

Simplifying Your Admin Experience

Make Drupal easy for the
people who use it most



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@mandclu



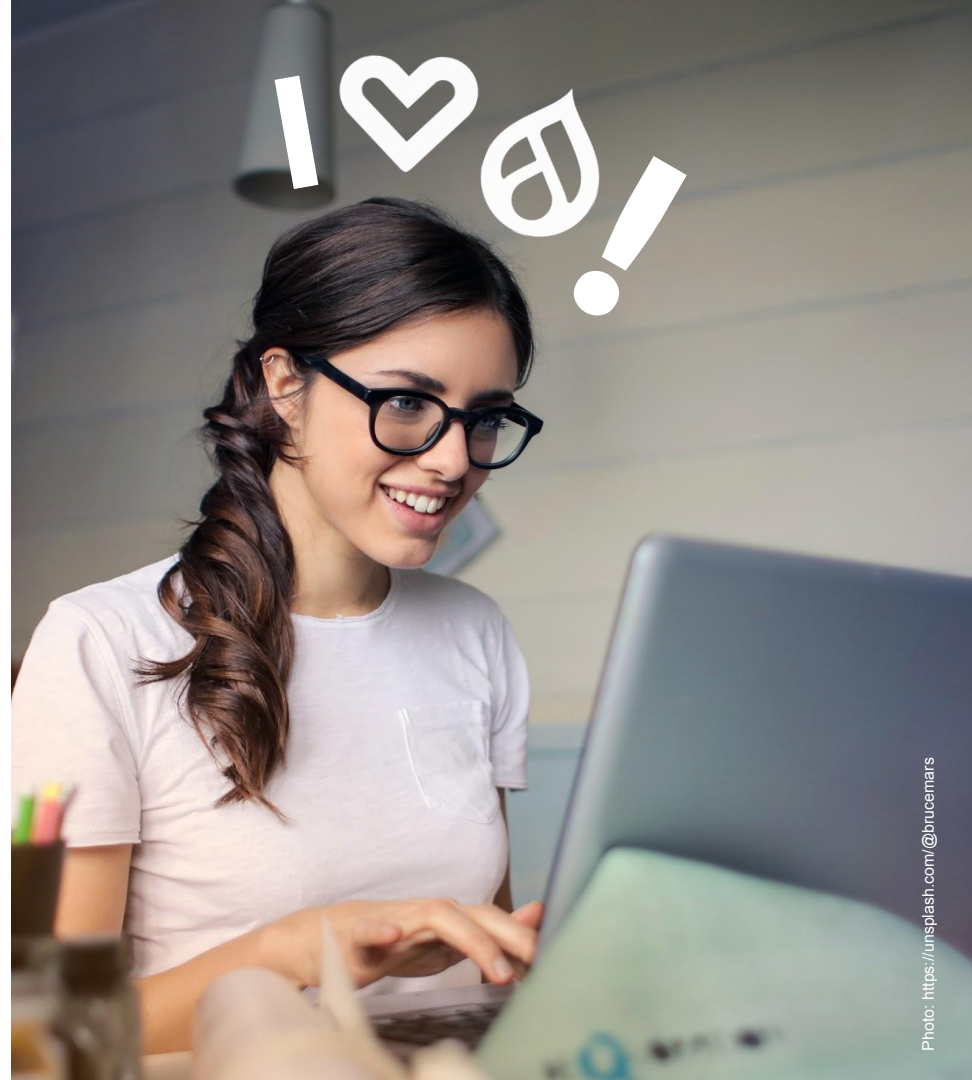
Acquia

DRUPAL HAS A REPUTATION
OF BEING

Hard to Learn



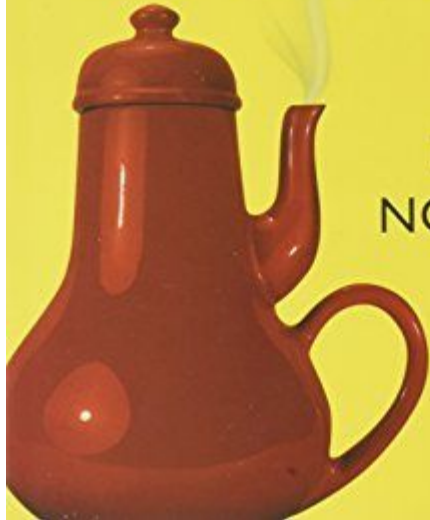
We have the power to make it easier. What follow are some ideas on how site builders and developers can help



