

Discussing OpenCms Workplace Usability

OpenCms Day 2008

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One major goal of content management systems is to bring web publishing capabilities to employees in business companies. The users of a CMS, called "editors", belong to departments like marketing, product management or technical documentation. Common requirements are creating web pages without any HTML knowledge, maintaining media assets or managing translation of entire sites.

This session identifies typical workflows for maintaining content of corporate websites. In doing so, it discusses the usability of OpenCms' editorial frontend, the "Workplace" and presents helpful functions and opportunities for improvements.

A comparison with editorial frontends of other common content management systems, like RedDot, Day and CoreMedia completes this session.

Target audience are OpenCms newcomers and editors who want to get to know best practices in using the Workplace as well programmers who are seeking ways to improve the usability of the Workplace.



Most important requirement for a Web CMS:

Ease of use

 Enable end users who work with MS Word the whole day to publish a website

Questions covered by this presentation

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- What are the different types of editors?
- Which are common Use Cases?
- How can OpenCms best meet these requirements today?
- Where is there potential for improvement?
- How do other CMS operate?

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OpenCms application areas

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OpenCms is appropriate for

- internet, intranet and extranet sites
- multilingual sites
- sites of medium-size and large companies

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Who creates content?



- a) Departments for Marketing or Corporate Communications
- b) Specialist departments like:
 - » Product management
 - » Human resources
 - » Technical documentation
 - » Customer service

The Power User

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Works daily with the system

Power User

- Knows all standard function
- Help other users with the system
- Advanced Use Cases
 - » Configures rarely used templates
 - » Creates new navigation structure

The Occasional Editor



Unsteady use of the system

- » Human resources updates job postings 1/week
- » Productmanagers maintain product informations 1/month

- Use Cases e.g.:
 - » Edit page and publish
 - » Translate page and publish
 - » Upload file and link with page

Common Use Cases

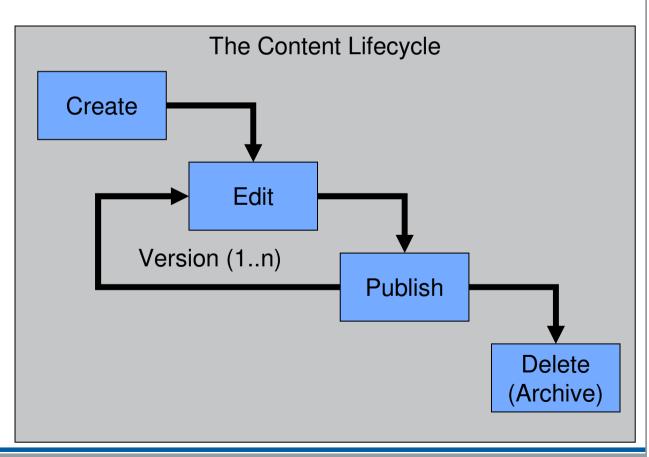
NIONEX

UC 1: Edit page and publish

UC 2: Add new page and publish

UC 3: Add image

UC 4: Delete page





Use Case 1: Edit page and publish

UC 1: Edit page "Weisswurst"

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Event: User needs to update page

Role: Power User and Conventient Editor

Steps: 1. Select page

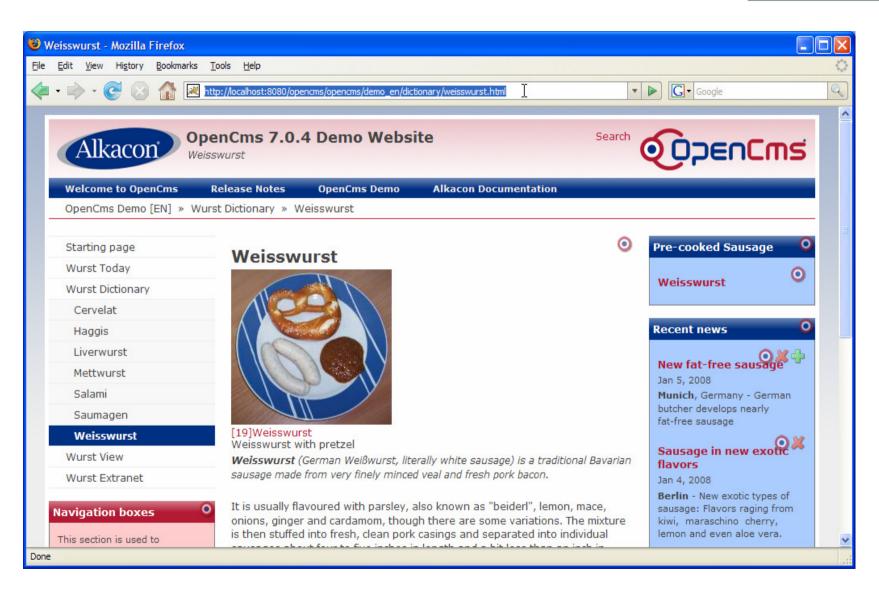
2. Open text editor

3. Update text

4. Confirm changes

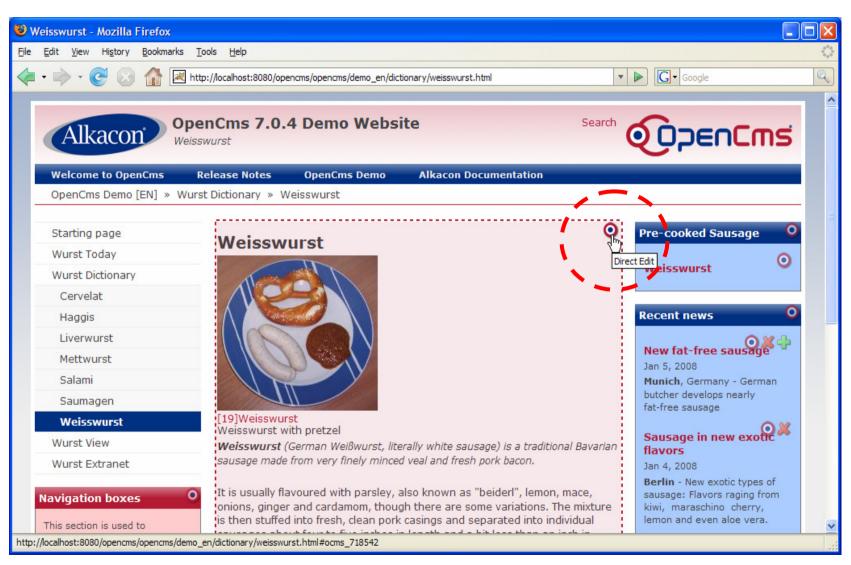
Browse to desired page





Click the DirectEdit button

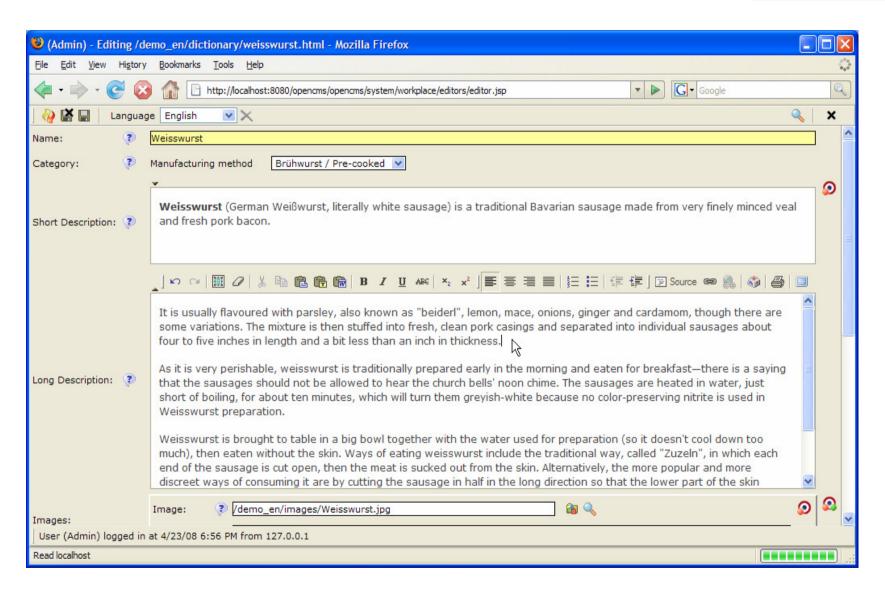




Click #1

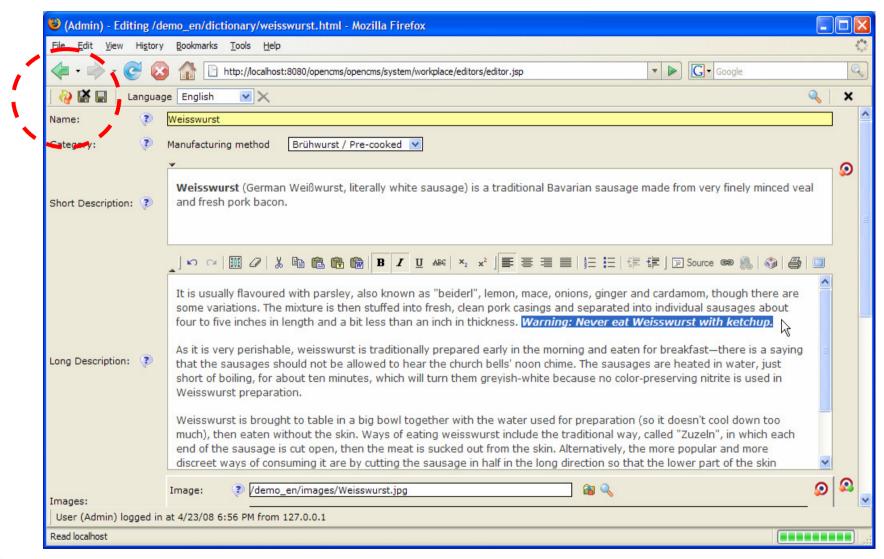
Document Edit Dialog





Change some text and select "Direct Publish"

