APPNOVATION TECHNOLOGIES

INTEL OPEN SOURCE TECHNOLOGY CENTER

DOCUMENTATION FOR PROJECT CREATION & MANAGEMENT ON 01.ORG WEBSITE

Revision History

Date	Version	Prepared By	Comments
Jan. 2nd 2013	1.0	Adrian Jones	Formal user documentation based on previously submitted material by Appnovation Technologies.

Table of Contents

1. Introduction

1.1. Document Purpose

The purpose of this document is to describe the administration and workflow around creating new open source project microsites on 01.org, Intel's portal website for their Open Source Technology Center (OTC).

1.2. Strategic Initiative

Intel's OTC felt that improvements were needed to their website, 01.org, in order to better showcase their contributions to the open source community. The Center felt that it was important to get the message out that Intel is the #1 company contributing to the Linux kernel, and also to promote the breadth of Intel employees making open source contributions from all over the world. They also wanted to improve the overall site experience to better foster engagement from their contributors, making it easier for them to participate in hosted or non-hosted projects.

Intel's OTC hired Appnovation to help them make improvements to 01.org, both aesthetically and functionally.

1.3. About the OTC

Over the last 15 years, Intel has contributed open source code and sponsorship at every level of the computing platform, from the BIOS to the kernel to middleware through applications. Open operating systems, including Unix BSD, Open Solaris, Android, Carrier-Grade Linux, and Tizen have seen contributions from their worldwide network of open source software engineers.

01.org is the online presence of OTC, where Intel pulls together all the open source work that their engineers are involved in.

2. Background

Each individual open source project microsite featured on 01.org is currently a separate Drupal installation. One of the OTC's objectives was to manage and allow for the creation of new project microsites from within the main 01.org Drupal system. The infrastructure for this functionality has been implemented by Appnovation developers using Drupal's Organic Groups module in combination with a "Project" custom content type. New project microsites should thus be created and managed using this new system architecture. This document outlines the steps required to follow the new project creation workflow.

3. User Roles & Permissions

There may me additional user roles set up in the Drupal installation, but for the purposes of this document we are just interested in 3 roles: Administrator, Registered User, and Publisher.

3.1. Administrator

An Administrator has full access to the website. In the context of the project creation workflow, an Administrator can create Registered Users and Publishers. Only an Administrator can delete a project.

3.2. Registered User

A Registered User can create a new project microsite, although when first created a project is in draft state and not visible to the public. If the project is approved and published, the Registered User then also gains the permissions needed to administer the project microsite, and is considered to be the “Project Administrator”. A Project Administrator can create and edit content for their project microsite and push to live without needing to further request publishing approval.

3.3. Publisher

A Publisher is responsible for reviewing a proposed new project microsite (in a “For Approval” state) and either approving it by putting it into a “Published” state, or not approving it by returning it to a “Draft” state. A selected Publisher is sent an email when a request for project approval is made to them, yet all publishers can see and approve any request in the system.

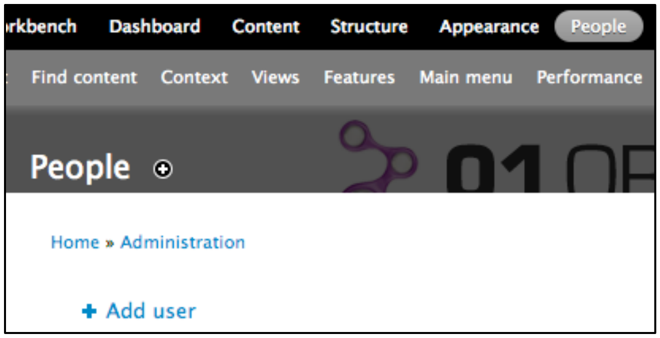
4. Administration

4.1. User Creation

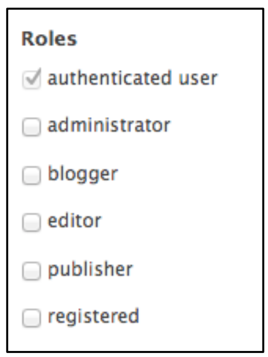
An Administrator can create a Registered User or Publisher. The steps are:

1. Log in as an Administrator

2. Click <People> in the Admin Navigation Bar
3. Click <Add User>



4. Enter the appropriate user details
5. For User Role, select “registered” or “publisher”



6. Click <Create New Account>

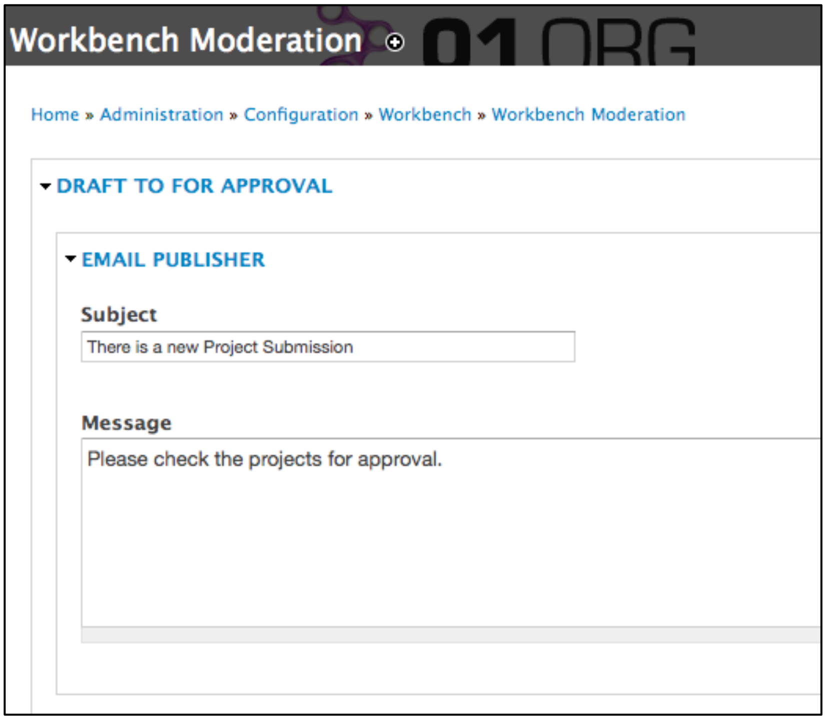
Note that Administrators can also grant a “Registered User” or “Publisher” role to existing users.

4.2. Email Notifications

By default the site has the ability to notify specific users of state changes of a project. Emails are sent and the text in these emails can be configured on a settings page.

1. Login as an Administrator.
2. Navigate to “admin/config/workbench/moderation/emails”.
3. There will be a fieldset expandable box for each state transition. Expand the email message you wish to configure.
4. The secondary fieldset outlines who will be receiving this email (i.e. “email publisher” sends it to a Publisher user).
5. Set the subject and message.

