Streamlining and Simplifying Drupal Publishing: A Checklist of Best Practices

July 18, 2023

Drupal: The Challenge

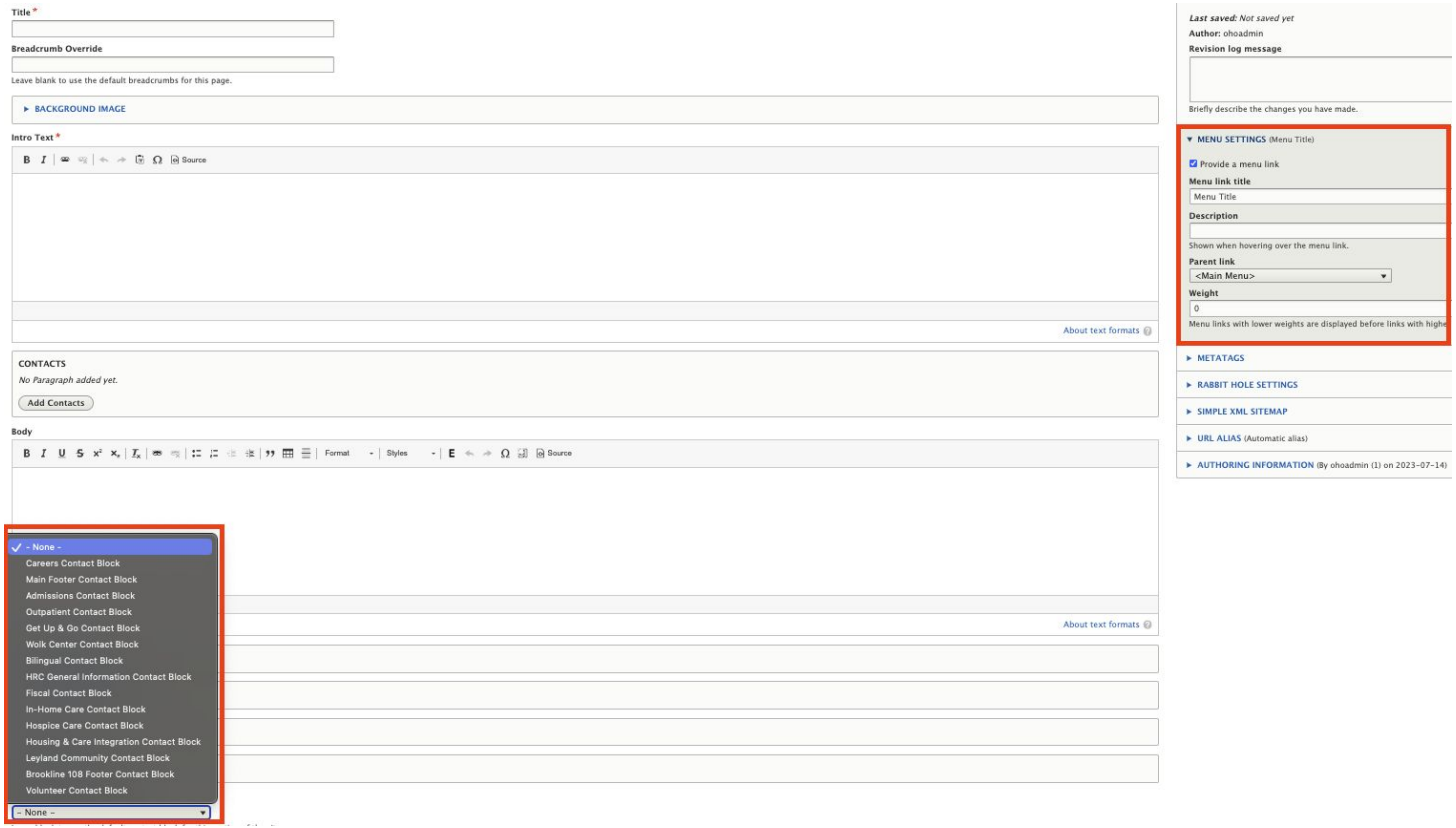
- Drupal is a very flexible and robust system; there are many different ways to build Drupal to fit many different use cases.
- The drawback is that it also opens the door for poorly planned implementations that can impede the effectiveness of your team.
- The good news: Drupal can be implemented to meet the needs of your team and empower efficient workflows!