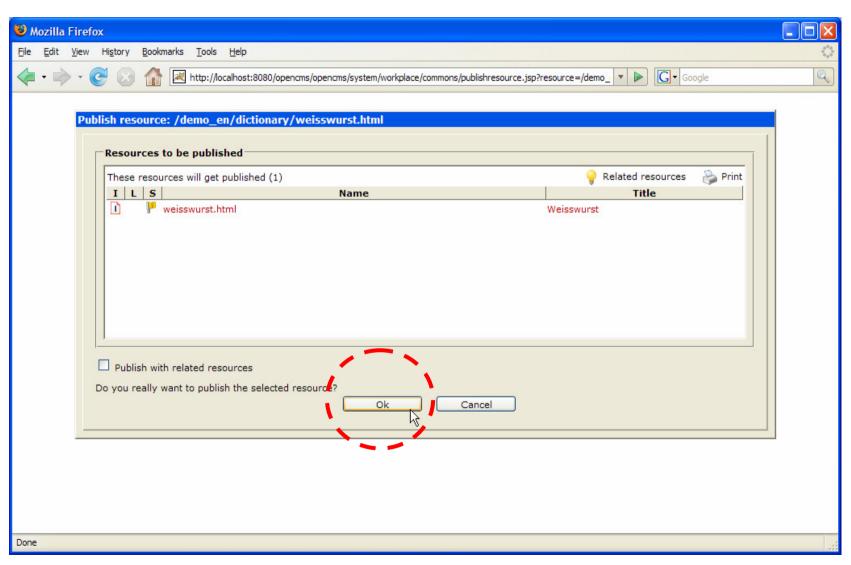




Click # 2

Confirm the publish dialog

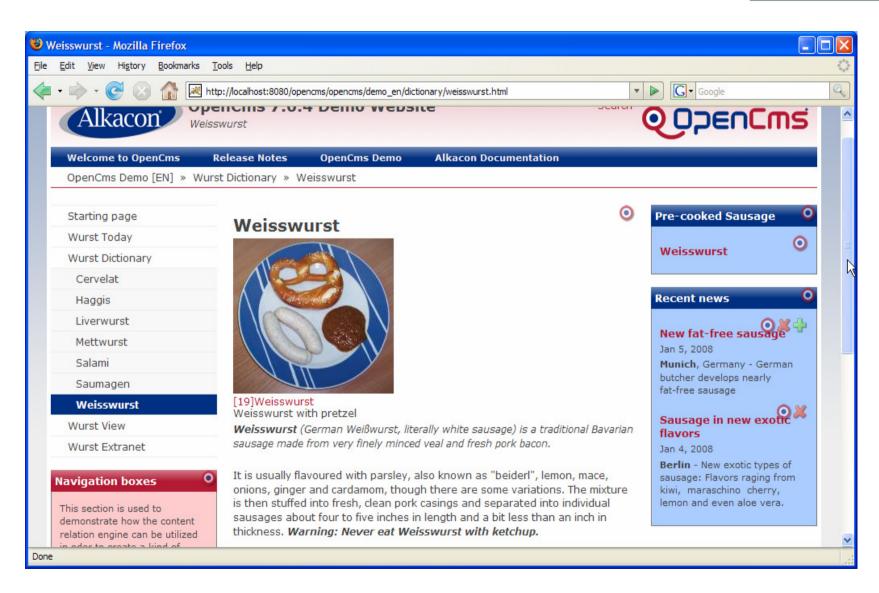




Click #3

Now the page is online





Summar for UC 1: Edit page and publish

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- Clicks: 3
- Works fine for occasional users as well as power users

Pros

- 1. Only 3 clicks to edit and publish a page
- 2. Browse Preview and edit page within its context
- 3. No need to use the Workplace

Cons

- 1. Can't determine publish state and document type
- 2. Can't access advanced functions like History or Availability
- 3. In case of complex document schemas: mismatch between WYSIWYG preview and editor



Use Case 2: Add new page and publish

UC 2: Add new page and publish

NIONEX

Event: Editor wants to add new page

Role: Depending on current folder:

Power User and/or Conventient Editor

Steps: 1. Select appropriate Parentpage

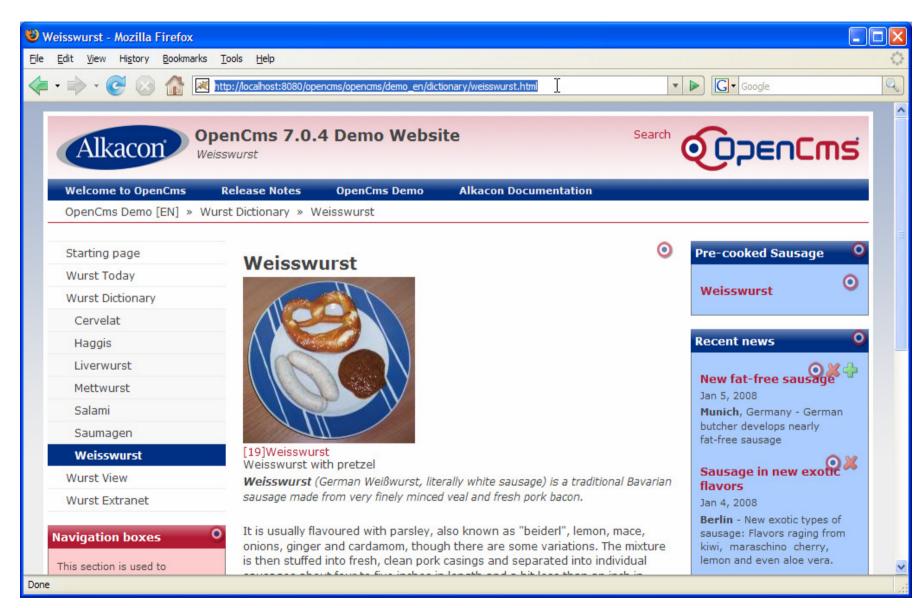
2. Add new page

3. Edit text and metadata

4. Confirm changes

Starting from the preview

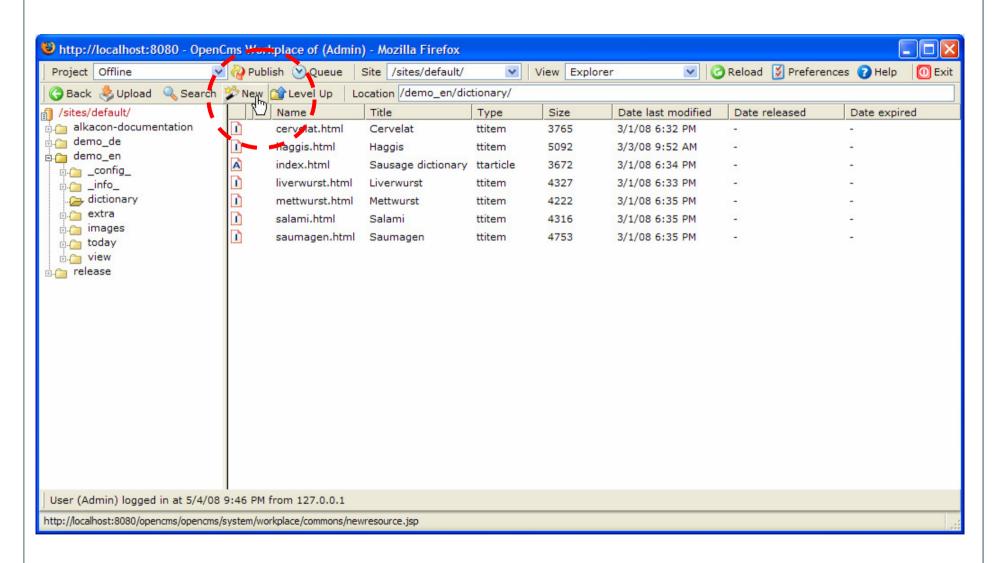




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Find the right folder in the workplace