6. Click <Save Configuration>.



The site will send these emails when triggered by changes from one state to the next. No further configuration is needed. If you leave the email message and subject blank, no email will be sent for that specific transition.

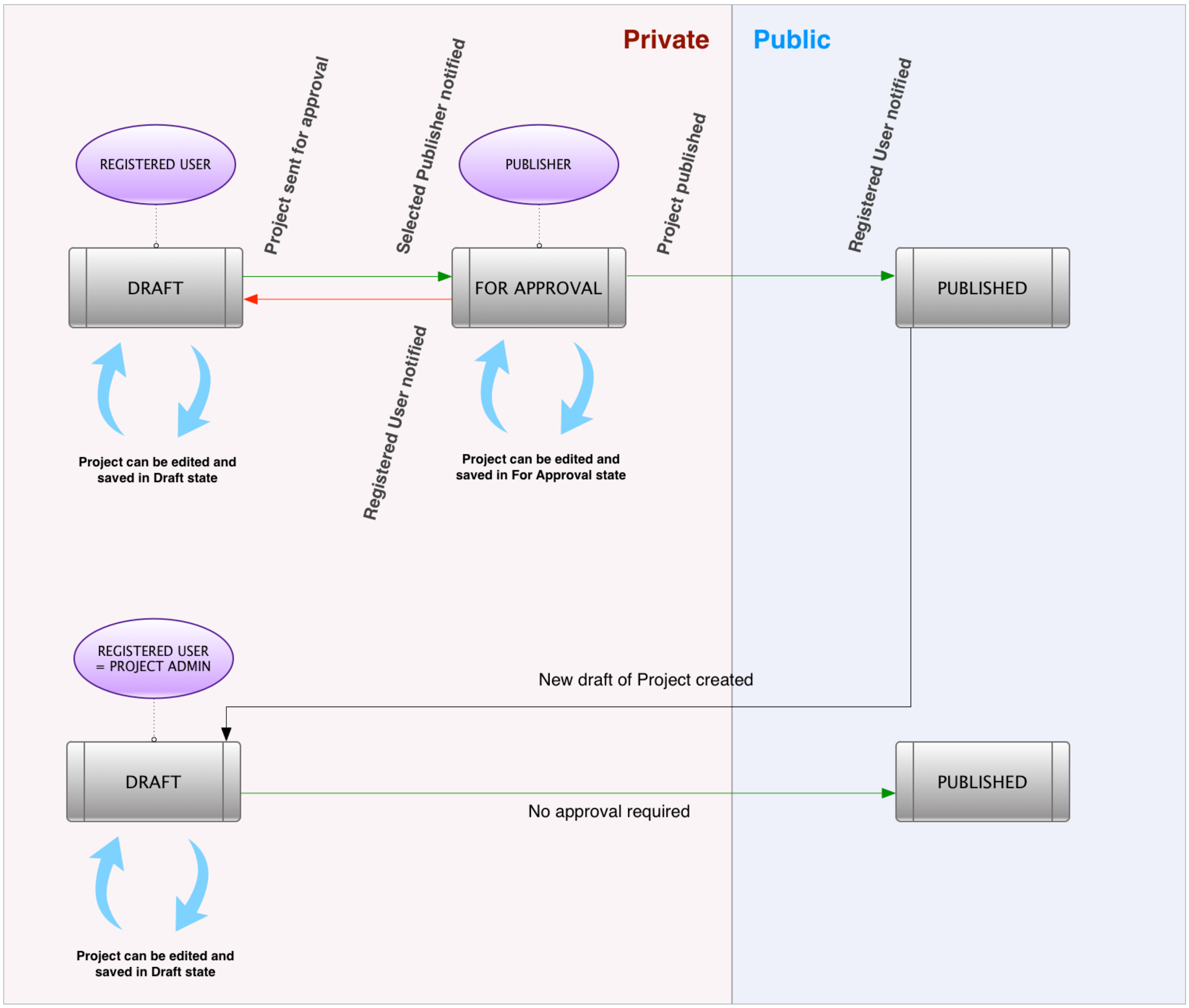
5. Project Creation Workflow

5.1. Project States

A Project can exist in one of three states during the creation workflow process: Draft, For Approval, or Published.

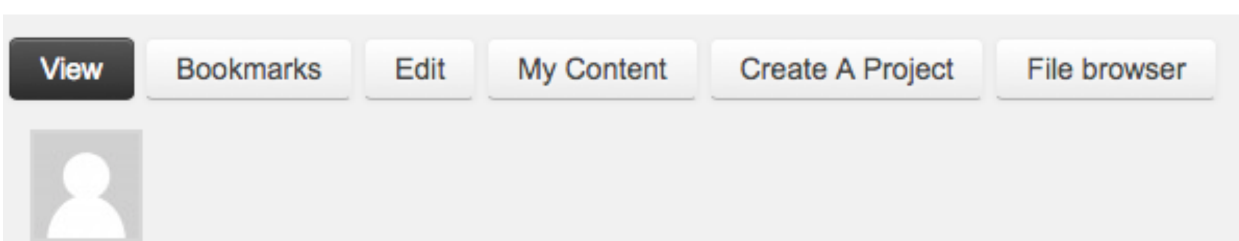
While a project is in draft or awaiting approval, the project is not visible on the 01.org site. Only the Registered User who created the project, or a Publisher can see content of the microsite (as well as the Administrator, of course). While in draft, both the Registered User and any Publisher can edit the content.

When in the “For Approval” state, only the Publisher can edit the content. Once the project is approved, the Registered User is promoted to Project Administrator, at which point they do not require further approval for updates. The Publisher continues to have the ability to edit the content as well.



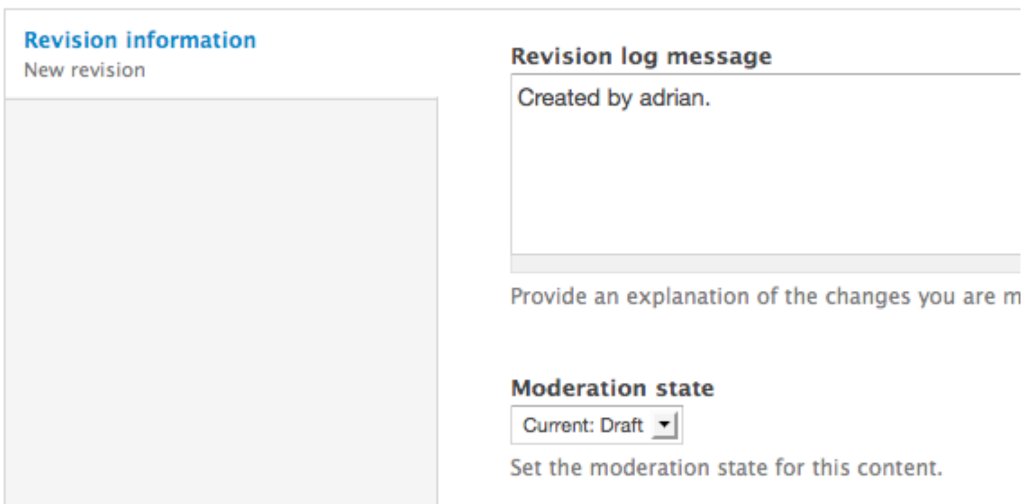
5.2. Workflow

Once logged in, a Registered User has a button on their account dashboard page named <Create a Project>. Clicking on the button takes the user to a project creation form.

