Planning for Drupal

before the build

So You Want a New Website?

marketing editors customer audience branding
Google guest mobile Facebook ahead image
expanding growth visitors security members news organization attract
stay sitemap management retention interactive
sales messaging Twitter integration inform search-engine attention content beautiful events
blog

Singlebrook Technology   **607 330 1493**   **info@singlebrook.com**

About the Project

Identify the purpose of the project

- "We need a site that is easier to manage"
- "We need to get information to our target audience"
- "We need our target audience to take action"

About the Project

Identify the project **stakeholders**

- Administrative (Directors or board members)
- Technical (IT team)
- Outside service providers (hosting, integrated platforms or services)
- Content Team
- Target Audience

About the Site

What is the **goal** of the site?

(this might be the same as the project's goal)

What about **future goals**?

About the Site

Are your **goals** being met now?

How do you know?

- Google Analytics
- Usability study
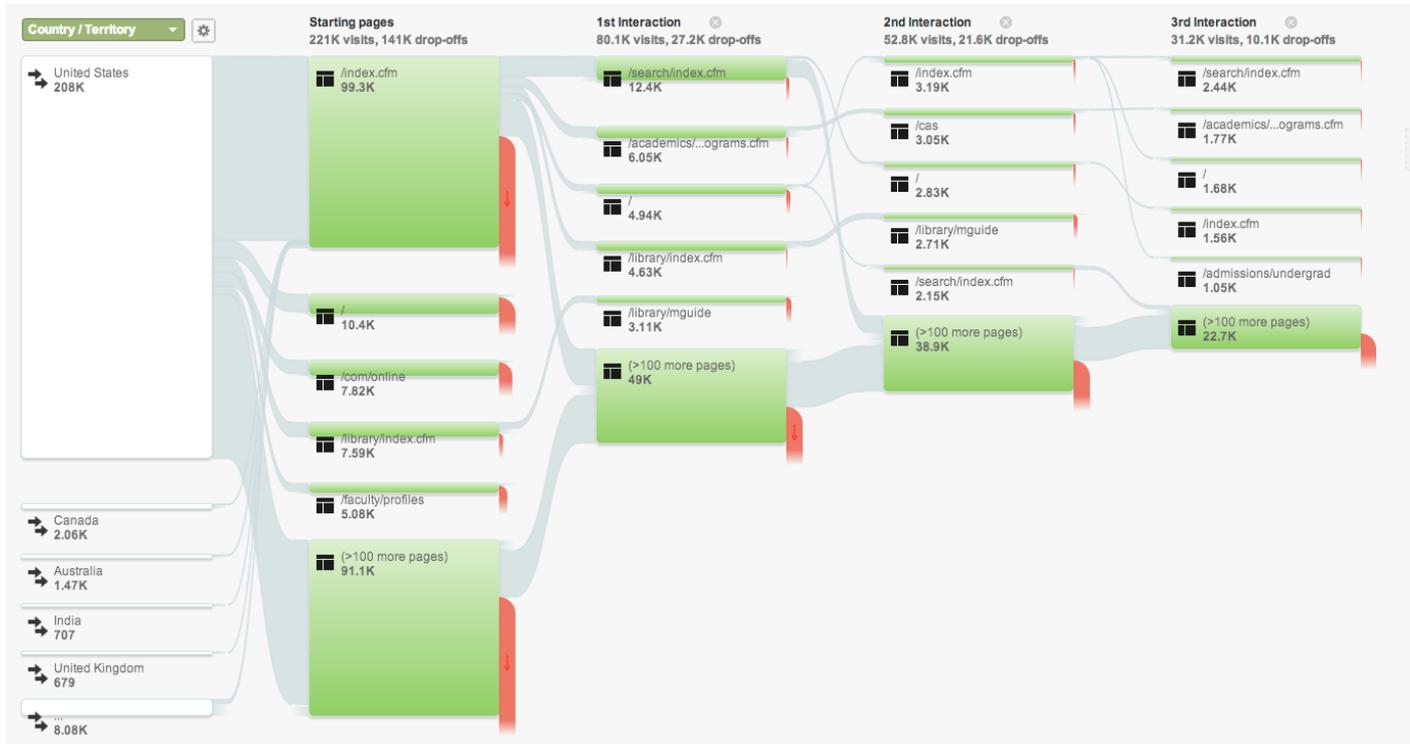- Surveys

About the Site

Who is your target **audience**?