Simplifying the Editing Experience

Best Practices

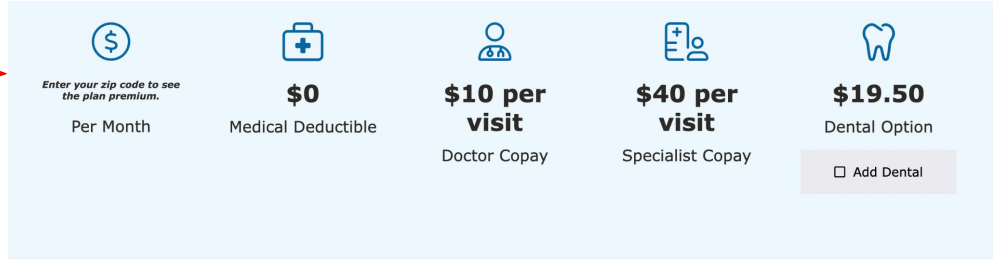
- Provide a unified editing location.
- Organize areas of the page on the backend to map to their frontend counterparts; think table of contents.
- Use the power of Drupal's backend and the site's frontend to simplify what is required for users to enter to build a page.
- Be mindful of where flexibility makes sense, and where a more rigid approach might be more appropriate.
- Provide supporting documentation that covers how to use the system from a functional perspective, and also from a content strategy perspective.

Unified Editing



Organized Forms

- Plan Details
- Intro
- Plan Section
- Drug Coverage
- Medical Coverage
- Dental Benefits
- Additional Benefits
- Plan Section



Jump to:

Medical Coverage | Dental Benefits | Additional Benefits | Additional Information

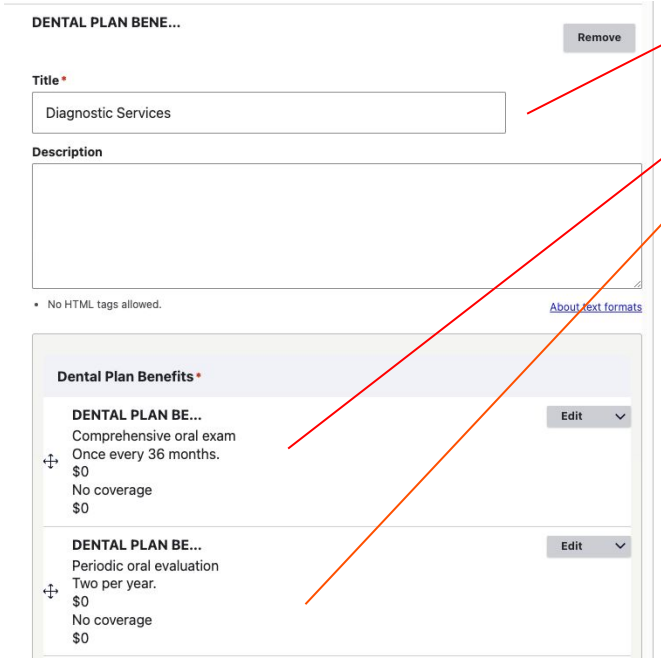
Medical Coverage

Out-of-Pocket Maximum

Your Annual Out-of-Pocket Maximum is $3,650. This is the most you will pay in a plan year for covered medical expenses.

