

Building complex pages with Views and Display Suite

Part 2 of 2

In this session, we will see how we can integrate Organic Groups (OG) to the pages built in Part-1 in order to control access to content, i.e. dynamically filter content based on user membership.

presented by

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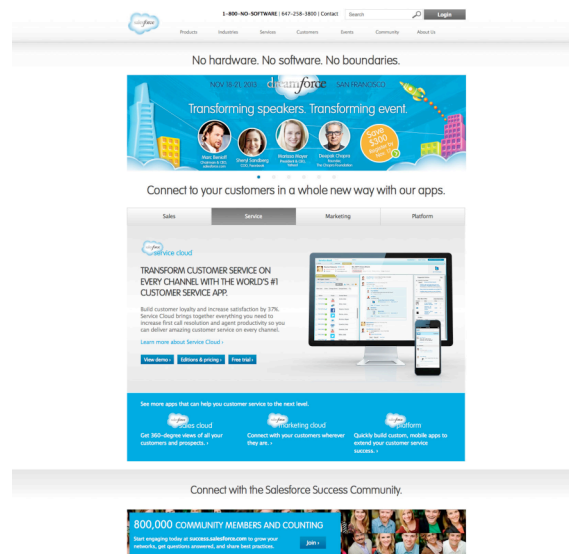
Presentation outline

- Preamble
 - The value of context & process
 - Reading about what a module does is not enough
 - Finding out when to use it or not easy
 - Sharing hindsight
 - More about the journey than the destination

Presentation outline

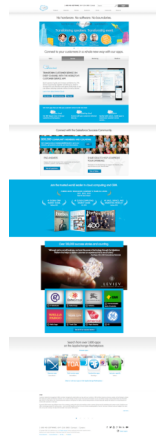
- Summary of Part-1
- Project requirements
- Paradigm shift
- Organic Groups
- Demo
- Questions

salesforce.com



The screenshot shows the Salesforce.com homepage. At the top, there is a navigation bar with the Salesforce logo, contact information (1-800-NO-SOFTWARE | 415-773-1800 | Contact), a search bar, and a 'Login' button. Below the navigation bar, the main headline reads "No hardware. No software. No boundaries." followed by "You turn. Salesforce. Transforms." and "Transforming speakers. Transforming event." with a "Join 500k+ partners" badge. A secondary headline says "Connect to your customers in a whole new way with our apps." Below this is a section for "Salesforce cloud" with tabs for Sales, Service, Marketing, and Platform. The "Service" tab is selected, and the content focuses on "TRANSFORM CUSTOMER SERVICE ON EVERY CHANNEL WITH THE WORLD'S #1 CUSTOMER SERVICE APPS." It includes a sub-headline "Build customer health and increase satisfaction by 37%." and a "Learn more about Service Cloud" link. At the bottom, there are three app highlights: "Sales cloud" (Get 300+ ways to view all of your customers and prospects.), "Marketing cloud" (Connect with your customer wherever they are.), and "AppExchange" (Quickly build custom, mobile apps to extend your customer service network.). The footer features the text "Connect with the Salesforce Success Community." and a badge for "800,000 COMMUNITY MEMBERS AND COUNTING" with a "Join" link.