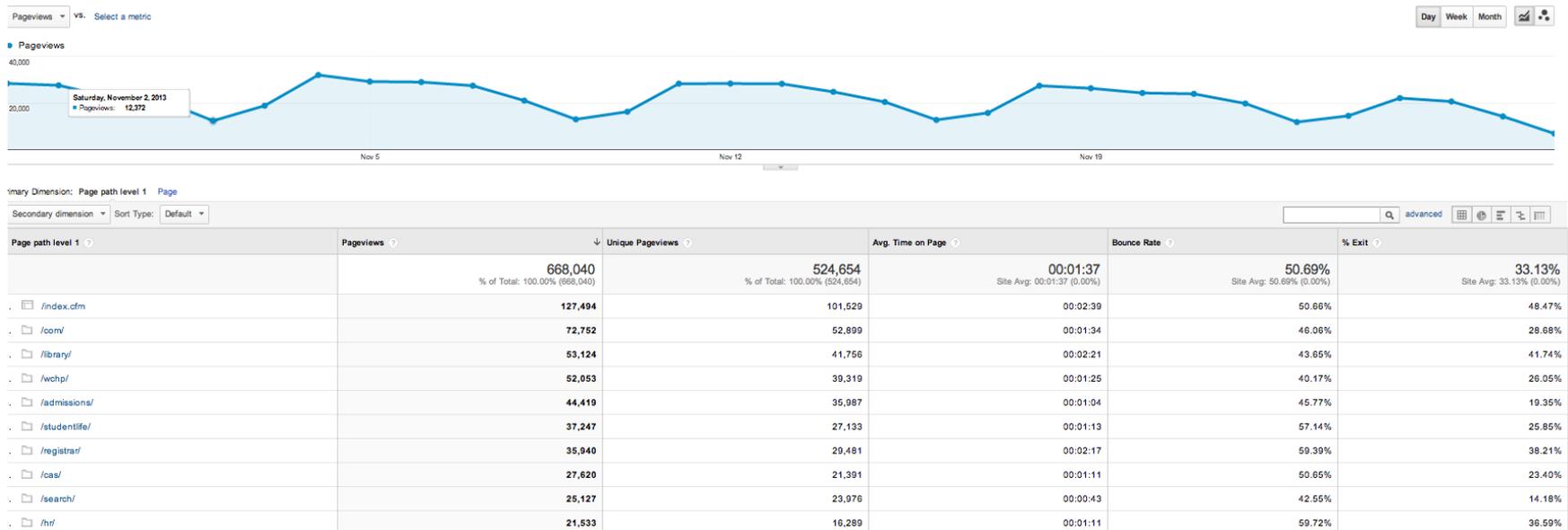Is your current content written for them?

How do you know?

- Google Analytics
- Usability study
- Surveys

Google Analytics

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Google Analytics

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About the Site

What other products are you using that you want to **integrate** with?

