Making Drupal Friendly for Editors and Clients

BADCamp

FOUR KITCHENS

October 5, 2019



Jim.Vomero@FourKitchens.com



Four Kitchens builds websites and apps for organizations that depend on large-scale or unconventional content.



Personalized Experiences

Drupal's extensibility allow us to create the perfect CMS for our organizations. How can we apply the same care to our internal UI?



Dashboard	Add New Post		Screen Options * Help *
Posts			
All Posts	Enter title here		Publish
Add New Categories			Save Draft Preview
Tags	Upload/Insert @	Visual HTML	Status: Draft Edit
윩 Media	B I ₩ 등 등 6 € \$ = 2 2 ₩ ₩ ₩ ₩		Visibility: Public Edit
P Links			Dublish immediately Edit
Pages			Move to Trash Publish
Comments			Move to Trash Publish
Appearance			Format
9 Plugins			 Standard
B Users			Aside
1 Tools			C Link
Settings			C Status
Collapse menu			C Quote
			- mage
			Categories
			All Categories Most Used
	Path: p		Uncategorized
	Word count: 0		
			+ Add New Category
			-
			Tags

Add

ն Dashboard	Add New Post		Screen Options 🔻 Help 🔻
🔶 Posts	Enter title here	Publish	*
All Posts Add New Categories Tags	93 Add Media B I ↔ Ξ Ξ ↔ Ξ Ξ Ø ‰ Ξ 🗙 🚟		ft Preview : Draft <u>Edit</u> ty: Public <u>Edit</u>
Media Pages		Move to T	h immediately <u>Edit</u> rash Publish
 Comments Appearance 		Format	A
 Plugins Users Tools 		● ★ St ○ ₩ As ○ ₩ In ○ ₩ Vi	ide
Settings			udio uote
	Path: p Word count: 0		
	Excerpt	▼ Categori	es 🔺
	Send Trackbacks	→ All Categ	ories Most Used

🚯 Dashboard	\oplus \bigcirc \bigcirc \bigcirc \bigcirc $=$		Publish	‡ :
📌 Posts		Document	Block	×
All Posts Add New		Status & Visik	bility	^
Categories Tags	Add title	Visibility Publish		Public Immediately
9] Media		Post Format		Standard 🗘
PagesComments	Start writing or type / to choose a block		he top of the k	olog
🔊 Appearance		Pending F	Review	
🖌 Plugins		Categories		~
占 Users		Tags		~
🗲 Tools		Footured Ima		~
Settings		Featured Imag	ge	•
 Collapse menu 		Excerpt		~
		Discussion		~



Personalized Experiences

There is a price to pay for extensibility. Non-standard tools and interfaces create an editorial training gap for each new site.



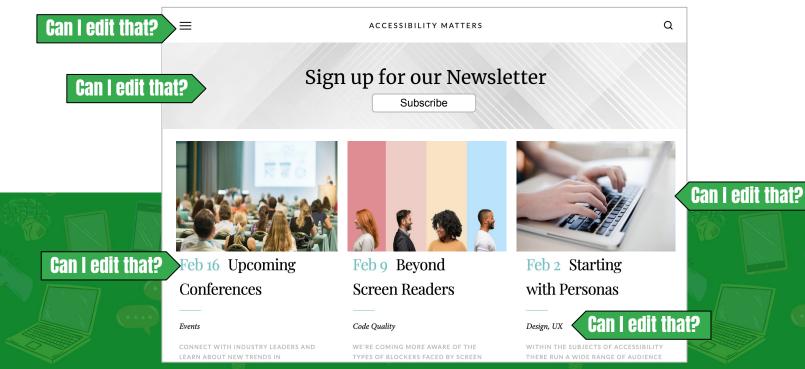


Sometimes 'node' is a 4-letter word. A taboo term that you'd rather not use in front of clients. A signal we're working under the hood.





Our internal audience think in terms of 'pages', but as site builders, we know all content is not created equally.





Personalized Experiences

As ambassadors of the Drupal brand, it's our responsibility to carry the frontend design and build process to our backend interfaces.





The login screen is the editors first impression; make it a good one. In this case 'user' is a taboo, four-letter word.





Student Portal

Logging into the Student Portal provides you with access to your courses and other student information to help you navigate student life from a distance. Log in using your university Access Account.