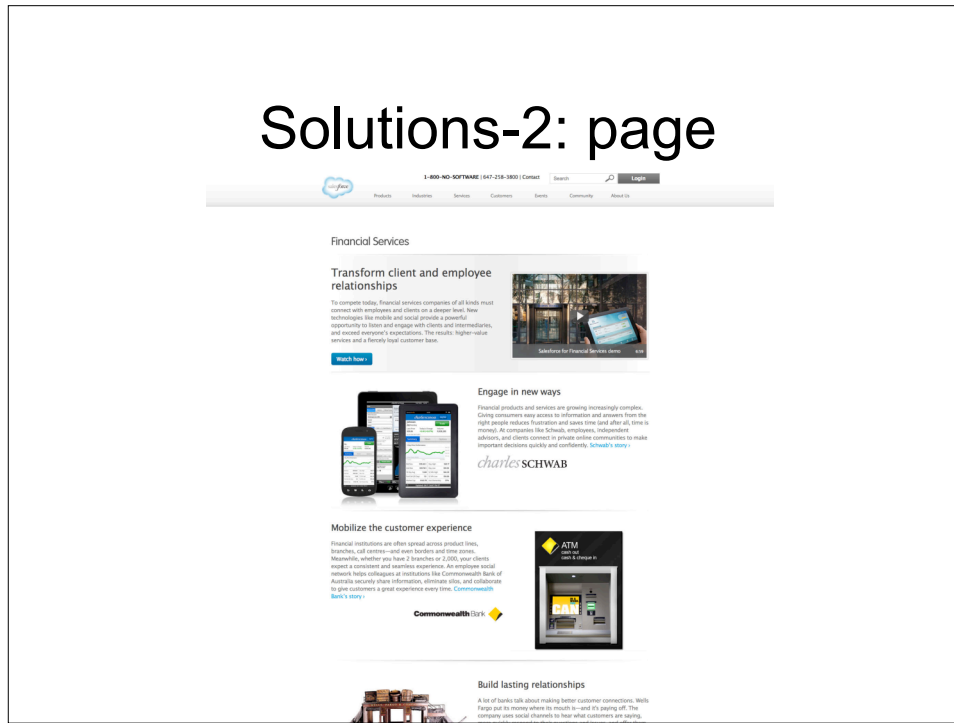
salesforce.com



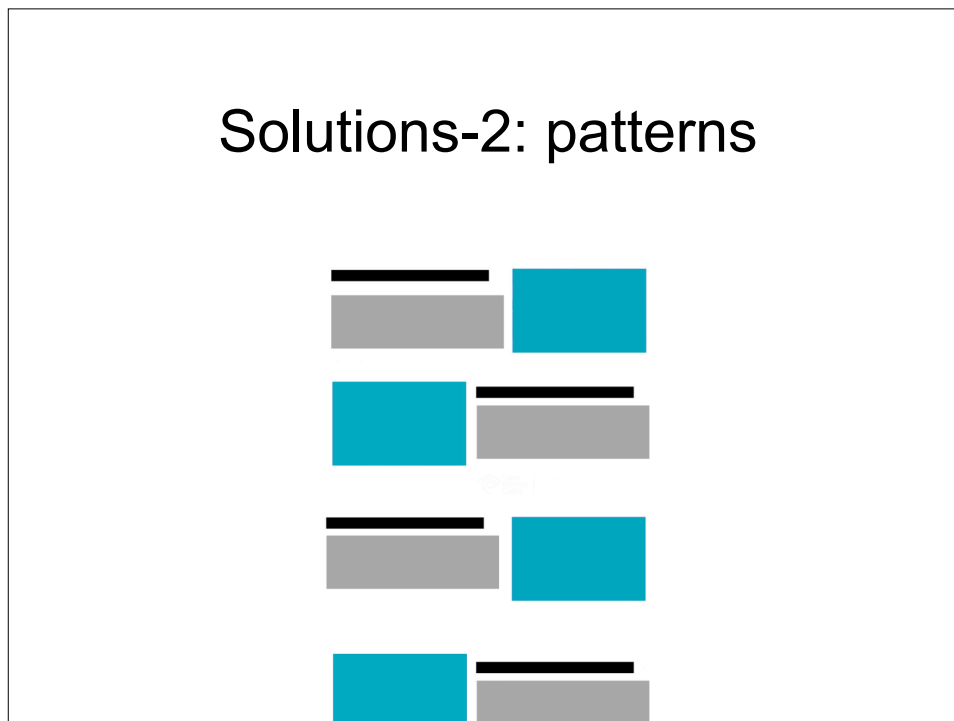
See any patterns?



Solutions-2: page



Solutions-2: patterns



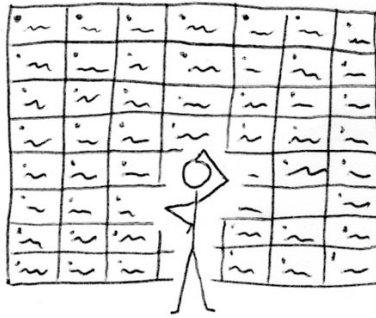


Making sense of complexity

April 2013

Charting the unchartable

Making sense of 60+ mockups...



