



SDL*

SDL Web Extension and Integration Gotchas, User Experience, and You

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Topics



UX Tools and You

Personas
Question(s)



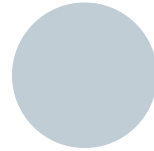
Authorization

The black box of versioning
There is always a user
You are not your user(s)



Blueprinting

Context matters.



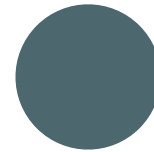
Change

Create. Read. Update. Delete.
Design for change. Don't overdo it.



Development

Dev. Test. Acceptance. Production.
Consider development scenarios



Your turn

Your examples
The black box revealed

Topics (Technical Variant)



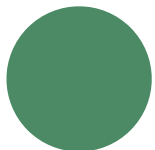
UX Tools and You

Personas
Question(s)



Authorization

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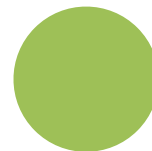
Blueprinting

Context matters.



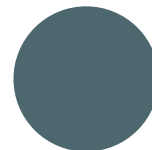
CRUD

Create. Read. Update. Delete.
Design for change. Don't overdo it.



DTAP

Dev. Test. Acceptance. Production.
Consider development scenarios



Your turn

Your examples
The black box revealed



SDL WEB PERSONAS

OCUPATION Works as a contractor for a large company, writes copy and adds content to a CMS.

BACKGROUND Started as a copywriter for a print magazin but now works primarily for marketing teams.

SKILLS Profound writing skills, basic knowledge of web technology.

TOOLS Office on Windows PC

DEVICES Desktop PC

LANGUAGE English only



collaborative work



write, edit, publish



translate offline material to online

LEARNING PATTERNS



Our web content management system is so complicated, I have to follow a written step by step instruction to use it without making mistakes.

This motivates me. 😊

- A simple and intuitive editing experience, just like MS Word.
- Ability to quickly make changes if I spot errors.
- Navigate the website to the right location and edit in context.
- Seeing how the content changes according to targeting rules.

This does not! 😡

- Losing the overview where content sits or belongs in the WCM system.
- Following long and complicated procedures to perform simple tasks.
- Using too many systems and having to switch all the time.
- Not seeing the results of customized elements and A/B tests instantly.

I care about the content and hope the technology is not getting in my way...



ANNA GILLEY | Web Content Author

SDL WEB | SDL EXPERIENCE MANAGER | SDL MEDIA MANAGER

EXPERT IN USING LANGUAGE AND HAS A BASIC UNDERSTANDING OF WEB TECHNOLOGY

Anna writes copy for websites, corporate intranets, mailings, online advertising and marketing campaigns. She adapts copy from offline sources for online use. She collaborates with designers on blending copy with teh right visual content and with subject matter experts to ensure the content is correct and relevant. She can participate in search engine optimization (SEO) projects and online experiments (A/B testing). She reports to the Chief Web Content Editor who assigns tasks to her and reviews the results before teh content goes online.

TOP GOAL

Anna wants to be able to make a lot of changes to the web content on her own, without breaking the web site and without having to understand the entire web content management system.

COMMUNICATION & COLLABORATION

Anna receives her assignments mainly from the Web Content Editor but also from teams in marketing or elsewhere in the business. She mainly communicates via email and some internal team collaboration and backlog management tools.

GAINS



PAINS



JOB



AGE 43

OCCUPATION Chief Editor for the corporate web site of her company and in charge of global content quality

BACKGROUND Passionate writer and „language nerd“ with background as a web master.

TOOLS Office, WCM, all kind of online services

DEVICES Desktop PC

SKILLS Good communicator, team player

LANGUAGE Multilingual



switches context and tasks a lot

approves content and publishes to live

I am focused on content quality

I ensure that properly organized website content meets the requirements of business units, fulfills the needs of website users and be localized to different languages.

This motivates me. 😊

- Focusing on content quality and not on processes and tools
- Running a global website with a small team of super heroes
- Full flexibility with the tools and systems I use
- Receiving good feedback, comments, and rating for our content

This does not! 🚫

- A long and steep learning curve for new tools and systems
- Switching between products and UI's all the time
- Overly complex processes for review and approval
- Lack of data and insights in content quality and performance

ELAINE DILLINGHAM | Chief Web Content Editor

SDL WEB

SDL EXPERIENCE MANAGER

SDL MEDIA MANAGER

LEARNING PATTERNS



CHALLENGES

“I coordinate, keep an overview, give support, make sure all is delivered on time and maintain the online brand experience. I share my knowledge about the application’s possibilities and boundaries when content needs to be delivered. I ensure that website content meets the requirements of the business and fulfills the needs of website visitors. Content needs to be properly organized within the CMS. I need to make sure that content will be localized to different languages and supports a wide range of channels.”