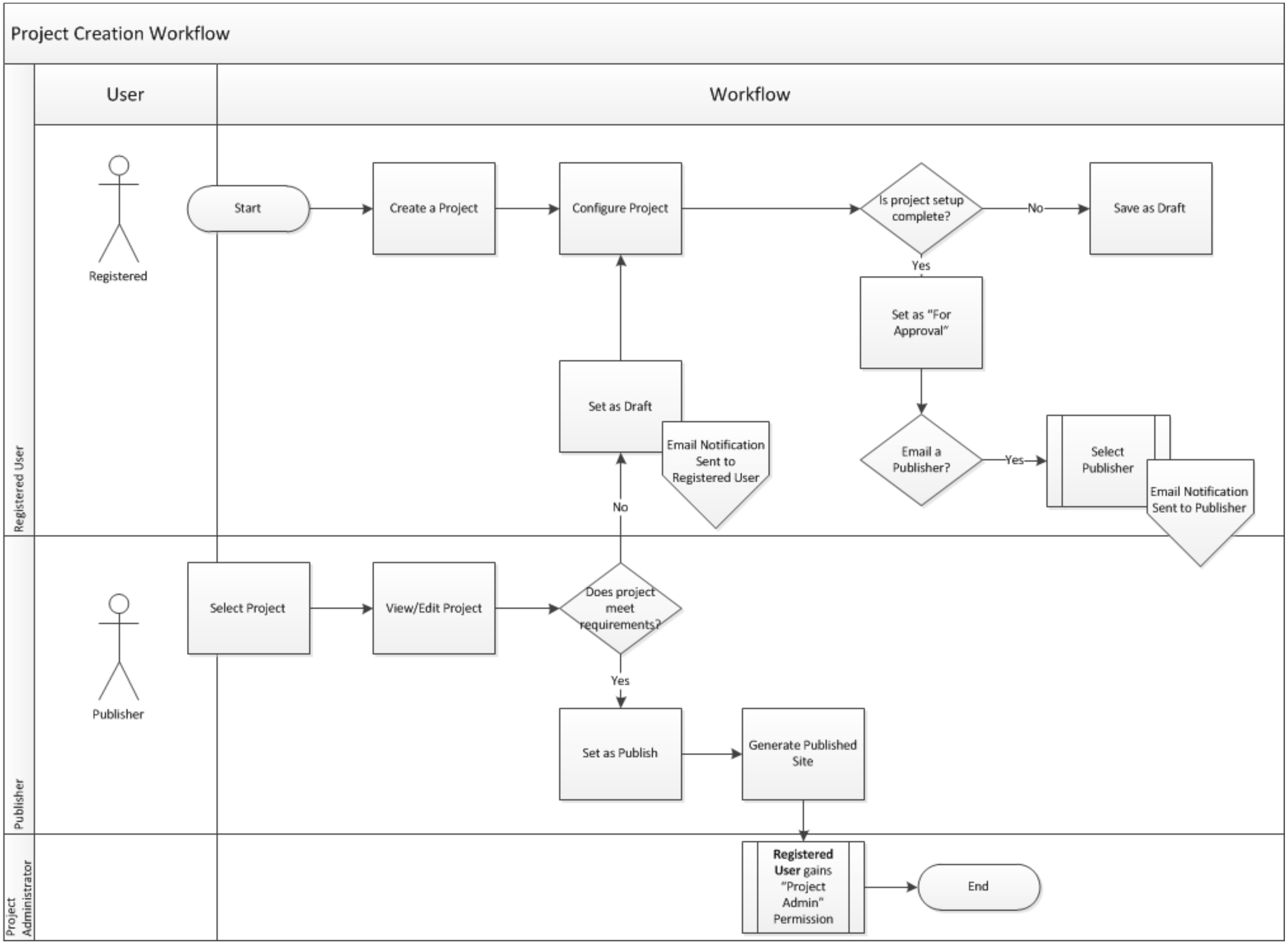


Note that clicking on “My Account” link at the top of any page will return a user to their dashboard.

Before a project becomes published, a Publisher must first approve it, but a project creator is allowed to save a project in a “draft” state and return to it later. The current state of a project can be found at the very bottom of the Project creation page under the “Revision information” section in the “Moderation state” dropdown.



Once a project creator is satisfied with the main content of the project, they can set its moderation state to “For Approval” and select a Publisher to be notified. Saving the project will then pass the editing permissions over to the selected Publisher and the system will send that Publisher an email. The project creator does not have access to modify the project any further once this state has been set. The creator will regain editing permissions once the project is published or returned to a draft state by the Publisher.


Project Creation Workflow
User
Workflow
Registered User
Registered
Start
Create a Project
Configure Project
Is project setup complete?
No
Save as Draft
Yes
Set as "For Approval"
Set as Draft
Email Notification Sent to Registered User
Email a Publisher?
Yes
Select Publisher
Email Notification Sent to Publisher
No
Publisher
Publisher
Select Project
View/Edit Project
Does project meet requirements?
Yes
Set as Publish
Generate Published Site
Project Administrator
Registered User gains "Project Admin" Permission
End

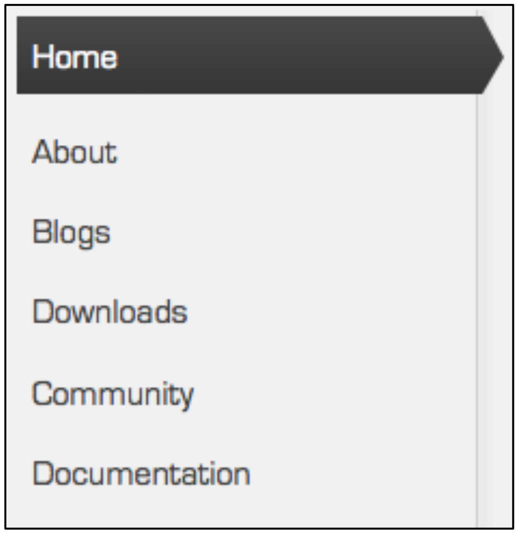
5.3. Workflow Task Breakdown

5.3.1. Create a New Project (Registered User)

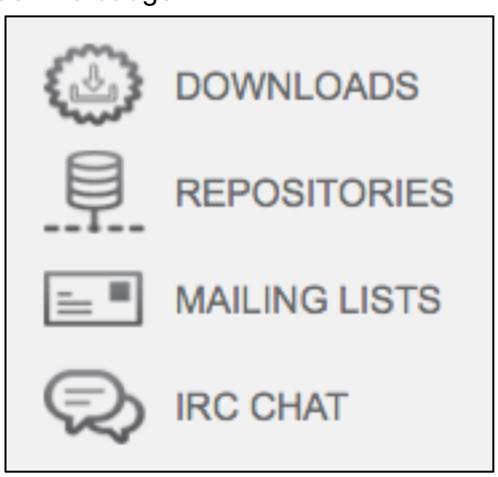
The following are step-by-step instructions for creating a new project through the Drupal admin user interface:

1. Log in as a Registered User
2. On the Dashboard, click the <Create a Project> button
    a. Click "My Account" at the top if the dashboard is not displayed
3. Enter in the relevant data for the project in the form fields:
    a. Project Title
        i. This is the project name and is displayed in various places on the site.
    b. Project Source
        i. Dictates whether the project is displayed on the "contribute" or "host" column on the project page (https://01.org/projects).
        ii. Within the admin it differentiates external sites from internally hosted sites.
    c. Internal
        i. This is used to differentiate between existing hosted projects (the 13 projects that already exist) versus newly created Organic Group projects. If you are creating a project where the project itself lives on another site (a sub-site), leave this field unchecked and proceed to fill in the "Website" field in the "Project Links" section.
        ii. Click the checkbox to have the project "hosted" on the main site.
    d. Project Description and Summary
        i. Description is displayed on the project homepage.
        ii. Summary is displayed on the Project Carousel and Project Grid.
    e. OTC Staff Owner
        i. Displayed in the Project Overview.
    f. Project Maintainers
        i. Displayed under the Maintainer section.
    g. Project Logo
        i. The logo is used by the Project Carousel and Project Grid to represent the project
    h. Project Screenshot
        i. The main image displayed on the project homepage.
    i. Deadlines/Milestones
        i. Displayed in the Project Overview.
    j. Project Objectives
        i. Internally viewed by publisher to establish purpose of project.
    k. Project Audience
        i. Internally viewed by publisher to establish who this project is for.

I. Project Features



i. About
   1. Link appears on the left sidebar
ii. Blogs
   1. Link appears on the left sidebar
   2. Displays “Latest Blogs” section on the project homepage
iii. Downloads
   1. Link appears on the left sidebar
   2. Displays “Latest Releases” section on project homepage
   3. Displays a badge (circle) on the top-right of the project homepage
   4. Displays a “Downloads” shortcut under the badge
iv. Community
   1. Link appears on the left sidebar
   2. Displays “Mailing List”, “Repository”, and “IRC Chat” shortcuts under the badge



v. Documentation
   1. Link appears on the left sidebar

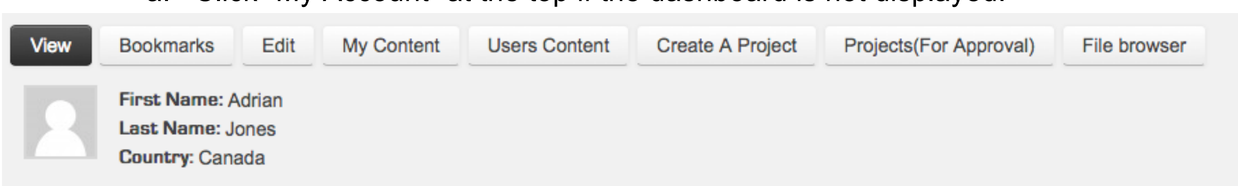
- **m. About Page**
    - i. What will appear on the About page.
    - ii. Can include paragraphs, images, and other details not part of the project description.
- **n. Community Page**
    - i. What will appear on the Community page.
    - ii. Can include paragraphs, images, and other details not part of the project description.
- **o. Custom Features**
    - i. Internally viewed by Publisher as requested features for implementation.
- **p. Project Links**
    - i. Links appear on the global Community page and Project Overview
        1. Website
        2. Git Repos
        3. Mailing Lists
        4. Bug Tracking
        5. IRC Channels
        6. Other Links

4. On the “Revision information” tab at the bottom of the form a Registered User has two options:
    1. **Save project as a Draft/Preview**
        - a. Leave the publishing option to Draft if:
            - i. The project configuration is not complete
            - ii. A preview of what the page will look like is needed
        - b. Save
    2. **Submit “For Approval” to Publisher**
        - a. If the project configuration is completed and reviewed, change the Moderation State to “For Approval”.
        - b. Select a Publisher that will be alerted of the submission.
        - c. Add any addition comments to the “Moderation notes" field.
        - d. Click Save.
        - e. An email is sent to the selected Publisher.

5.3.2. Reject a New Project (Publisher)

The following are step-by-step instructions for a Publisher to reject a new project through the Drupal admin user interface:

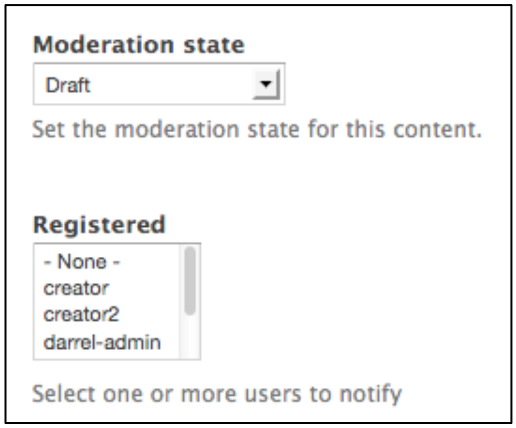
1. Log in as a Publisher.
2. Click <Projects (For Approval)> on the Dashboard.
    a. Click “My Account” at the top if the dashboard is not displayed.



3. Choose the project by clicking the Title of the project.

MODERATION STATE	MODERATE	TITLE	TYPE	REVISED BY	LAST UPDATED
For Approval View Moderation History	Draft Published	My New Project	Project	adrian	*2 hours 28 min* ago

4. Click Moderate to see revision messages and changes.
5. Click the “Edit Draft” tab at the top right to view the configuration setup.
6. Under Publishing Options, enter moderation notes to inform the Registered User.
7. Change the Moderation State to “Draft”.
8. Select the Registered User.