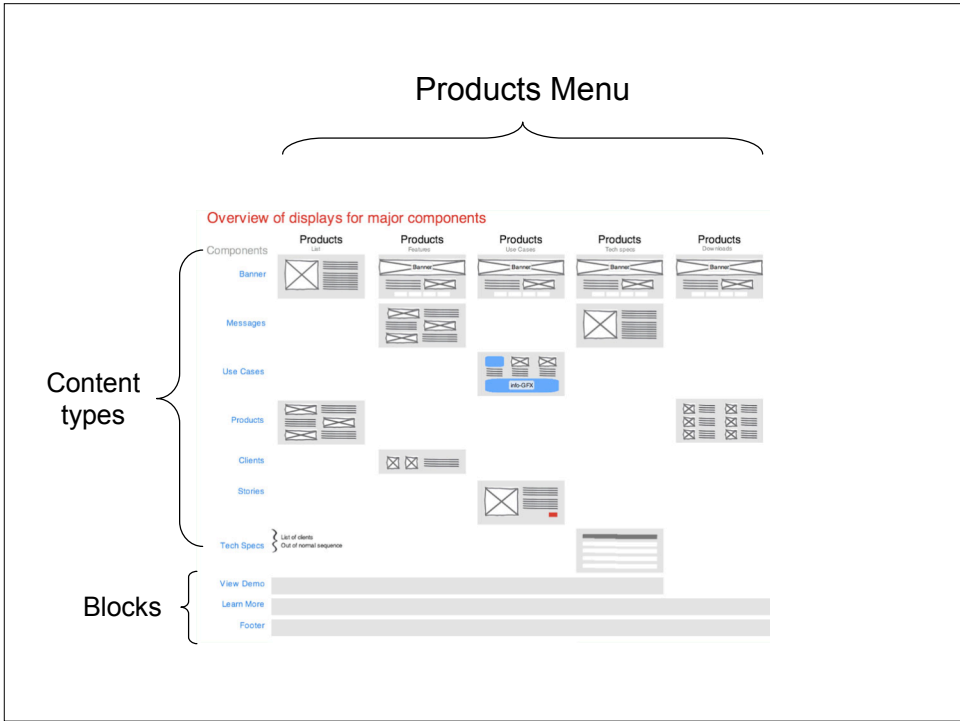
Charting the unchartable

Slicing up 60+ mockups...

	SOLUTIONS	INDUSTRIES	PRODUCTS (List)	PRODUCTS (Feature)	
Person (static)	[Icon]	[Icon]		[Icon]	
Features	[Icon]	[Icon]		[Icon]	
Use Cases		[Icon]		[Icon]	
Related Products	[Icon]		[Icon]	[Icon]	
Content/Localization		[Icon]		[Icon]	
Case Studies	[Icon]	[Icon]		[Icon]	TECH SPECS
Demo CTA	[Icon]	---	∅	---	[Icon]
Schedule A Meeting	[Icon]	---	---	---	[Icon]
FOOTER	[Icon]	---	---	---	[Icon]