REVISED & EXPANDED EDITION

The DESIGN of EVERYDAY THINGS

DON
NORMAN



Develop the skill of observation

*“Question the obvious and you
will discover many hidden
insights. What seems to be
obvious often is not.”*



Dan Formosa
Design and Usability Expert



2:01 / 16:09

Koko Jack

EFFECTIVENESS

USABILITY



REDESIGN

5 Opening Kitchen Gadgets Tested by Design Expert | Well Equipped | Epicurious



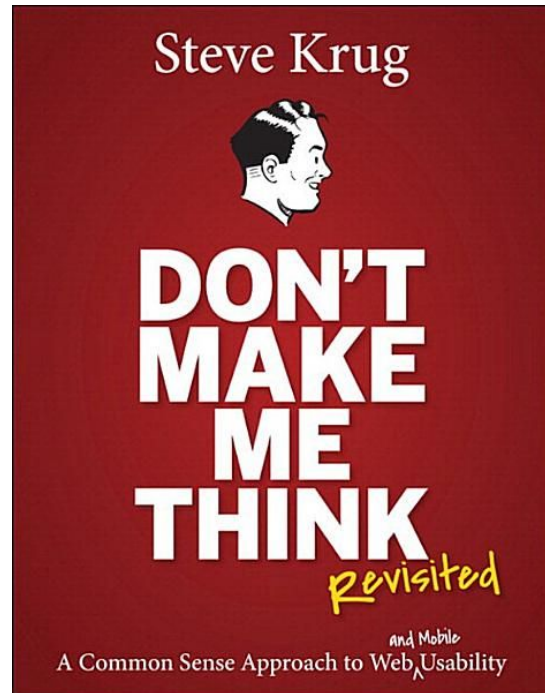


Demo 1

A stock install of Drupal 10

Don't Make Your Editors Think

- Every page should be **self-evident**, or at least self-explanatory
- Make it obvious how to perform a task
- Standard UX principles apply
 - Use a visual hierarchy
 - Consistent use of link colours



Be Descriptive

- Provide help text (field descriptions) wherever possible
- Label icons, at least on hover
- Where validation constraints exist, state them in the help text
 - Including expected input patterns, e.g.
Sku: XXXX-#####
 - Characters not permitted or required

Watch Your Language

- Avoid Drupalisms
 - Nodes, entities, media, etc
- Use familiar, relevant, and meaningful labels
 - Alerts, events, images, etc

Appropriate Complexity

- Have roles configured with a simplified editor experience, for less technical users
- Balance power and configurability with simplified, single-purpose tasks
- The right answer will be different from site to site, and change over time
- Default to Basic HTML with a simpler set of WYSIWYG options

Reduce Friction

- Make every click count
 - Admin Toolbar and Coffee modules can help users get where they need to go faster
- Think about where you take a user when a task is completed
 - Login And Logout Redirect Per Role can allow you to a user somewhere useful after login

WYSIWYG Buttons

- Err on the side of keeping simple
- Some buttons very rarely needed:
 - Superscript
 - Subscript
 - Justify text
- Others likely should always be excluded:
 - Underline
- Consider adding:
 - Maximize

Staying In Context

- Provide obvious prompts on listing pages to manage the content
 - for editors only
- For simple tasks, keep in context when possible
- For more complex tasks, return when finished
- Add Content By Bundle and Display Link Plus help to add links for editors only



Welcome to Example Site

Quick Links



[Accessibility](#)



[Events](#)



[Report a Problem](#)