TOP GOAL

Elaine’s goal is to create and publish the right content in the right channels and reach the intended target audience to help drive customer engagement and conversion for a global website.

COMMUNICATION & COLLABORATION

Content is provided by content authors, Elaine reviews and either approves or requests changes. She works together with other Editors in a global team of 2 to 3 people. She is responsible for publishing content to the live site.

GAINS



PAINS



JOBS



AGE 31

OCUPATION Works as a web developer for a flight company, builds and maintains the back end of the website.

SKILLS Expert in the development technologies used by the Web team.

DEVICES Desktop PC, Laptop

BACKGROUND 6 years web development

TOOLS IDE, Source Control, Build Tools, JIRA (issue tracking)



translates requirements into a foundation



builds his own extensions



I would like to configure and extend the CMS to create and integrate systems into our website.

This motivates me.

- The ability to use standards and APIs.
- The ability to extend systems using code (APIs).
- Re-use existing frameworks, architectures and functionalities.
- Default setup and configuration settings.

This does not!

- Unclear and impossible requirements.
- Lack of documentation and unclear APIs.
- Being blocked by system issues or people.
- Being forced to work with certain technologies.

DANESH KUMAR | Web Developer

SDL WEB

LEARNING PATTERNS



ACCURATE, PRECISE, EXPERT

Danesh is an expert of all platforms used by the Web team. He works in the content management system, and integrates and maintains external tools and other platforms making use of various APIs. He makes and maintains his own extensions, describes the process and way to use. He will be consulting experts for advice, guidance and standards. He mostly re-uses existing frameworks, architectures and functionality.

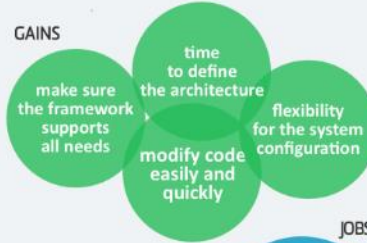
COMMUNICATION & COLLABORATION

Danesh receives requirements from Project Managers / Marketing Manager. He advises or provides Authors and the Chief Content Editor configuration solutions. He collaborates with the Designer to make sure the project gets implemented correctly. In case of the issue related system set-up he notifies the System Administrator.

TOP GOAL

He wants to be able to modify code quickly and easily.

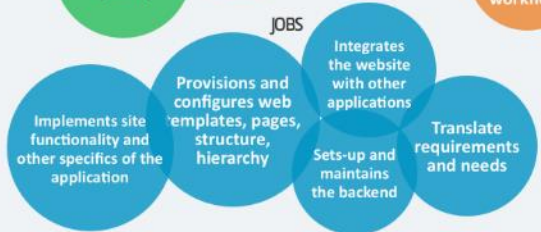
GAINS



PAINS



JOBS



OCCUPATION Provides and maintains the infrastructure foundation for the Web team in an international enterprise

BACKGROUND Broad knowledge about several applications, and technologies and specifics

TOOLS Backend tools (e.g. status dashboards and maintenance tools), familiar with command line tools (e.g. terminal and powershell), Cloud Systems



enabler for the team



technical, more abstract point of view

I provide a solid structure and service level for the Web Developers and Web Content Editors and other internal users for several systems including the CMS.

Keeping the systems running is my priority.

This motivates me. 😊

- Intuitive and familiar ways to configure and maintain systems
- Secure and compliant systems that are easy to audit
- Systems that work well with our other systems
- Opportunity learn more and leverage Cloud

This does not! 🚫

- Complex systems with vendor specific configurations
- Unstable and inflexible systems
- Vague or unclear error messages
- Hard-to-deploy systems



SAM COATES | System Administrator

SDL WEB

LEARNING PATTERNS



TECHNICAL ADVISOR AND EXPERT

He gained advanced understanding of CMS and many other infrastructure systems. He provides the technical foundation for the web team. He is one of the few people at the company who has an idea about the technical possibilities and limitations of the CMS and other systems.

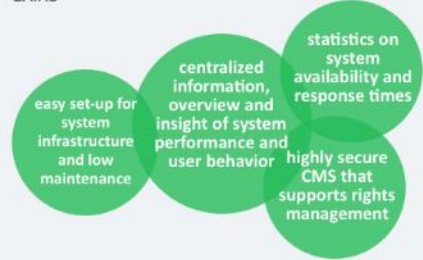
TOP GOAL

Sam wants to provide the technical foundation for the web team.

