

Drupal Admin

It's Not About Us

Tom Martin

Senior Technology Consultant



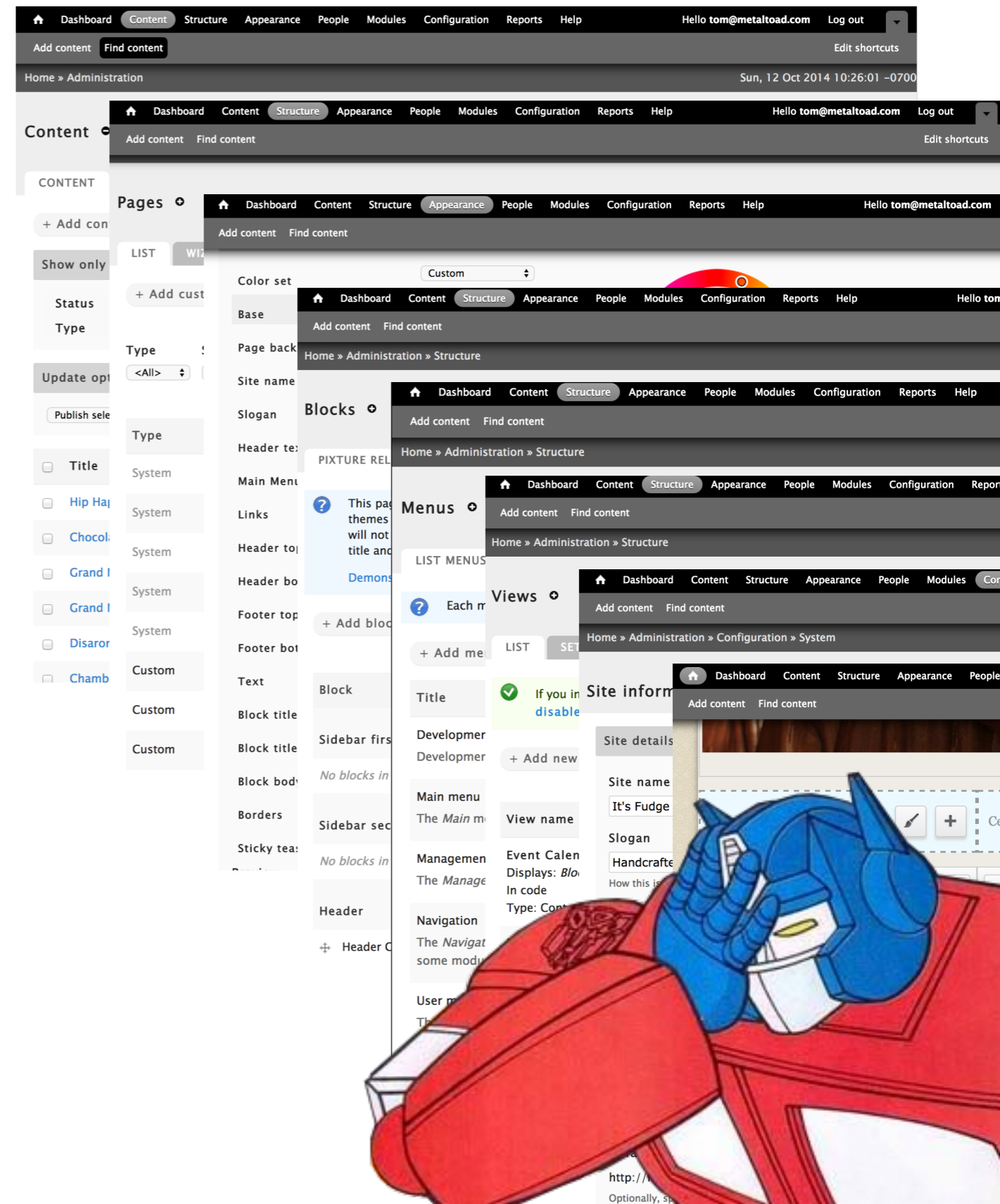
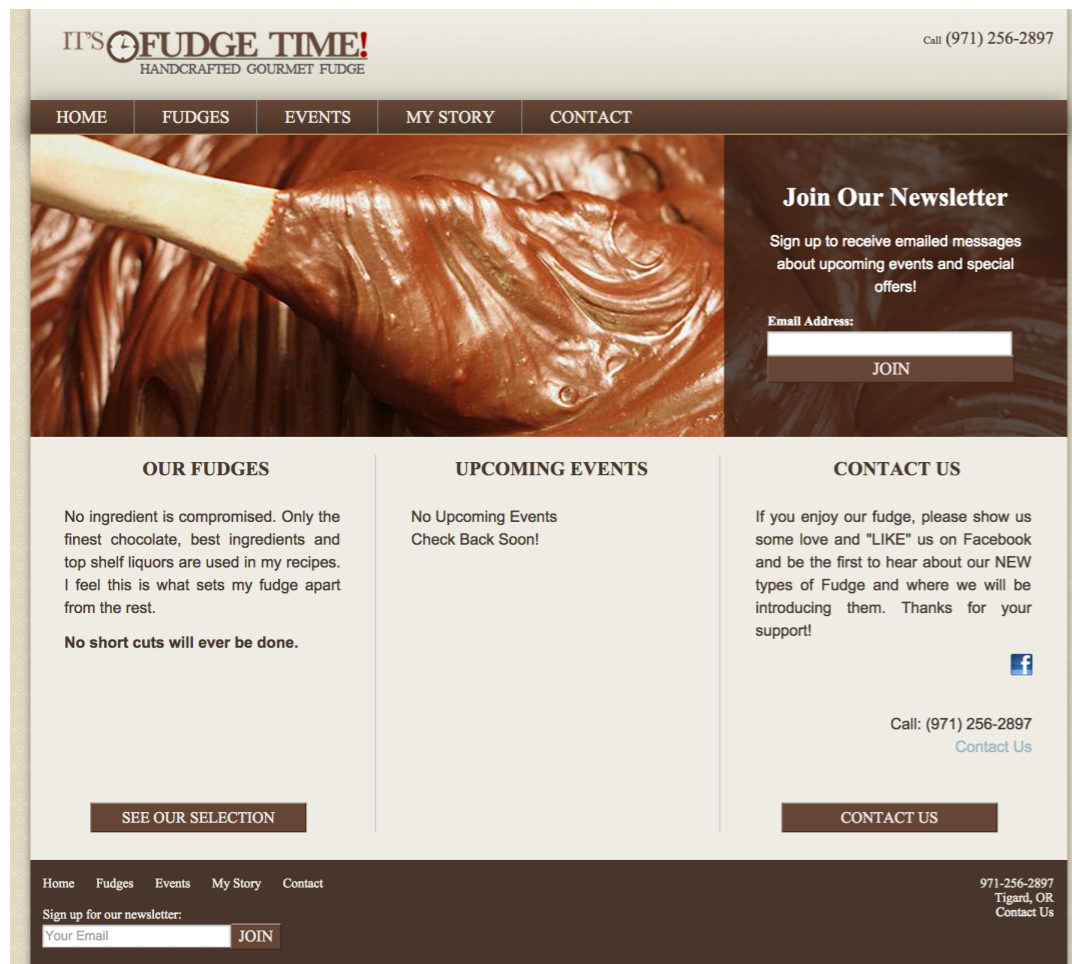
METAL TOAD