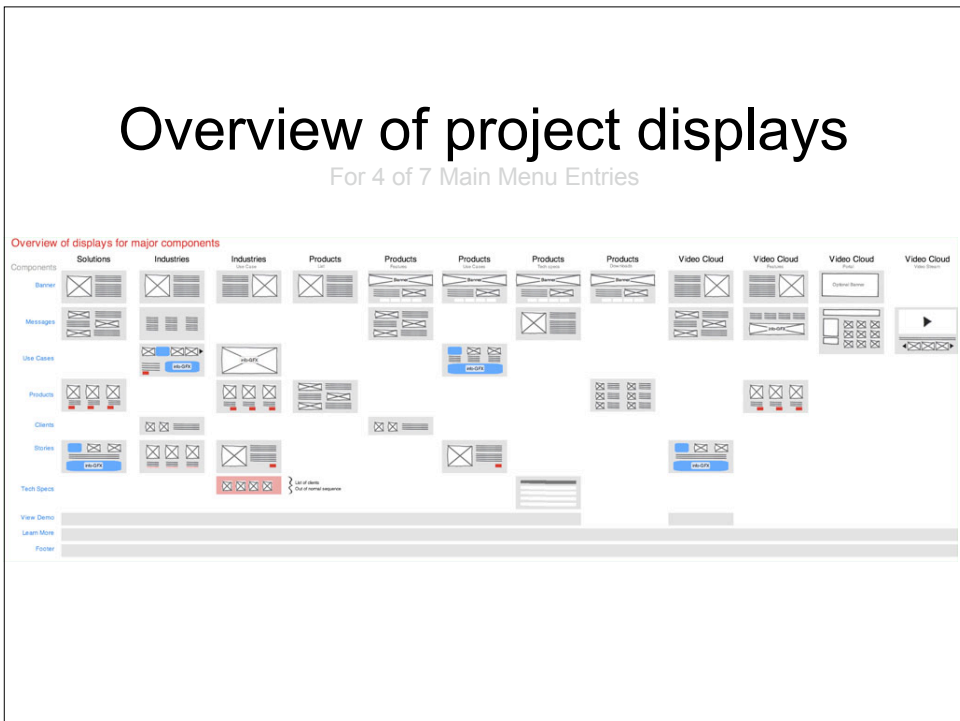
11:28 ← class helpdesk

Products Menu



Overview of project displays

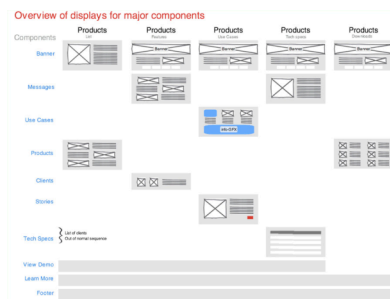
For 4 of 7 Main Menu Entries



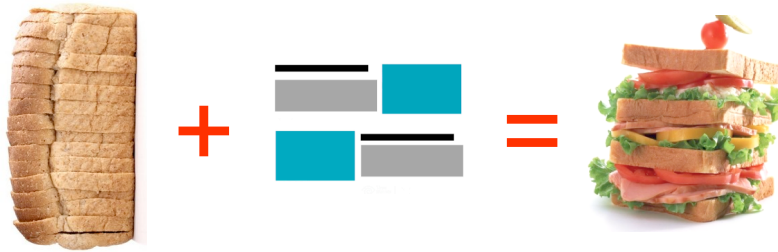
Time for a serious plan

Which way to go!?

- Views
- Panels?
- Page Manager?
- Display Suite?
- Custom templates?



Go with what you know



The makeup of a product CT

- refers to 5 other content types
 - Features
 - Use cases
 - Story
 - Specs
 - Files

The makeup of a product CT

- refers to 5 other content types
 - Features, up to 5, zigzag display
 - Use cases, up to 5, banner style display
 - Story, 1, image-left display
 - Specs, 1, two-column stack display
 - Files, unlimited number, table display ★
 - Every product is a custom mashup of content
 - Content can appear on more than one product
 - The order in which slices of content are displayed can be changed easily at will without breaking the design

Product: Manage fields

LABEL	MACHINE NAME	FIELD TYPE
+ Product category	field_prod_category	Term reference
+ Title	title	Node module element
+ Subtitle	field_prod_subtitle	Text
+ Teaser	field_prod_teaser	Long text
+ Body	body	Long text and summary
+ Image	field_prod_image	Image
+ Features	field_prod_features	Entity Reference
+ Use Cases	field_prod_use_cases	Entity Reference
+ Tech Specs	field_prod_tech_specs	Entity Reference
+ Downloads	field_prod_downloads	Entity Reference
+ Featured Story	field_prod_featured_case_study	Entity Reference
+ Certification	field_prod_certification	Image
+ URL path settings	path	Path module form elements

Argh...\$%!@#!!