- Learning management systems
- Social media
- Newsletter/mailing services
- Customer relationship systems
- Other content management systems
- Commerce systems

About the Site

Content Strategy:
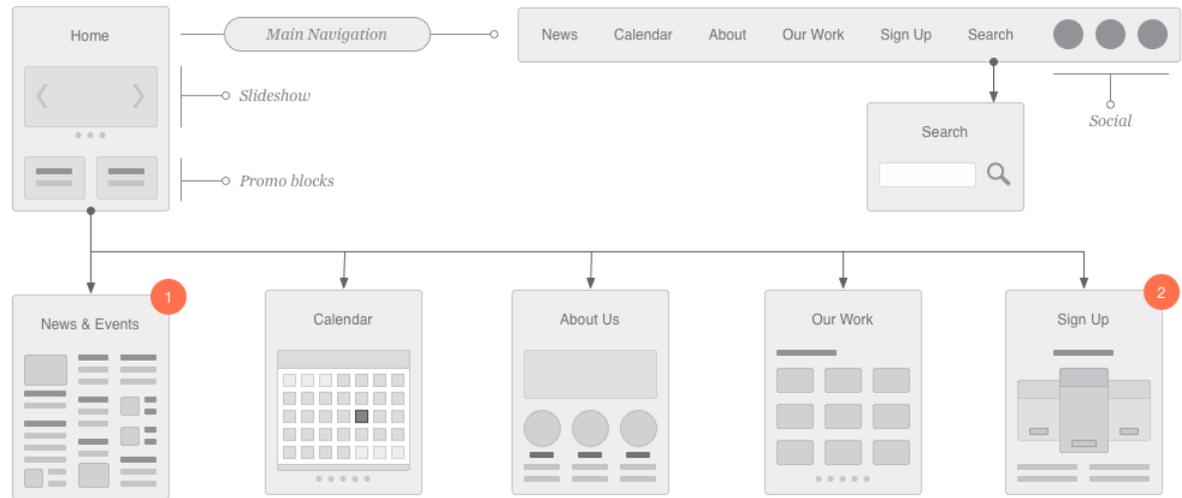
Is it easy to find information on your site?

Do you have a **site map** of the current site?
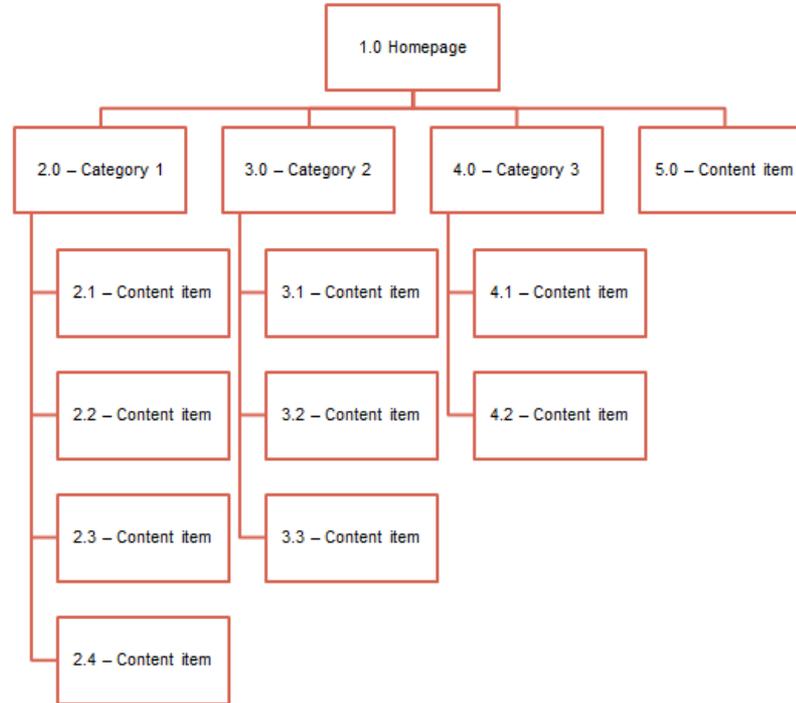How much can it/will it change for the new site?

Site maps

Detailed: defining page types takes more time upfront, but can save time later

Site maps

Basic:

quicker, but is more ambiguous

Site maps

Spreadsheet:

Less visual, but can include more information.