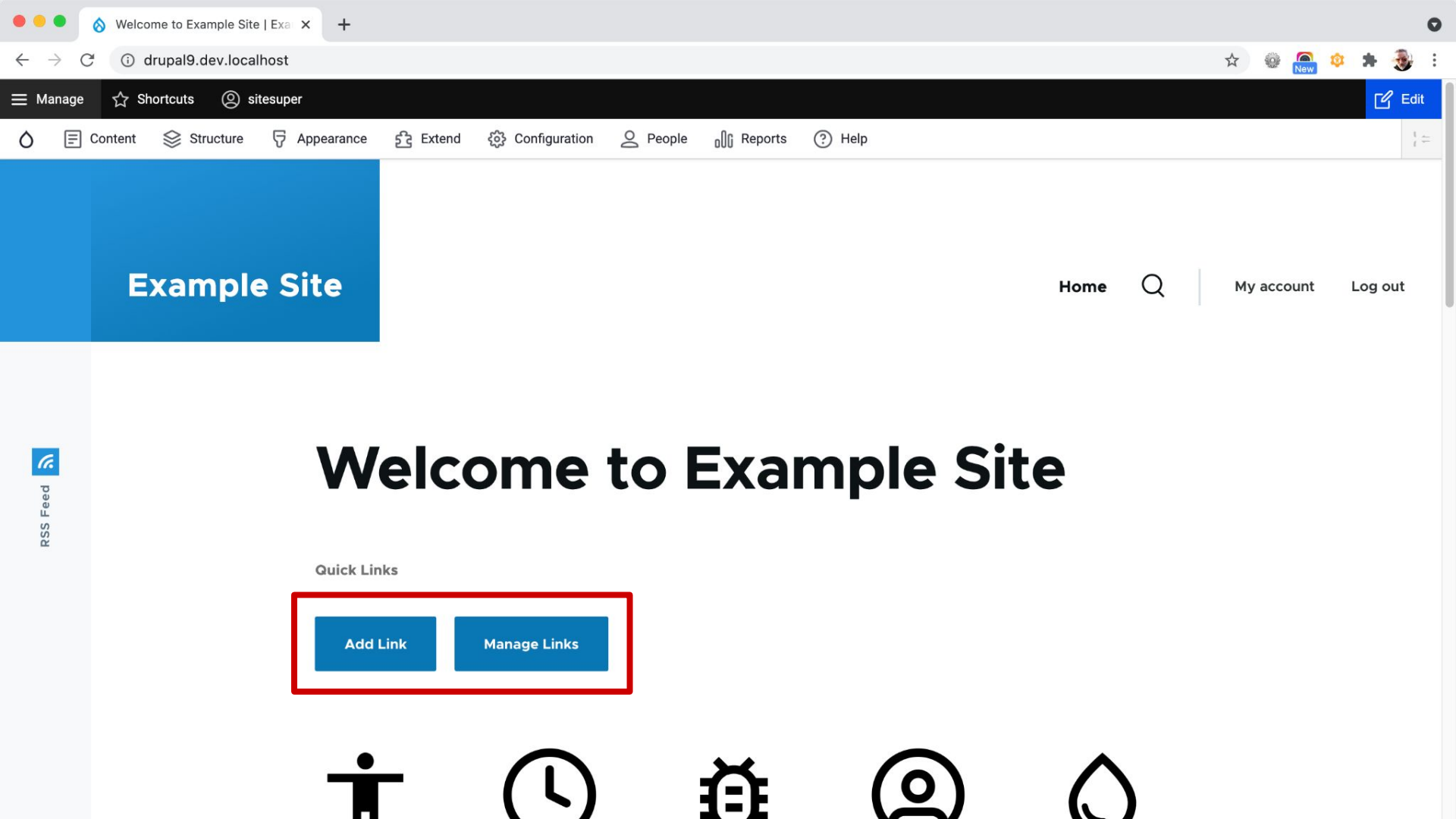


[Our Team](#)



[Water Rates](#)

You haven't created any frontpage content yet.