Log In

If you have trouble logging in or have forgotten your password, <u>contact our HelpDesk</u> for assistance.

Remove barriers to entry

- Add a memorable URL to replace 'user' via redirects.
- Include a login button or user landing page.
- Add help text and contacts for tech support.

Log in	
Log in Reset your password	Editor Login
Username *	Username *
Enter your WebConference username. Password *	Password *
	Reset your password or contact support.
Enter the password that accompanies your username.	

Override the login form

- Provide contextual labels and instructions.
- Consider SSO access options when available.

Home		
jlv1	61	
View	Edit	Workflow Notifications
History		
Member f 2 years 7	9000	

Choose a user path

- On login, Drupal directs users to their profile page.
- Instead, choose a more useful location based on common personas.
- Employ destination parameters in URLs.



Admin Theme and Toolbar

Admin themes include editorial tools and create continuity between the backend experience between sites and over time.

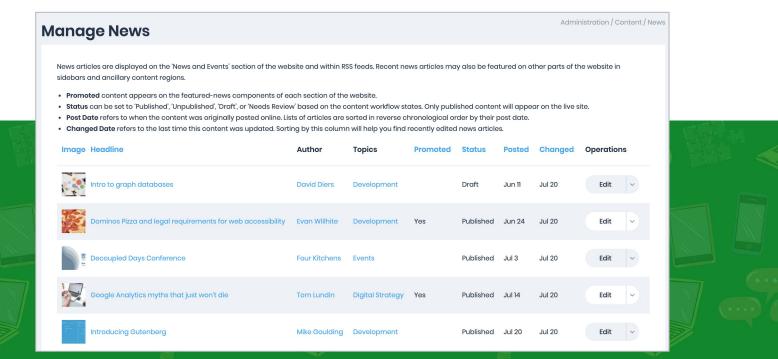




Provide a set of tools and reports that are most helpful to editors. This may be a single page or a collection of interfaces.



Create content management screens to **replace the default content overview page**. Customize views per content type.

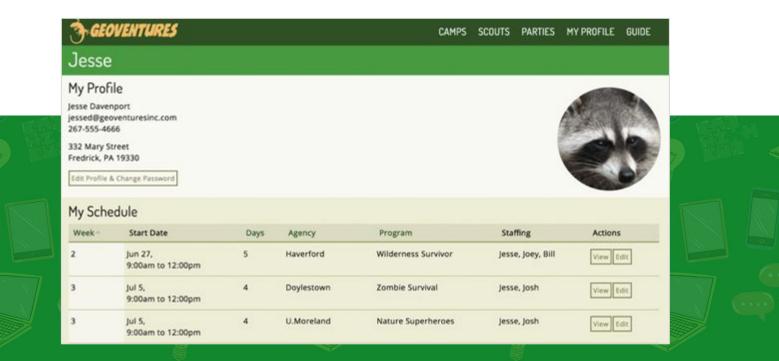


Prioritize tasks with landing pages. What are the top tasks your editors take on the site? Customize per user, role, or task.

					411		Home	About	Services	Program Portfolio 🔻	Contact
	Home >	Content [Dashboard	b							
	Create C	ontent									
d a	ei:	(1	۲			D			0	····	
infor	Page	Alert	Gallery	Video	News	Blog	Project	Form	Office	Landing	
	Popular	Today					Recently (Changed			
	 129 views 32 views 30 views 19 views 9 views 6 views 5 views 	Finding a care IBM Watson p Teaching STE New Director Partnerships	erience firsthar eer path in loca project team fin M through fire announced for for at risk popu open for leade	l government alists announc fighting robotic southeast reg lations	ed s		 4 hours ago 4 hours ago 5 hours ago 1 day ago 1 day ago 1 day ago 1 day ago 2 days ago 	 How new i Students h Summer c Interns ref Reflecting 	media is shap nost rally for o atalog annou lect on exper on 25 years o	local government bing local campaigns climate change awareness inced riences at city hall on Maple Street new revenue source	
		g and Hov		Voice a	nd Style G	uide	Content	Tools		Request Help	



Personalize dashboards through contextual filters. **Surface relevant content** based on user profiles and account settings.