Physical and Wellness Visit

Simplify User Experience

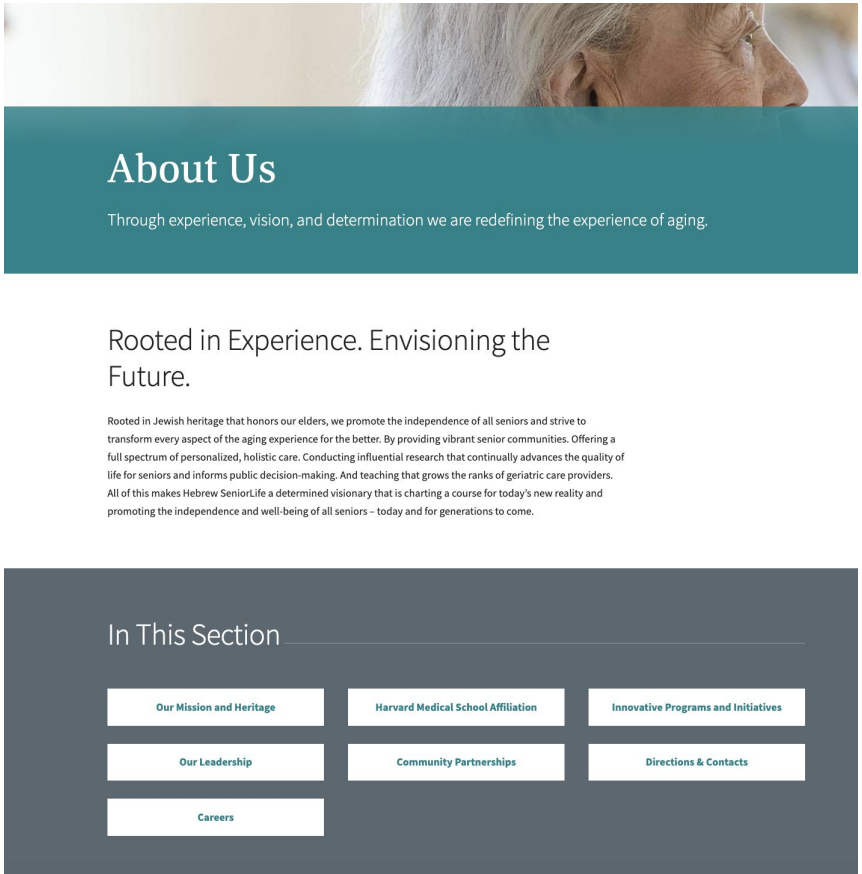


Diagnostic Services

Benefit	HMO Saver, Basic, Value	Prime, Prime Rx+	With Dental Option
Comprehensive oral exam Once every 36 months.	$0	No coverage	$0
Periodic oral evaluation Two per year.	$0	No coverage	$0
Emergency oral evaluation problem focused exams Once every 12 months.	50%	No coverage	20%
Intra-oral X-ray image of the entire mouth Panoramic image. Once every 60 months.	50%	No coverage	20%
Intra-oral X-ray image of the entire mouth Full mouth series. Once every 60 months.	50%	No coverage	20%
Intra-oral bitewing X-ray images X-rays of the crowns of the teeth. Completed when oral conditions indicate need. Two per year.	$0	No coverage	$0
Single tooth X-ray images; as needed As needed.	50%	No coverage	20%

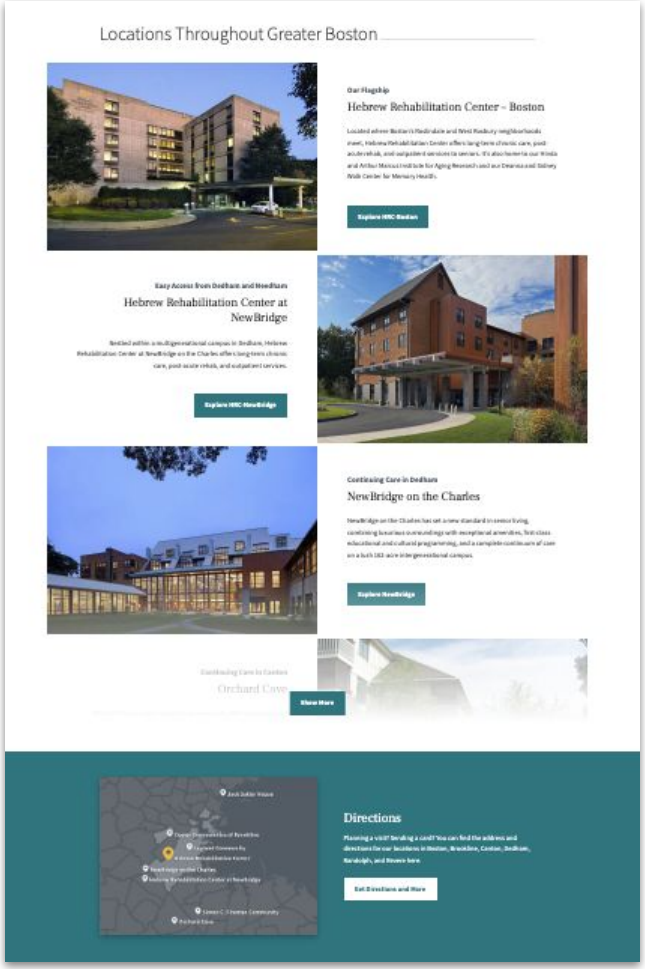
With great flexibility, comes great responsibility