COMMUNICATION & COLLABORATION

He gives feedback on Project Management outlines. He gives first line support for the Chief Content Editor and Content Authors.

GAINS



PAINS



JOBS





UX EXERCISE (YOUR PERSONAS)



ABCD
ALVIN
THE BLACK BOX



AUTHORIZATION

“Translate Minor Versions”

“Workflow as Collaboration”

Translation Manager

Publishing

Template
(trusted read-only mode)



Workflow

“Translate Minor Versions”

“Workflow as Collaboration”

Translation Manager

Publishing

Template
(trusted read-only mode)

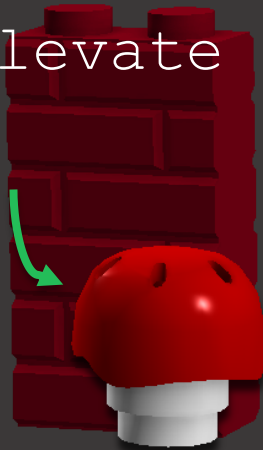


Workflow

User (in Event System)



Elevate Privileges



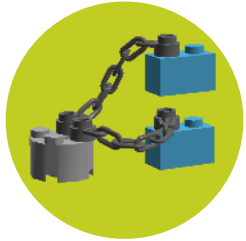


Elevated Privileges



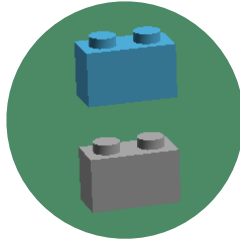
BLUEPRINTING

Blueprinting Awareness in SDL Web's Extensions/Integrations



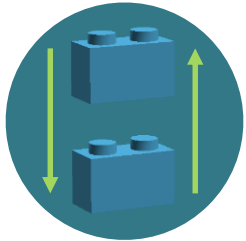
External Content Library

"Create" external item in any Publication
Flattening effect
(Can pass publication context to external system)



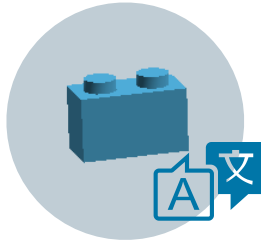
Experience Manager

Separate Content and Page Context (Publications)



Translation Manager

Source and Target Publications (Language Pairs)
Push and Pull Jobs



User Generated Content

Comments are Publication-specific

When you create that killer feature in a child Publication....



“

That's awesome!
I want that too.

”



CHANGE

CREATE

READ

UPDATE

DELETE

SDL*

Ownership

Updates

Ownership

Best fitted system for the content,
data, or binaries

Updates

Quantity, frequency, and
functionality

UX Considerations

- Design for edge cases
 - No data or data = 0
 - Data (still) loading
 - Errors
 - Lots of data
- Handle:
 - System errors
 - Delays and expectations for when data will arrive
 - Times where there is no data (from an integration)



**DEVELOPMENT
PROCESS**

**DEVELOPMENT
TEST
ACCEPTANCE
PRODUCTION**

DTAP + Train (or Demo)



Unit



Development



Test



Acceptance



Production



Train



**ALWAYS
LISTEN TO
VERY
IMPORTANT
NOTES**

Always Listen to Very Important Notes



Elevate don't impersonate

TOM.NET / Core Service
Meet the "blame" requirement for event system code using Elevate.
Tip: Use "using" to limit the context of the elevation.

Workflow as collaboration

Configuration: let others read the latest, dynamic, "minor" version including workflow code and other users.



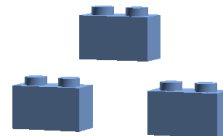
Context matters

Blueprint.
Environments.
Right context for the right user and the right system.



Translate minor versions

Configuration: let translation manager send minor versions (compliments workflow as collaboration).