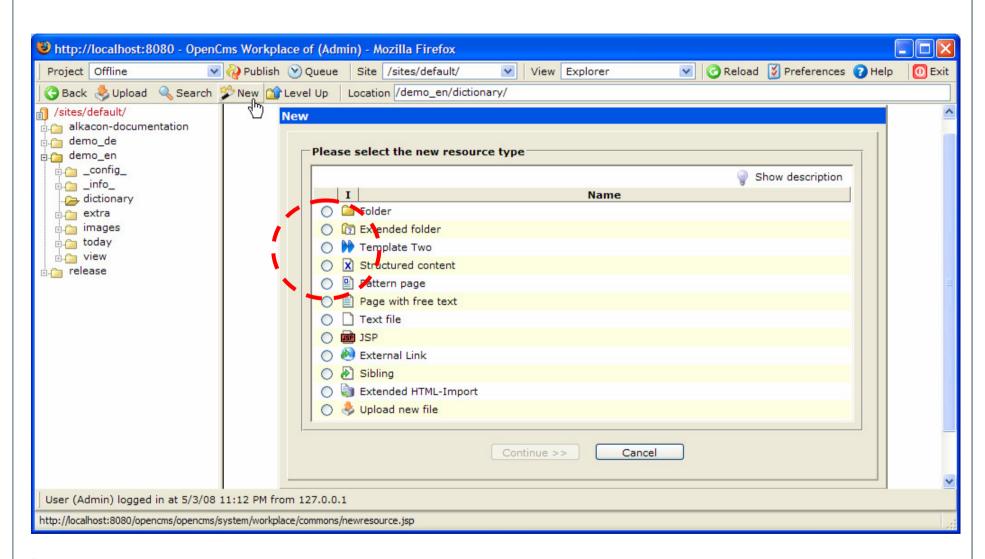




Click #1

Add a page based on some template

NIONEX

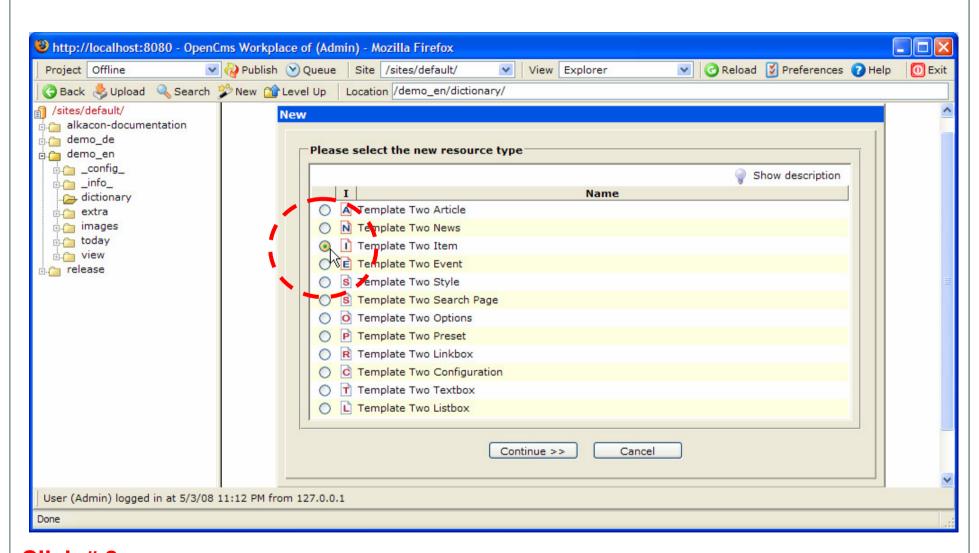


Click # 2

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Select the template



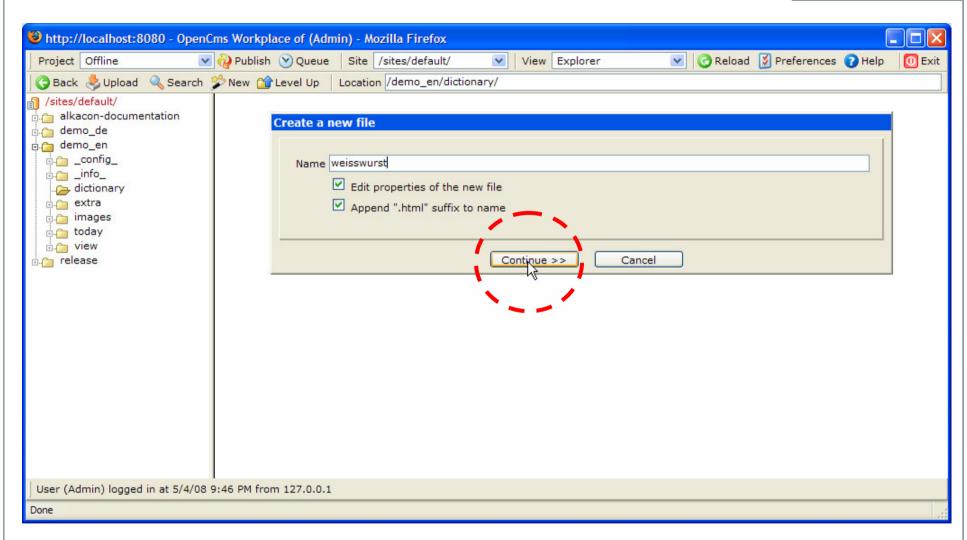


Click #3

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Enter filename and skip some default options



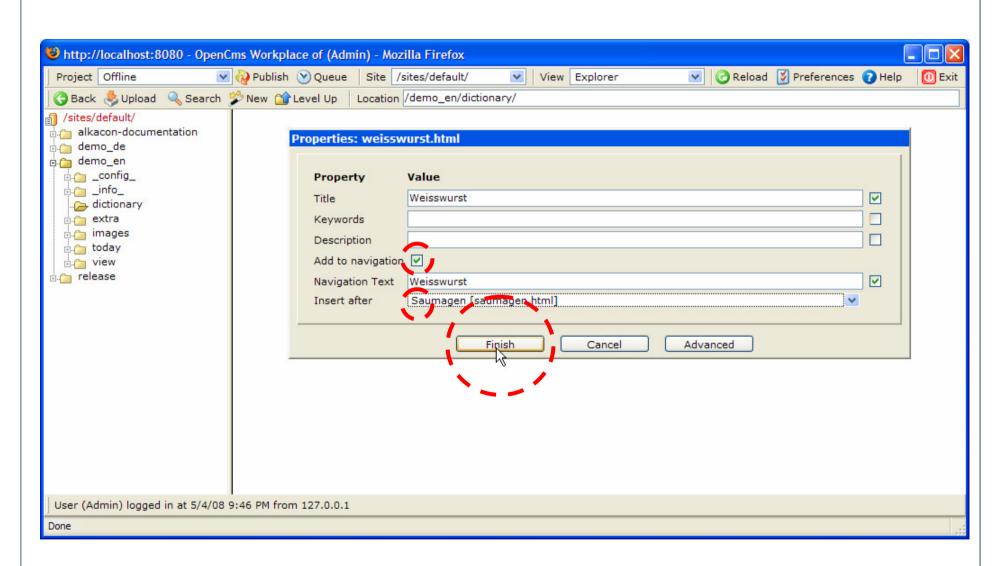


Click #4

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Edit title and navigation properties