Create reports of **commonly referenced datasets** or completing common tasks. Export as files or feeds for sharing and archival.

	is for Track Chairs to vote and discuss proposals as they are submitted. V	iew the proposal to read the full descri	uption and to re	ave comments for other	committee mem
SUBMITTED	TITLE	TOPICS	COMMENTS	VOTING	ACTIONS
Jan-30	Lifelong Learning with lynda.com Jen Sheetz	Accessibility, Content and Marketing,	5	Average: 2.1 (10 setes)	view edit
jan-23	A standards based approach to PDF document accessibility joel Goodman	Accessibility	4	***** Average: 4.3 (13 votes)	view edit
Jan-20	Mindful Social Media: The Eightfold Path Austin Matco, Debble Green	Marketing, Project Management and Leadership	3	Average: 3.3 (30 votes)	view edit
Jan-20	The Voyage of the Beagle: Biology, Evolution, and Content Strategy Jeff Brennan	Content and Marketing	2	Average: 3.9 (00 votes)	view edit
jan-20	Building a Better Butcave: Building a Collaborative WordPress Intranet Mitch Connell	Innovation and Design, Project Management and Leadership	11	***** Average: 4.2 (30 votes)	view edit
Jan-20	Making together: the merging journeys of UK, design & development Kelly Young, Maranda Hernandez	Usability	7	승규 승규 승 슈 슈 Average: 4.1 (12 vetes)	view edit
Jan-19	Social Silo-Busting: Using the Google Analytics Social Report Vanessa Hildie	Content and Marketing, Education and Training	*	Average: 3.7 (3 virtes)	view edit
Jan-19	Brain hack: unleashing the publisher within Mo Hasan	Content and Marketing	*	★★★★☆ Average: 4.2 (3 votes)	view edit
Jan-19	Banishing shame from education and work Dwight Dietrich	Innovation and Design	3	Average: 3.5 (10 votes)	view edit
Jan-19	Banishing shame from education and work Marissa Smith	Education and Training	5	****	view edit



Out of the box, Views has **exposed filters and arguments** to sort and parse content.



HOME ABOUT LOCATIONS - STUDENTS FACULTY INSTRUCTION & TRAINING - COMMUNITY - CONTACT US

PROJECTS - LOGS -

Projects

Multimedia assignments are collaborative and projects within Media Commons reflect this fact. There are 292 projects currently in our database. Select a title from our list to learn how each initiative enriches the teaching and learning experience through multimedia.

Project Members	Course	earch Terms			
<any></any>	•		Apply		
Instructor	Project Title	Proje	ect Lead Upd	ated Logs	Add Log
cmm48	BIOL 220W (Butterworth)	Nick	Smerker 2 m	ionths 0 L	.ogs Add Log
	Scholarly Storytelling	Nick	Smerker 2 m	ionths 1 L	.ogs Add Log
lrm155	ENGL202C (Mateer)	Trac	e Brown 2 w	eeks 21 L	logs Add Log
Tim Kerchinski	Marketing 220: Business Skit	Dan	Getz 3 m	ionths 5 L	logs Add Log
	PHOTO 402 - Photographic Narratives	Rubin) Rya	wetzel 3 m	ionths 3 L	logs Add Log
sls334	RPTM 120 (Beaver)	Nick	Smerker 3 m	ionths 1 L	.ogs Add Log



Views Bulk Operations and Action Plugins lets editors **perform routine actions** over a large set of content.

	Geo	Action Geocode the address field Apply to selected items									
		ID	IMAGE	MAP	NAME	DATE OF FIRST VISIT	LOCATION	CHANGED	TYPE	ACTION	
Por Par		1		N and	D.G. Yuengling & Son	2005-07-16	Sth & Mahantongo Streets Pottsville, PA 17901 United States POINT (-76.1978365 40.6829446)	2018-07-03	Brewery	Edit	you
		2	T		Anheuser Busch	2005-08-13	2351 Busch Drive Fort Collins, CO 80524 United States POINT (–105.0051165 40.617477)	2018-07-03	Brewery	Edit •	
	•	3		and a second sec	New Belgium Brewing Company	2005-08-13	500 Linden Street Fort Collins, CO 80524 United States POINT (–105.066874 40.593415)	2018-07-03	Brewery, Brewpub	Edit •	
	0	А		- 14 - 10 - 10 - 10 - 10 - 10 - 10 - 10	Boscos Restaurant &	2005-08-21	500 President Clinton Avenue Little Rock, AR 72201	2018-07-02	Brownub		

Cloning tools create **duplicate content** items, prepopulated with the values of an existing piece of content.

