



## Monthly Meeting

Hosted by the C&O Web/Digital Team

June 21, 2012

Phone:

Access Code:

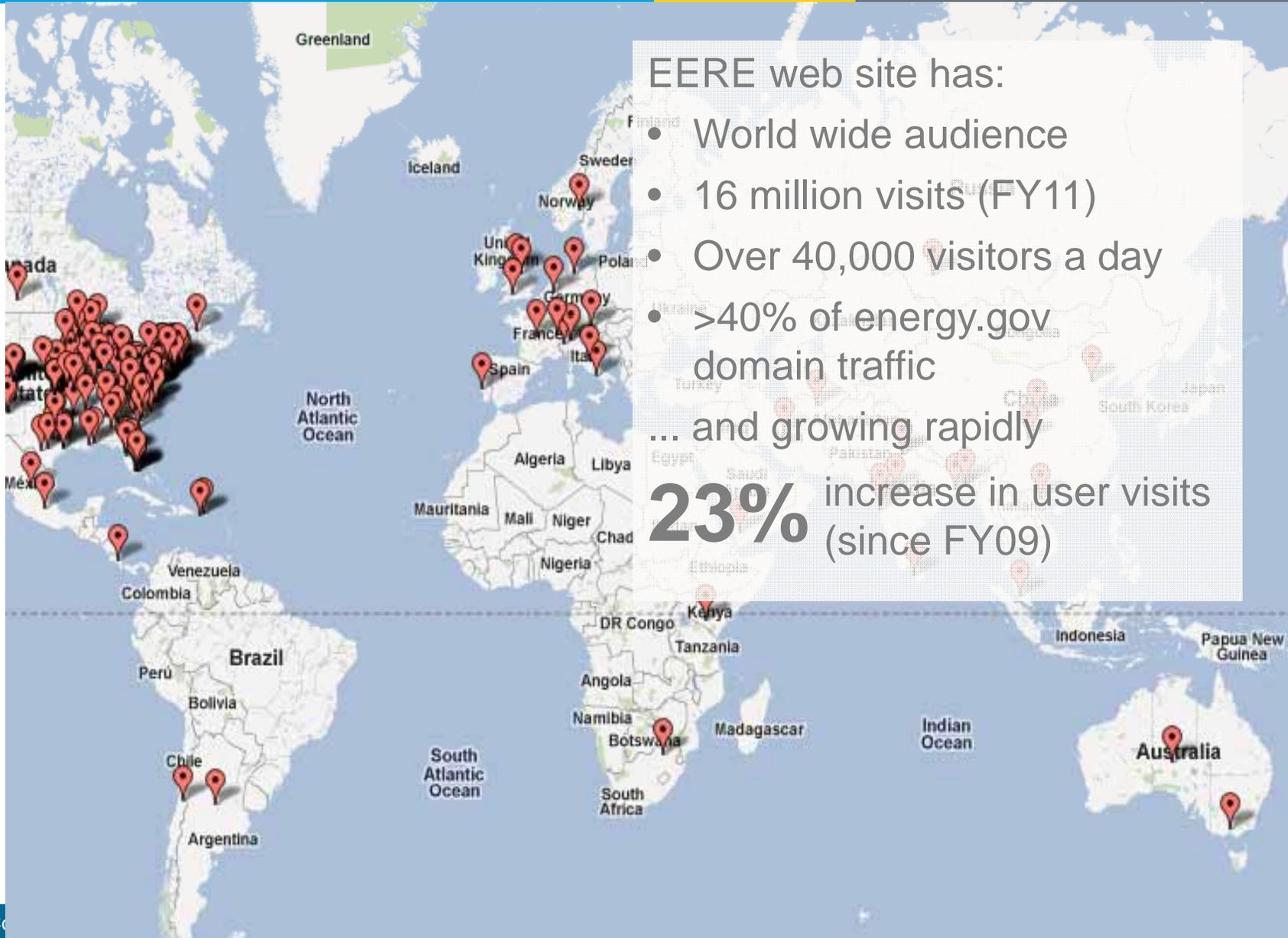
- Around the Room (15 min) – Drew Bittner
- EERE Usability Study Findings & Next Steps (40 min) – EERE Web Team
- EERE Intranet Lessons Learned (20 min) – Lou Sousa
- GovDelivery: Open Rate (5 min) – Michelle Resnick
- Communication Standards Tip (5 min) – Elizabeth Spencer

## Agenda

- Background
- Usability study results
  - Positive findings
  - User experience measurements
  - Navigation and information architecture
  - Search
  - Content and terminology
  - Design
  - Perceptions and consequences
- Next steps

- In April 2011, the White House and OMB issued an executive order for agencies to improve customer service
- DOE launched redesigned energy.gov, asked program sites to move into new platform
- EERE conducted data-driven research project in order to understand:
  - Who are EERE's customers?
  - What is the user experience like for EERE customers on energy.gov and the current EERE site?
  - How do we improve the user experience?
- Next step: Improve our customers' experience with our content as we unify our web presence with energy.gov

# What We've Accomplished So Far



# Continuous Improvements

2000



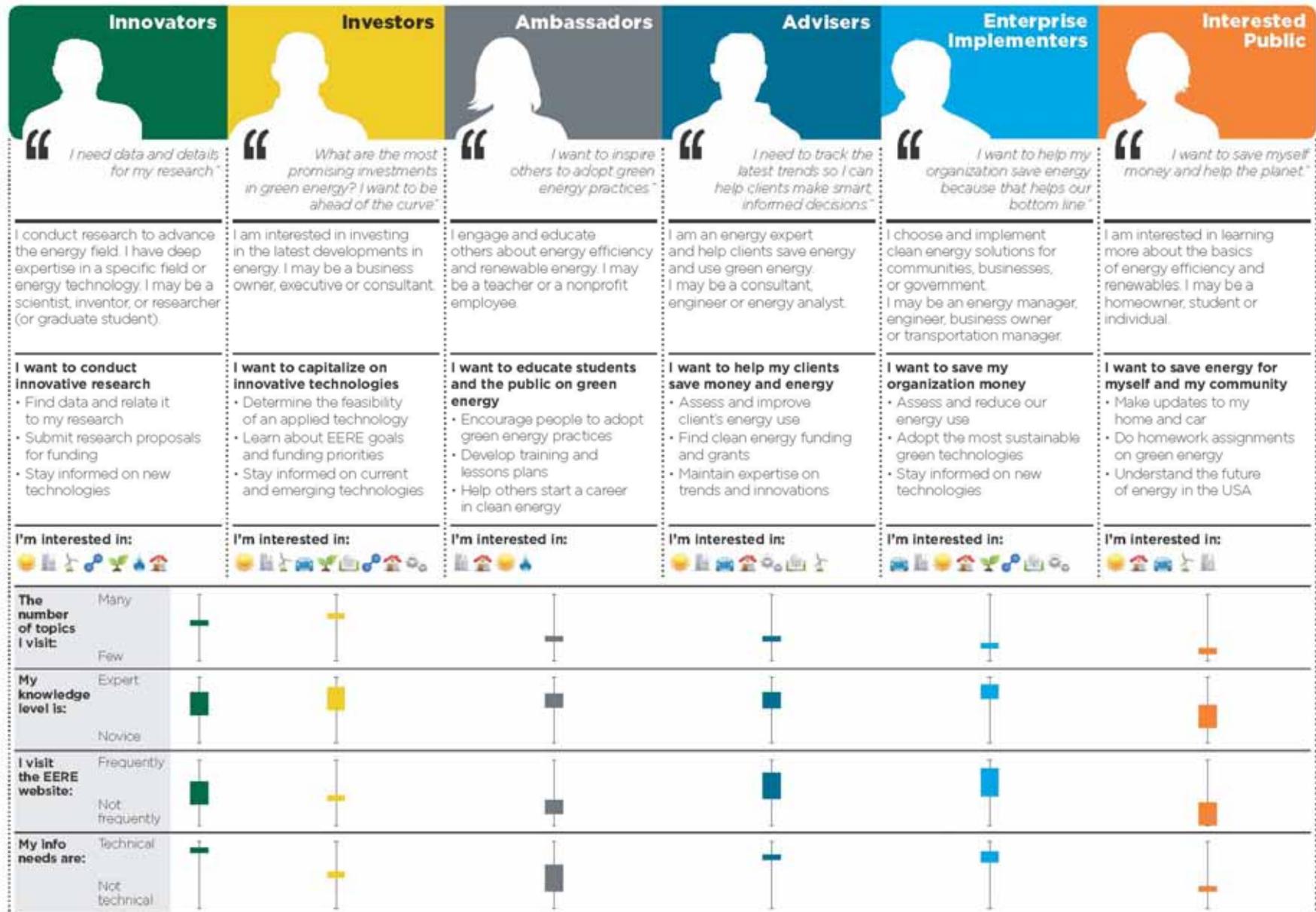
2010



Shared look and feel

User-centered information architecture

# EERE Silhouette Personas



A usability study is a research activity in which:

Representative users ▶

Perform realistic tasks ▶

An interdisciplinary team ▶

Collects empirical data ▶

In a usability lab or with  
remote usability software ▶

**133 unmoderated participants**

**11 moderated participants**

- Advisers
- Ambassadors
- Enterprise Implementers
- Innovators
- Investors
- Interested Public
- Invited participants across the nation, connected through remote usability software (UserZoom)
- Database
- Screen capture software
- Qualitative notes

## Users find EERE content **credible**

The U.S. Department of Energy funds research, development, and deployment projects to advance the use and adoption of clean, renewable energy technologies.



*DOE information is credible... and all the info is very useful.*

*I and my colleagues use this source as a reference source, and it's comforting. As opposed to if I go to Joe Doe's website I'm not sure if that information has been vetted as opposed to DOE site.*

*“ Researcher trust government websites... they are making an honest attempt to put up objective information. ”*

## Users find EERE content **valuable**

“*This site was a treasure of information for future use.*”

### EnergyPlus

EnergyPlus 7.0 is now available. Learn about the [new features](#).

[EnergyPlus](#) is a whole building energy simulation program that engineers, architects, and researchers use to model energy and water use in buildings. Modeling the performance of a building with EnergyPlus enables building professionals to optimize the building design to use less energy and water. Each version of EnergyPlus is [tested](#).

EnergyPlus models heating, cooling, lighting, ventilation, other energy flows, and water use. EnergyPlus includes capabilities for thermal comfort.

### FEATURED SOFTWARE

#### [SunAngle Professional Suite](#)

More sophisticated, robust, and well-documented version of SunAngle for people interested in better understanding the calculation methodology or developing...



*You've actually done me a great favor by asking me to use this. What I found through this new portal is that there's just a plethora of great information that's going to be readily at my fingertips.*

*It's obvious there's a lot of great information here and a willingness to provide it.*

*I didn't know there were so many software tools available! I'll definitely explore some of those on my own.*

*I liked how it had so much information on renewable energy and biomass. I think I'll go home and find more about it.*

## Users find the site **appealing** and **modern**

“A beautiful, modern site with lots of updates.”



*This looks so new I can't believe that this website has been in existence very long, it has some of the newest web design principles in how to view it. I'm so delighted that it exists! I'm going to be a big fan for sure.*

*They used good modern techniques for web design. I like the picture icons along with some of the titles. It gives you a visual as well as a text description. That's a very contemporary thing to do!*

*The overall landing page is appealing because it's not a long scrolling page.*

*The graphics are beautifully-done and the site is aesthetically appealing.*

# User Experience Measurements

## Users struggle to accomplish their tasks

Overall success:

- Moderated: 21%
- Unmoderated: 32%

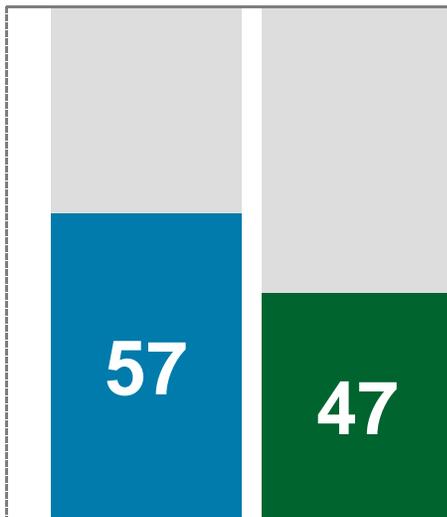
	Success in Task Completion	
	Unmoderated	Moderated
 Advisers	28%	
 Ambassadors	49%	
 Enterprise Implementers	25%	15%
 Innovators	20%	21%
 Investors	7%	
 Interested Public	47%	24%
 Other	44%	

# User Experience Measurements

## Users report a below-average experience with the site

### Perceived Usability

100: Very Usable

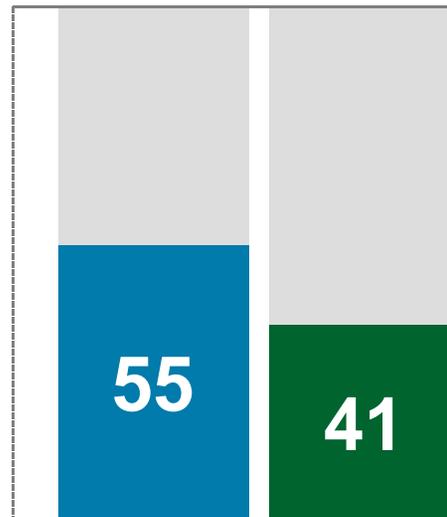


0: Not usable at all

- System usability score
- Industry average is 66

### Satisfaction

100

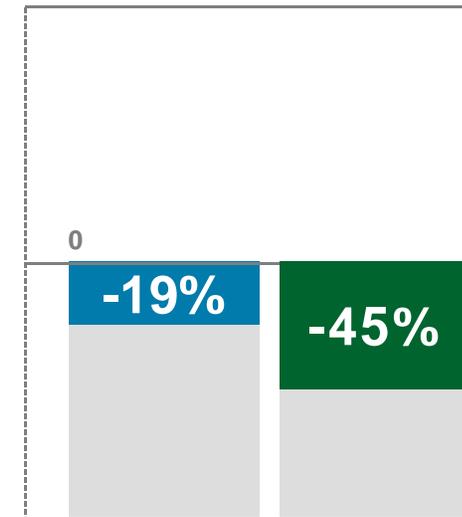


0

- American Customer Satisfaction
- Possible comparable average is for 68 for Environmental Protection Agency. [See ASCI Scores for E-gov \(Q4,2011\)](#)

### Customer loyalty

100%



-100%

- Net Promoter Score

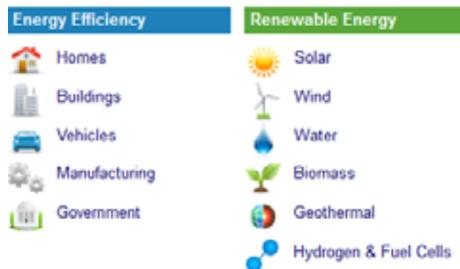
■ Unmoderated  
■ Moderated

## Users struggle to find what they need

- Low task completion
- Not a strong sense of place
- Perceived as frustrating and difficult to use
- Does not support lateral navigation
- Users have trouble discovering the breadth of content

*“I don't see anything really relevant here. At this point, since I'm frustrated at not finding stuff through basic navigation”*