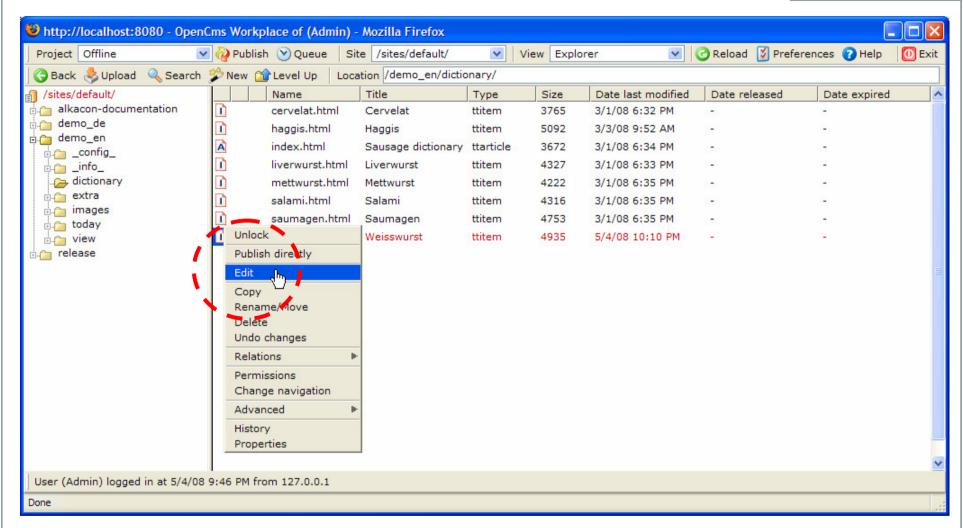


Click # 5-7

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Open Edit Menu on new file

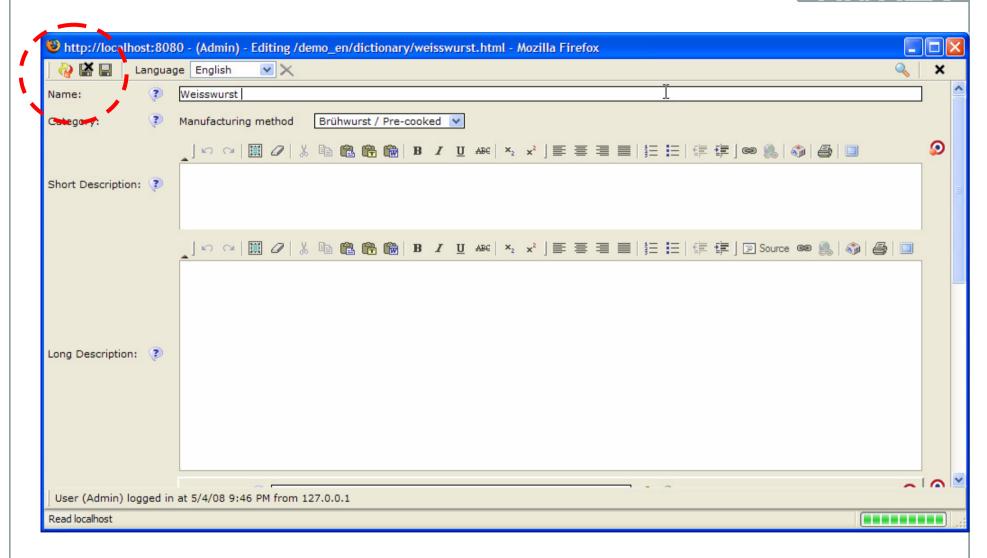
NIONEX



Click #8

Edit Document, enter some text and publish

NIONEX



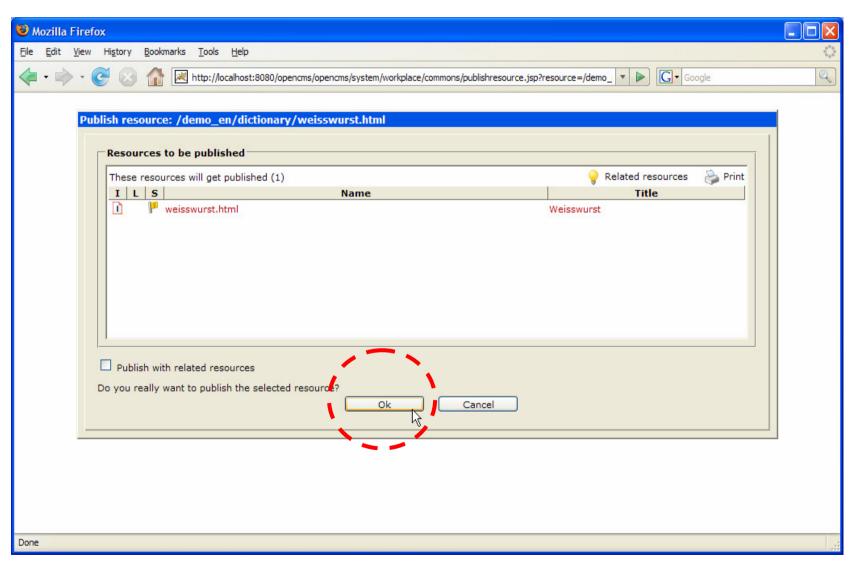
Click #9

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Confirm the publish dialog





Click # 10

Summary UC2: Create page and publish

NIONEX

- Clicks: ~10
- Works well for power users
- Complex for occasional users

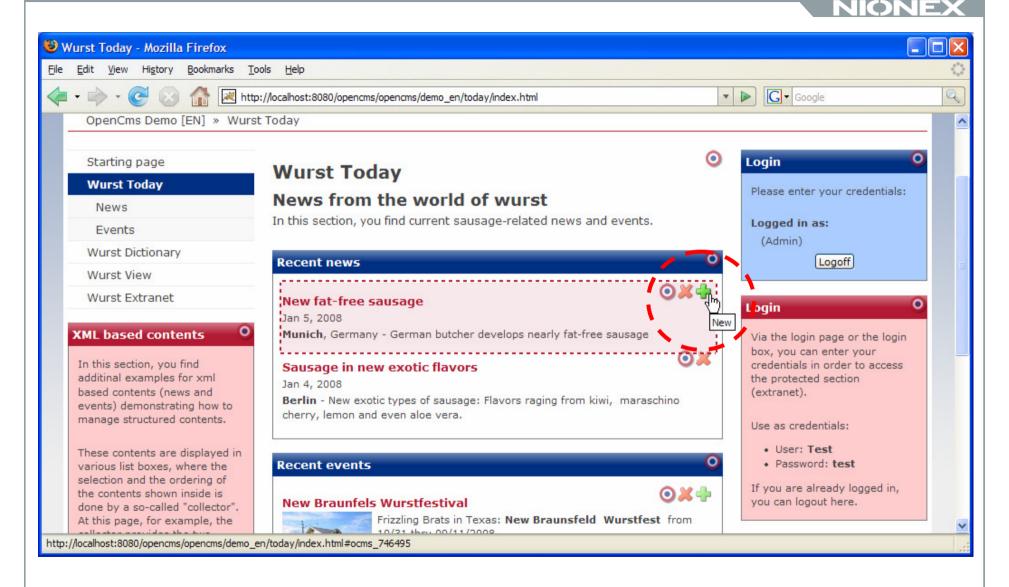
Pros

1. Flexibel

Cons

- 1. Too many clicks
- 2. Too many options
- 3. No direct edit support. Needs Workplace
- 4. Can't restrict document types
- 5. Newly created page contains no content