🛛 Week 🛛 🖸	Days 👩 Time 🗆 Venue	Price	Link Staff Notes	Status		
WEEK 🔺	START DATE	DAYS	TIME	AGENCY	PROGRAM	ACTIONS
1	Mon, June 20	5	9:00am to 12:00pm	UpperDublin	Heros	View Edit Copy
1	Wed, June 22	1	12:00pm to 3:00pm	Makoto	Survivor	View Edit Copy
1	Mon, June 20	5	1:00pm to 4:00pm	U.Gwynedd	Survivor	View Edit Copy
2	Mon, June 27	5	9:00am to 12:00pm	UpperDublin	Art	View Edit Copy
2	Mon, June 27	5	9:00am to 12:00pm	Haverford	Survivor	View Edit Copy
2	Mon, June 27	4	12:00pm to 3:00pm	UpperMerion	Survivor	View Edit Copy
2	Mon, June 27	5	9:00am to 12:00pm	Horsham	Geo	View Edit Copy
2	Mon, June 27	4	9:00am to 1:00pm	Newtown	Spy	View Edit Copy
2	Mon, June 27	5	9:00am to 12:00pm	Abington	Jedi	View Edit Copy
3	Tue, July 5	4	1:00pm to 4:00pm	U.Providence	Jedi	View Edit Copy
3	Tue, July S	4	9:00am to 12:00pm	U.Providence	Explore	View Edit Copy



Weight creates dragable interfaces for editors to change the order of content in lists and menus.

Home + Administration + Content

Manage Content: Project Order

By design, every program belongs to a single strategic program area. The programs and these groupings are illustrated in the tables below. The order (top to bottom) of the projects in a table illustrates the order that the programs are displayed on the website. You can click-and-drag a program by the cross-hairs to change its order. Commit all changes by clicking the 'Save' button at the bottom the page.



	Show row r	weight
Strategic Area: Science, Technology, Engineering, and Math (STE)	and a second	
TITLE	STATUS	
Summer Dreamers Academy	Published	
∲ Real-Life Math	Published	
	Show row	weight
Strategic Area: Energy		
inte	STATUS	
Pittsburgh Green Innovators	Published	
Mid-Atlancic Solar Resource and Training Center (MASRTC)	Published	
Smart Grid Training and Resource Center (GridSTAR)	Published	
National Energy Leadership Corps (NELC)	Published	
	Show row r	weigh
Strategic Area: Stormwater Management	120000	
NTLE .	STATUS	

'Views Entity Form Field' and 'Toggle Editable fields' save time on redundant content tasks.

	WEEK 🔺	START DATE	AGENCY	PROGRAM	VENUE	STAFFING	
	1	Mon, June 25	Abington	Explore	Alverthorpe Park	Sarah (174)	83
						Crystal (40)	0
						Jim (1)	0
130F							0
						Add Another Staffer	
	1	Mon, June 25	UpperDublin	Rebel	Robbins Park	Derek (58)	0
						Add Another Staffer	
	3	Mon, July 9	Doylestown	Geo	Central Park	Cassie (39)	0
						Add Another Staffer	
	3	Mon, July 9	UpperDublin	Jedi	Robbins Park	Jim (1)	0
						Crystal (40)	0
							0
						Star 11 - 1 - C. C.	

Identify the tasks most common for your internal users:

- What was that page I was editing yesterday?
- Did that new item get published?
- What events are displaying across all categories?
- Which products have a header image?
- What alerts are scheduled for the site?
- What are the metatags for each landing page?
- Which url redirects exist and when was it last accessed?

Identify the tasks most common for your internal users:

- A11y: What is the alt-text for images across the site?
- What reports do I need to share? CSV files of feeds?
- Stale content: Which products were not updated in a year?
- Performance: Which pages have the most traffic?
- Announcements: How can I post updates to editors?
- Support: Where do I go for help?
- Where can I find 'my' content?*



Field Types, Widgets, Formatters

Get to know the field types available in Drupal Core and contrib. Always use the right tool for the job.



Field Types, Widgets, Formatters Not everything needs to be a text-field. Field types and widgets add structure and validation to interfaces.