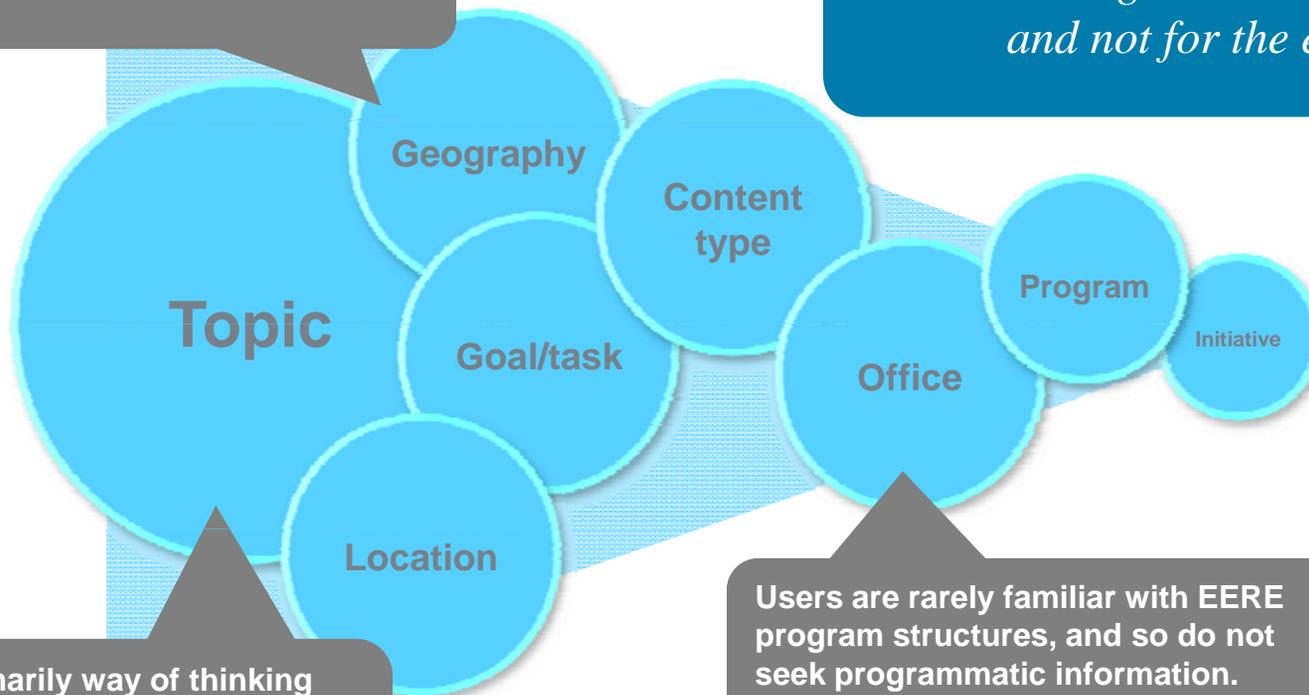
Drilling down



The information architecture and navigation design does not support users' mental models and way finding strategies

Users think of energy as a local issue, often turning to maps and zip codes to find answers.

“ I feel like it's been designed for the organization and not for the end user.”



Users' primarily way of thinking about energy is topically, i.e. defined categories instead of defined activities

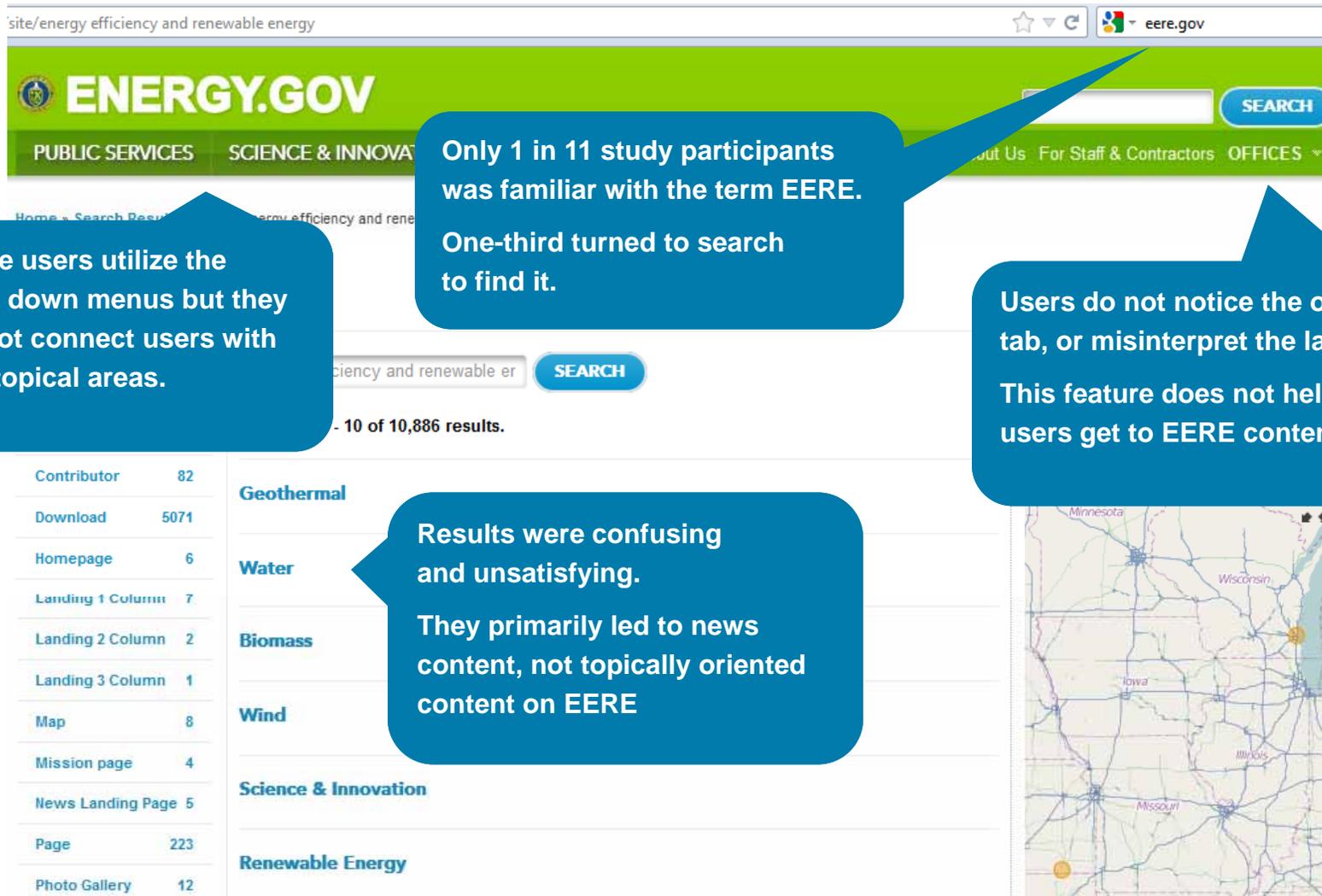
Users are rarely familiar with EERE program structures, and so do not seek programmatic information.

## Topic focus:

Users think topically, not programmatically

# Navigation and IA

## Users struggle to find EERE content from energy.gov



## Search is not user-friendly

- 1 Overwhelming:**  
The number of results overwhelmed users
- 2 Irrelevant and news dominant:**  
Search results were often news-heavy and irrelevant to user questions
- 3 Text/Content Heavy:**  
Users found they had to spend more time than desired reading search results to find answers
- 4 Not forgiving:**  
Search returns corrections that don't make sense
- 5 Filters:**  
Filter controls are not clear, and options are not helpful

“I’ve already had such a bad experience searching on energy.gov, I’ll just use Google” - Consumer

Home » Search Results » Site » biodiesel

### SEARCH RESULTS

The screenshot shows the search results for 'biodiesel' on energy.gov. A search bar at the top contains 'biodiesel' and a 'SEARCH' button. Below the search bar, a 'Did you mean: diesel' suggestion is shown with a circled '4'. The results are displayed as 'Showing 1 - 10 of 181 results.' with a circled '1'. The first result is 'Biodiesel Revs Up Its Applications' with a circled '2'. The second result is 'Atlanta Suburb Greases the Path to Savings with Biodiesel' with a circled '3'. On the left side, there is a sidebar with a table of result counts and a list of filters. The table has a circled '5' next to it. The filters include 'Energy Efficiency', 'Energy Sources', 'Tax Credits, Rebates, Savings', 'Energy Economy', 'Science & Innovation', and 'National Security Safety'. At the bottom, there is a secondary search bar with 'measure building efficiency' entered and a 'SEARCH' button. Below this, there is a 'Results for: measure building efficiency' section with a 'Document count' and a list of results.