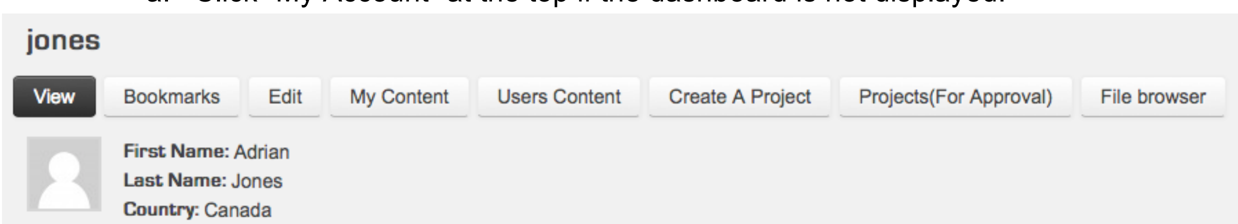


9. Click <Save>.
10. An email is sent to the selected Registered User.

5.3.3. Approve a New Project (Publisher)

The following are step-by-step instructions for a Publisher to approve a new project through the Drupal admin user interface:

1. Log in as a Publisher.
2. Click <Projects (For Approval)> on the Dashboard.
    a. Click "My Account" at the top if the dashboard is not displayed.



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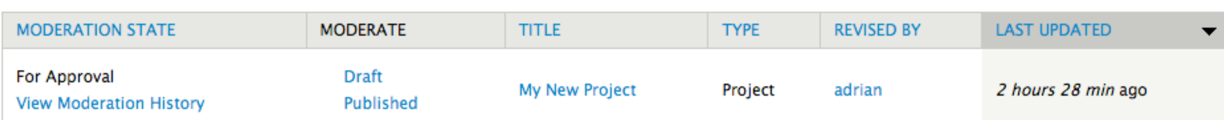

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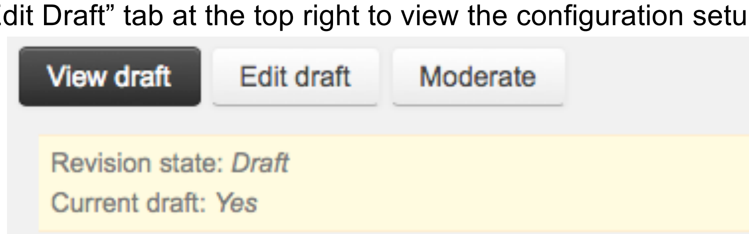


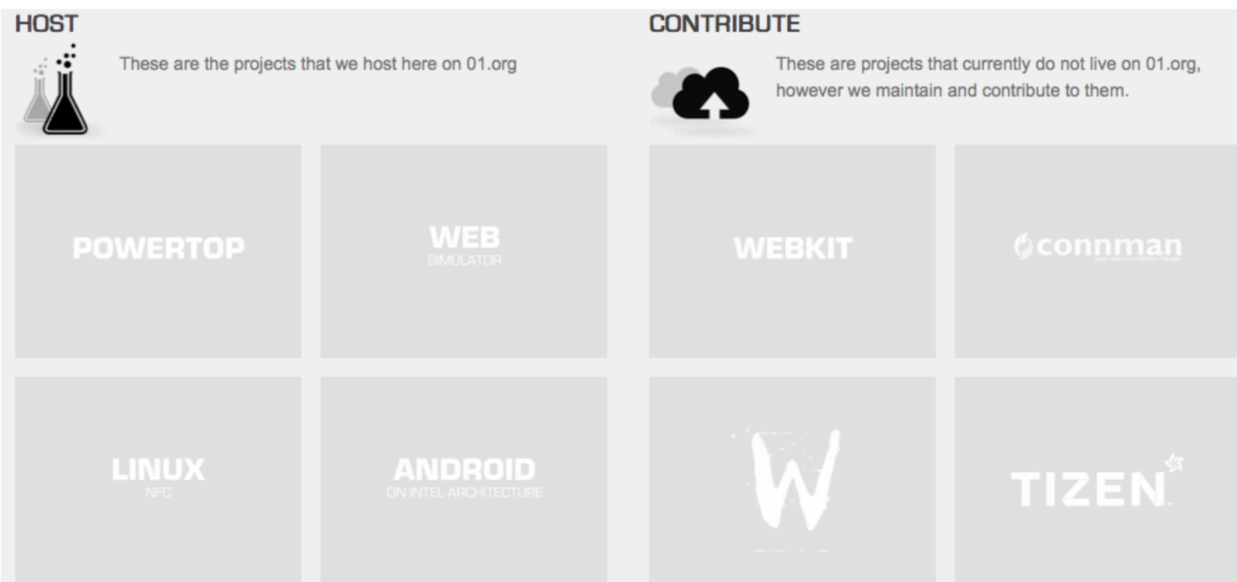
6. Under Publishing Options, enter moderation notes to inform the Registered User.
7. Change the Moderation State to "Published".
8. Select the Registered User.

9. Click <Save>.
10. An email is sent to Registered user.
11. The Registered User gains permissions of a Project Admin.

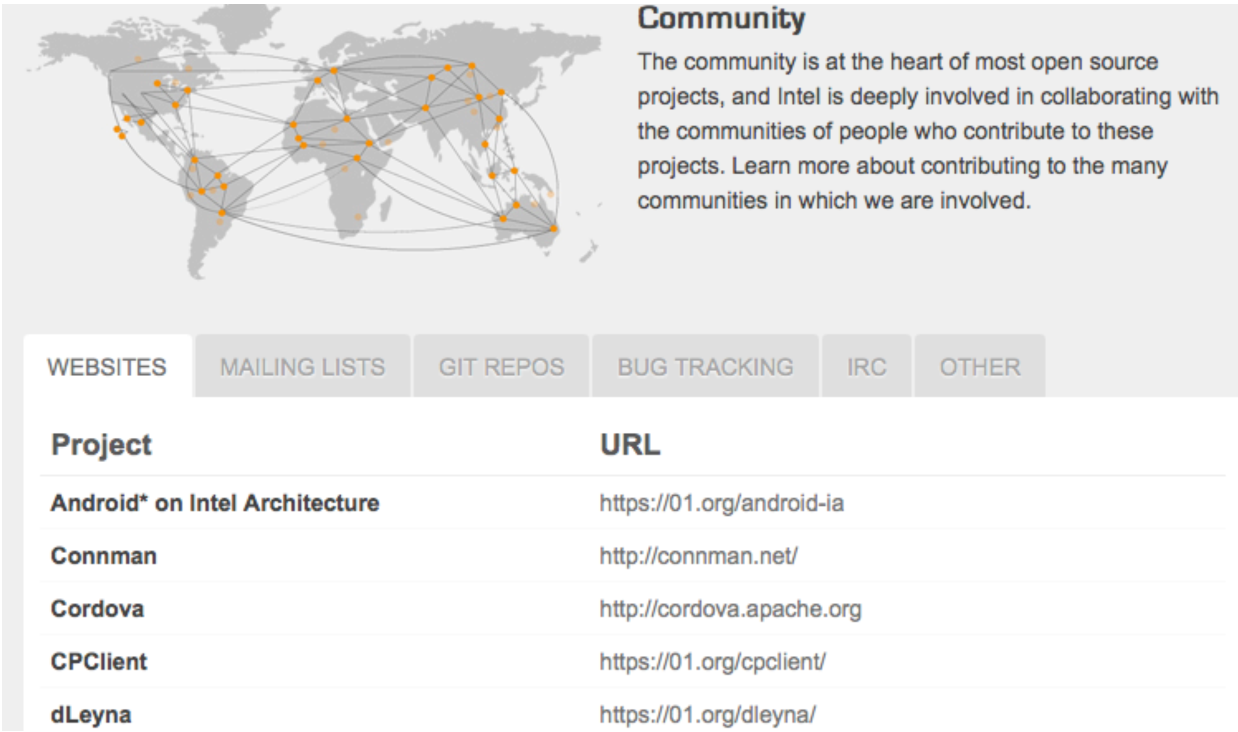
5.4. Post-Creation Events

While a project is in draft or awaiting approval, the project is not visible on the site. Once the project is approved there are several areas that get updated on the main 0.1org website:

- The project is added to the project dropdown sub-menu.
- The project is added to the Carousel.
    - The project logo is used as an image
- The project is added to the Project grid in its appropriate project source. It requires manual weight adjusted by an administrator to change the order.
    - The project logo is used as an image
    - The project summary is the hover text (if the summary isn't found part of the description is used)
    - The project source indicates if it should be shown on the Hosted or Contributed side



- The project links are added to the corresponding listing on the Community page (for those links provided).
    - Website
    - Mailing List
    - Git Repos
    - Bug Tracking
    - IRC
    - Other

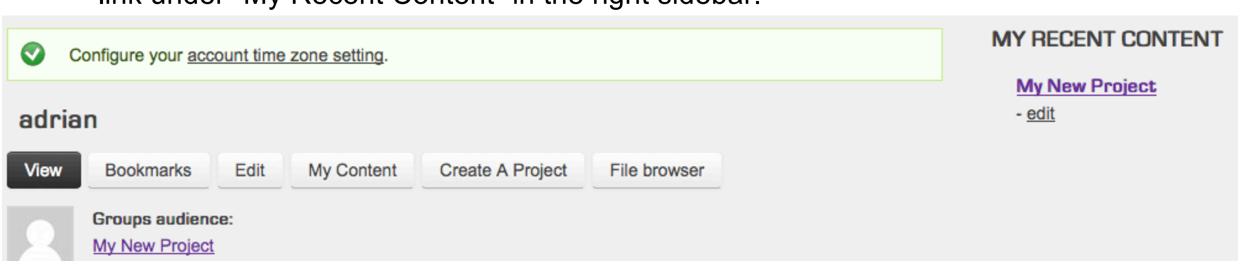


6. Projects

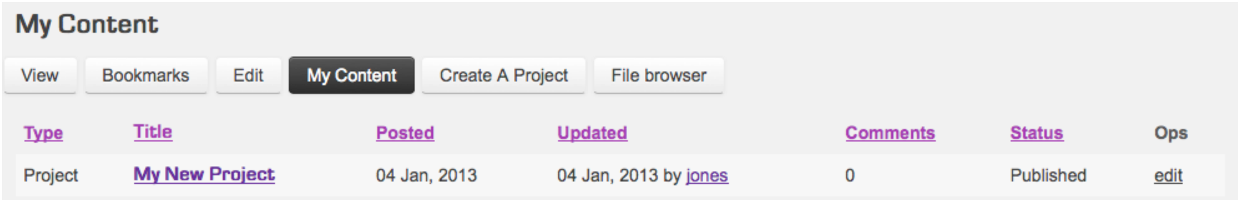
6.1. Microsite Management

Once a project is approved, the creator (Registered User) now has access to modify it without requiring further approval from a Publisher.

1. Click the “My Account” link at top of a page to return to the dashboard.
2. From the admin dashboard, click <My Content> button or click the corresponding “edit” link under “My Recent Content” in the right sidebar.



3. Click the “edit” link in the “Ops” column. The status of the project is also displayed in this table. The user is able to see if the project has been approved or not.



Modifying content will create a new revision for the project, but until the user sets its moderation state to “published” the changes will not be displayed to other users. Click <Save> when done.

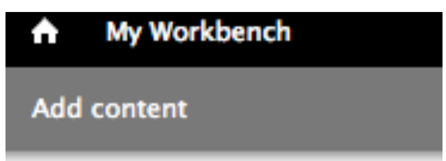
On the project page, there are now “view draft” and “edit draft” buttons. This allows the user to view the current draft state of the project while edits are being done. The “moderate” button will display the version history, notes and edits done to the project.

Edit the draft and set its moderation state to “published” once the project changes are ready to go live.

6.2. Adding Content to a Project

Blogs, Downloads and Documentation objects (called “nodes” in Drupal) can be added to a published project. These elements will be displayed within the context of the project that they are linked with. Registered Users have access to add these nodes but they can only be associated to projects that they are Project Administrators for. There needs to be at least one published project for the user in order for these content types to be available.