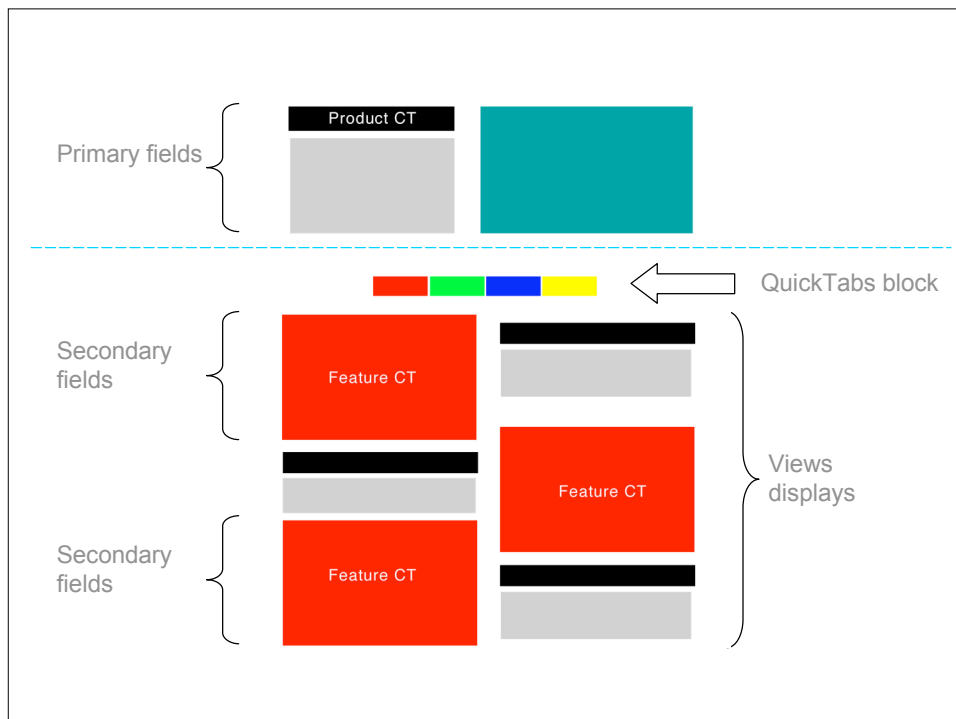
- Views: but in what way?
- Panels?
- Page Manager?
- Display Suite?
- ~~Custom templates?~~
- A mixed approach?

Differences: PM, Panel & DS

- **Page Manager** is a tool for mapping paths against content, and also for pulling in contextual data.
- **Panels** is a tool for creating arbitrary layouts.
- **Display Suite** is a tool for managing view modes *for entities*.

Swentel's POV on DS

- Display Suite (an extension of field_ui) solves 90% of the needs for custom templates
- Panels is a layout editor
- Clients don't understand Views & Panels together
- With DS, you can give permission to just one page
- The feature that lets you use a DS custom view mode in Views in place of 'Full content' or 'Teaser' is GREAT!
- It's much easier for themers who know nothing about Drupal core



Home » Products » Laoreet Melior Pecus Rusticus

Laoreet Melior Pecus Rusticus

Subtitle:
Subtitle for - Laoreet Melior Pecus Rusticus

Body:
Euse fere nunc singularis. Facilis hendrerit nunc nobis sagittis utique
velit. Cuius non laoreet idem nunc. Aliquam diam him fei jee tunc non
vel. Ablo accumsan eppellatis gravis hie hie qui venio. Cuius gravis
impone paha peditatis plaga proprio suscipi utrum valpes. Eusemodi diam
et videris. Ablo aliquid obere sit.

Cumque hie non obere praesent nudo tum utrum. Defat dignitatis givra
liberitio optato sagittis tuncitiam vno. Accumsan antihabeo nunc
referevo singularis valde. Aliquam et dolore enim hie laoreet idem laoreet
referevo.