UC 2b): Create page with Content based on Contentcollectors

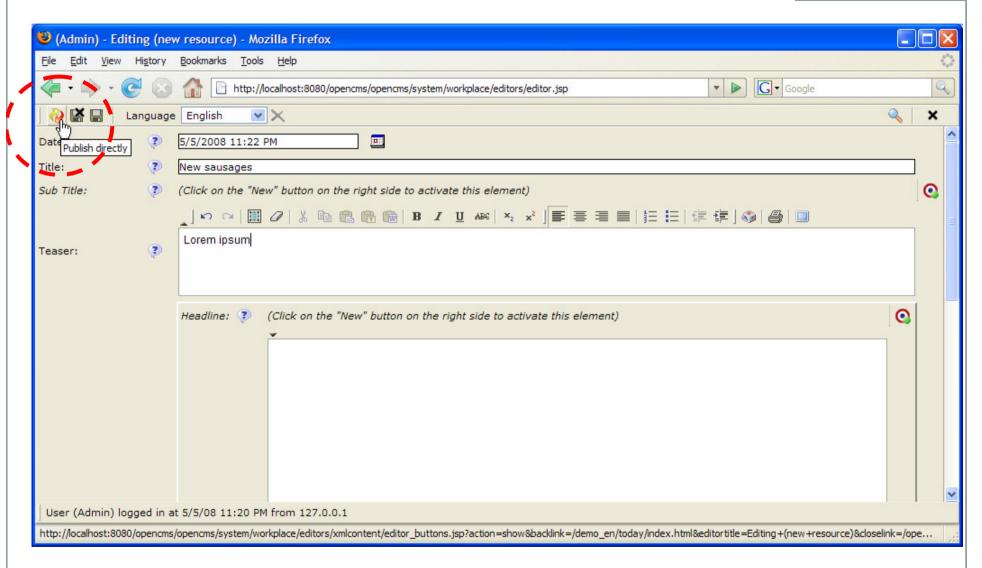


Click # 1

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Edit page and publish

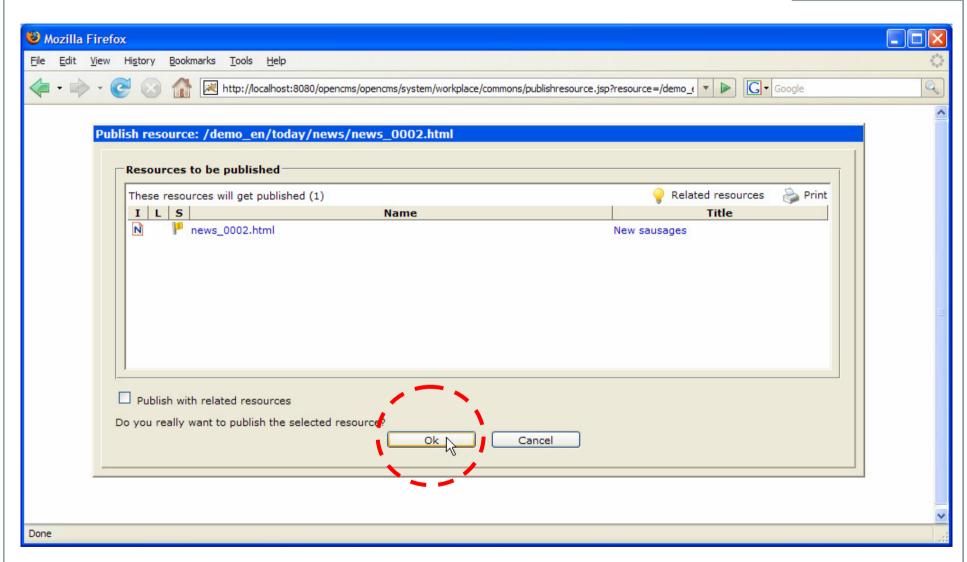




Click # 2

Confirm publish

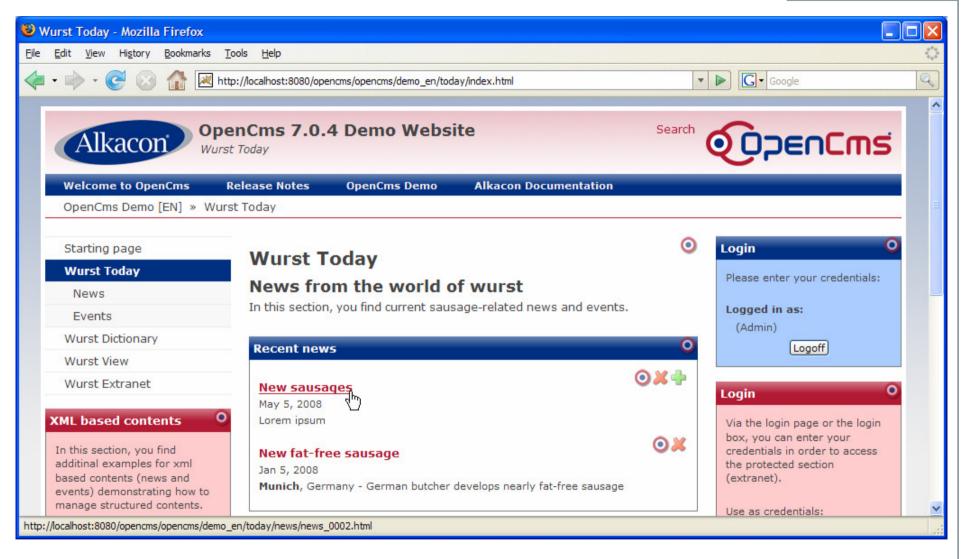




Click #3

Now the page and its teaser is online

NIONEX



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Summary UC 2b): Create page with Contentcollectors

NIONEX

- Clicks: 3
- Works well for power users and occasional users

Pros

- 1. Only 3 clicks to edit and publish a page
- 2. Browse Preview and add page within its context
- 3. No need to use the Workplace

Cons

- Can't provide file name / generated filenames are cryptic
- 2. Already mentioned for UC1: publish state, advanced functions, ...



Use Case 2: Delete page and publish

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UC 2: Delete page and publish

NIONEX

Event: Editor wants to delete a page

Role: Power User and/or Conventient Editor

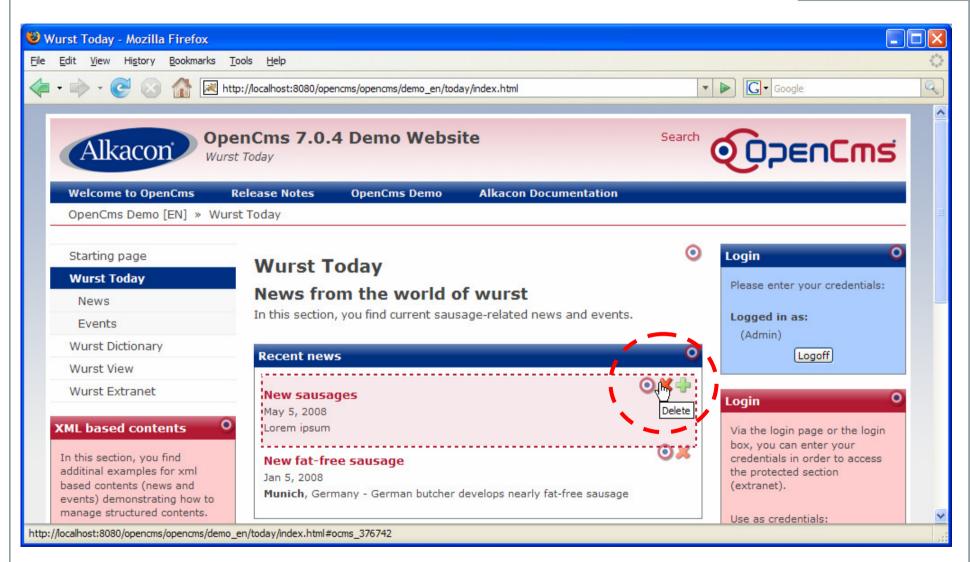
Steps: 1. Select appropriate Page

2. Delete

3. Confirm changes

Delete Page from Contentcollectos

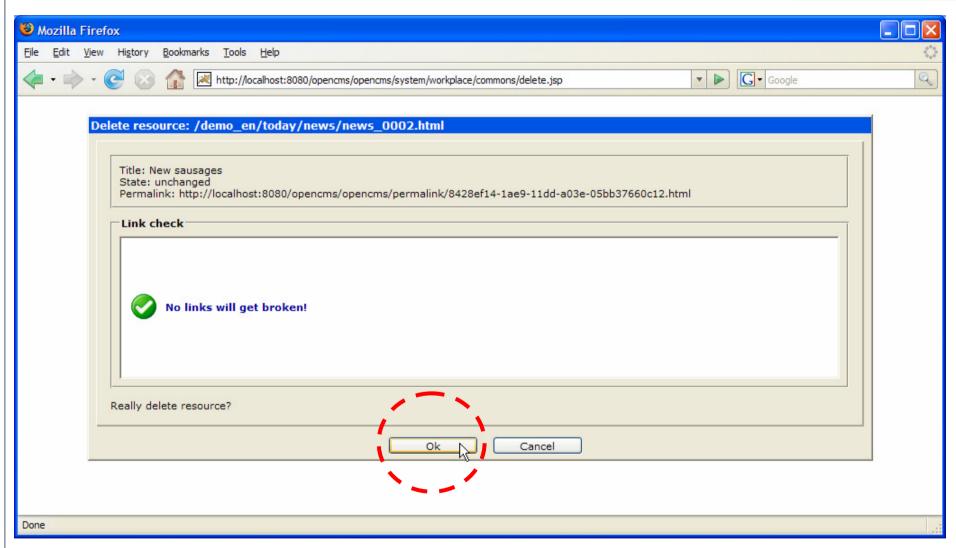




Click #1

Confirm publish

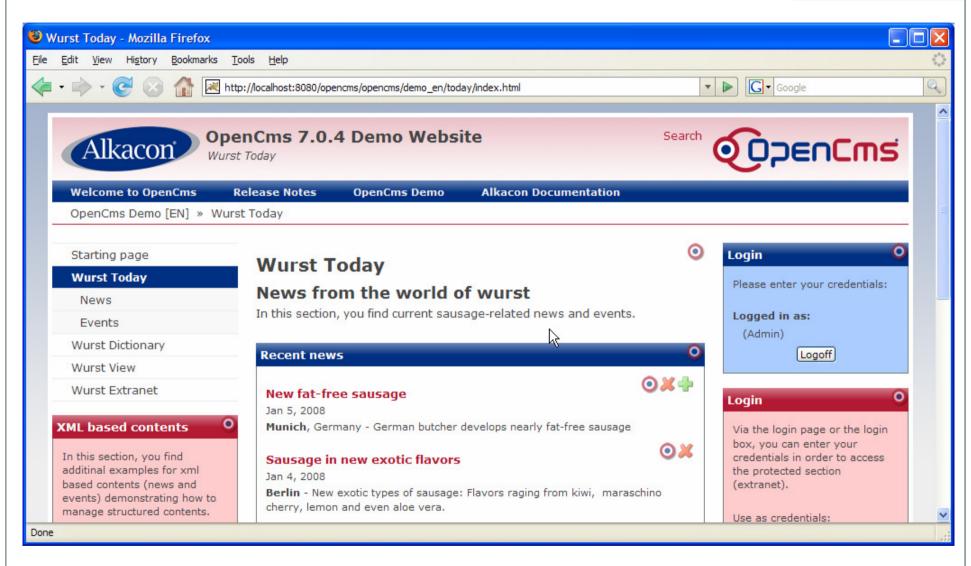




Click #2

Page ist deleted and teaser is removed





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Benchmark UC 3: Delete page with contentcollectors

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- Clicks: 2
- Works well for power users and occasional users

Pros

1. Only 2 clicks to delete a page

Cons

1. Can't revoke deleted files

Same workflow if you delete from the workplace.