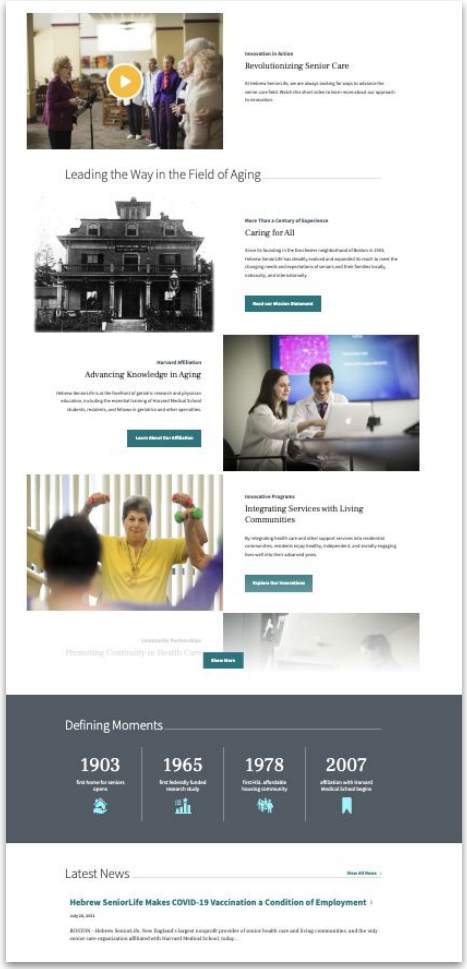
Locked down components



With great flexibility, comes great responsibility

Flexible components





User Documentation

Link Fields

Link fields are unique fields that allow linking to internal pages or external pages. These fields also have the following optional attributes:

Target
The primary purpose of a target is to determine if a link should open in a new window.

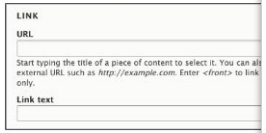
Rel
The primary purpose of the rel attribute is to tell a search engine not to visit a link when crawling the site.

A full list of values is available here:
https://www.w3schools.com/tags/att_a_rel.asp

Aria Label
Used to define text that labels the link for assistive devices. In most cases this will not be needed as accessible text has already been accounted for by the Drupal theme.

Link field without Link text (text of link will be hard-coded)

Link field with text (text of link is editable)



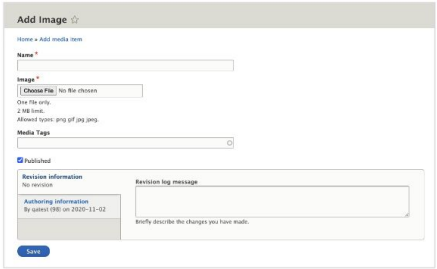
1. Adding images in the media tab

Upload Images

To upload an image, type a Name, browse to and select the desired image file, and add any Media Tags. *(Or, in the Media Popup, you can drag and drop an image into the popup.)*

When uploading image, use the following best practices:

- Use dashes - not underscores _; Do not use spaces and 255 characters max
- Example: 720x480-first-year-orientation-student.jpg



User Documentation (cont.)

Landing page - reorderable components

Content element	Recommended use
Card section	Provide brief snippets of information and clear pathways to related content. Each card has a title, optional link, and brief description. Cards grouped together in a section should have a clear connection, which is conveyed through the card section title and intro.
Checkerboard	Provide related info, with optional link; use one or stack multiple. Stick to one subject per checkerboard.
Promo block	Use to present multiple clear calls-to-action under one heading and brief description.
Plan summary	Table to present multiple pans with quick, scannable presentation of key info (primary care physician required, out of network coverage, and PDF download for plan details).
Plan summary feature	Brief description of a single plan, focusing on key benefits for members. In a sentence or two, why should I pick this plan over the others?