All Results	181
Article	33
Download	85
Landing 2 Column	1
Page	3
Rebate	59

5

Energy Efficiency

Energy Sources

Tax Credits, Rebates, Savings

Energy Economy

Science & Innovation

National Security Safety

SEARCH

Did you mean: diesel 4

Showing 1 - 10 of 181 results. 1

**Biodiesel Revs Up Its Applications** 2

A look at the rapidly expanding applications of biodiesel from the 2011 National Biodiesel Board's Conference and Expo. <http://energy.gov/articles/biodiesel-revs-its-applications>

**Atlanta Suburb Greases the Path to Savings with Biodiesel** 3

A community of 51,000 located just northwest of Atlanta, Smyrna will soon begin producing biodiesel made primarily from used cooking oil in order to cut fuel costs and reduce fossil fuel consumption.

SEARCH

measure building efficiency

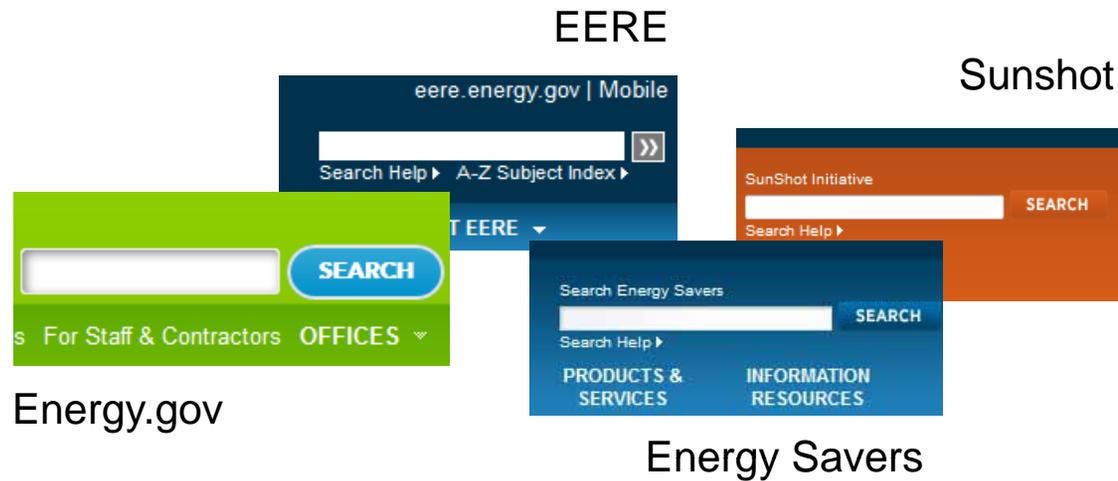
SEARCH Advanced

Results for: measure building efficiency) Document count: measure (12603) building (33401) efficiency (27803) measure buildin  
about 44447 results found, top 500 sorted by relevance score using date hide summaries group by location

[Buildings Technologies Program: Commercial Lighting Solutions Web Tool: Improve Your Building Efficiency \(text version\)](#)  
Commercial Lighting Solutions Web Tool: Improve Your **Building Efficiency** (text version) Below is a text version of the Webinar titled "Commercial Lighting Solutions Web Tool: Improve Your **Building Efficiency**," ...  
[http://www1.eere.energy.gov/buildings/webinar\\_commercial\\_lighting\\_20101214\\_text.html](http://www1.eere.energy.gov/buildings/webinar_commercial_lighting_20101214_text.html) 93.3KB

[EERE News: DOE Offers \\$5.2 Million for Building Efficiency Technologies](#)

## Users rarely understand search scope



“

*“I’ve noticed that if I’m at a granular level, it does not search the entire site, it searches the subset. I’m not sure if the system is capable of handling an overall search while you’re at a lower level”*

The amount of content is overwhelming – and users don't have time to read or learn DOE language

*“I've got a twitter mindset. I need this Website to tell me what it needs to tell me in 120 characters or less, and I don't have time to go through all that content.”*

## Too much copy

*“You have to read this whole paragraph just to find out you're in the wrong place!”*

*“My time... especially if I'm working with a client, I don't want to spend time going through a ton of information.”*

## Too many pages

*“It'd take hours to go through and try to understand all this information. There's so many different topics here I'd have to open each one and read it.”*

*“There is so much information here, so many links... a lot is somewhat related to what I'm doing, but it's a lot more than I could cover in an hour.”*

## Too much jargon

*Initiatives, programs?*

*Energy usage, energy efficiency or energy sources?*

*funding, financing, credits, rebates, incentives, grants, financial opportunities?*

*software, tools, assessments, calculators, analysis energy modeling?*

*public services?*

# Content and Terminology

The language of the site does not match the language of the user

Example: Users found savings or funding options confusing

The screenshot shows the EERE website interface with several callouts highlighting user confusion:

- Innovators expect to find funding here.** (Callout pointing to the main news article)
- Users looking for funding are unsure of the difference between:**
  - Grants
  - Incentives
  - Unsolicited Proposals(Callout pointing to the 'FUNDING' dropdown menu)
- Consumers unsure of the difference between:**
  - Credits
  - Rebates
  - Financing
  - Incentives(Callout pointing to the 'Energy Savings' dropdown menu)
- Advisors/ Enterprise Implementers look for partnership opportunities by topic, i.e. manufacturing, government, etc.** (Callout pointing to the 'Manufacturing' and 'Government' options in the 'Energy Savings' dropdown)

The website header includes the U.S. Department of Energy logo, navigation tabs for Energy Efficiency, Renewable Energy, Research & Deployment, Funding, and About EERE, a search bar, and a mobile link. The main content area features a large image of a wind turbine and a news article titled 'Energy Department Announces \$180 Million to Deploy U.S. Offshore Wind Projects'. The 'FUNDING' dropdown menu lists options like Recovery Act, Funding & Award Processes, Types of Financial Assistance, Solicitations, Homes, Buildings, Vehicles, Manufacturing, and Government. The 'Energy Savings' dropdown menu lists options like Credits, Rebates, Financing, Incentives, Biomass, and Energy Savings.

## Users draw wrong conclusions or misinterpret site content

“*Emerging technologies seems to be targeted to just commercial buildings. Maybe that's all they do.*”

- When users are uncertain of terminology, they draw wrong conclusions.
- When users cannot find the answer, they assume it's not there.

*“Is EERE initiatives under plans? Looking at this list of 10-12 bullets under plans, I'd assume that these are the initiatives and plans you currently have under this Website.”*