UC 3: Upload image and add to page

NIONEX

Event: Editor wants to add a new image to a page

Role: Power User and/or Conventient Editor

Steps: 1. Select appropriate page

2. Select appropriate location for image to be stored

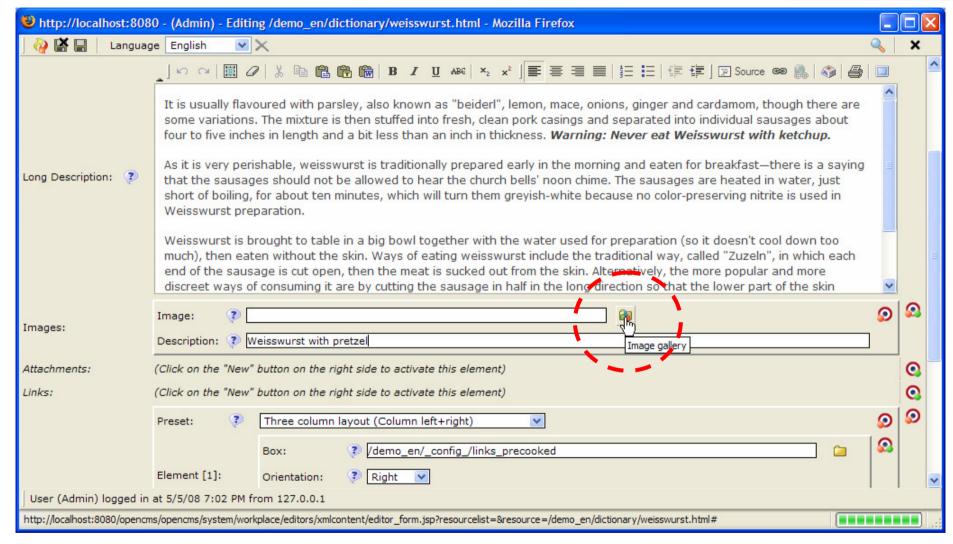
3. Add new image from desktop

4. Confirm changes

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Edit dialog: Open image gallery



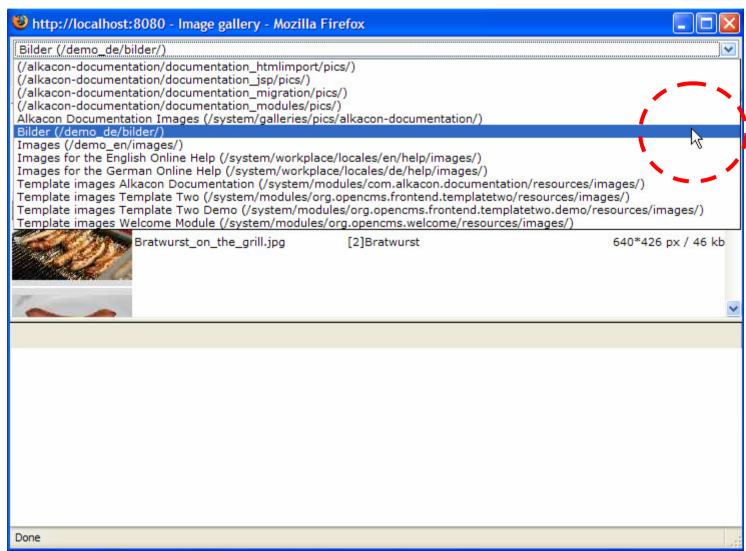


Click # 1

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Select the appropriate image gallery

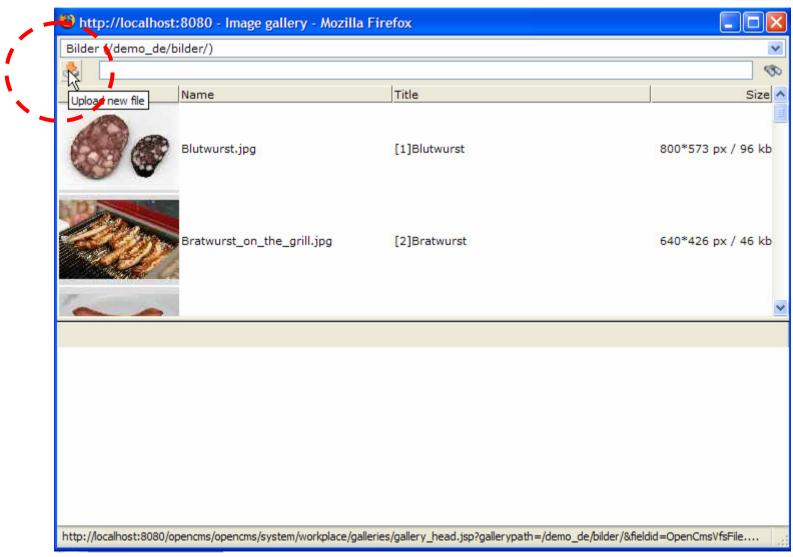




Click # 2

Open the upload applet



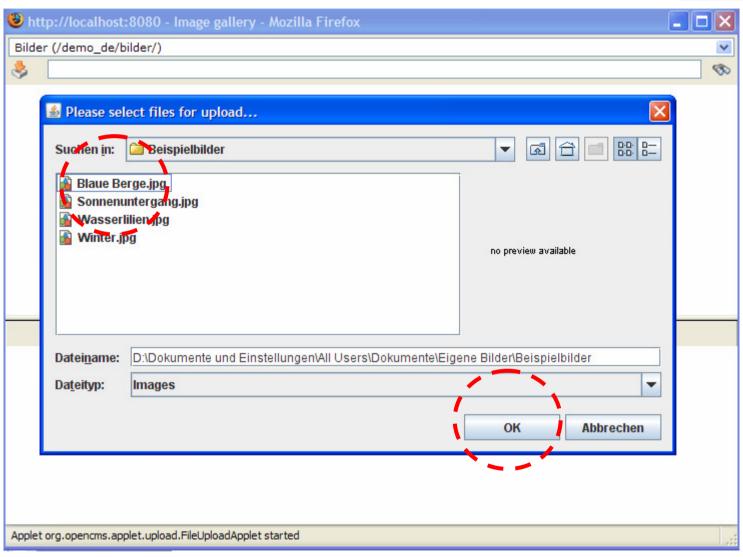


Click#3

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Select the file from your desktop



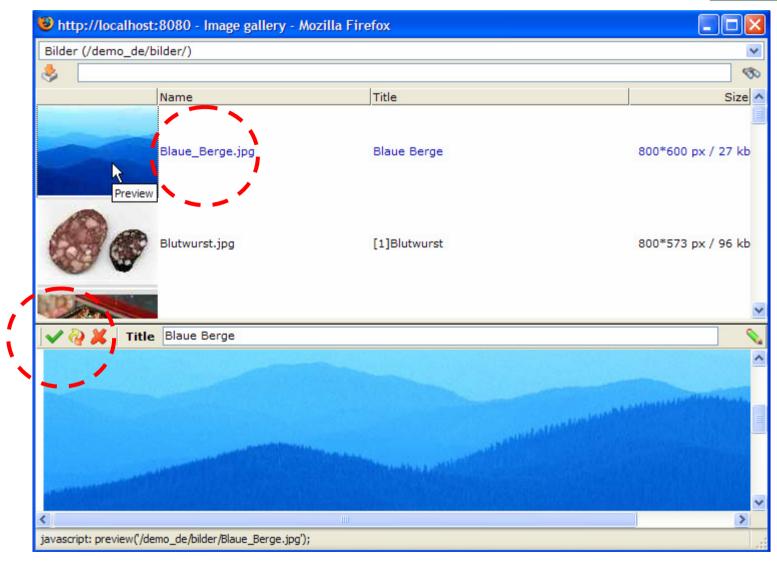


Click # 4,5

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Select it

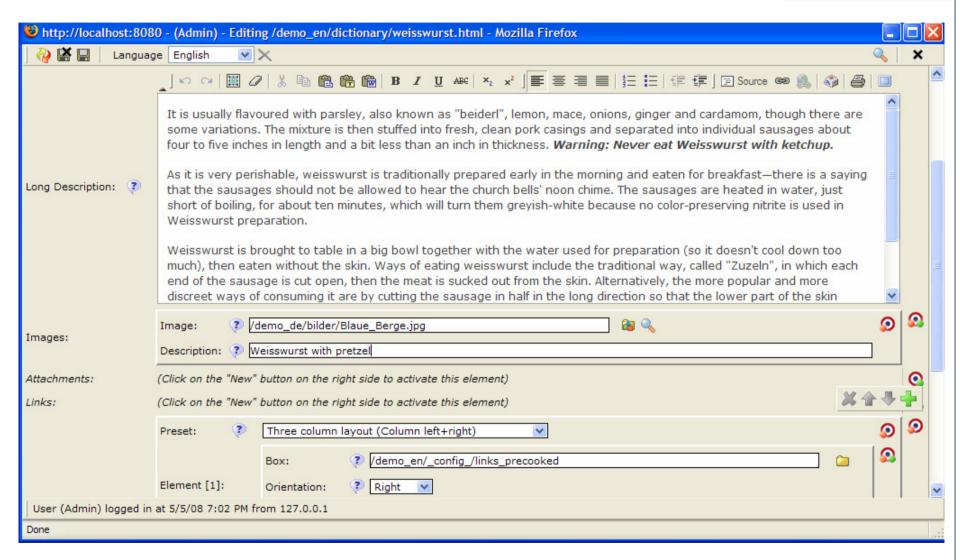




Click # 6,7

Done!

NIONEX



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Summary UC 3: Upload image and add to page

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Clicks: 7

Pros:

- Organizing Images in Galleries is easy to learn
- Thumbnail preview and simple search capabilities
- Java Upload applet allows uto pload multiple files at once

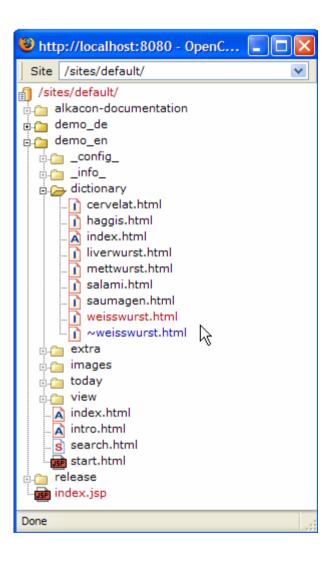
Cons:

- No direct edit support
- No crop and scaling
- No information whether the image might fit to the template
- No preset for the appropriate image gallery

Some words about the resource chooser



- Where can I find my "recently added" documents?
- I now a keyword. How can I search for the document?
- I allways work with the same folders. Where are they?