Example Site

Home



My account

Log out

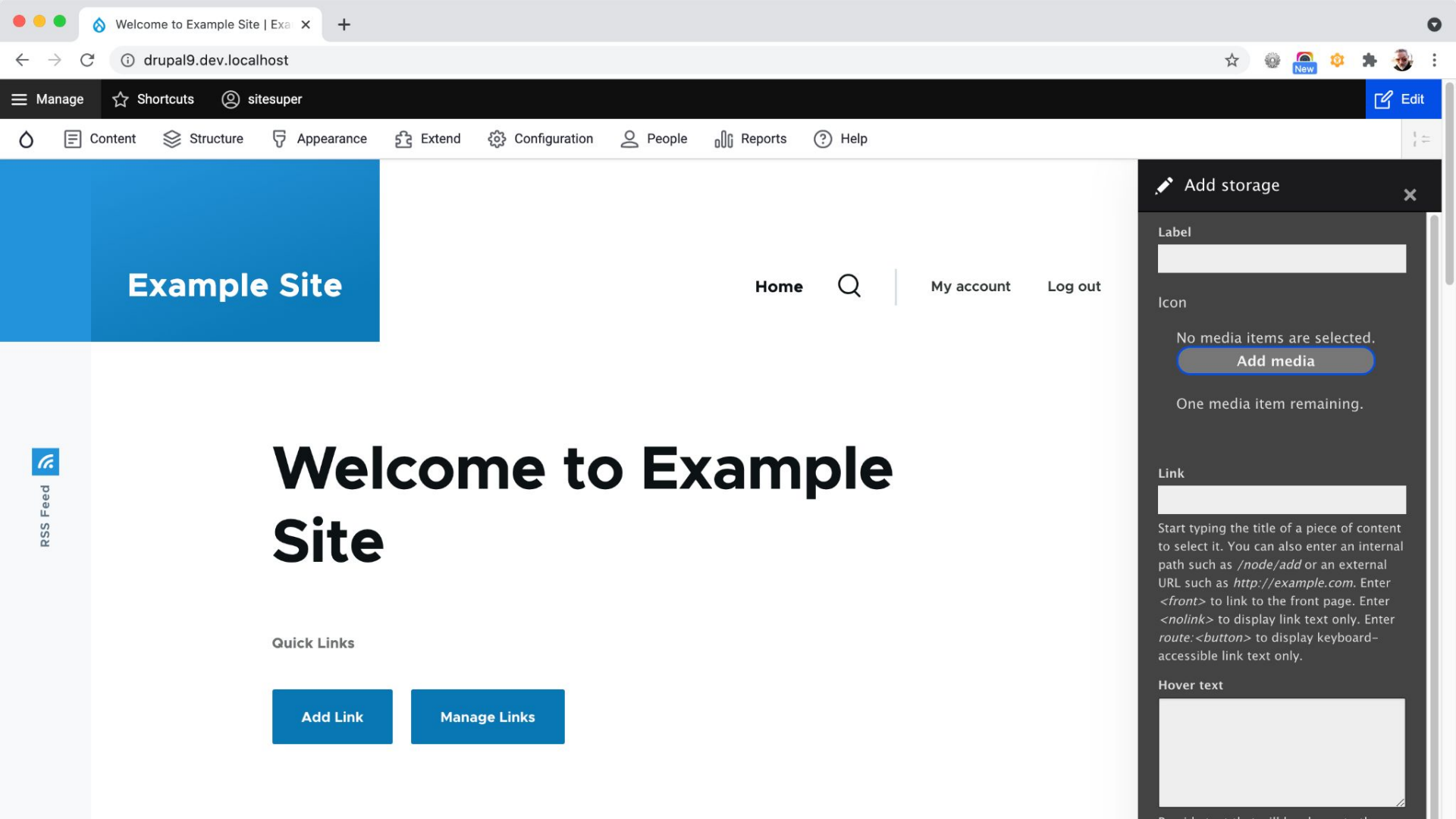
Welcome to Example Site

Quick Links

Add Link

Manage Links





Example Site

Home



My account

Log out

Welcome to Example Site

Quick Links

Add Link

Manage Links

Add storage

Label

Icon

No media items are selected.

