Discussing OpenCms Workplace Usability

OpenCms Day 2008

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06.05.2008
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

- 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?
OpenCms application areas

OpenCms is appropriate for

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

- Works daily with the system
- Knows all standard function
- Help other users with the system

Advanced Use Cases
  - Configures rarely used templates
  - Creates new navigation structure
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

UC 1: Edit page and publish
UC 2: Add new page and publish
UC 3: Add image
UC 4: Delete page

The Content Lifecycle

Create -> Edit -> Version (1..n) -> Publish -> Delete (Archive)
Use Case 1: Edit page and publish
Event: User needs to update page
Role: Power User and Convenient Editor
Steps: 1. Select page
2. Open text editor
3. Update text
4. Confirm changes
Weisswurst (German Weisswurst, literally white sausage) is a traditional Bavarian sausage made from very finely minced veal and fresh pork bacon.

It is usually flavoured with parsley, also known as "beidert", lemon, mace, onions, ginger and cardamom, though there are some variations. The mixture is then stuffed into fresh, clean pork casings and separated into individual sausages before being cooked in boiling water. The sausages are then served in white wine or beer and eaten with pretzels.

Pre-cooked Sausage

Weisswurst

Recent news

New fat-free sausage
Jan 5, 2008
Munich, Germany - German butcher develops nearly fat-free sausage

Sausage in new exotic flavors
Jan 4, 2008
Berlin - New exotic types of sausages: Flavors ranging from kiwi, marshmallow, cherry, lemon and even aloe vera.
Click the DirectEdit button

Click # 1
Weisswurst (German Weißwurst, literally white sausage) is a traditional Bavarian sausage made from very finely minced veal and fresh pork bacon.

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As it is very perishable, Weisswurst is traditionally prepared early in the morning and eaten for breakfast—there is a saying that the sausages should not be allowed to hear the church bells' noon chime. The sausages are heated in water, just short of boiling, for about ten minutes, which will turn them greyish-white because no color-preserving nitrite is used in Weisswurst preparation.

Weisswurst is brought to table in a big bowl together with the water used for preparation (so it doesn't cool down too much), then eaten without the skin. Ways of eating Weisswurst include the traditional way, called "Zuzeln", in which each end of the sausage is cut open, then the meat is sucked out from the skin. Alternatively, the more popular and more discreet ways of consuming it are by cutting the sausage in half in the long direction so that the lower part of the skin...
Change some text and select „Direct Publish“

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Confirm the publish dialog

Click # 3
Now the page is online

Weisswurst

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Summar for UC 1: Edit page and publish

- 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
Event: Editor wants to add new page
Role: Depending on current folder:
  Power User and/or Convenient 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

Click # 2
Select the template

Click # 3
Enter filename and skip some default options

Click # 4
Edit title and navigation properties

Click # 5-7
Open Edit Menu on new file

Click # 8
Edit Document, enter some text and publish

Click # 9
Confirm the publish dialog

Click # 10
Summary UC2: Create page and publish

- 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
Confirm publish

Click # 3
Now the page and its teaser is online
Summary UC 2b): Create page with Contentcollectors

- 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
1. 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
UC 2: Delete page and publish

Event: Editor wants to delete a page
Role: Power User and/or Convenient Editor
Steps:
1. Select appropriate Page
2. Delete
3. Confirm changes
Delete Page from Contentcollectos

Click #1
Click #2
Benchmark UC 3: Delete page with contentcollectors

- 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.
Event: Editor wants to add a new image to a page
Role: Power User and/or Convenient Editor
Steps:
1. Select appropriate page
2. Select appropriate location for image to be stored
3. Add new image from desktop
4. Confirm changes
It is usually flavoured with parsley, also known as "beiderl", lemon, mace, onions, ginger and cardamom, though there are some variations. The mixture is then stuffed into fresh, clean pork casings and separated into individual sausages about four to five inches in length and a bit less than an inch in thickness. **Warning: Never eat Weisswurst with ketchup.**

As it is very perishable, weisswurst is traditionally prepared early in the morning and eaten for breakfast—there is a saying that the sausages should not be allowed to hear the church bells’ noon chime. The sausages are heated in water, just short of boiling, for about ten minutes, which will turn them greyish-white because no color-preserving nitrite is used in Weisswurst preparation.