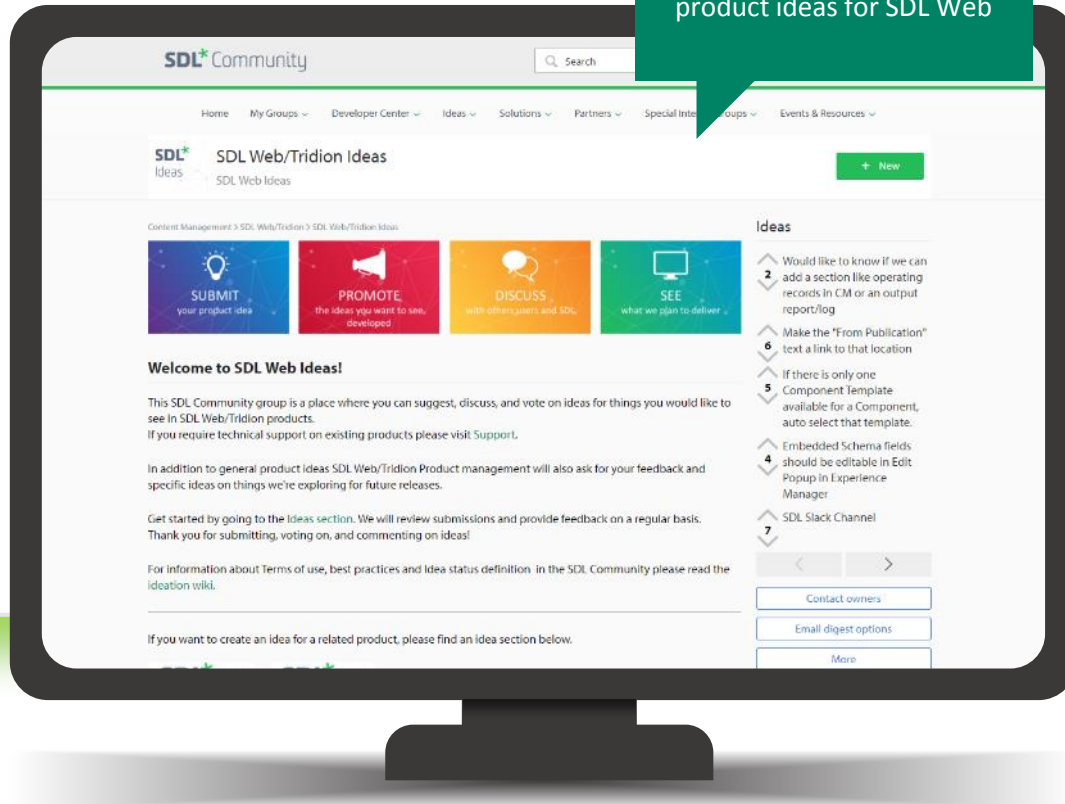
Keep your personas in mind

Who does what in the system?
What steps do users follow?



SDL Web Ideas

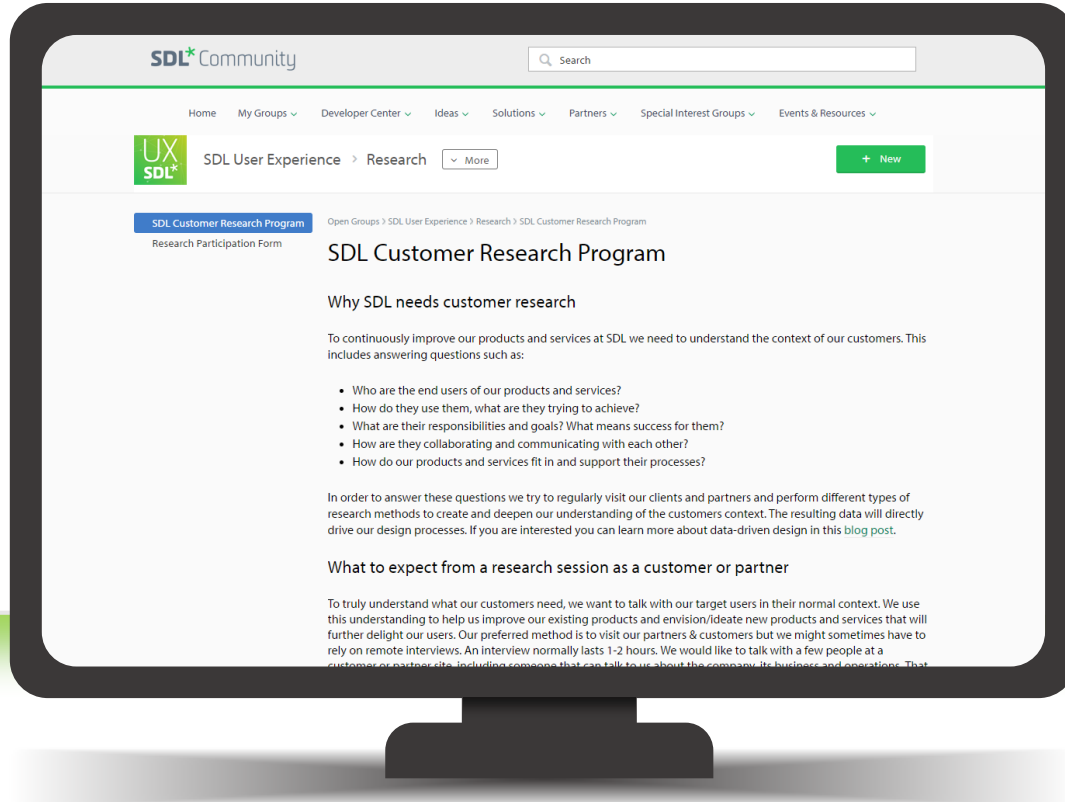
Suggest, vote, and discuss product ideas for SDL Web