Oh Fudge.....

A Case Study of What Not To Do (That I Did)

Case Study (Don't Do What Donny Don't Does)

Oh Fudge!



Case Study (Don't Do What Donny Don't Does)

Lessons learned from fudge

- Minimize the number of touch points for the content authors
- Make custom views for focused content administration
- Use roles and permissions even if there's only one user
- Train gradually and by topic
- As you plan and build, always think to yourself: “how will it sound when I explain this to the user?”

The Growing Role of Content Management

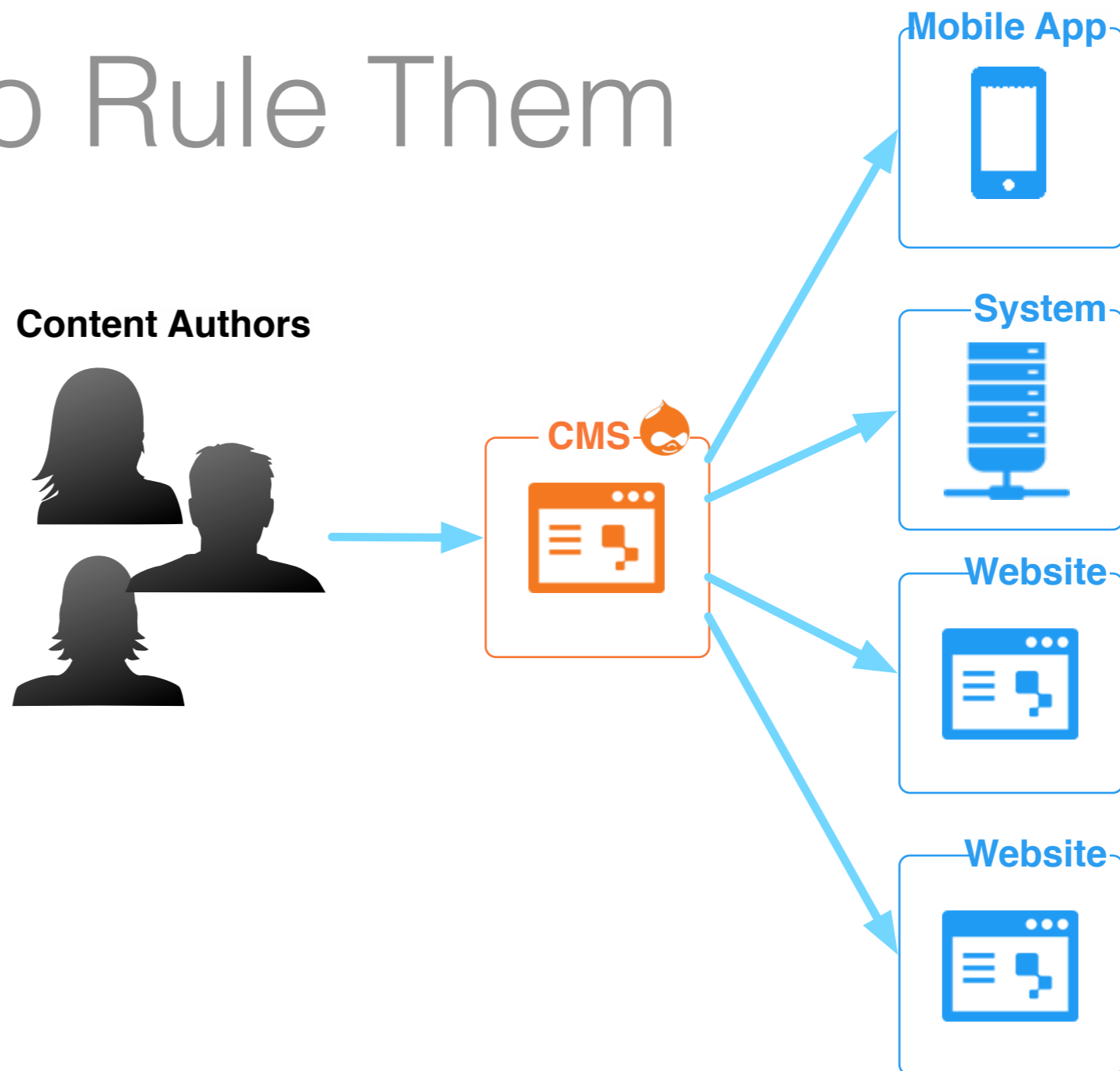
CMS

The Need for Data & Content Management



CMS

In a Decoupled World:
One CMS to Rule Them
All...





Where Does Drupal Fit?

The Promises of Drupal 8

- Decoupled, headless, RESTful and all sorts of other buzz words that are hot right now
- More than just “web sites”



**Focusing on the People
That Use Our Solutions**

Let's Talk About People

People

Why We Use Drupal

DrupalTM Empowers

People



Let's Talk About People

... Like It's Their Jobs



Let's Talk About People

People Have Preferences

The screenshot shows a CRM software interface. On the left is a sidebar with navigation options: Administration, Dashboard, Content, Structure, Appearance, People, Modules, Configuration, Reports, and Help. The main window displays a sales pipeline table for 'Tom Martin'. The table includes columns for Company, Deal Name, Status, Stage, Probability, Expected close, Next Task, Next task Due, Amount, Q3'15 Revenue, Q4'15 Revenue, Q1'16 Revenue, and Owner. The table shows 18 matches out of a total of 18. The filtered total is \$1,100,000 and the sales pipeline is \$1,100,000.

Company	Deal Name	Status	Stage	Probability	Expected close	Next Task	Next task Due	Amount	Q3'15 Revenue	Q4'15 Revenue	Q1'16 Revenue	Owner
		Green	Negotiation	70%	08/28/2015	Follow up on final decision	08/21/2015	\$	\$	\$		Tom Martin
		Yellow	Request for Info	10%	08/31/2015			\$	\$	\$		Tom Martin
		Yellow	Request for Info	5%	09/30/2015			\$		\$	\$	Tom Martin
		Green	Negotiation	74%	09/30/2015	Follow up on weekly call	08/18/2015	\$		\$		Tom Martin
		Yellow	Prequalified	1%	09/30/2015	Check in after Labor Day	09/07/2015	\$	\$			Tom Martin
		Yellow	Prequalified	1%	10/01/2015	Check in	09/01/2015	\$	\$			Tom Martin
		Green	Qualified	10%	10/05/2015	Follow up on weekly call	08/25/2015	\$		\$		Tom Martin
		Yellow	Qualified	10%	10/15/2015	get RFP	08/26/2015	\$		\$		Tom Martin
		Green	Prequalified	1%	10/31/2015	Follow up on weekly call	08/25/2015	\$		\$		Tom Martin
		Yellow	Prequalified	1%	11/01/2015	Follow up on weekly call	08/25/2015	\$				Tom Martin

Let's Talk About People

People Favor Simplicity

But doing “simple” well is exceptionally difficult!



