

Stephen Lucero

Building an Intuitive Admin

UX for the Forgotten End-User

FORUM ONE™





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A true developer at heart, Stephen brings eight years of Drupal experience to his role as the Director of Engineering and Developer Operations at Forum One. When faced with a challenge or a task, he enjoys finding an elegant solution to solve it and enjoys it even more when he has the opportunity to automate the task in some way.

Throughout his career he's had the privilege of working with a lot of talented individuals who excel in their own varied disciplines. This has provided a lot of influence to embrace a strong multidisciplinary perspective toward projects to achieve the most complete end product.

By embracing the goal of encouraging team members to explore beyond their familiar responsibilities and learn from each other, Stephen has seen significant success both personally and with coworkers to adopt a cross-functional approach toward project development. This has allowed teams to work more cohesively for more opportunity to learn and grow during the build of a more complete and satisfying end result.





FORUM ONE

About Forum One

We've been at this for 23 years.

We've partnered with more than 1,000 organizations and government agencies.

We've helped them better reach their mission on over 2,000 projects.

We are experts in digital strategy, creative, technology, data, and user experience.

We create experiences that make an impact.



Featured Clients



NATIONAL MUSEUM
of AFRICAN AMERICAN
HISTORY & CULTURE



The
Pew Center
for Arts
& Heritage



MIT
museum



Smithsonian Institution

NATIONAL
MUSEUM *of*
NATURAL
HISTORY



U.S. COMMITTEE
FOR REFUGEES AND IMMIGRANTS

UNITE**HERE!**

MacArthur
Foundation



seattlecenter



ALLIANCE FOR JUSTICE



NATIONAL ENDOWMENT FOR THE
Humanities



Fairfax County
PUBLIC SCHOOLS
ENGAGE • INSPIRE • THRIVE

UNITED
FOR
NEWSSM

What is Admin UX?



“UX best practices promote **improving the quality of the user’s interaction** with and **perceptions of your product** and any related services.”

Usability.gov

UX for the Other End-User

- End users and target audiences aren't the only users.
- Who are the most frequently returning users?
- Who spends the most time on a site?



Site Administrators



Content Editors

What is Admin UX?

- Applying UX practices to the administrator's experience.
- Easing the burden of administrative tasks.
- Increasing success and confidence of administrators.
- Improving perception of the system as a whole.



Why is Admin UX important?

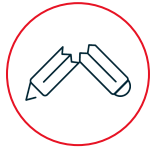
Symptoms of Poor Admin UX



Confused users



Frustrated or **dissatisfied** editors



Broken content



Lots of **support questions**



Lack of **confidence**



Misunderstanding



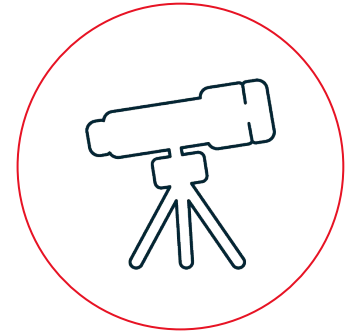
How do we make a great Admin UX?



**How do we make a ~~great~~
Admin UX?**

better

How Does the Admin UX Get Neglected?



- Projects are sometimes built toward a front-end design
 - Ignores information architecture
- Admin ends up as a functional by-product
- Developers typically have much more Drupal familiarity
- Site-builders have very different goals
- Site-builders and developers often **avoid** entering content

The Excuses

Spoiler: None of these are true.



Less “valuable”

Since public users don’t see the interface it isn’t as valuable.



Not enough time

It takes too long to build all these custom interfaces for the admin.



Too expensive

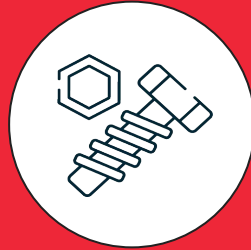
It costs too much to identify all the issues.

Some Solutions



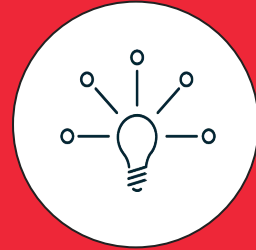
Learn UX basics

Learn key UX principles to make smart decisions.



Build as you go

Incorporate improvements to UX during typical build tasks.



Use contrib modules

Incorporate useful contrib modules to improve the experience with less effort.

UX Crash Course

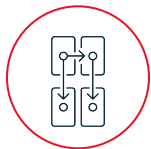
Common Pitfalls



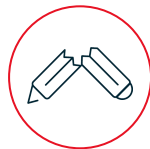
Long forms



Little or **no help text**



No **order** or **organization**
for fields



Misleading help text



Unclear labeling



Too much **information**

Guiding Principles



Create a
hierarchy



Stay
consistent



Keep it
simple



Leverage
intuition



Be
helpful

Hierarchy *noun*

Hi·er·ar·chy | /hī(ə)rärkē/

An arrangement or classification of things according to relative importance or inclusiveness.