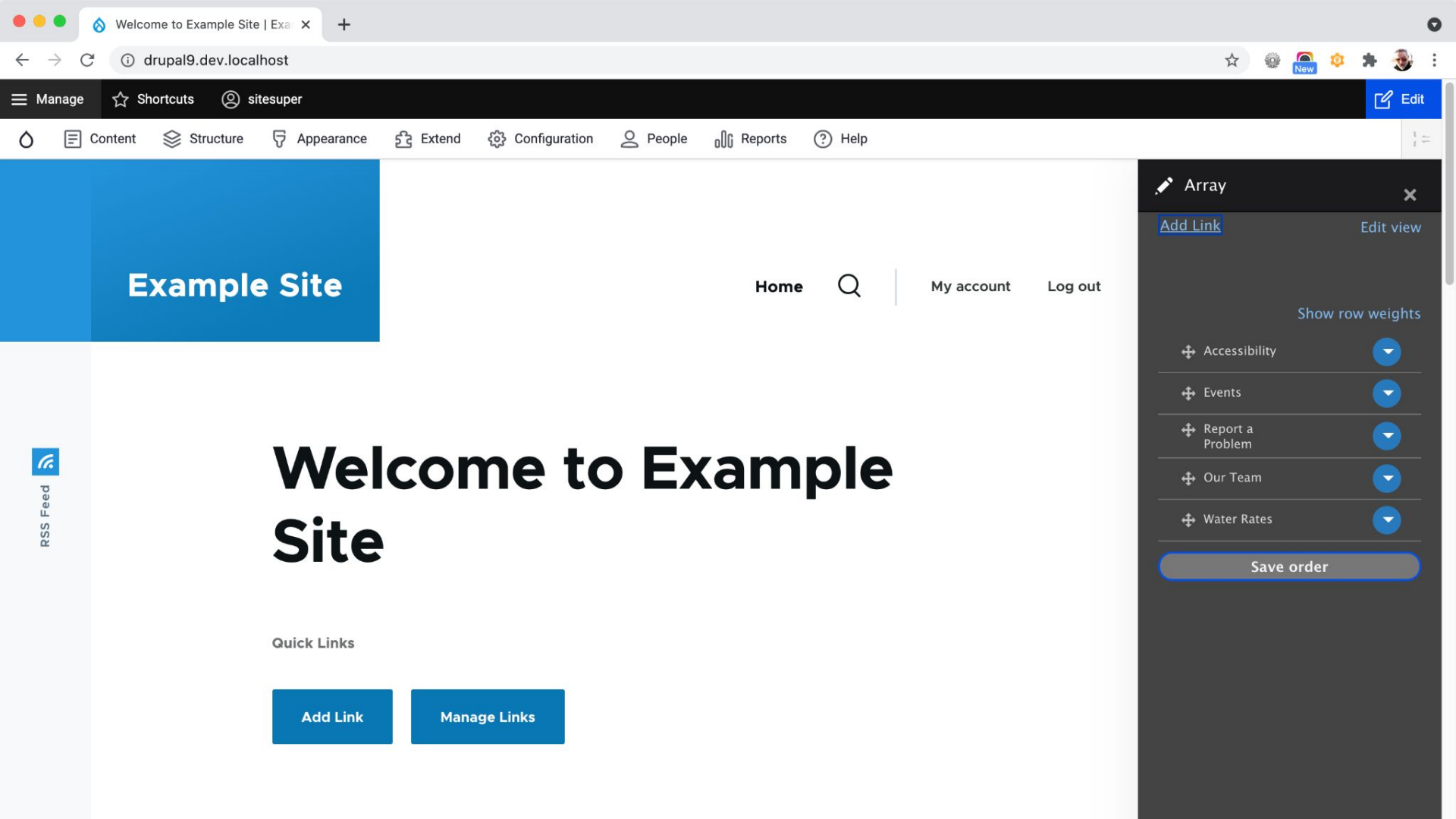
Add media

One media item remaining.