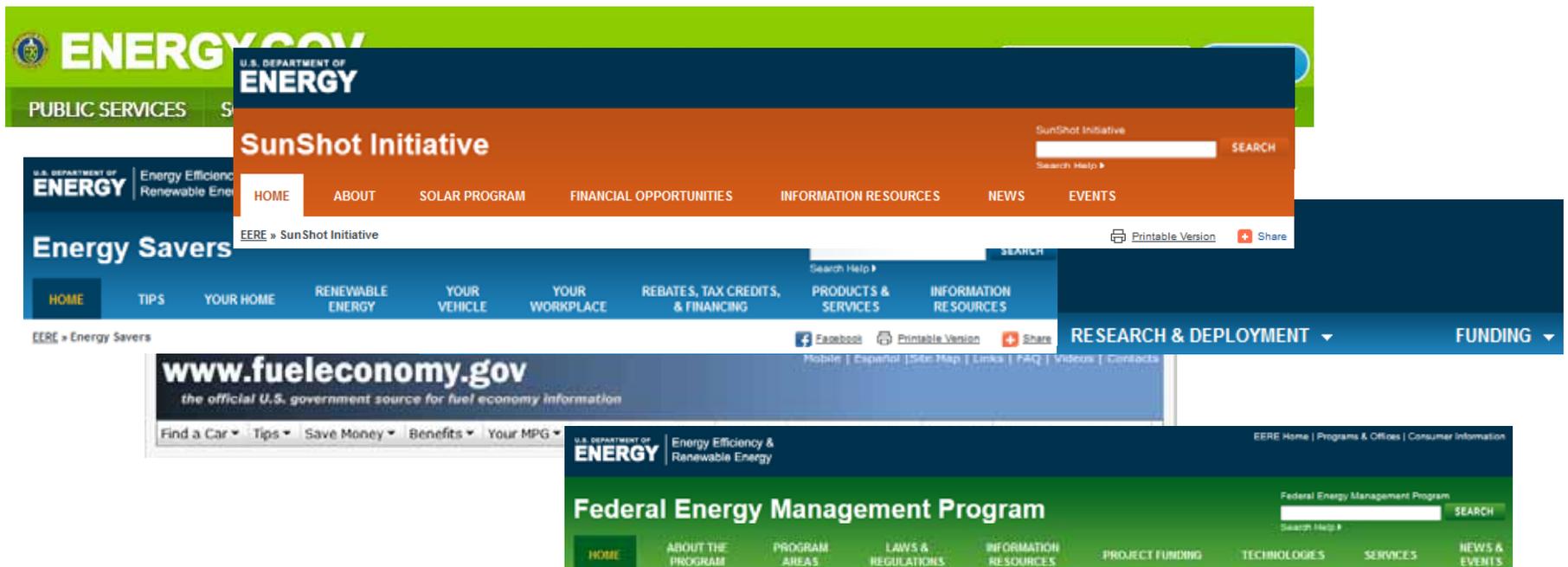
*“I found my county [on dsireusa.org], but I guess there are no tax incentives.”*

*“I guess my town can't generate much energy.”*

*“I can scroll down to WA on this map, and... we're in Pierce county, so it looks like there are no incentives for homeowners.”*

# Design

The disparate look and feel of sites and sub-sites leads to confusion



*“If they are all DOE sites, why don’t they look more similar?”*

Multi-media and pictures are engaging to some and prevent others from finding what they need

*“More pictures does not equal a better website. Sometimes it’s better to keep things simple, and this is definitely one of those cases.”*

- + Users comment that they:
  - Like the clean graphics and modern feel of the site.
  - Enjoyed the multi-media content.
- Several users comment that:
  - These design elements are optional
  - They compete with content that could help them find what they need.

*“The graphics are beautifully-done and the site is aesthetically appealing”*

*“I liked the videos – I’ll probably go and watch some more of those.”*

*(About EERE) “Personally, I don’t like the rotating kind of things at the moment. I’m not bored and want to be entertained, I’ve come here to look for something.”*

*(Saving energy at home) “They’ve got all these pictures, that’s great, but what I really want is to start with an energy assessment.”*

*(post-study) “I don’t like glitz, I find it distracting, I just want the information. I don’t go to a website for its fun-ness or prettiness. Just basic plain but functional.”*

Users have mixed impressions of the site



“*I feel like it's been designed for the organization and not for the end user.*”  
- *Enterprise Implementer*

Desirability exercise.  
N = 11.

Users say they want to abandon the site and turn to other information resources or channels

“*I’m assuming it’s a government agency, so since government is pretty inefficient, it’s not surprising that the Website is, as well”*

Some users form negative impressions of the organization

“*At this point I say rats and call it a day, or go to my local utilities site and see if there are any answers there.”*

## Improve navigation

### **Flexible**

Supports multiple way-finding strategies (per topic, role, etc.)

### **Improve sense of place**

Show users where they are, where they have been, and where they can go next (breadcrumbs, active state, used state etc.)

### **Conventional**

Based on best practices and standards for navigation design and specific information for other audience segments

### **Accommodates depth**

Extensible to lots of content

### **Consistent**

Works the same way no matter where you go

### **Iconic**

Utilizes icons to support users behaviors

### **Lateral**

Support lateral navigation across topic areas

### **Layered**

Progressive disclosure from basic information for interested public to technical and specific information for other audience segments

## Improve search

### Global

Searches all of energy.gov, including EERE.

### Basic vs. advanced

Start simple, allow for advanced use and scoped results (per topic, site, etc.)

### Familiar

(Google) – works the way users expect it to behave and leverages what they already know

### Quality results

Meta tagging to improve quality of results.

### Forgiving

Provides better alternatives for misspelled words.

### Learnable

Teach search to recognize regularly occurring queries for specific types of information and configure search results accordingly.

### Multi-faceted

Allows for filtering of results based on various facets (topics, type, audience, date, most popular etc.)

The screenshot shows a search results page from Forrester. The search term is "usability". The page displays 13 results for "usability" in Events. The results are filtered by "Most relevant" and "Search Results From: The past 36...". The results are categorized by audience: For Customer Experience Professionals, For Content & Collaboration Professionals, For Vendor Strategy Professionals, and For Business Process Professionals. Each result includes a title, author, and date.

**FORRESTER**

usability

13 results for "usability" in Events

Sort by: Most relevant Search Results From: The past 36...

For Customer Experience Professionals  
**WEBINAR: How To Craft Your Customer Experience Research**  
*Vidya L. Drego* | September 14, 2011  
...into your design and development cycle?Which firms have successfully methods?Vendors mentioned: AnswerLab, Bentley Design and Usability | Horse

For Content & Collaboration Professionals  
**WEBINAR: Enterprise Search: Key Trends in 2011**  
*Leslie Owens* | March 29, 2011  
...search was not easy to use and produced unsatisfactory results from a standpoint. Today's knowledge workers demand role-specific, contextual

For Vendor Strategy Professionals  
**WEBINAR: The Race For Rankings: Competition Drives Tech**  
*Jennifer Belissent, Ph.D.* | March 03, 2011  
...if they can address the perennial constraints and improve the accessibility technology both in and by educational institutions.Agenda:Education is ir

For Business Process Professionals  
**WEBINAR: The Forrester Wave™: CRM Suites For Large An Organizations, Q2 2010**  
*William Band* | July 21, 2010  
...of their current functionality as well as an assessment of technical architecture.Learn how to evaluate the vendors and how they stack...

**REFINE YOUR RESULTS**

**Date Range**  
Past 6 months (4)  
Past 12 months (7)  
Past 18 months (8)

**Analyst**  
Ron Rogowski (3)  
Vidya L. Drego (2)  
Adele Sage (1)  
Benjamin Ensor (1)  
Ellen Carney (1)  
See all Analysts

**Topics**  
Customer Experience Management (9)  
Branding (4)  
Customer Intelligence Strategy and Process (4)  
Interactive Marketing Strategy and Process (4)