1. From anywhere, click on “Add Content” in the gray admin navigation bar at the top of the page.



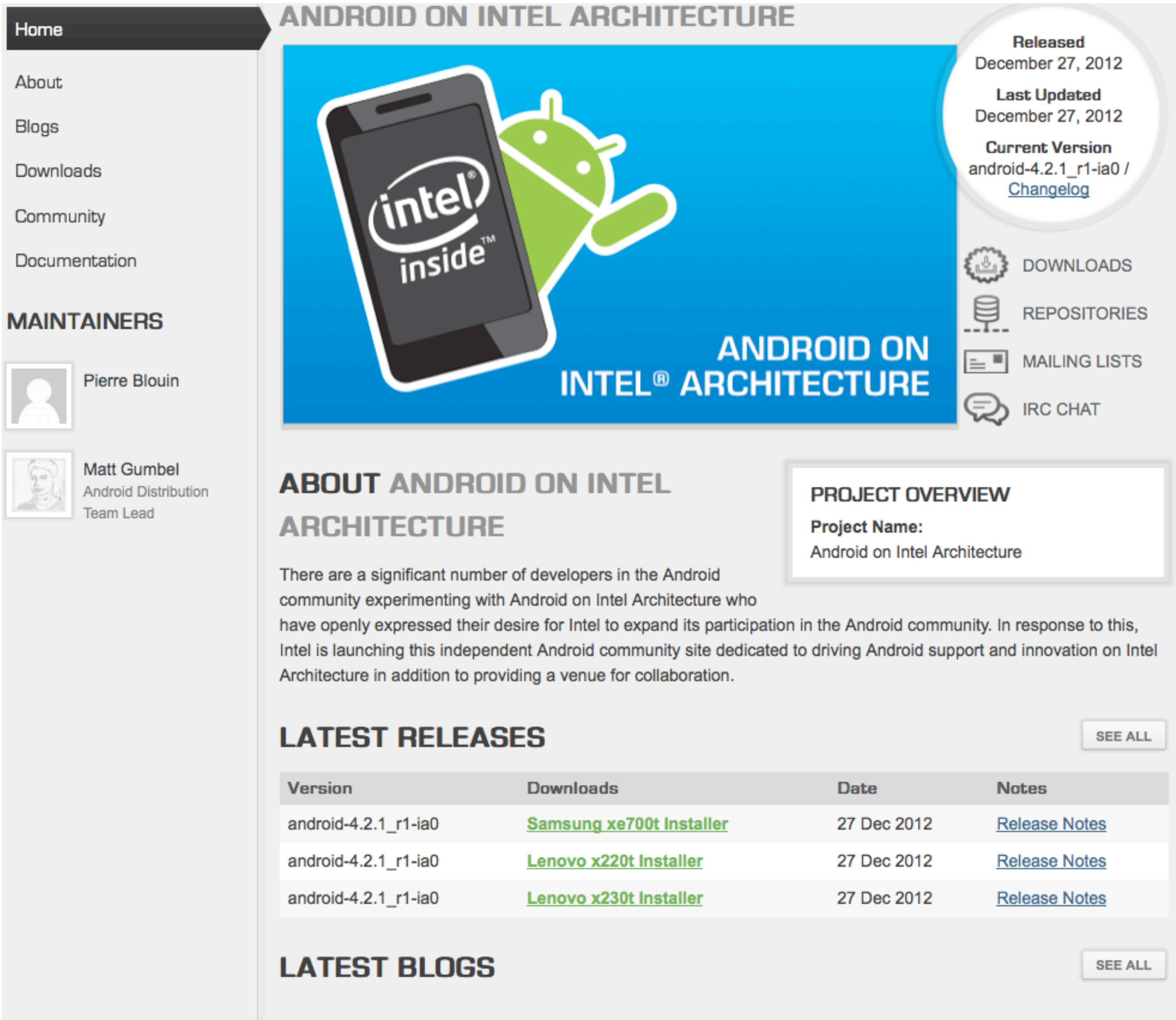
2. Select the content type you wish to add.
3. Fill in the corresponding fields as desired.
4. The “Project” dropdown box lets the user select which project this will be a part of. Choose one.

Blogs have their own workflow so the nodes can be modified multiple times before getting published.

6.3. Project Sections

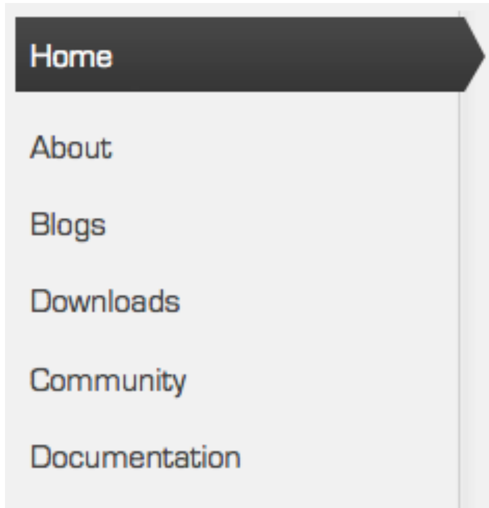
6.3.1. Home

Once the project is approved, there are several configurations that affect the homepage.



- Project Title
    - The title shows up at the top of the page.
- Project Image
    - The image shows up at the top center of the page.
    - The image is the large screenshot, not the logo, in the configuration.
    - A user can choose not to use the image by unchecking the Homepage Highlight in the feature section.
- Project Description

  - A section underneath of Project Image with a header “About [Project Title]” with the description of the project.
- Project Overview
  - It contains several configuration entries. If the entries aren’t there it does not show up on the page.
  - Project Name is the project title. The Project Overview is always shown with the Project name being the minimum displayed.
  - Project Owner.
  - OTC Owner is the OTC Staff Owner.
  - Milestones.
  - Project URL.
- If the project utilizes the Downloads site feature then several areas are shown:
  - This information is pulled from Github and requires appropriate setup of the Github project to display correctly.
  - A project Badge is shown on the top right, next to the Project Image, listing Release Last Update, Current Version and Changelog (depending if the information is found).
  - An image link of “Downloads” found under the badge directs the visitor to the download section of the project site.
  - A “LATEST RELEASES” header is found below the project description.
- If the project utilizes the Community site feature then three image links are found under the image link of “Downloads”.
  - Repositories – will take the user to the Github site repository.
  - Mailing List – will take the user to the top mailing list link in the configuration.
  - IRC Chat – will take the user to the IRC link in the configuration.
- If the project utilizes the Blogs site feature then a section of the blog is shown below “LATEST BLOGS”. It lists the latest blog entries.
- Left Sidebar
  - The sidebar is broken down into two areas, Navigation and Maintainer listings.
  - Under the Maintainer listings it shows the Project Owner and any users set under the Maintainer in the configuration.
  - The navigation is dependent on the configuration of which Project Features are selected. The possible links displayed are:
    - About
    - Blogs
    - Downloads
    - Community
    - Documentation
    - Projects
    - Events



6.3.2. About

"About" contains the description of the project. If "About" is not checked in the Project Features section the link is not displayed on the sidebar. The description is still shown on the main page. Additional changes can be made on the page by the Project Administrator or Publisher.

6.3.3. Blogs/Events

The Blog or Event page is empty initially and allows the Project Administrator to create blogs and events specific to the Project. If "Blog" or "Event" is not checked in the Project Features section, the corresponding link is not displayed on the sidebar.

6.3.4. Community

The Community page contains the links found in the project configuration. This includes Mailing List, Repository, and IRC Chat. If "Community" is not checked in the Project Features section, the link is not displayed on the sidebar. Additional changes can be made on the page by the Project Administrator or Publisher.

6.3.5. Documentation

If "Documentation" is not checked in the Project Features section, the link is not displayed on the sidebar. Changes can be made on the page by the Project Administrator or Publisher.

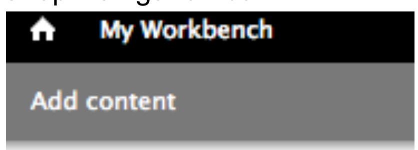
6.3.6. Downloads

The Downloads page utilizes data from Github to displays the download links and other relevant information on the page. If “Downloads” is not checked in the Project Features section, the link is not displayed on the sidebar. Changes can be made on the page by the Project Administrator or Publisher.