Link

Start typing the title of a piece of content to select it. You can also enter an internal path such as `/node/add` or an external URL such as `http://example.com`. Enter `<front>` to link to the front page. Enter `<nolink>` to display link text only. Enter `route:<button>` to display keyboard-accessible link text only.

Hover text



Example Site

Home



My account

Log out

Welcome to Example Site

Quick Links

Add Link

Manage Links

Array

[Add Link](#)

Edit view

Show row weights

Accessibility



Events



Report a Problem



Our Team



Water Rates



Save order

RSS Feed

Provide Immediate Feedback

- Provide tools to give immediate feedback on any additional work that may be needed
- **Accessibility:** [Editoria11y](#)
- **Responsive:** [Responsive Preview](#)
- **SEO:** [Real-time SEO](#) (yoast_seo)
- Image previews: use a thumbnail image format cropped to the same proportions as when viewed full size



Good Form

Principles for making your forms
intuitive

Field Usability

- Clearly mark required fields
- Provide sensible defaults when possible
- Avoid placeholder text
- If more than one “action” button, clearly indicate primary
 - Never a “Clear” or “Reset” button

Field Usability

Radios, Checkboxes

- Options obvious without clicking
- Select with a single click

Choices *

☐

Yes

☐

No

☐

Boolean

Choices *

☐

Extra Cheese

☐

Pepperoni

☐

Mushrooms

☐

Green Peppers

☐

Black Olives

Select dropdown

- Better if many options (>5)
- Add Select2 or Chosen to provide search

Choices *

Choices *

Remove Elements That Aren't Needed

- “Promote to Front” and “Sticky” for content types where these values won't be used
- Simplify module allows base fields to be hidden from forms
- Use Field Permissions to hide fields only needed by high-level admins



Reference Field Usability

- Inline Entity Form to allow creating new, related content
 - Allows custom labels e.g. “Image” or “Contact”
- Tagify for an interactive reference field

The screenshot shows a form field labeled "Category" with a required field asterisk and a help icon. Below the input field is a vertical scrollbar. At the bottom of the form, there is a light blue horizontal bar. Below this bar, the text "Drag to re-order taxonomy terms." is visible, indicating an interactive taxonomy list.

Jakob's Law

- Leverage conventions and mental models editors bring to your site
- Mimic the way similar applications work whenever possible
- Keysave module allows Drupal forms to save via keyboard



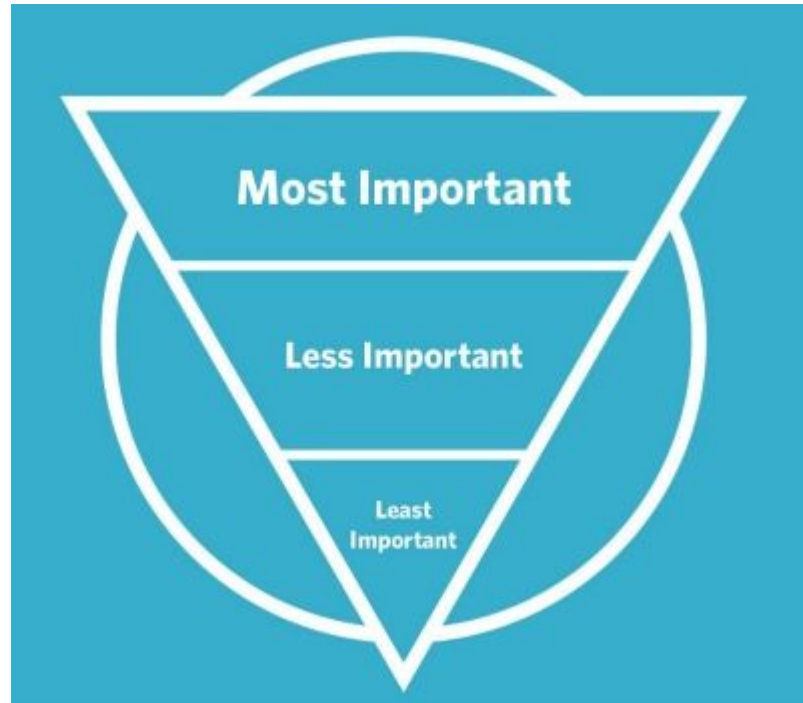
Users spend most of their time on other sites. This means that users prefer your site to work the same way as all the other sites they already know.