	A	B	C	D	E	F	G	H
1	Homepage	/						
2			category 1	/category1				
3					content item	/category1/title		
4					content item	/category1/title		
5					content item	/category1/title		
6					content item	/category1/title		
7					subcategory1	/category1/subcategory		
8							content item	/category1/subcategory/title
9							content item	/category1/subcategory/title
10			category 2	/category2				
11					content item	/category2/title		
12					content item	/category2/title		
13					content item	/category2/title		
14					content item	/category2/title		
15			category 3	/category3				
16					content item	/category3/title		
17					content item	/category3/title		
18					content item	/category3/title		
19			content item	/title				
20								
21								
22								

About the Content

What **types of content** do you have?

- news
- events
- people
- groups
- blogs

- general information
- contact/inquiry
- departments
- degrees
- courses

About the Content

Structured Content -

What information can be **fielded**?

What content might need special styling?

What information might need to used elsewhere?

About the Content

What special pages are there?

- calendars
- directories
- maps
- listings of news, posts, people, etc.
- forms
- landing pages

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About the Content

Basic Drupal Terminology

Content Type - each is a unique collection of fields and displays. Content types generate nodes.

Node - pages users can land on.

About the Content

Basic Drupal Terminology

Taxonomy - often thought as tags, but really can be any reusable collections of information.

Block - allows you to display pieces of information in various places around the site.

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About the Content

Basic Drupal Terminology

Views - a tool that helps pull pieces of entities under configurable conditions (The dates and titles of all events starting this week, or the name and job title for all people affiliated with a department)

About the Content

Static content stands alone and is not dependent on other content or user input.
(Typical for about or history pages, for example.)

About the Content

Dynamic content is pulled from elsewhere on the site or based on user input.

(Displaying a person's recent blog posts on their profile page, for example.)

About the Users

What types of **users** are going to need access to the site?

What's their **story**?

What will their **roles** or job duties be?

About the Users

Basic Drupal Terminology

User - *any* visitor to the site

Role - defines the user type (anonymous, member, editor, manager, admin, etc.)

Permissions - set for each role individually. Used to set who can read or create/edit each content type (and much more).

About the Users

Tell us a (short, specific, testable) **story**….

An editor needs to be able to edit an existing event in order to indicate that it has been canceled.

Project Requirements

A work in progress, but this document is the end goal of planning and discovery phases.

But why?

	A	B	C	D	E	F
1	Requirements					
2			Item	Details	Priority	Notes
6	R1.1.2			Managers will be able to create and edit users and grant roles		
7	R1.1.3			Editors will be able to create and edit any content on the site		
8	R1.1.4			Marketing will be able to move ad blocks and create/edit content for them as needed		
9	R1.1.5			Blog Editor will be able to edit any blog post		
10	R1.1.6			Blog contributor will be able to create blog posts and edit their own blog posts		
11	R1.1.7			Print Subscribers will have access to everything Registered users do, plus premium content		
12	R1.1.8			Archive users will have access to special archive materials		
13	R1.1.9			Comp will have access to everything Registered users do, plus premium content. Role to be added by UberCart w/ expiration date		
14	R1.1.10			Premium users will have access to everything the users do, plus premium content		
15	R1.1.11			Registered users will have access to everything guests do, plus discussion forums and article commenting, purchasing both print and online subscriptions,		
16	R1.1.12			Guests will be able to view free content and comments on premium content		
17	R1.2		User Profiles will collect the same information as required in the current registration form			
18	R1.2.1			Email Address		
19	R1.2.2			User Name		
20	R1.2.3			Password		
21	R1.2.4			Account Type		
22	R1.2.5			Salutation		
23	R1.2.6			First Name		
24	R1.2.7			MI		
25	R1.2.8			Last Name		
26	R1.2.9			Company		

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Project Requirements

- Ensure everyone understands what is needed
- Open discussions of value vs effort
- Provide testing guidelines
- Help set realistic delivery dates
- Make for happy stakeholders and developers

Thank You

Lauren Kelly

lauren.kelly@singlebrook.com

Singlebrook Technology   **607 330 1493**   **info@singlebrook.com**