The power of automation and content reuse

Best Practices

- Use typeahead fields to manually curate the existing content you want to pull in.
- Leverage taxonomy and views to enrich pages with related content automatically.
- Cut down on user error and effort by having a canonical content source.
- Create listings with full featured filtering capabilities.
- Leverage existing data sources by integrating them with Drupal.

Curated related content

Related Articles

Can brushing your teeth prevent heart disease? (461)

Four Easy Ways to Prevent Falls (545)

How Can You

How Can You Prevent Kidney Disease?

You might also be interested in...

Can brushing your teeth prevent heart disease?

The health of your teeth and gums can affect your overall health.

Read more

Four Easy Ways to Prevent Falls

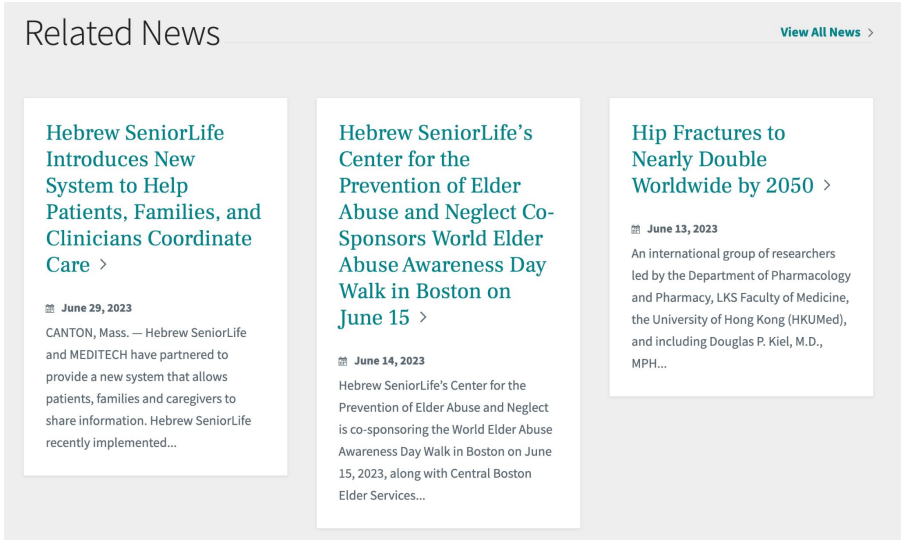
Muscles generally lose strength and flexibility as you age—which is why all adults are at risk of falling.

Read more

How Can You Prevent Kidney Disease?

Kidney disease means your kidneys are damaged and can't filter blood properly. While kidney disease can develop at any time, it is more common in those over the age of 60. According to the Centers for Disease Control

Taxonomy-based related content



Filtered listings

Filters

You can filter in three ways to find the best plan for you.

Filter by **Plan Type** | Filter by **Expected Health Expenses** | Filter by **Premium/Deductible Amount**

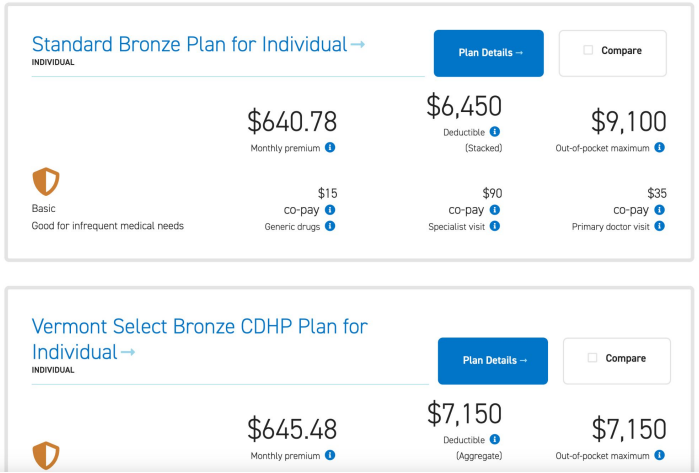
We offer three levels of qualified health plans with different levels to meet your health care needs. Select from our plans and plan levels to filter your search.