Specialized Fields

- Leverage fields meant to replicate common patterns of data entry
 - Address module provides a set of fields for capturing location information
 - Integration for geocoding, mapping
 - Smart Date for app-like date and time entry, including recurring events
 - Integration for calendar displays

Organize Your Form

- Sequence forms logically with most important fields first
 - Required fields high up too
- Visually group related fields and labels
 - Field Group module
- Single column is better



Consistency

- Try to have edit forms follow the same structure as the entity view
- Try to use the same widgets and naming across different entities and bundles

Design for the Typical Use Case

- If an entity has numerous fields to handle edge cases, collapse them into a fieldset or tab
- If various WYSIWYG plugins are needed for edge cases, put them into a separate text format, not default
- Form Mode Control can help using different form configurations based on use case

When Things Go Wrong



- Alerts should be descriptive enough to communicate the fix required
- Don't show errors in a modal or popup that has to be dismissed
- Show errors inline on the form element or at least highlight the field with the error
 - Inline Form Errors module (core) puts error messages next to each element and outputs a summary



Demo 2

An optimized Drupal site



Dynamic Layouts

Giving editors control over the
output structure

Layout Builder

- Core's visual, accessible solution for laying out:
 - The default layout of a content type
 - Each node of one or more content types
- Only enable when necessary, possibly only on a single content type

Layout Builder

- Can expose a bewildering list of options
 - Layout Builder Restrictions allows for a smaller list
- Possible to make bad decisions
 - Layout Builder Lock can help prevent some
- Use Layout Builder Library to allow editors to choose from predefined layouts

Paragraphs

- Less visual, but harder to break
- Possible to nest for complex layouts
- Can also be used for field collections
- Some use paragraphs with Layout Builder
- [Paragraphs Edit](#) gives authors a quick way to edit a single component



Systems Thinking

Thinking about your sites as a set of
individual systems

Website Systems

- One or more content types, related views, sometimes with specific modules for additional functionality
- Examples:
 - Blog or news
 - Alerts
 - Staff directory
 - Events Calendar

Keeping Context

- Allow management within a system
- Provide obvious prompts for managing
 - for editors only
- For simple tasks, stay in context when possible
- For more complex tasks, return when finished
- Add Content By Bundle and Display Link Plus help to add links for editors only



Additional Thoughts

Clone and Edit

- For complex content types, sometimes easier to clone and edit than build from scratch
 - Entity Clone module provides an operation for this

Managing Dates

- Where the “date” of content is important (e.g. news) make an explicit and obvious field
 - “Created date” is hidden and often isn’t what should be shown
- Publication Date module will automatically show the date content is actually published, but also allows a manual value

Create Article | Drupal 9 Demo

+

← → ↺

drupal9.dev.localhost/node/add/article

☆ ⚙️ 🌈 New ⚙️ 🧩 👤

Manage

Shortcuts

sitesuper

🔗

Content

Structure

Appearance

Extend

Configuration

People

Reports

Help

Create Article ☆

Published

Preview

Save

Title *

Body (Edit summary)

B I 🔗 🔗 ⋮ ⋮ ⌵ ⌵ ⌵

Format

Source

Text format

Basic HTML

About text formats

Last saved: Not saved yet

Author: sitesuper

Published on

yyyy-mm-dd

--:--:--

Format: 2021-04-24 05:53:40. Leave blank to use the time of form submission.