SDL rebooted several product suggestion channels into SDL Community.

SDL Web is one of the more active idea boards!

SDL UX Research Program



Learn more about the UX Group on SDL Community and the UX Research Program

SDL Community > Special Interest Groups > SDL User Experience



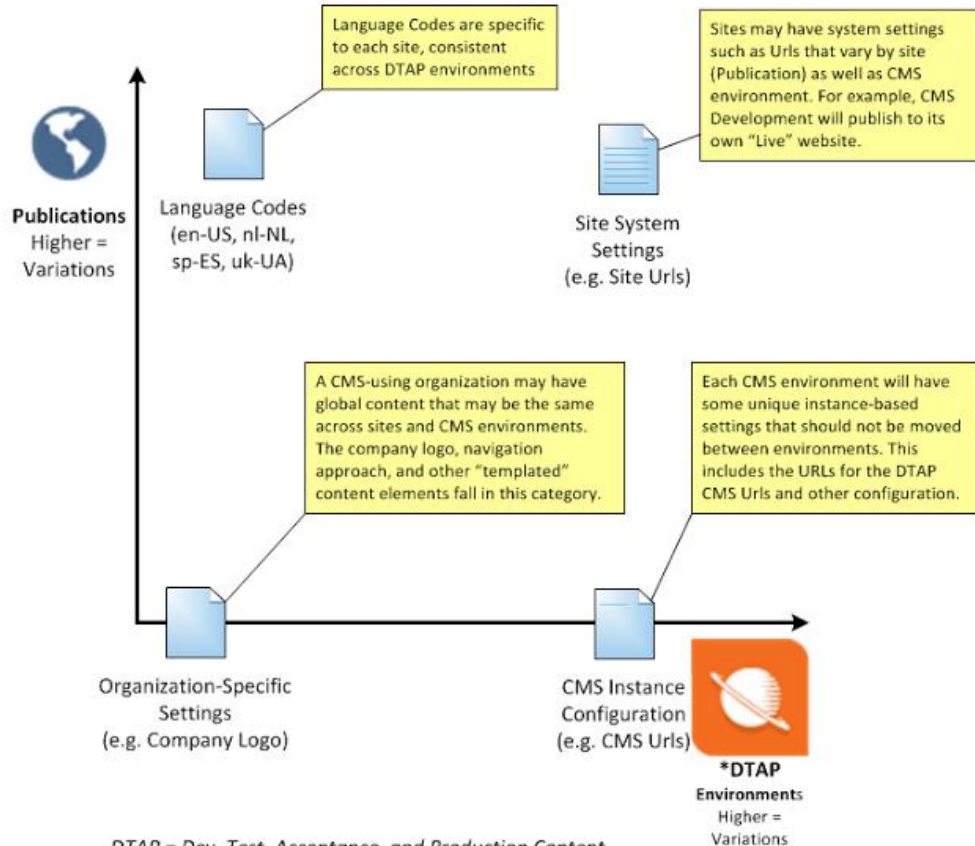
Software and Services for Human Understanding

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Example (Older) Ideas

- Language Codes
- Website Settings
- Website Logo
- CMS URLs



App Data

- Learn more about Application Data logic (thanks, Lars): <https://tridion.stackexchange.com/q/5496/46>
- Each version starts with a new “fresh” v0 copy of AppData from the last major version which is
 - lost if you undo checkout
 - saved if you check in
- To match versioning behavior, set AppData on v0 or last major version
- Otherwise, for “version-less” behavior, always copy the current major AppData version to new major version
- This gives flexibility for things like UGC, where comments are unique to a given publication.

More on ECL

<https://tridion.stackexchange.com/a/3338/46>

<https://tridion.stackexchange.com/a/3339/46>

<https://tridion.stackexchange.com/a/3337/46>