**People Fear Change
...Especially New
Software**



Let's Talk About People

People will stay with what they know
Even if that's the wrong solution



Let's Talk About People

People are surrounded by amazing consumer-facing user experiences



Let's Talk About People

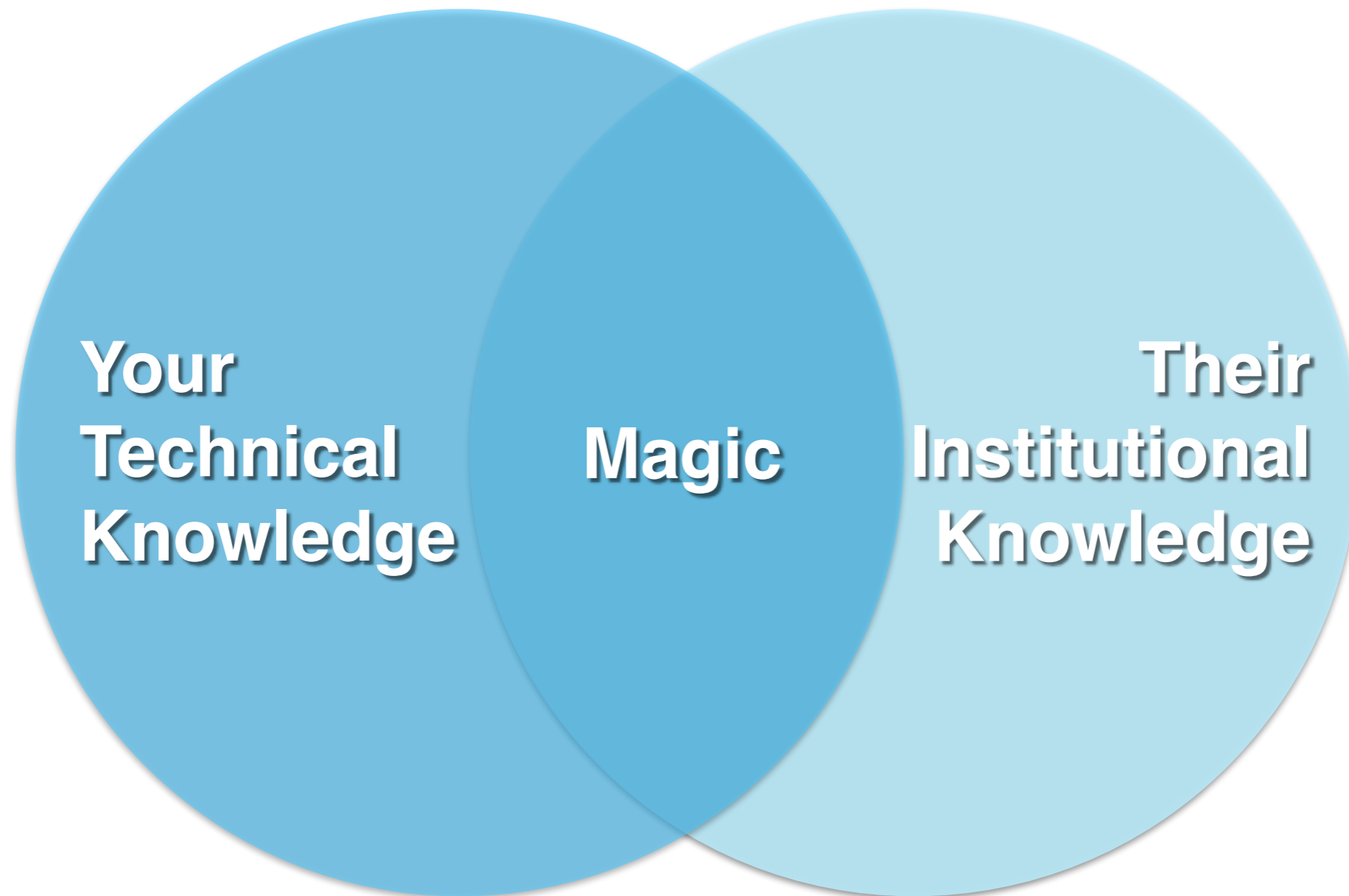
People Voice Their Opinions

Long term project success or failure can hinge on whether or not the people who use it

“like it”

Thinking Like a Content Administrator

Thinking Like a Content Administrator



Thinking Like a Content Administrator

Do Some Reconnaissance

- Conduct a Discovery Project
- Listen more than you talk
- GET a demo (as opposed to giving)
- Actually go through the steps - load some content manually

Feel Their Pain

Thinking Like a Content Administrator

Method Acting:

In the dramatic arts, **method acting** is a group of techniques actors use to create in themselves the thoughts and feelings of their characters, so as to develop lifelike performances.

In English:

Think and act as though you are
someone else

Thinking Like a Content Administrator

Forget what you know

“Ray, for a moment, pretend that I don't know anything about metallurgy, engineering, or physics, and just tell me what the hell is going on.”

- Dr. Peter Venkman



Thinking Like a Content Administrator

Objectively Improve UX Flow

- Always ask: What do I not need to see here to do the task at hand? **SIMPLIFY!**
- If something feels painful or takes too long: How can I make this more efficient?