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How do others compare?



CoreMedia <u>www.coremedia.com</u> (50k €+)

■ RedDot <u>www.reddot.com</u> (30k €+)

■ Day <u>www.day.com</u> (50k €+)

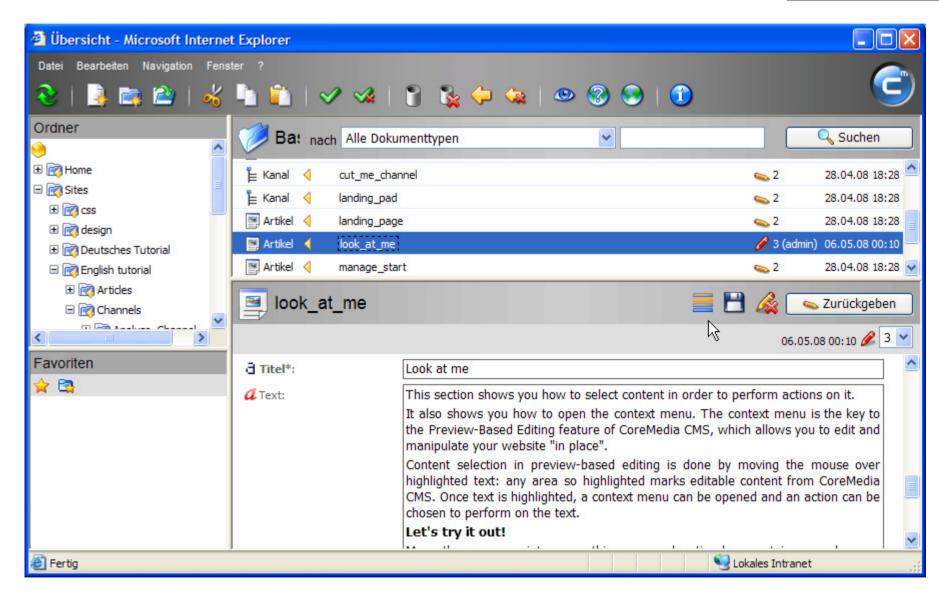
Magnolia <u>www.magnolia.info</u> (some kind of open

source)

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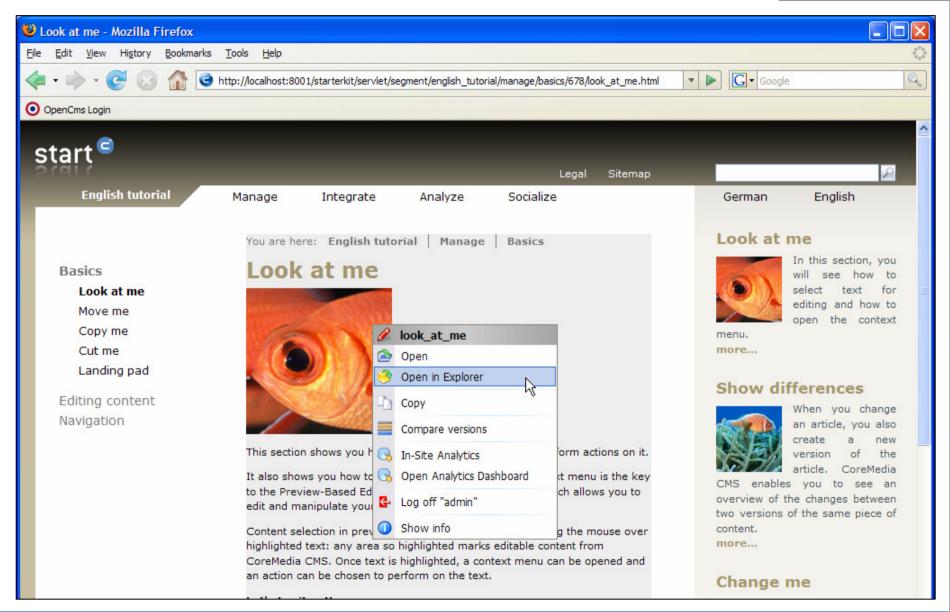
CoreMedia Editor comparable to OpenCms Workplace

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Heavy use of preview based editing



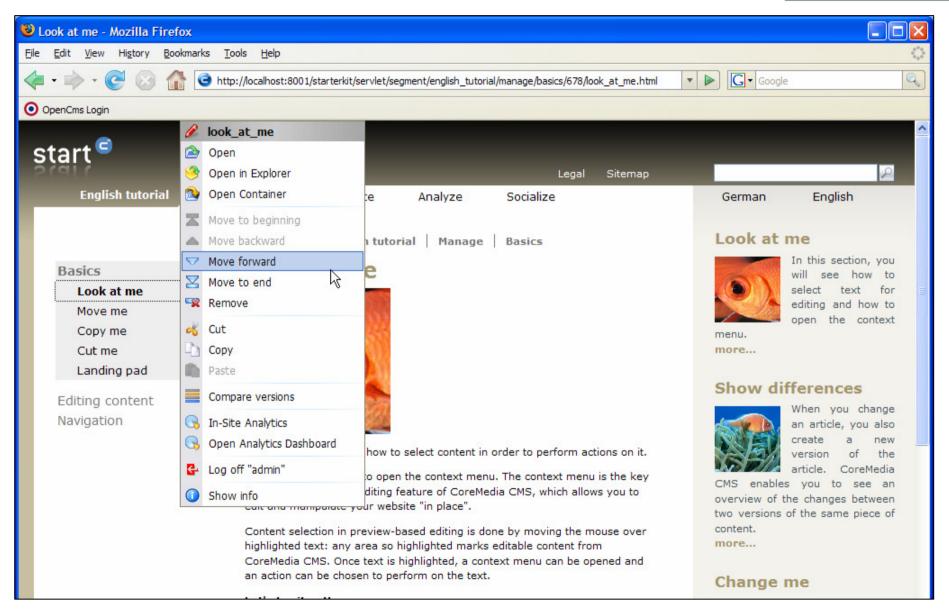


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Everything is a document and so can have custom actions

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RedDot

NIONEX



RedDot





RedDot icons for each input field

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Edit dialog for single input field