# Next Steps

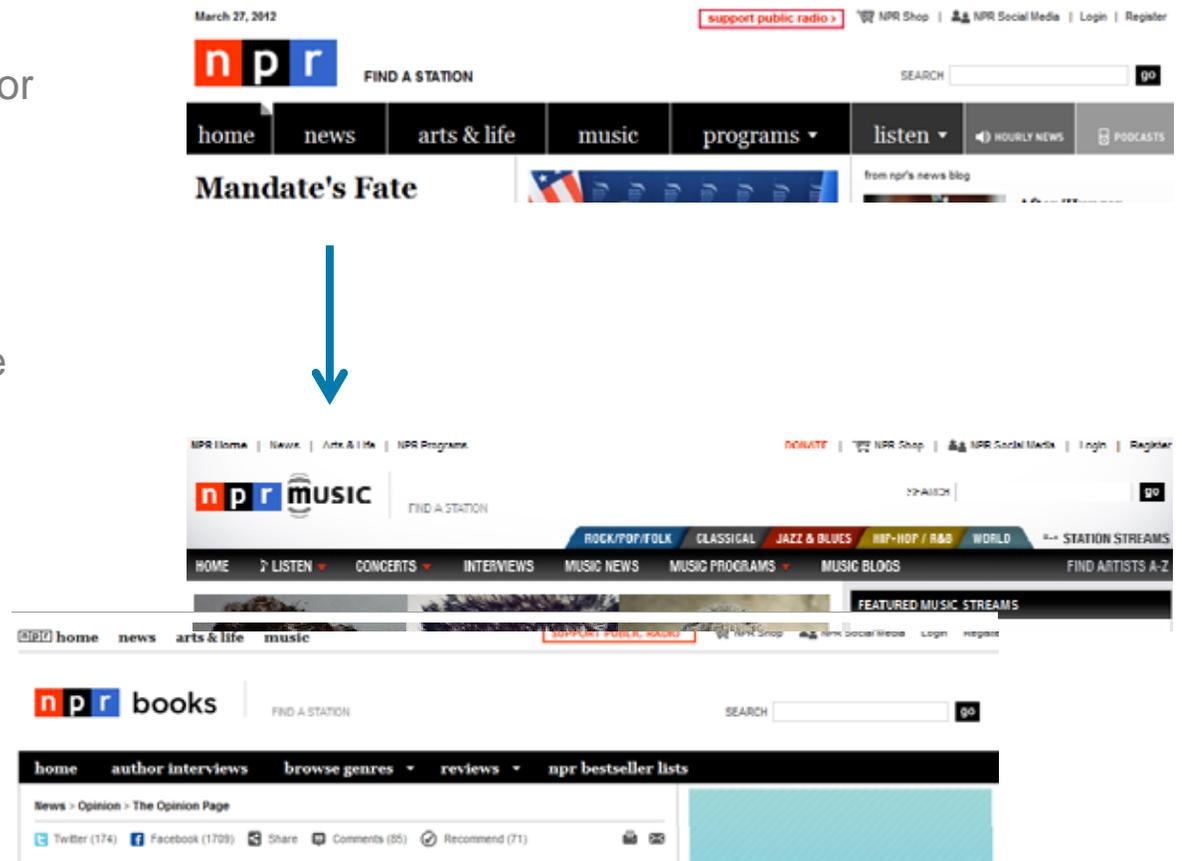
## Create consistent branding

### Consistent

most visual elements – logo, color palette, icons, font to give users instant visual confirmation that they are still on a DoE Web site

### Scale

Organizational branding to fit the sub-site or domain.



## Consolidate and simplify content

### Reduce content

a wealth of information creates a poverty of attention. Use user research and Web analytics to eliminate content that

- does not serve a user or EERE goal
- has low usage
- is covered by other content

### PlainTalk

it's the law

### Writing for the Web

users don't read content on EERE

### Clarify ambiguous terms

especially in information architecture.  
Use card sorting to discover users' terminology

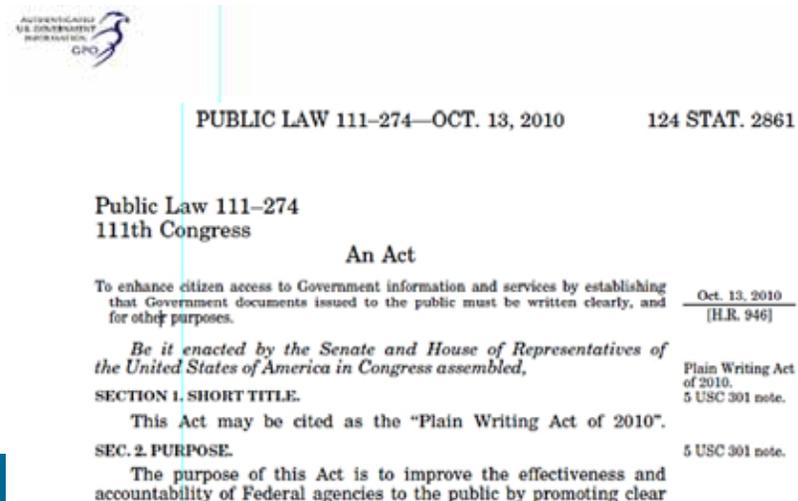
### Create a controlled vocabulary

Call the same thing, by the same name everywhere on the site

### Multi-faceted content taxonomy

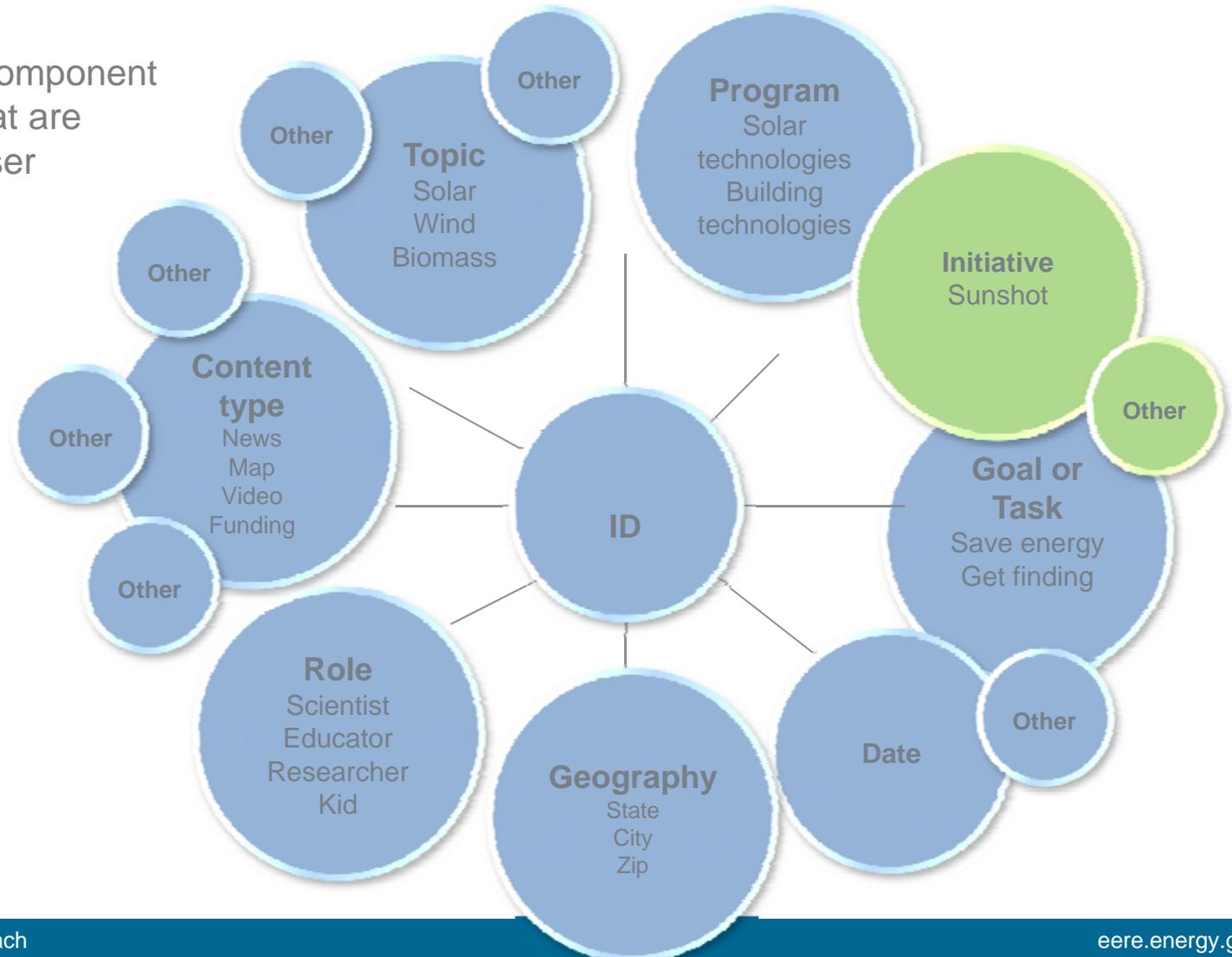
so content can be:

- Shared
- Re-aggregated
- Syndicated



## EERE-wide content taxonomy and controlled vocabulary

Tag each content component with dimensions that are important for the user experience.



## Increase accessibility of our content

### Traditional (section 508)

Make the EERE Web content broadly accessible, including users with disabilities or age-related hearing or vision loss.

### Across all devices

Use responsive design so site content is extensible to mobile platforms and devices

### In multiple contexts

At home, on the road, at work, in school, in the workplace, in the store.