Phone Number

Area code? Dashes? Dots? Extensions? Letters?

Link

Relative vs absolute? Include protocol? Twitter?

Price

Currency? Decimal? Thousands? Numbers only?



MM/DD or DD/MM? Long name? Include year?

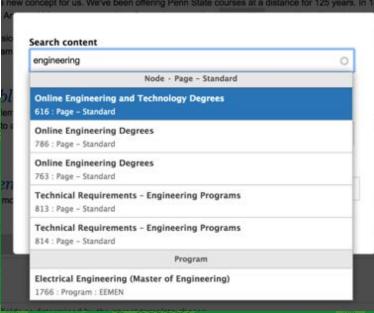




Here's a field. You figure it out. **Field Types, Widgets, Formatters** The Email, Telephone, and Date fields use HTML5 markup to inputs and include custom validation.



Field Types, Widgets, Formatters Linkit is a solution for internal linking. Editors should not have to 'go find the page and copy something' to create a link.







Field Types, Widgets, Formatters "Drop downs should be the UI of last resort" (Luke Wroblewski). Some Drupal alternatives:



cherry meringue		

Select	Team	Mem	bers:

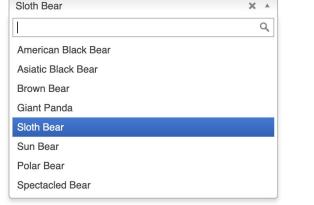
Gianluigi Buffon	Xabi Alonso
Alessandro Del Piero	Steven Gerrard
Cristiano Zan	etti
	Diego Cavalieri
David Trezeguet	Fernando Torres

Range Slider		
\$421 - \$780	\$421	\$780

- Pick an option*
- Option 1
- Option 2
- Option 3
- Other (please type)

Other

My custom value!



Fantasy Soccer Team

Field Types, Widgets, Formatters Computed Fields populate based on programmable logic; or alter

entity save logic; shortening the form and reducing user error.

Subtotal Wages Subtotal Mileage Total Payment Due Total Hours: 19 Total Miles: 150 Total Due: 341.5 Pay Rate: 16.00 Mileage Rate: 0.25 Total Due: 37.5 Wages Due: 304 Mileage Due: 37.5 Total Payment Due	View Edit	Devel							
Total Hours: 19 Total Miles: 150 Pay Rate: 16.00 Mileage Rate: 0.25 Wages Due: 304 Mileage Due: 37.5	Total Due								The states and
Pay Rate: 16.00 Mileage Rate: 0.25 Wages Due: 304 Mileage Due: 37.5	Subtotal Wages		Sub	total Mileage		Total Paym	ent Due		total
Wages Due: 304 Mileage Due: 37.5 Billable Hours and Travel	Total Hours: 19	9	Тс	tal Miles: 150		Total Due	: 341.5		19-19-19
Billable Hours and Travel	Pay Rate: 16.00	o	M	ileage Rate: 0.25					
	Wages Due: 30	14	м	leage Due: 37.5					
Setup Sunday Monday Tuesday Wednesday Thursday Friday Saturday	Billable Hours and	d Travel							
	Setup	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
Hours: 1:30 Hours: 1:00 Hours: 0:00 Hours: 4:15 Hours: 4:15 Hours: 4:00 Hours: 4:00 Hours: 0:00	Hours: 1:30	Hours: 1:00	Hours: 0:00	Hours: 4:15	Hours: 4:15	Hours: 4:00	Hours: 4:00	Hours: 0:00	
	Mileage: 0.00	Mileage: 30.00	Mileage: 0.00	Mileage: 30.00	Mileage: 30.00	Mileage: 30.00	Mileage: 30.00	Mileage: 0.00	



Enhancing Forms

Drupal's extensibility empowers site architects. Without careful consideration, content forms can become unwieldy.



