REVISIONS?

- More like "versions"
- Keep old copies of content
- Ideally, work on multiple versions of content at once


## WORKFLOW?

- Drupal has "unpublished" and "published"
- Add more states, like "approved" or "needs edits"
- Control access to each of those states


## CORE DRUPAL REVISIONS

- Only saves previous copies
- Can't edit two copies independently
- No working drafts
- Only applies to nodes
- Only core 'workflow' states


## ALL THE THINGS?

- Nodes
- Menus
- Block Content

Block Placement

## NODE ALL THE THINGS!

- Can be translated
- Drupal takes care of basic revisions
- Basic workflow needs met


## MENUS

- Drupal Menus are not strictly content
- No publishing, unpublishing
- Behavior can be unpredictable and confusing for content editors


## SOLUTION: MENU FIELD

- Menu-like content as a field
- Translatable, revisionable
- Mirrors Drupal native menus
- Flexible menu content - rich text



## SOLUTION: NODEBLOCK

## SOLUTION: STATE FLOW

- Highly configurable workflow solution

API-driven, developer-friendly

| Workflow for Energy.gov + |  |  |  | View | Edit | What links here | Revisions | Workflow | Log | Devel |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Current Revision |  |  |  |  |  |  |  |  |  |  |
| STATUS <br> published <br> REVISION <br> 1551775 <br> ACTIONS <br> Unpublish |  |  |  |  |  |  |  |  |  |  |
| Other Revisions |  |  |  |  |  |  |  |  |  |  |
| ID | Title | Status | Last Updated | Actions |  |  |  |  |  |  |
| 1551763 | Energy.gov | unpublished | 08/29/2012-15:01 | Edit \| | o Dra |  |  |  |  |  |
| 1542049 | Energy.gov | unpublished | 08/14/2012-18:23 | Edit \\| | o Dra |  |  |  |  |  |
| 1541965 | Energy.gov | draft | 08/14/2012-17:45 | Edit I | or Rev | I Immediate Publi | \| Immediat | chedule |  |  |
| 1541953 | Energy.gov | draft | 08/14/2012-17:41 | Edit \| | or Rev | \| Immediate Publi | \| Immediat | chedule |  |  |
| 1536349 |  | draft | 08/14/2012-17:42 |  |  |  |  |  |  |  |

## REVISION TAGGING

- Label each revision

All content with that tag can be acted on

- Preview site with different tags



## SHOW ONLY ITEMS WHERE

| Content Tag | Winter Campaign | R | Refine |
| :--- | :--- | :--- | :--- |
| Sany] State  |  |  |  |

## UPDATE OPTIONS

$\checkmark$ Transition Action: for review
Transition Action: immediate publish
Transition Action: approve
Transition Action: reject
Transition Action: publish
Transition Action: unpublish
Transition Action: to draft
Transition Action: revert

| Transition Action: revert |  | Page | tcosgrove | Draft | edit | delete |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| $\bigcirc$ | Footer Menu | Menu | jturgeon | Draft | edit | delete |
| $\bigcirc$ | Shopping | Page | tcosgrove | Draft | edit | delete |
| $\bigcirc$ | View All | MPP | tcosgrove | Draft | edit | delete |




## POTENTIAL DRUPAL 8 IMPROVEMENTS

- Entities Everywhere
- Content Staging Intiative and Site Preview System


## LESSONS

## RESOURCES

- Template Field http://drupal.org/project/template field
- Formatter Field
http://drupal.org/project/formatter field
- Block Reference
http://drupal.org/project/blockreference


## RESOURCES

- Embeddables
http://drupal.org/project/embeddable
- i18n
http://drupal.org/project/i18n
- Domain
http://drupal.org/project/domain


## RESOURCES

- State Machine
http://drupal.org/project/state machine
- Nodeblock
http://drupal.org/project/nodeblock
- Menu Field
http://drupal.org/project/menu field


## THANKS.

## QUESTIONS?

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