Standard Plans
- Platinum
- Gold
- Silver
- Bronze

Vermont Select Plans
- Select Gold
- Select Silver
- Select Bronze

Vermont Preferred Plans
- Preferred Gold
- Preferred Silver
- Preferred Bronze

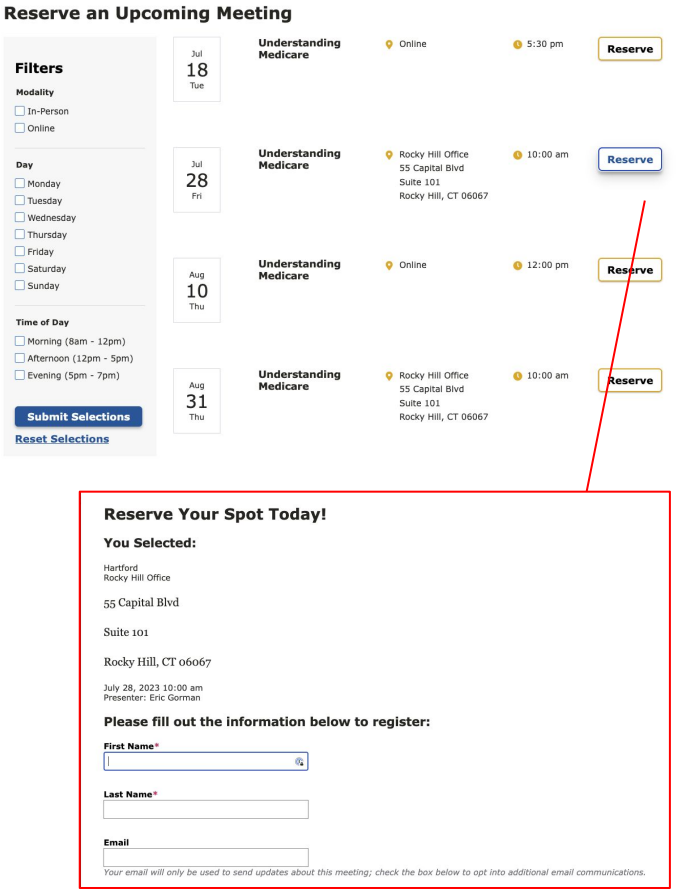
Health Savings Account (HSA)
- Show Only HSA Compatible Plans



The following 17 plans meet your filter criteria

Data source integration

- Meetings imported into Drupal via Salesforce
- Registration captured in Drupal Webforms and sent to Salesforce



Administrative Experience

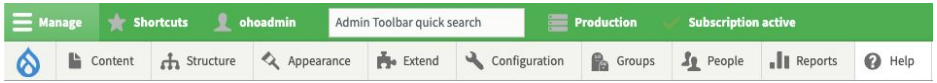
Best Practices

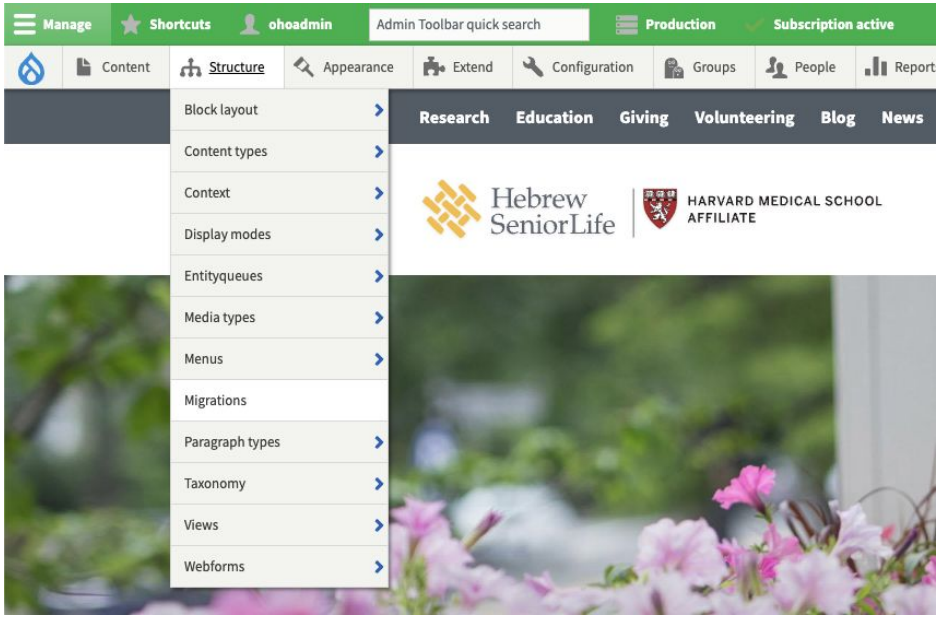
- Streamline what can be accessed, and don’t confuse users with options they don’t need.
- Provide dashboards to easily find relevant resources and tasks.
- Be mindful of overly complex roles and permissions structures, and leverage the practices of your organization to fill in gaps.