Create a Hierarchy

- Use proximity to define relationships
- Group related elements logically
- Use clear labels to convey organization
- Use containers to visually separate elements
- Use tabs to guide focus through elements



Fieldsets and Details

- Group related elements logically
- Fieldsets define clear semantic relationships
- Details visually separate groups of elements
- Labels help to define relationships
- Help text can also be added

Global settings Bartik Seven

Home » Administration » Appearance

Control default display settings for your site, across all themes. Use theme-specific settings to override these defaults.

▼ PAGE ELEMENT DISPLAY

- User pictures in posts
- User pictures in comments
- User verification status in comments
- Shortcut icon

▼ LOGO IMAGE

Use the logo supplied by the theme

Path to custom logo

Examples: logo.svg (for a file in the public filesystem), public://logo.svg, or core/themes/seven/logo.svg.

Upload logo image

No file chosen

If you don't have direct file access to the server, use this field to upload your logo.

▼ FAVICON

Your shortcut icon, or favicon, is displayed in the address bar and bookmarks of most browsers.

Use the favicon supplied by the theme

Path to custom icon

Examples: favicon.ico (for a file in the public filesystem), public://favicon.ico, or core/themes/seven/favicon.ico.

Upload favicon image

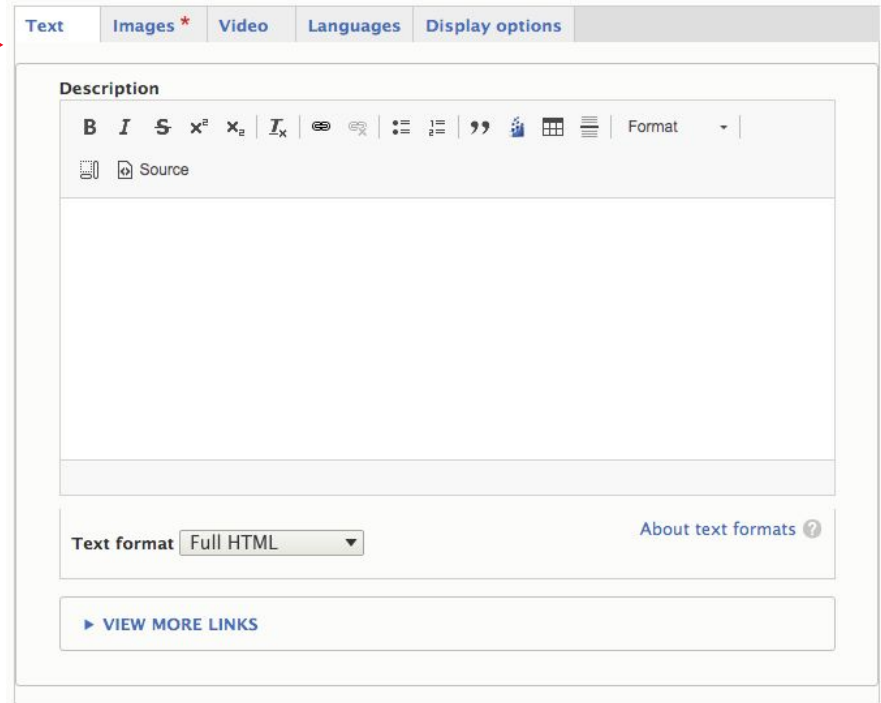
No file chosen

If you don't have direct file access to the server, use this field to upload your shortcut icon.



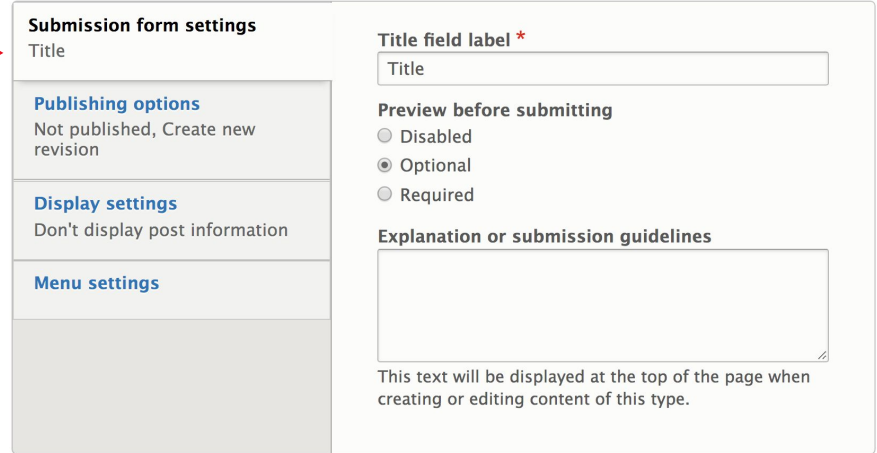
Horizontal Tabs

- Left to right
- Keep titles short
- Avoid too many tabs
- Don't let a tab become too tall for the screen
- Skippable content
- Don't nest tabs
- Limit one set per page



Vertical Tabs

- Top to bottom
- Skippable content
- Expands more easily
- Don't let it get too tall
- Reduced horizontal area
- Don't nest tabs
- Limit one set per page



The image shows a vertical tabbed interface for 'Submission form settings'. The tabs on the left are: 'Submission form settings', 'Publishing options', 'Display settings', and 'Menu settings'. The 'Submission form settings' tab is active and contains the following content:

- Title**
- Title field label *** (input field containing 'Title')
- Preview before submitting** (radio buttons for Disabled, Optional, Required; 'Optional' is selected)
- Explanation or submission guidelines** (text area containing 'This text will be displayed at the top of the page when creating or editing content of this type.')