Enhancing Forms

A great architecture is meaningless if clients can't use it. How can we tame content forms?



roome + Add Content		
Create News		
Headline *		
	09	
Banner Image 9. Open File Browser		
Choose File No file chosen	Upload	
Files must be less than 2 MB. Allowed file types: peg gif jog j	peg.	
Thumbnall Image S. Open File Browner		
Choose File No file chooses	Upload	
Files must be less than 2 ME.		
Allowed file types: prog gif jpg j Outbound Link	P49.	
	peg.	
Outbound Link	PRG.	
Outbound Link	PFG.	
Outbourd Link Display On Home Page PuBLISHED DATE Date Time	2 45am	
Outbound Link		
Outhoused Link C Display On Home Page PUBLISHED DATE Date Time Eq02/11/2017 Eq0 Timezone AmericaNew_ton News Article (Edit summary)	1 45an T	
Outhoused Link Display On Home Page PUBLISHED DATE Date E.g., 02/11/2017 E.g., 0 Timezone AmericaNew, Ton	1 45an T	1 1



Altering the **add and edit form titles** is a simple way to add direction to content editors.

Create Session

Every year, it's our mission to give attendees the best experience possible. We can't do this without great sessions. So, bring it. Whether you're a seasoned veteran or new to the circuit, we want your idea. **Proposals must be submitted by 11:59 p.m. on December 1.** The main speaker of any accepted session will receive a free conference registration. Any other speaker on the same talk may take advantage of early bird pricing. A maximum of two speakers per session is allowed.

Session Title *

Submit a Proposal

Every year, it's our mission to give attendees the best experience possible. We can't do this without great sessions. So, bring it. Whether you're a seasoned veteran or new to the circuit, we want your idea. **Proposals must be submitted by 11:59 p.m. on December 1**. The main speaker of any accepted session will receive a free conference registration. Any other speaker on the same talk may take advantage of early bird pricing. A maximum of two speakers per session is allowed.

Session Title *

Create Application Join Our Team

Create Timesheet Track Your Time

Create Alert Set a Campus Alert Message

Altering the **form submit buttons** is another way to provide context to the form action as content moves through a workflow.

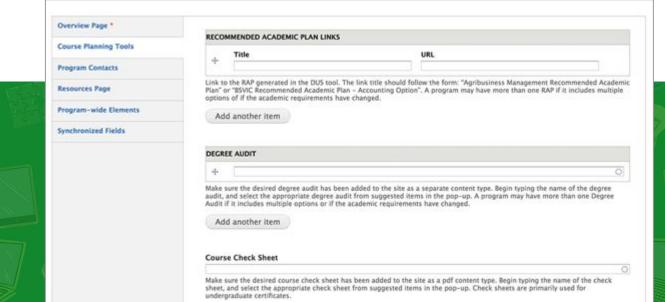




Field groups and tabs can organize interfaces by content areas or help model your workflow. Also minimize content footprint.

ent Details	Title	
arketing Details	June 11 Upper Moreland Zombie Survival Camp	
gistration *	Agency	
Staffing	Upper Moreland (351)	your she
	Program	
	Zombie Survival Camp (16)	
	Venue	
	Mason Mills Park (356)	
	Visibility	
	Staff: Show User on internal staff portal page	
	Event: Show on Event on public camps listings	

Use **field descriptions** to provide contextual instructions to site editors. Descriptions written with the stakeholder who use the field.





Field permissions provides granular control to view and edit values based on the user's role. (But add access controls cautiously.)

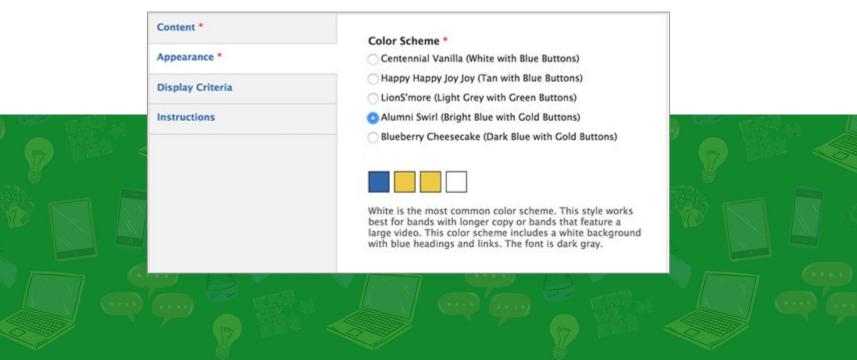


PERMISSION	ANONYMOUS USER	AUTHENTICATED USER	ADMIN	PAYROLL	STAFF	
Create own value for field Pay Rate	0				0	
Edit own value for field Pay Rate	0	0	0		0	
Edit anyone's value for field <i>Pay Rate</i>		D	0		0	
View own value for field Pay Rate		۲	1	$\overline{\mathscr{A}}$	2	
View anyone's value for field Pay Rate	0		0	Ø	0	

The **Clientside Validation** module adds inline error handling on forms. **Validation Plugs** are easy to define in a custom module.