Streamline Access

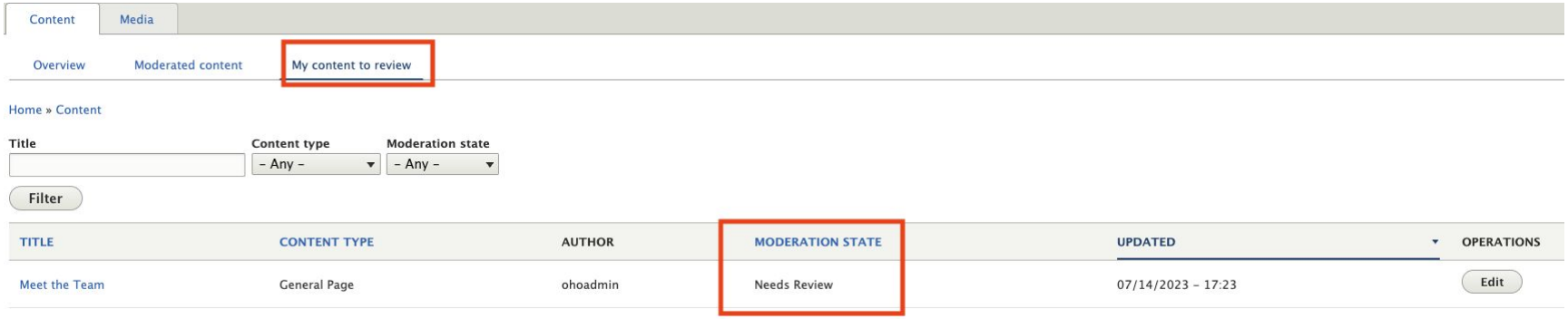
Content Editor

Administrator



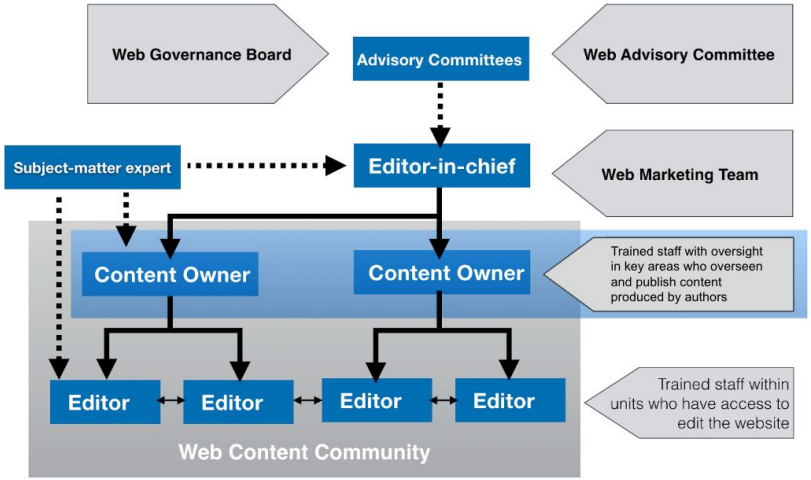


Relevant Dashboards



Website Roles and Permissions

- Keep these high-level, think in terms of trust and ability
- Exceptions are okay, but should not be the norm
    - Try to avoid responsibility-triage using the system, when it can be addressed offline
- Segment users into “Groups” to manage particular sections of the site to allow for nuance.



Final Thoughts

- Drupal is a complex system with many different use cases.
- It takes a lot of thought and planning to build an effective and easy-to-use Drupal site.
- When built right, it can empower your team and make their lives easier:
    - Keep the editing experience simple and streamlined
    - Build in flexibility responsibly so users have the tools they need
    - Allow for content reuse whenever possible to reduce user error and effort
    - Integrate with data sources
    - Tailor the administration experience to the user's role