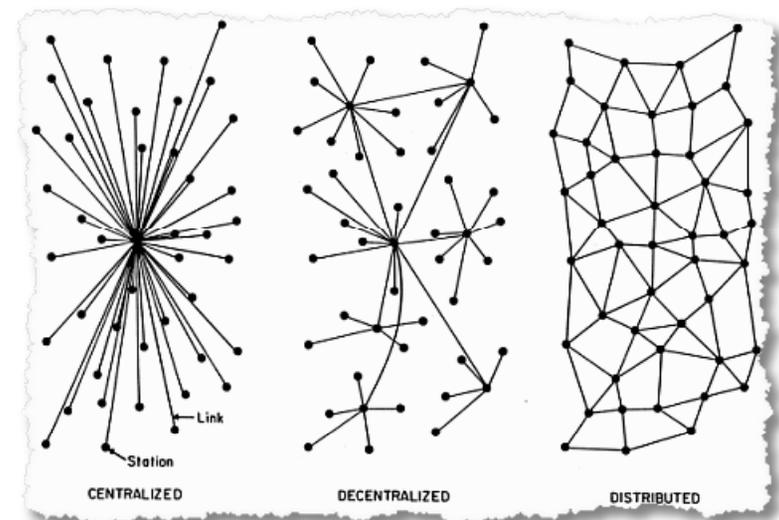


## Modify our Web governance

- Continue to maintain clear and centralized EERE Web governance
- Coordinate our governance processes with energy.gov
- Continue to maintain Web standards and best practices
- Identify and engage energy efficiency and renewable energy topic subject matter experts
- Update EERE's Web strategy to align with federal Web reform and energy.gov strategy

## User-centered design

- Continue to formalize a user-centered design process
- Build in-house expertise, research repository, tools, and templates



## User-centered design roadmap (high-level)



<p><b>✓ DISCOVERY</b></p> <ul style="list-style-type: none"> <li>Stakeholder communications</li> <li>Review Web strategies</li> <li>UCD plan and schedule</li> <li>Program outreach</li> </ul> <p><b>✓ USER RESEARCH</b></p> <ul style="list-style-type: none"> <li>Surveys</li> <li>Web and search analytics</li> <li>Information center reports</li> <li>Search log analysis</li> <li>Social media analysis</li> </ul> <p><b>✓ USABILITY STUDY</b></p>	<p><b>✓ PERSONAS</b></p> <p><b>↓ Phase 2 starts here</b></p> <p><b>CONTENT STRATEGY</b></p> <ul style="list-style-type: none"> <li>Content inventory &amp; improvements</li> <li>Content tagging</li> </ul> <p><b>INFORMATION ARCHITECTURE</b></p> <ul style="list-style-type: none"> <li>Build information architecture</li> <li>Test information architecture</li> <li>Revise information architecture</li> </ul> <p><b>USER-EXPERIENCE CONCEPT (vision)</b></p>	<p><b>DESIGN</b></p> <ul style="list-style-type: none"> <li>Navigation model</li> <li>Layout</li> <li>Interactions</li> <li>Visual design</li> </ul> <p><b>EVALUATE</b></p> <ul style="list-style-type: none"> <li>Navigation model</li> <li>Layout</li> <li>Interactions</li> <li>Visual design</li> </ul>	<p><b>SYSTEM</b></p> <ul style="list-style-type: none"> <li>Content/data creation and revisions</li> <li>CMS implementation</li> </ul> <p><b>↓ Phase 3 starts here</b></p> <ul style="list-style-type: none"> <li>Migrate content</li> </ul> <p><b>STANDARDS</b></p> <ul style="list-style-type: none"> <li>Usability</li> <li>Content</li> <li>Communication</li> <li>Publishing</li> </ul> <p><b>✓ completed</b></p>	<p><b>TESTING</b></p> <ul style="list-style-type: none"> <li>Functional testing</li> <li>Usability testing</li> <li>User acceptance</li> </ul> <p><b>LAUNCH</b></p> <p><b>MEASURE</b></p> <ul style="list-style-type: none"> <li>Ongoing customer feedback / user research</li> <li>Measure success</li> </ul>
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## EERE will move into an energy.gov platform

### How will we achieve this?

- Content analysis
- Information architecture restructuring
- Update visual design
- Migrate to new platform
- Training
- High touch collaboration with New Media team

**EERE is forming an advisory team to participate and facilitate the integration of EERE with energy.gov.**

# Questions and Discussion



# EERE Intranet Lessons Learned

- Overview
- Becoming Familiar with Drupal
- Migration Process
- Drupal 7
- There's a Module for That
- Theming
- Content Types
- Empowering Site Editors
- Q&A

The screenshot displays the EERE Intranet homepage with the following components:

- Navigation:** Home, Front Office, Business Operations, Energy Efficiency, Renewable Energy, Strategic Programs, Field Offices.
- My Favorites:** My Internet Bookmarks, My Documents, EERE Internal News, Energy.gov, EERE Website, iPortal.
- EERE Resources:** Human Capital, Training Schedule & Registration, Information Technology, Business Management Systems, Procurement & Logistics, Budget, General Administration, DOE Policies & Procedures, DOE Forms, For New Employees.
- Help Desk:** Submitted Page List, Problem Report, Feedback Report.
- EERE News:** Article titled "How Supervisors Release the Potential of Their Workforce" with a photo gallery.
- EERE Activity Planner:** Calendar for January 2012.
- I Want To...:** Links for "Fill out my timesheet", "Request a conference room", "Look up a phone number", "See what's for lunch", "Monitor EERE Tracker tasks".
- EERE Trends:** Bar chart titled "EERE FY 2012 Base Appropriations Funding (in millions)" showing data for Energy Efficiency, Renewable Energy, and Corporate Management. The chart compares Budget Request, House Mark, Senate Mark, and FY 2012 Appropriations.
- Tools & Quick Links:** Links for "CFR", "Conference Room Request System", "Customer Service Request", "DOE Phone Book/People Locator", "EERE Dig Chart", "EERE Tracker", "Get Tip", "Time and Attendance", "View All".
- Connect and Share:** "Discussion Forums", "EERE SharePoint", "EERE Blog", "IT Tips and Tricks Blog", "Personal Announcements".
- Social Media:** "EERE Facebook", "DOE Facebook", "DOE Twitter", "DOE YouTube", "View All".
- Top Intranet Pages:** 1. Office of Information and Business Management, 2. Human Capital, 3. Information Technology, 4. IT Roll-out Plan for EERE, 5. Office of Business Services.

## What is Drupal?

- Content management system (CMS)
- Content management framework (CMF)
- Open source
- Modular and Extendible
- Reliable and Secure
- Written in PHP
- Supports several databases:
  - MySQL, postgresql are the most common
- Prefers Apache (over Microsoft IIS)
- Prefers Linux



Drupal has a unique and helpful community. The best way to get comfortable with it is to become familiar with it in small, regular doses. Here are some points of entry:

- **Go to [Drupal.org](http://drupal.org) and create an account**  
This will allow you to edit and comment on posts as well as subscribe to issue discussions.
- **Read up on Drupal terminology in the glossary:** <http://drupal.org/glossary>
- **Read about general concepts** in the “Understanding Drupal” section of Drupal.org: <http://drupal.org/documentation/understand>



## Use the resources on [Acquia.com](http://www.acquia.com)

- New and recorded webinars: [www.acquia.com/resources/webinars](http://www.acquia.com/resources/webinars)
- Training courses, including one for PM <http://training.acquia.com/managing-drupal-projects/drupal-project-managers>
- Whitepapers: <http://www.acquia.com/resources/whitepapers>

## Join a Drupal group

There are hundreds of specific interest groups, such as:

<http://groups.drupal.org/drupal-state-and-federal-agencies-government>

<http://groups.drupal.org/project-management>

Join the group and subscribe to receive emails of new posts; this is one way that the Drupal community shares knowledge and best practices.