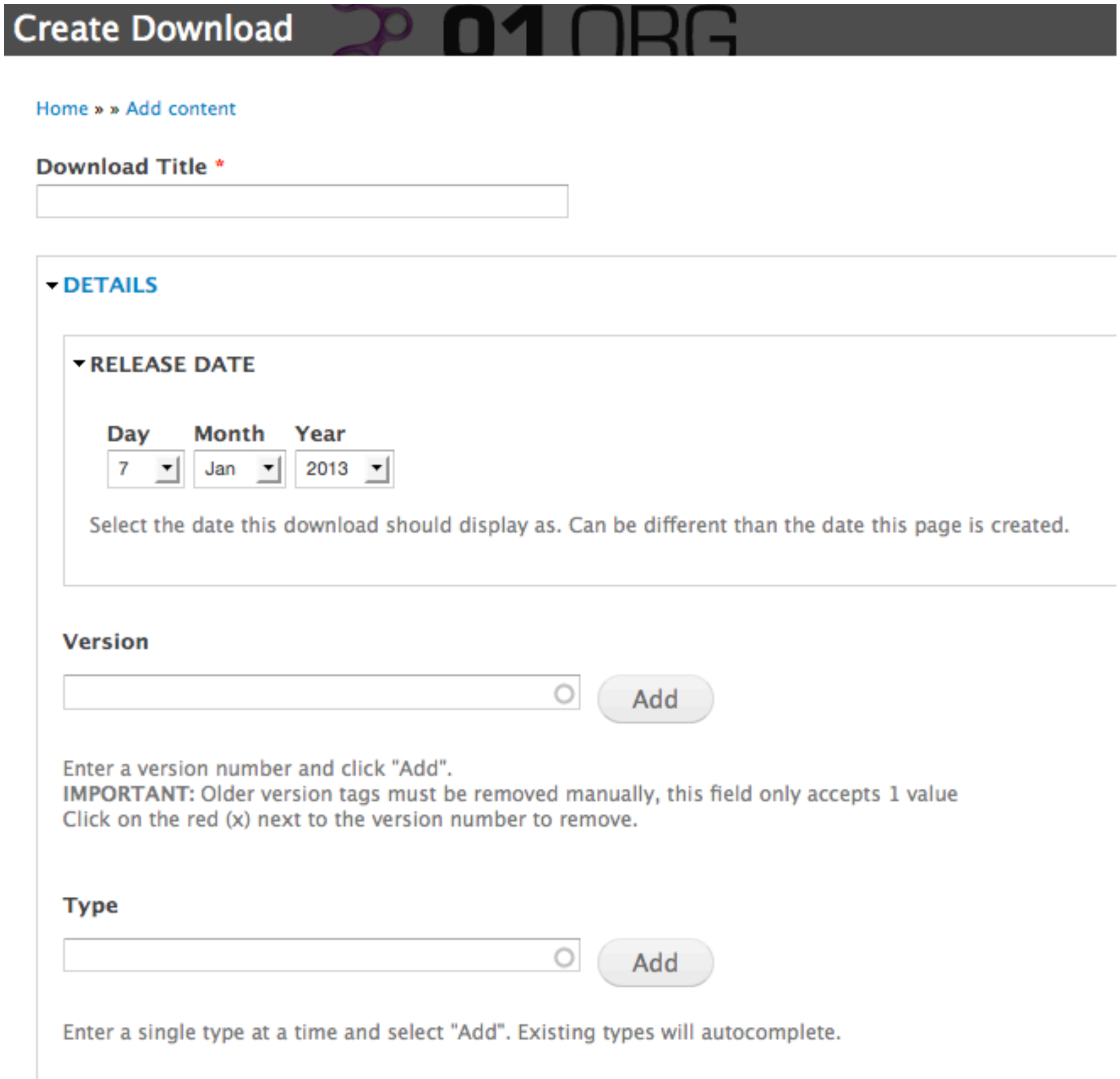
6.3. Create Download Releases Task Breakdown

The following are step-by-step instructions for a Project Admin to create a Download Release through the Drupal admin user interface:

1. Log in as a Project Admin.
2. Click “Add content” on the top Navigation bar.



3. Click Download.
4. Fill in the relevant content entry fields:



a. Download Title
    i. Title of Download Release
b. Release Date
c. Version
    i. Version number of the release
    ii. Only 1 value allowed
d. Type
    i. Type of release (Alpha, Beta, etc)
e. Download
    i. Title of the download (i.e. release name)
    ii. URL of the location of the download if not hosted externally
    iii. “Download Files” allows the Project Admin to upload the file and host it internally
f. Release Notes

i. Description of the Release. It could include the changelog.

g. Project

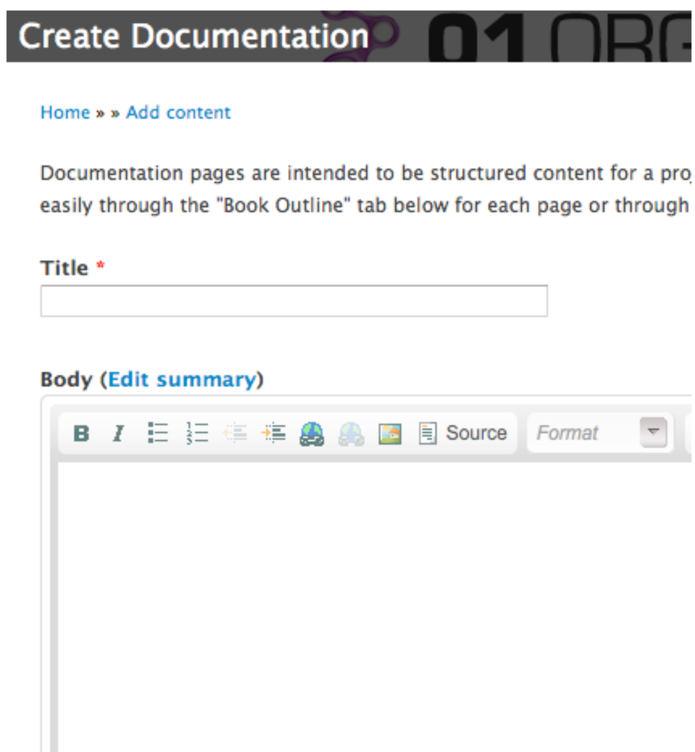
i. If a Project Admin has more than one project, they have to select the appropriate project

5. Add a revision message.
6. Click Save.

6.4. Create Documents Task Breakdown

The following are step-by-step instructions for a Project Admin to create a Document through the Drupal admin user interface:

1. Log in as a Project Admin.
2. Click "Add content" on the top Navigation bar.
3. Click Documentation.
4. Fill in the relevant content entry fields:



a. Document Title

i. Name of page

b. Body

i. The content of the document

c. Attachments

            i. Offer downloadable resources (i.e. pdf, video etc)
    d. Project
        i. If a Project Admin has more than one project, they have to select the appropriate project
    e. Book Outline (For future phase)
        i. Allow Project Admin to create a TOC
        ii. If creating a parent level TOC
            1. Change dropdown of Book to <create a new book>
                a. Defines parent level
            2. Change link title if it will be different from the title
        iii. If creating a child level TOC
            1. Change dropdown of Book to parent level selection
            2. Change the link title if it will be difference from the title
5. Add a revision message.
6. Click Save.