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Select the appropriate image gallery

Click # 2
Open the upload applet

Click # 3
Select the file from your desktop

Click # 4,5
Select it

Click # 6,7
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Summary UC 3: Upload image and add to page

Clicks: 7

Pros:
- Organizing Images in Galleries is easy to learn
- Thumbnail preview and simple search capabilities
- Java Upload applet allows to upload 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 always work with the same folders. Where are they?
How do others compare?
- CoreMedia  [www.coremedia.com](http://www.coremedia.com) (50k €+)
- RedDot  [www.reddot.com](http://www.reddot.com) (30k €+)
- Day  [www.day.com](http://www.day.com) (50k €+)
- Magnolia  [www.magnolia.info](http://www.magnolia.info) (some kind of open source)
CoreMedia Editor comparable to OpenCms Workplace

This section shows you how to select content in order to perform actions on it. It also shows you how to open the context menu. The context menu is the key to the Preview-Based Editing feature of CoreMedia CMS, which allows you to edit and manipulate your website "in place".

Content selection in preview-based editing is done by moving the mouse over highlighted text: any area so highlighted marks editable content from CoreMedia CMS. Once text is highlighted, a context menu can be opened and an action can be chosen to perform on the text.

Let's try it out!
Heavy use of preview based editing
Everything is a document and so can have custom actions.
Sie können eine Seite bearbeiten, indem Sie auf das Symbol klicken. Die Einsteigerhilfe erläutert Ihnen, wie Sie die Oberfläche benutzen.

**Home**

Auszeichnung für Rekordwachstum
Die Business Company konnte ihre führende Position unter den am schnellsten wachsenden, deutschen Unternehmen auch in diesem Jahr wieser behaupten. [mehr]

Geschäftsjahr 2003 erfolgreich abgeschlossen

Heinz Meyer wird Aufsichtsratsvorsitzender bei
Sie können eine Seite bearbeiten, indem Sie auf das 📝 Symbol klicken. Die Einsteigerhilfe erläutert Ihnen, wie Sie die Oberfläche benutzen.
RedDot icons for each input field

Sie bearbeiten die Seite "Nachrichten" mit Seiten-ID 50

- Eigenschaften
- Aktionen
- Verlinkung
- Schlagworte
- Bemerkungen
- Seiteninformationen

1. Auszeichnung für Rekordwachstum
   Die Business Company konnte ihre führende Position unter den am schnellsten wachsenden, deutschen Unternehmen auch in diesem Jahr wieder beibehalten. [mehr]

2. Geschäftsjahr 2003 erfolgreich abgeschlossen

3. Heinz Meyer wird Aufsichtsratsvorsitzender bei BizCom
   Mit Heinz Meyer (55) konnte die Business Company einen der erfahrensten Manager Deutschlands als Vorsitzenden des Aufsichtsrates gewinnen. [mehr]

4. G. W. Versicherung baut auf BizCom
   Die G. W. Versicherung (GWV) hat ihr konzernweites Intranet sowie ihr Unternehmensportal auf Basis des BizCom-Produkts komplett überarbeitet und vereinheitlicht. [mehr]
Edit dialog for single input field
Day – Toolbars show page structure and commands

People at Geometrixx

Fred Thompson, CEO

Mr. Thompson joined the company in 1965, after a long and successful career in geo-engineering. His dedication to the company and unmatched geo-talent have made him the CEO in 1986. He still strongly believes in the magic of geometry and is confident that that market will continue to grow at an experienced pace.

Jane Doe, CFO

Mrs. Doe has been with Geometrix since her graduation from the University of Maastricht with a Masters in Business Administration. She has also earned an MBA from Harvard. Her leadership talents have been noticed throughout her career in various positions in various departments, finally earning her the CFO position.

Matthew Williamson, CTO

Mr. Williamson is the master of technology at Geometrix. He joined the company after leading the Research and
Magnolia – Toolbars similar to day
Add paragraph to a Page in Magnolia

Select a type for the new paragraph:
- Samples: Text and image paragraph
  Paragraph with title, text and image
- Samples: Link paragraph
  Set an internal or external link
- Samples: Table paragraph
  Draw and configure a table
- Samples: Download paragraph
  Upload a file
- Samples: Editor
  Web content editor with all features (tables, images, styles, ...)
- Samples: Freemarker paragraph
  Inserts a paragraph which will be rendered with the configured Freemarker template
- Documents
  Select a folder or single document or define a custom query.
Proposals for improvement
Show publish state in DirectEdit preview

**Weisswurst**

*Weisswurst* (German *Weiβwurst*, literally white sausage) is a traditional Bavarian

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**Flag Icon**
Show publish state in edit dialog

Flag icon

Document info

Show history
Offer advanced functions in DirectEdit

Wonderful World of Wurst

Wonderful World of Wurst presents the most spectacular and amazing stories about sausage from around the world. Entertaining and with lots of useful information. Let us take you into the adventurous world of sausage 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 about sausage.
- If you already have access, you can find additional information inside our extranet: Wurst Extra.
Offer advanced functions as tabbed dialog

advanced functions placed on tabs
My Top 10 of my most wanted features for OpenCms

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
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 it 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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