- **Read Drupal Planet**

This is an aggregate of approved Drupal blog posts:

<http://drupal.org/planet>

- **Attend Capital Camp in DC on July 27 & 28!**

It's only \$20 and you can choose from many sessions in your area of interest: <http://capitalcamp.org/>



## Drupal versions

- Drupal 6 is the oldest supported version: most stable, most modules; will no longer be supported when D8 is released
- Drupal 7 released Jan. 2011: now outnumbered sites built in D6; number of updated modules continues to grow
- Drupal 8 scheduled to release in August 2013

## Drupal 7 modules

- Where they come from
- How to find good ones
- Allow time to test, test, test
- Research Resources for modules that aren't ready for Drupal 7

## Keys to a successful migration

- Ensure that everyone involved is familiar with the structure of the legacy content and its intended use on the new site
- Run several test imports
- Break down content migration into small manageable steps
- Document successes and challenges in the process
- Keep stakeholders informed



## Methods for importing content

- Drupal modules such as Node Import, Migration and Transformations - see <http://groups.drupal.org/node/21338> for various data import & export modules
- Custom PHP
- Custom MySQL scripts for database to database migration



There are migration modules, case studies and experts within the Drupal community who share best practices and process guidance:

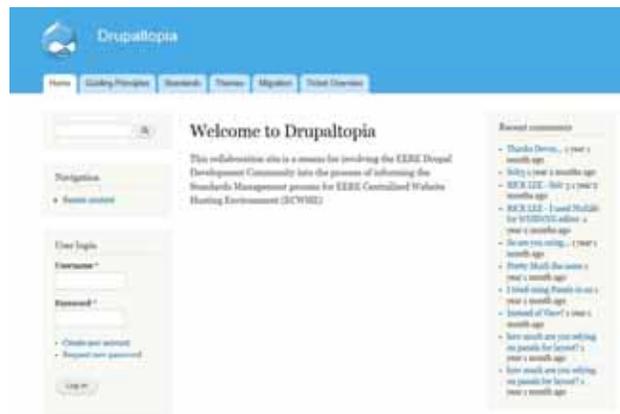
- Main module: <http://drupal.org/project/migrate>
- General information: <http://drupal.org/documentation/migrate>
- Converting to Drupal Forum: <http://drupal.org/forum/37>
- Migration tips: <http://www.acquia.com/tags/migrations-tips>
- Economist Migration Case Study: <http://drupal.org/node/915102/>

## Modules extend and customize Drupal functionality

- To date, there are approximately 10,000 modules
- If you seek functionality beyond what is available...
- Most popular:
  - Views
  - Pathauto
  - WYSIWYG
  - Google Analytics
  - Search for available modules here:  
<http://drupal.org/project/Modules>

## Module Vetting

- Allow time to experiment
- Test, test, test
- Share knowledge:  
Drupaltopia.com was begun by EES for best practice sharing on EERE sites. Has been abandoned but could be revived:  
<http://www4.eere.energy.gov/drupaltopia/>



Theming refers to the look and feel of a Drupal website and includes the HTML, CSS, page layout, and site graphics

- There are hundreds of contributed themes and modules for enhancing themes, including overarching modules to control page layout
- Generally one chooses a "starter" theme and the customizes it by overriding the styles
- Choose your theme and approach carefully at the start of the build
- Decide early on what your layout approach will be – Panels? Blocks? Display Suite?
- The community consensus theme of choice seems to be “Omega” for its robust responsive/mobile capabilities.

<http://drupal.org/project/omega>

(For i2 we used the “Fusion” theme as a base for our custom design.)

# Content Types

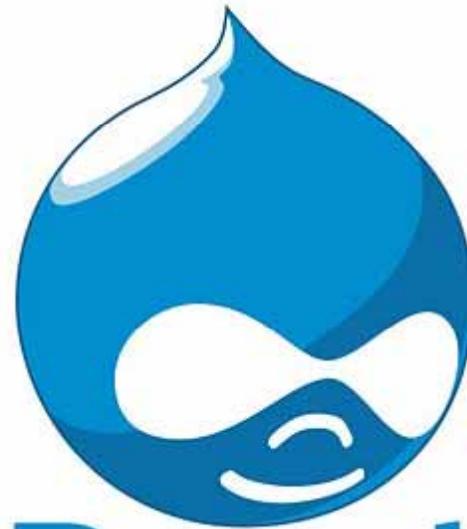
Content types refers to the CMS system of organizing text, images, media, and links in the database and for display on a website.

- Discuss early on who your users are, what kinds of permissions they need, (what they can see/do/edit on the site )and what kinds of
- There are lots of options, so create content types conservatively
- Avoid modeling content types based on the organizational structure
- Use a user-centric approach to building content types
- Use a matrix to spell it all out; your developers will thank you

Permission	anonymous user	authenticated user	administrator	contributor	editor	reviewer
<b>system module</b>						
access administration pages	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
access site reports	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
administer actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
administer files	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
administer site configuration	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
select different theme	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Allow editors to easily publish and manage content

- Configure the WYSIWIG module to fit your needs
- Configure additional add-on modules for image and document
- Keep it simple - provide all the tools and formats needed in the editor interface and nothing more
- Implement workflows
- Provide editor training
- Create training guides and videos for editor's reference



**Drupal**

Questions?

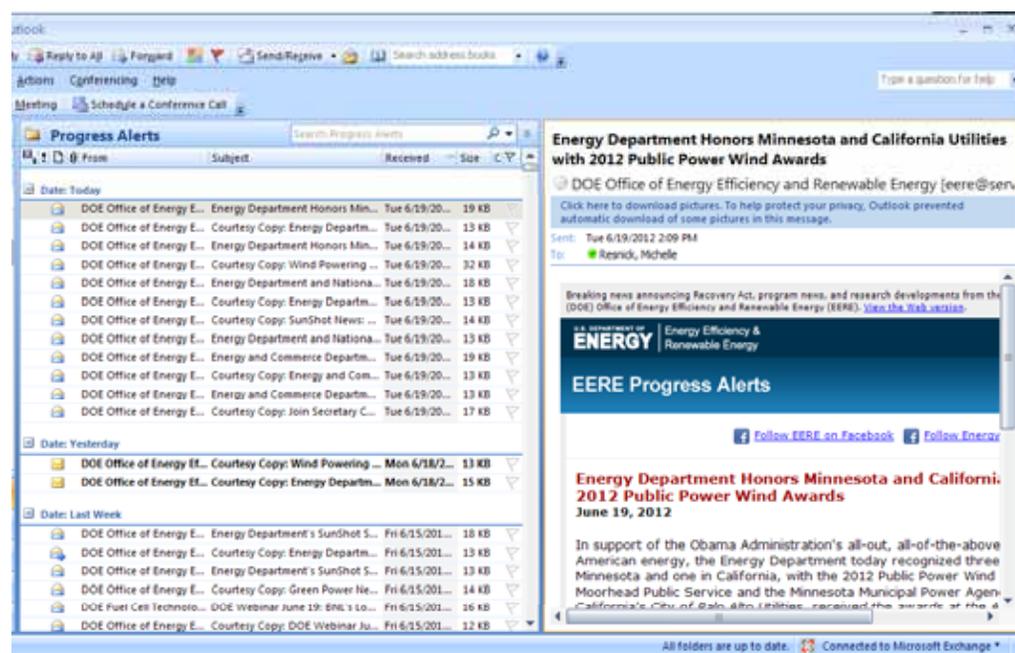
Please email Sara Hunt ([shunt@bcs-hq.com](mailto:shunt@bcs-hq.com))

## Mobile and Outlook reading pane views are counted in GovDelivery open rates

- Mobile opens count if subscribers can view images in their mobile email client.
- Messages "opened" in the reading pane in Outlook count as opens, as long as the email client is set to load images upon message viewing in the pane.

### What's not counted:

- Digested emails are not factored in the bulletin open rate.



The new Widget Guidelines page walks you through the entire process of making a widget, from planning all the way through to promotion.

[eere.energy.gov/communicationstandards/widgets.html](http://eere.energy.gov/communicationstandards/widgets.html)

We'll be posting a Mobile Web Application page soon, too.

- Next meeting: July 19