Revision log message

Briefly describe the changes you have made.

Menu settings

Not in menu

Content View As A Dashboard

- Customize the filters
- Consider making the moderated content view an attachment or block
- Content Planner module provides analytics and calendar views

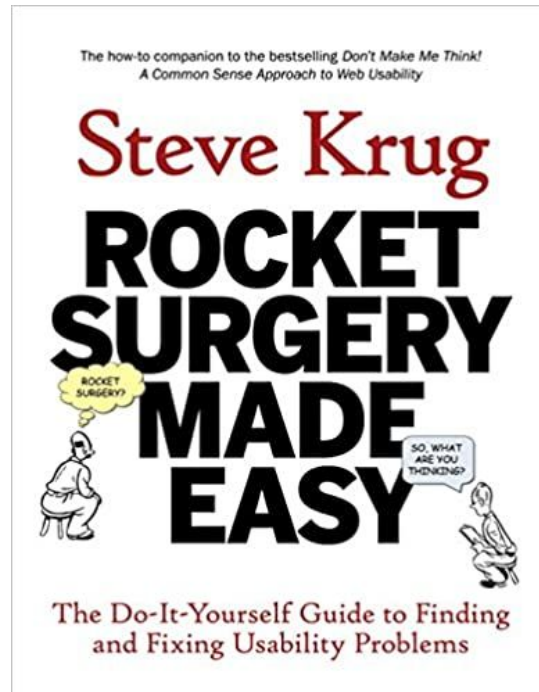
Documentation

- Make scannable, with steps clearly indicated
- Include screen captures
- Provide in a user-friendly format
 - Not everyone can use Google Docs
- Videos can also help show a process
e.g. [Loom](#) screen recorder
- Try using [Tour](#) or [Help Topics](#) for embedded help



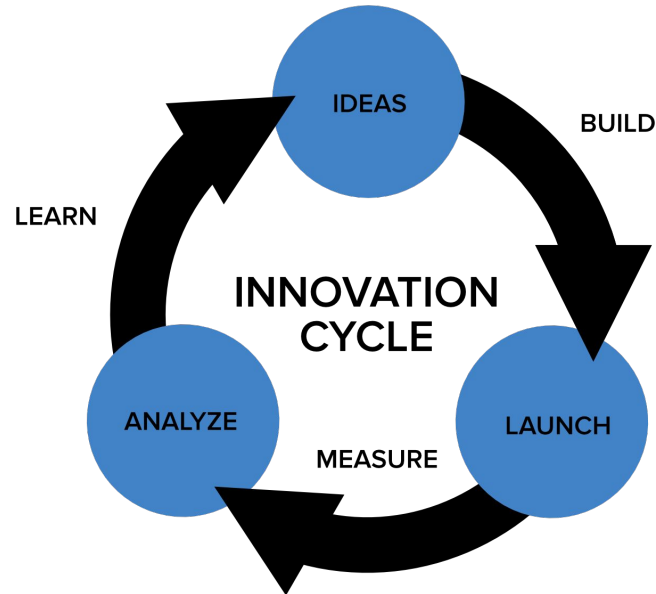
Testing!

- Get feedback as early and often as you can
- It doesn't have to be expensive



Incremental Improvements

- Test as much as possible
- Get feedback and iterate
- Eat your own dog food



Modules to Help

- Responsive Preview
- Editoria11y
- Field Group
- Form Tips?
- Smart Date
- Add Content By Bundle
- Inline Entity Form
- Inline Errors
- Entity Browser or Media Library
- Tour
- Help Topics (beta)

Resources

- [Laws of UX](#)
- [Form Design Best Practices](#)
- [Content Creation by Average People](#)
- [Website Forms Usability: Top 10 Recommendations](#)
- [UX Considerations for Building an Amazing CMS | UX Booth](#)
- [How to set up a CMS that will make non-technical users happy](#)
- [User Experience: The Single Most Important Element of a Web CMS](#)



Thank you.

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