Modules to Build a Hierarchy

- Field Group
- Paragraphs
- Entity Construction Kit (eck)
- Inline Entity Form



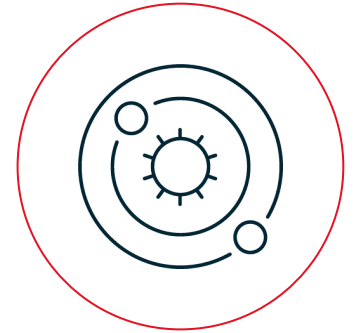
Consistent *adjective*

Con·sist·ent | /kən'sistənt/

In agreement with other facts or with typical or previous behaviour, or having the same principles as something else.

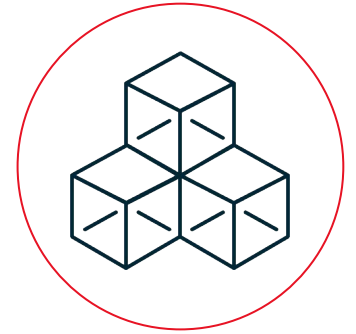
Stay Consistent

- Keep your interactions as consistent as possible
- Establish and reuse patterns for the way data is entered or managed
- Organize forms as similarly as possible
- Reuse the same fields for the same data
- Maintain the same widgets for the same type of data



Modules to Build Consistently

- Field Tools
- Field Report
- Image Styles Mapping
- Field List Details



Simple *adjective*

Sim·ple | /sɪmpəl/

Without unnecessary or extra things or decorations; plain.

Keep it Simple

- Don't make the user work when they don't need to
 - Provide default values
 - Auto-populate or update fields
- If a user doesn't need to see it, it shouldn't be there
 - Role-specific customizations
- If it doesn't serve a purpose, hide it



Modules to Simplify

- Allowed Formats
- Vertical Tabs Config
- Automatic Entity Label (auto_entitylabel)
- Conditional Fields
- Field Permissions



Intuitive *adjective*

In·tu·i·tive | /in't(y)ʊədiv/

Using or based on what one feels to be true even without conscious reasoning; instinctive.

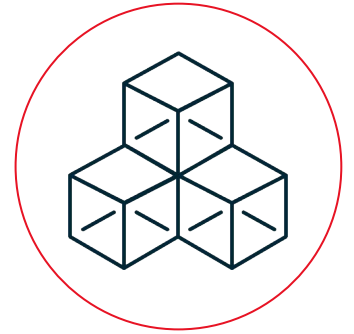
Leverage Intuition

- Use language the user will be comfortable with
- Leverage established patterns for common interactions
- Use the most helpful widgets for the data being entered
- Group information together sensibly



Modules to Build Familiarity

- Linkit
- Multiselect
- Chosen
- DropzoneJS
- Entity Browser
- Entity Embed
- Custom Add Another



Helpful *adjective*

Help·ful | /'helpfəl/

Giving or rendering aid or assistance; of service.

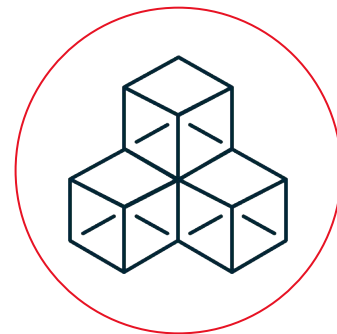
Be Helpful

- Guide the user through the process
- Include help text and guidance with fields
- Add clear labels and helpful notes to your groups
- Describe what's expected from the user
- Explain what the user should expect
- Help the user succeed
- Make the user's job easier



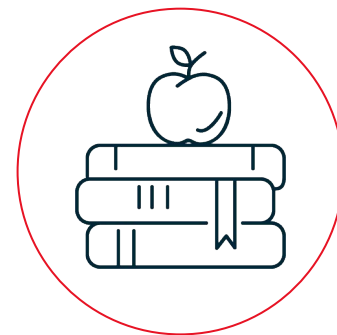
Modules to Assist

- Inline Form Errors (Core)
- Shortcut (Core)
- Tour (Core)
- Entity UI Builder (entity_ui)
- Admin Toolbar
- Pathologic
- Pathauto
- Redirect
- Focal Point
- Photographs Previewer



Resources

Where to Learn More



1 Drupal user interface standards
<https://www.drupal.org/docs/develop/user-interface-standards>

2 Usability.gov

3 Admin UI and Javascript Modernisation Initiative
<https://www.drupal.org/about/strategic-initiatives/admin-ui-js>

4 Distributions
Lightning | Thunder | Rain

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Thank you!

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