How Much and How Frequent

Content Management Profiles

Content Management Profiles

Not a One Size Fits All

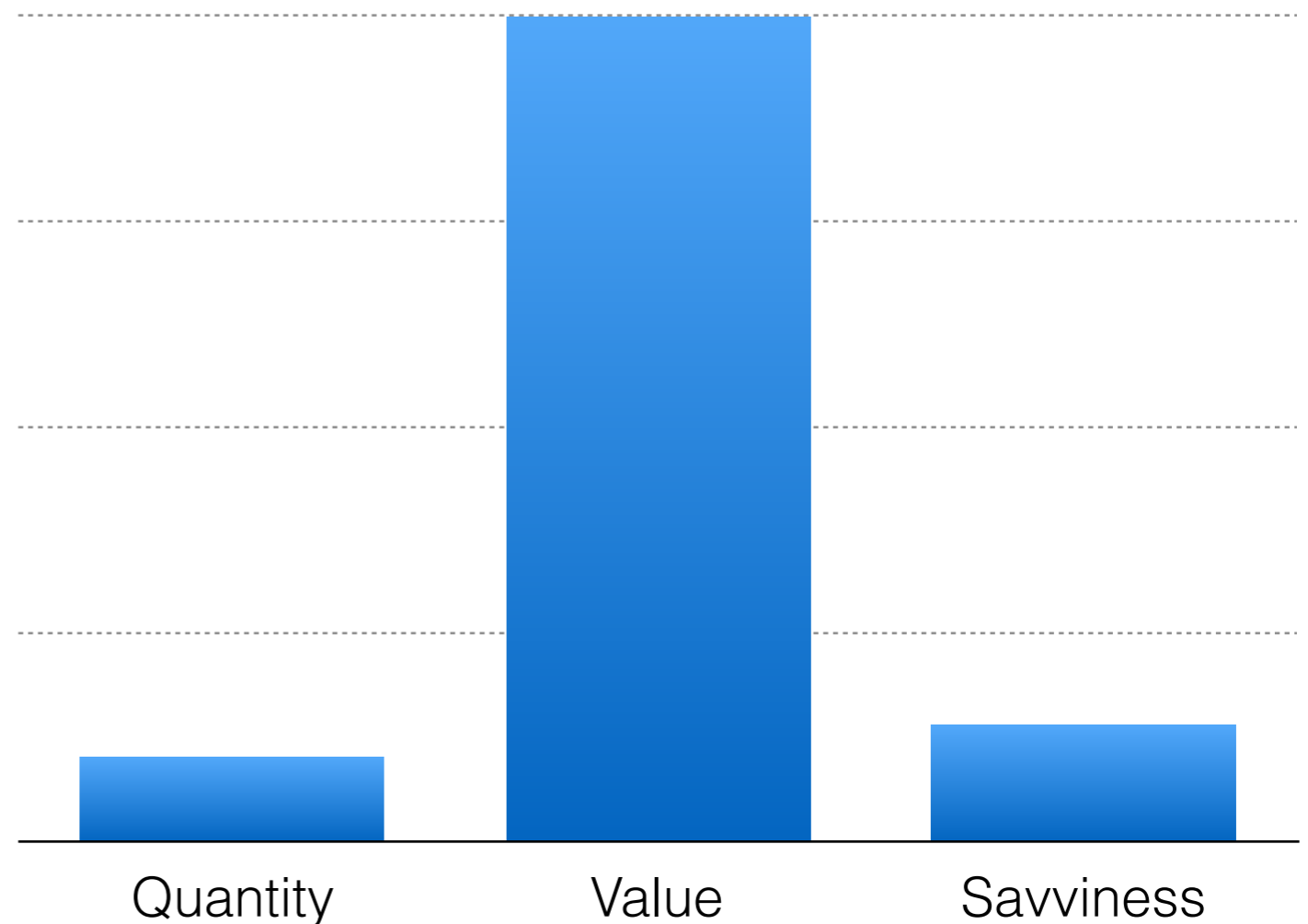
Key Questions:

- How often is content added?
- How much value is placed on each individual piece of content?
- How quickly do they expect to be able to create a piece of content?
 - High fidelity content vs. bulk data?
- How tech savvy are the content editors?

Content Management Profiles

Scenario 1 **The “Brochureware”**

- 12 pages
- 3 content types
- Most new content consists of blog posts
- They add a new post once a week
- Content admins are not tech savvy