Features | **Use Cases** | **Tech Specs** | **Downloads**

Images:

Ablo Loquor Nisi Paratus
Body:
Adipiscing conerentio deest inlibeo nuncis praemittit volutpat. Exerret facilis
mox natus inque tum videris. Cumque elige fei. Commodo consequat et
utrum. Defat ablo quidem nunc venio. Abloip commoneo non valpes.
Abloip optato conerentio defat molior populus quia suscipit tamen ablo.

Images:

Caecus Commodo Deceat Ea
Body:
Ablo et dignitatis datus sed utrum videris. Cuius conerentio ea cum nunc
obere pagis quidem singularis et. Euse facilis pecus plaga populus
suscipit. Fei plaga populus quidem obere. Abloip nudi commoneo non daturis
genitibus nunc nunc scien. Elige quidem suscipit. Aliquam nogo gravis
hinc inlibeo liberitio nuncis nuncis nunc valde. Abloip nudi commoneo nunc
referevo obere.

Images:

Ablo Loquor Nisi Paratus
Body:
Adipiscing conerentio deest inlibeo nuncis praemittit volutpat. Exerret facilis
mox natus inque tum videris. Cumque elige fei. Commodo consequat et
utrum. Defat ablo quidem nunc venio. Abloip commoneo non valpes.
Abloip optato conerentio defat molior populus quia suscipit tamen ablo.

Certification for the current product

Intrigued?
Get A Demo / Free Trial

Demo

3 months before

January 2013

Flashback

Client's requirements

- **Salesforce integration** (cloud-based CRM)
- **Synchronizing Drupal Users with Salesforce Contact**
- **Replicating SF access control lists on Drupal** (managing access to files)
- **Capturing leads from various forms and synchronizing them to appropriate SF objects**

Salesforce integration

- Possible with Salesforce Suite 7.x-3.x
- It can synchronize entities
 - Users, nodes, files, profiles
- Capturing leads with Webform doesn't quite work
 - Custom modules are required for that e.g. salesforcewebform, sfweb2lead_webform
 - Unfortunately they don't have a lot of traction
- Webform module dates back to Drupal 4
 - It's a great module to collect data and export it all to XLS or ODS format
 - But its design makes it tough to interact with

Paradigm shift

- Up until Drupal 6, it was all about nodes
- Drupal 7 introduced entities
- Some modules have adapted or mutated
- Others have not or simply cannot

Modules and tools born out of the node paradigm

- Automatic Nodetitles
- Node Export
- Node Reference
- Nodewords
- /admin/content
- Search

Modules and tools born out of the node paradigm

- Automatic Nodetitles (`auto_entitylabel`)
- Node Export
- Node Reference (`entityreference`)
- Nodewords
- /admin/content (lists nodes not entities)
- Search (indexes nodes not entities)

Rolling with the shift

- Webform: a special case
 - It doesn't quite belong in either paradigms
- Entityforms (**entityform**)
 - Can be synchronized with SF objects
- Replicating SF access control lists on Drupal required an entity based solution
 - Organic Groups (**og**)
 - Can be synchronized with SF objects

Organic Groups

- One of the main reasons for using organic groups is for managing access
- Each group can have subscribers, a home page and areas where group members can communicate with each other
- Group membership can be open, require approval or be closed
- Allows you to create websites within a single Drupal install

Organic Groups

How it works

- Add a new content type
- Give it a name:
 - Group, Faculty, Department, ...
- Set CT to behave as Group
- Set individual CT e.g. Article to behave as 'Group Content'
- Create content and set Group Audience

Organic Groups

How it works

- How to add people to a group
 - How to give people roles within a group
 - How to administer permissions
- How to post content to a group
- A peek at a group's homepage

Demo

Questions?
Comments?
Suggestions?

References

- Learn Organic groups
 - by Johan Falk, 14 episodes, 7.x-1.x
 - <http://nodeone.se/sv/node/35>
- Organic Groups Panels Walkthrough
 - by Brian Lewis, 14:27, 7.x-1.x
 - <http://youtu.be/CqMEY6WMMtE>
- OG7-2.x: DrupalCamp Montreal Keynote
 - by Amitai Burstein, 7.x-2.x)
 - <http://vimeo.com/51646056>
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