Attach **custom CSS and JS** to progressively enhance forms to take control of the presentation layer.



Consider where to **redirect a user** after saving content. What is the next step? Adding another? Viewing a thank you page?

Thank You

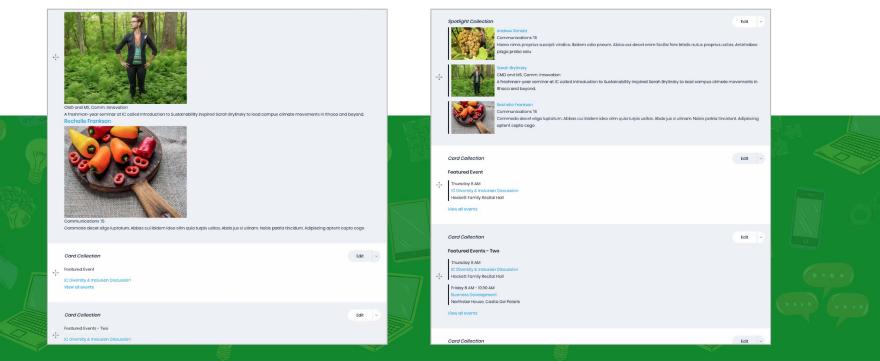


Your application has been submitted.

Thank you for your interest. We will be collecting and reviewing applications for the next several weeks. You will be notified by the hiring department should we choose to move forward with your application. Please contact Jim@GeoVenturesInc.com if you have any questions.



Theme **form display modes** to reduce their footprint. Hide seldom viewed fields in groups. Define preview modes for paragraph.





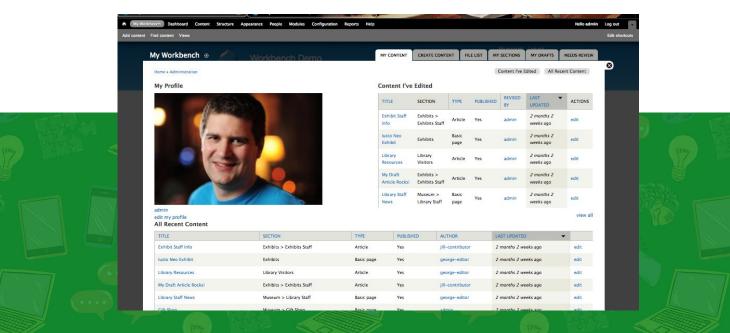
Editorial Workflows

Where the technology reflect the roles and content lifecycle needs of the organization.



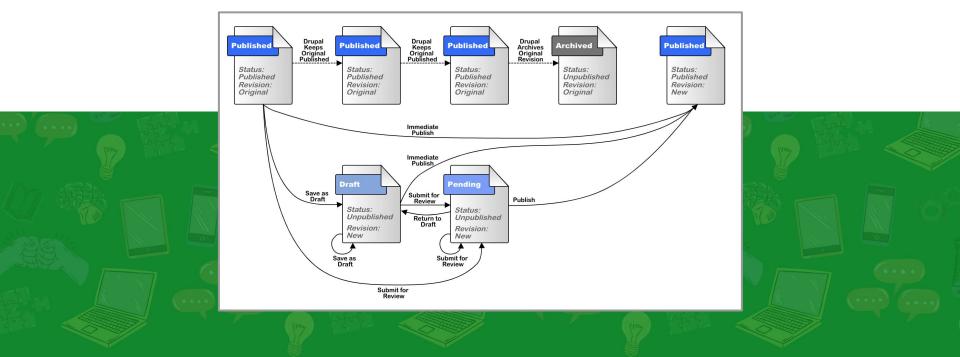
Editorial Workflows

The **workbench** set of modules provide an out of the box experience and can establish consistent controls across many sites.



Editorial Workflows

The **workflow** module allows you to define a custom set of content states and transitions, and to react to content events.





In an increasingly competitive market there are **high expectation** on our open source community.

Embrace your user's stories. **Discover** their frustrations and workarounds. **Share** with the community.



Jim.Vomero@FourKitchens.com