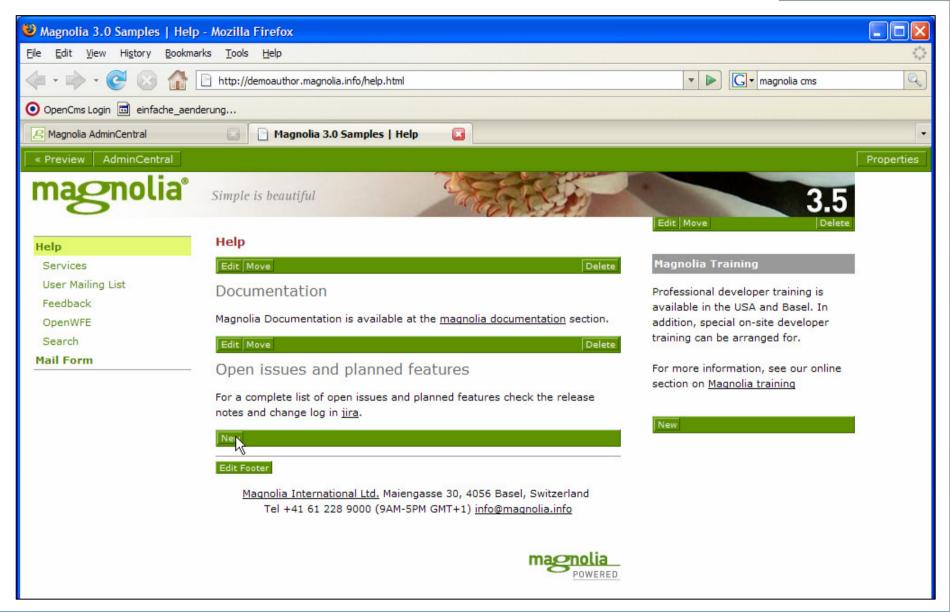


Day – Toolbars show page structure and commands



Magnolia - Toolbars similar to day

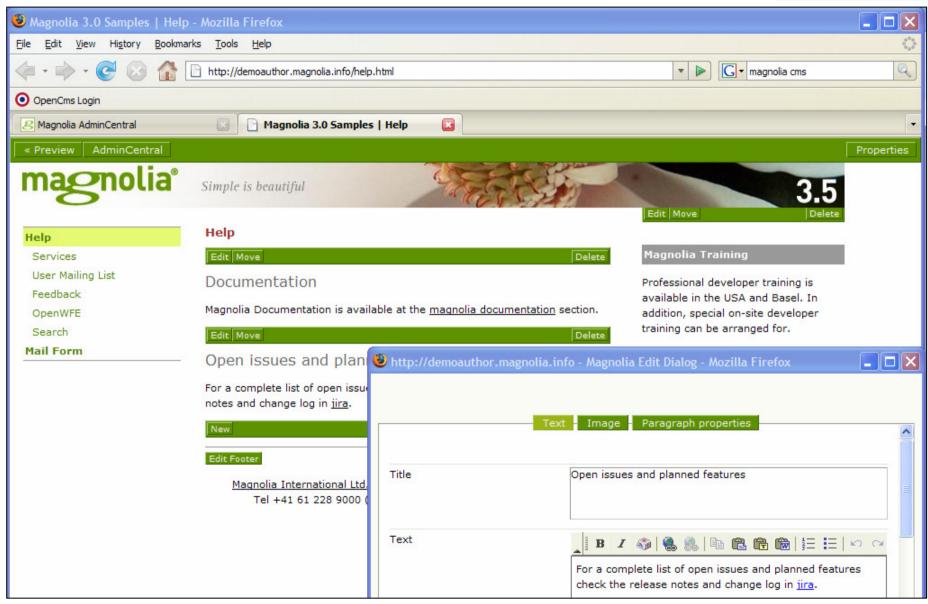
NIONEX



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Edit paragraphs in Magnolia

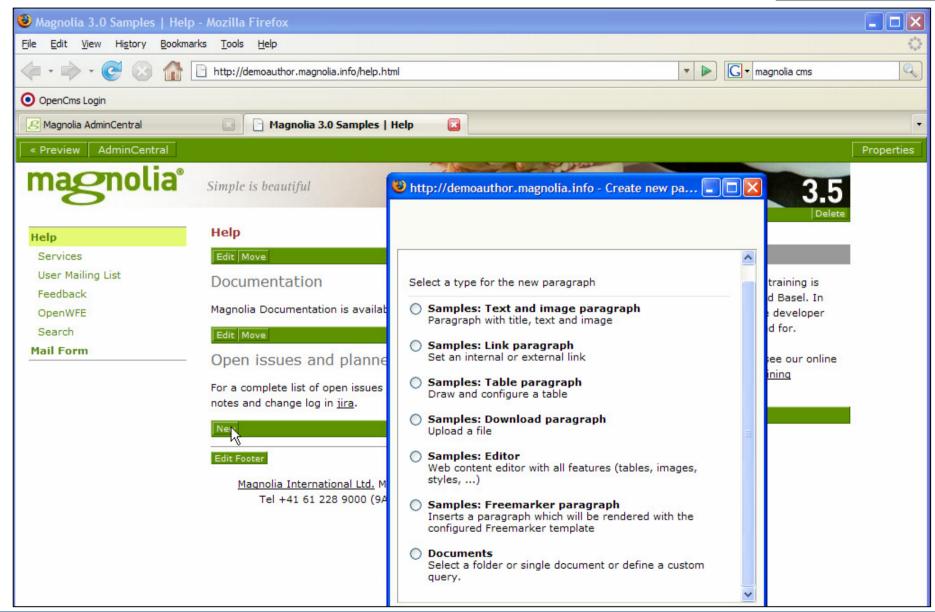




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Add paragraph to a Page in Magnolia



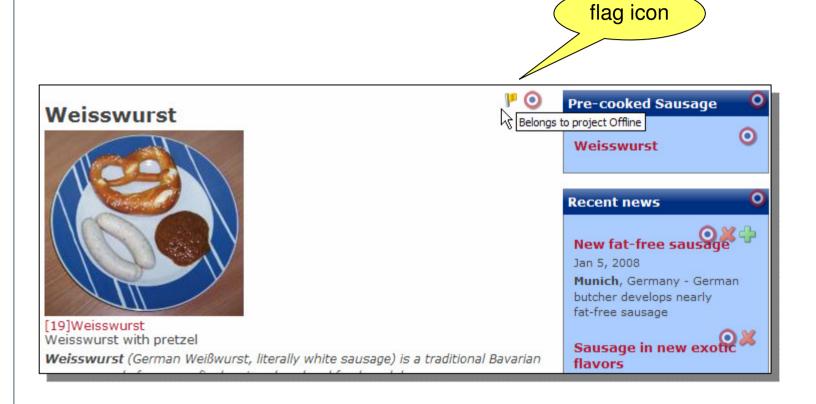




Proposals for improvement

Show publish state in DirectEdit preview

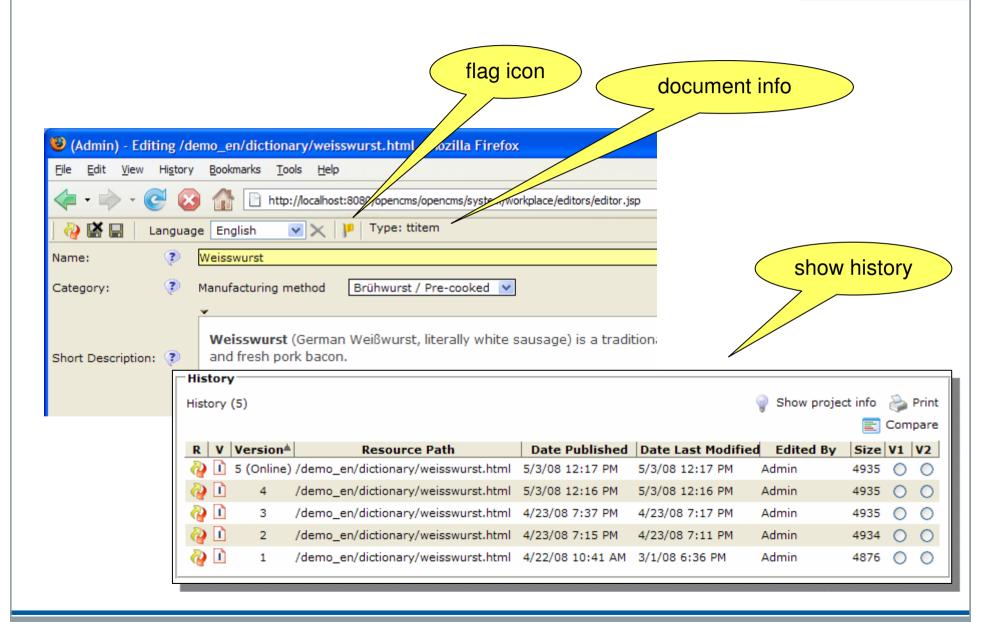
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Show publish state in edit dialog





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Offer advanced functions in DirectEdit

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popup menu in direct edit

Wonderful World of Wurst

Wonderful World of Wurst presents the most spectacular and amazing storie about sausage from around the world. Entertaining and with lots of useful information. Let us take you into the adventurous world of sauage around the globe!

Overview

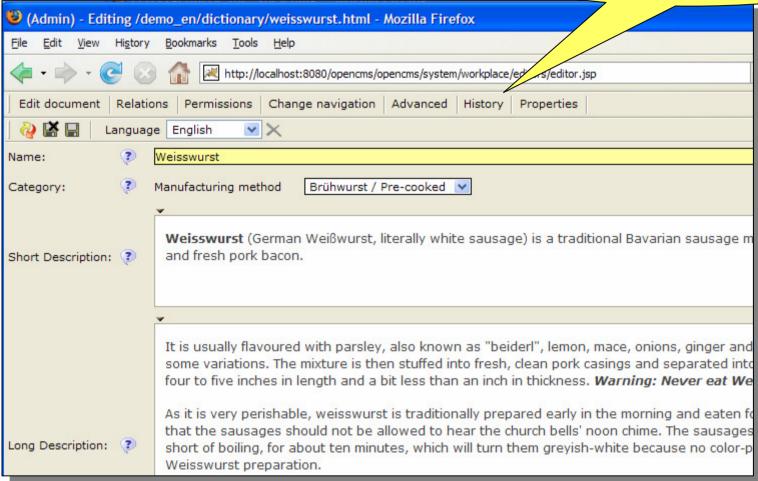
- Below Wurst Today you will find all up-to-date news and information about sausage-related events.
- The Wurst Dictionary provies in-depth information about sausage in various flavours.
- Within Wurst View, you find articles and entertaining contributions abou sausage.
- If you already have access, you can find additional information inside ou extranet, Wurst Extra.

 Recent news weisswurst.html Unlock Publish directly German Edit Copy Rename/Move Delete Undo changes Relations Permissions pes of ng from Change navigation erry, Advanced /era. History Properties

Offer advanced functions as tabbed dialog



advanced functions placed on tabs



My Top 10 of my most wanted features for OpenCms

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- 1. Add advanced functions and properties either to DirectEdit or edit dialog
- 2. Clean up "add new" dialog
- 3. Offer worklist, "recently modified" or something like bookmarks
- 4. Improve resource chooser with search and "recently modified"
- 5. Improve handling of media assets with metadata and thumbnail view in explorer
- 6. Add image manipulation capabilities like "scale down", "crop" and "convert"
- 7. Allow customized DirectEdit actions
- 8. Add spell checking
- 9. Put deleted content to archive and allow revoking from archive
- 10. Clean up "properties" dialog

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Conclusion



- The Workplace is an easy to use, stable, fast and browser-safe editing environment for power users
- DirectEdit is a smart addition for occasional editors but it is currently no replacement for the workplace as doesn't cover the complete content lifecycle
- ImageGalleries offer satisfying support for dealing with images but need improvements
- ResourceChooser could be improved by search, worklist and bookmarks.



Thank you for your audience!

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