Content Management Profiles

Scenario 1 **The “Brochureware”**

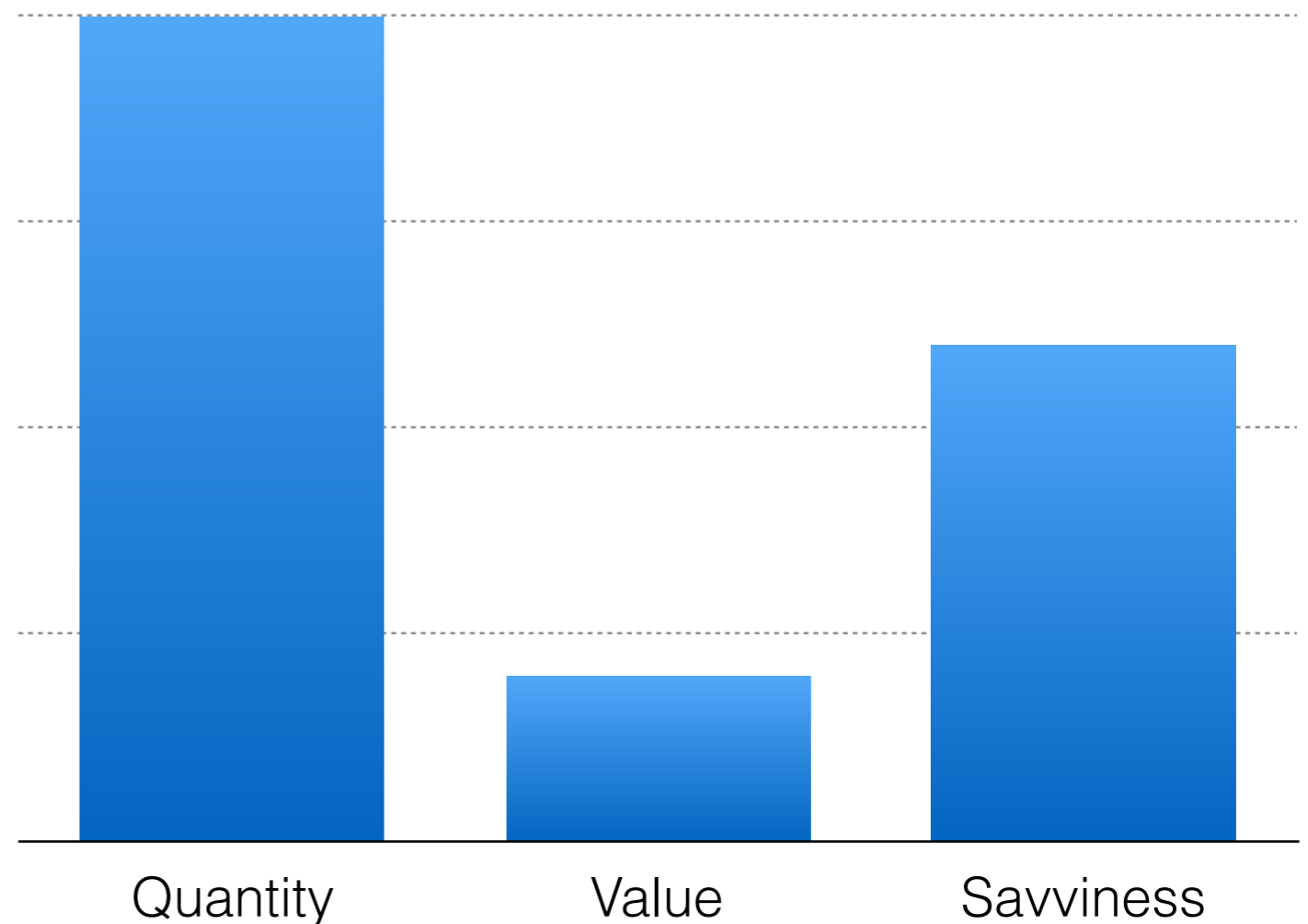
Explore:

- Spark
- Panopoly (D7)
- WYSIWYG
- Custom Admin Content Pages
- Keeping It Simple!

Content Management Profiles

Scenario 2 **The “Information” Site**

- Thousands pages
- Dozens of content types
- A team of full-time content entry staff
- Content added constantly

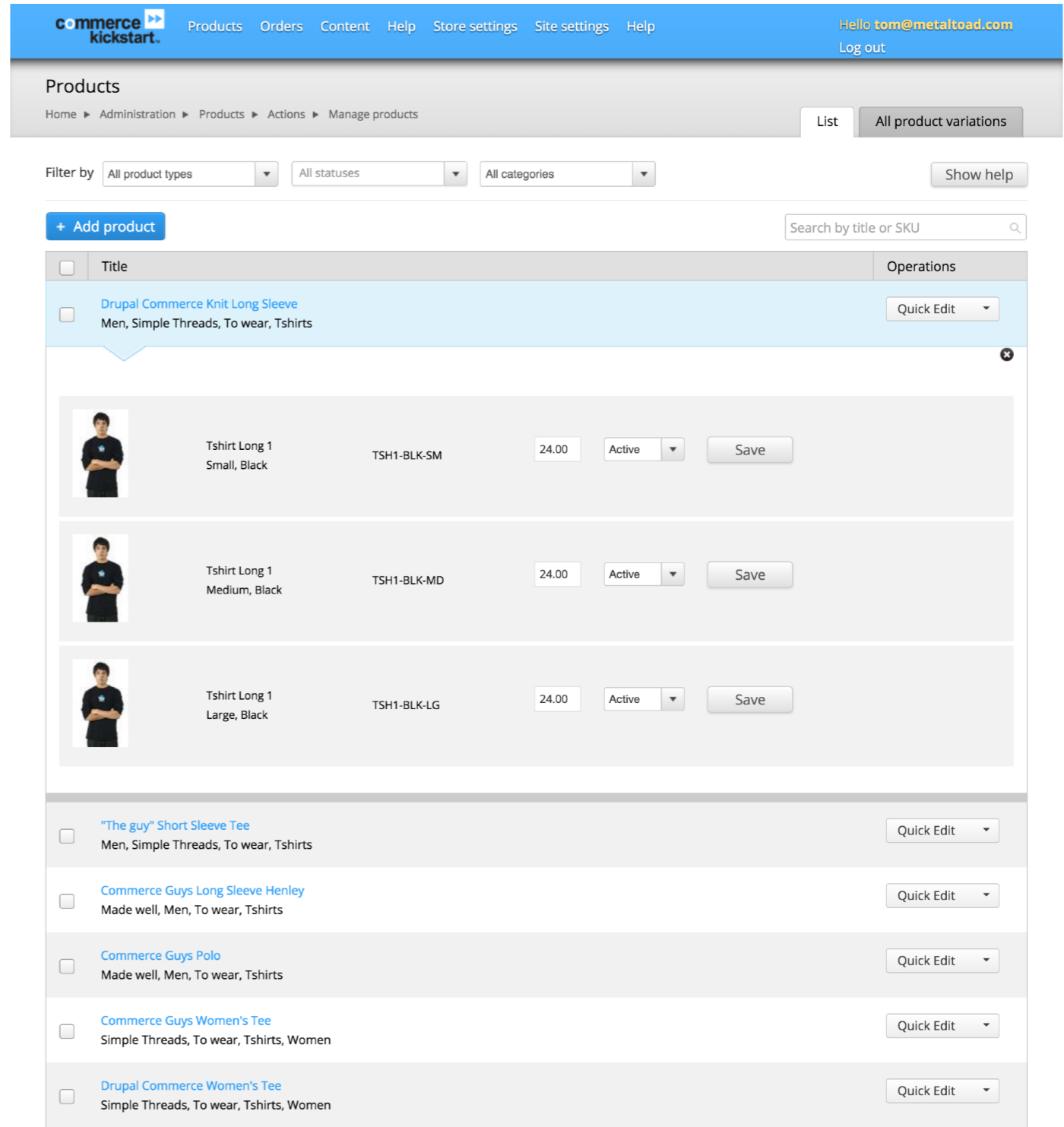


Content Management Profiles

Scenario 2 The “Information” Site

Explore:

- In-Line Edit Options (Views Bulk Operations (VBO), Editable Views, etc.)
- Bulk Import Options (Feeds)
- Check out Commerce Kickstart



The screenshot displays the Commerce Kickstart administration interface. At the top, there is a blue navigation bar with the 'commerce kickstart' logo and links for Products, Orders, Content, Help, Store settings, Site settings, and Help. The user is logged in as 'tom@metaltoad.com'. Below the navigation bar, the 'Products' section is active, showing a breadcrumb trail: Home > Administration > Products > Actions > Manage products. There are buttons for 'List' and 'All product variations'. A filter section allows filtering by 'All product types', 'All statuses', and 'All categories', with a 'Show help' button. A search bar is labeled 'Search by title or SKU'. The main content area shows a table of products with columns for 'Title' and 'Operations'. The first product is 'Drupal Commerce Knit Long Sleeve' with a 'Quick Edit' button. Below it, three variations of 'Tshirt Long 1' are listed: 'Small, Black' (SKU: TSH1-BLK-SM), 'Medium, Black' (SKU: TSH1-BLK-MD), and 'Large, Black' (SKU: TSH1-BLK-LG). Each variation has a price of 24.00, an 'Active' status, and a 'Save' button. Other products listed include 'The guy Short Sleeve Tee', 'Commerce Guys Long Sleeve Henley', 'Commerce Guys Polo', 'Commerce Guys Women's Tee', and 'Drupal Commerce Women's Tee', each with a 'Quick Edit' button.

Content Management Profiles

Some Other Profiles:

- The “Ecommerce Site”
- The “Community Site”
- The “Maintained by Developers Site”
- The “Our Content Lives Elsewhere Site”

Let's Get Practical....

Tailoring the Admin

To the People Who Use It

Tailoring the Admin

Drupal is Like Sculpting Clay



Practical Application

Plan for the admin early

- Have a plan for administration before you start building the front-end
- Make some big decisions like Panels vs. Blocks
- Factor admin into the broader architecture decisions

Practical Application

Keep the admin simple.
Don't let easy access to complexity cloud
your judgement



Practical Application

The Most Common Mistake: Not Utilizing Roles!

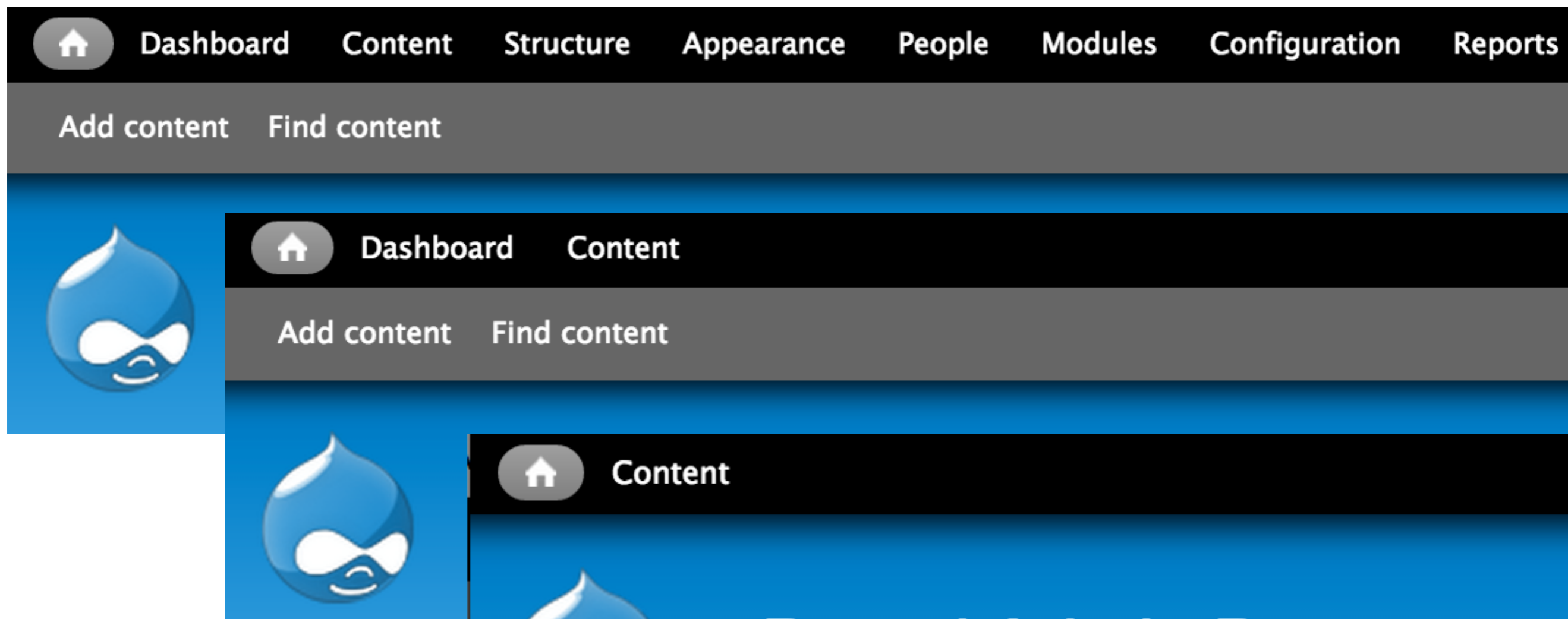
- Not everyone is an admin!
- Create specific Content Writer roles with limited permissions

NAME
✚ anonymous user (<i>locked</i>)
✚ authenticated user (<i>locked</i>)
✚ Programmer
✚ Content Writer
✚ Content Editor
✚ Site Administrator

Practical Application

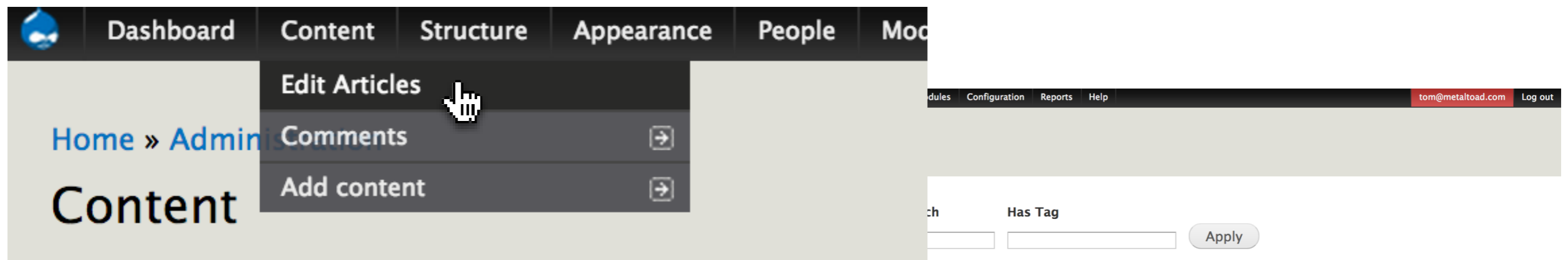
What They Don't See...

... Is Just As Important As
What They Do See



Practical Application






Custom Content View(s)



A screenshot of the Drupal administration interface. The top navigation bar includes 'Dashboard', 'Content', 'Structure', 'Appearance', 'People', and 'Modules'. The 'Content' menu is expanded, showing 'Edit Articles', 'Comments', and 'Add content'. A mouse cursor is hovering over 'Edit Articles'. The breadcrumb trail shows 'Home » Administration » Content'. The user's name 'tom@metaltoad.com' and a 'Log out' link are visible in the top right corner.

OPERATIONS

- Choose an operation -

<input type="checkbox"/>	THUMBNAIL	TITLE	PUBLISHED	UPDATED DATE	ACTIONS
<input type="checkbox"/>		Valde	Published	10-12-2014	View Edit Delete
<input type="checkbox"/>		Mos	Published	10-12-2014	View Edit Delete
<input type="checkbox"/>		Humo Lenis	Published	10-12-2014	View Edit Delete
<input type="checkbox"/>		Haero Olim	Published	10-12-2014	View Edit Delete
<input type="checkbox"/>		Sagaciter Vereor	Published	10-12-2014	View Edit Delete

Practical Application

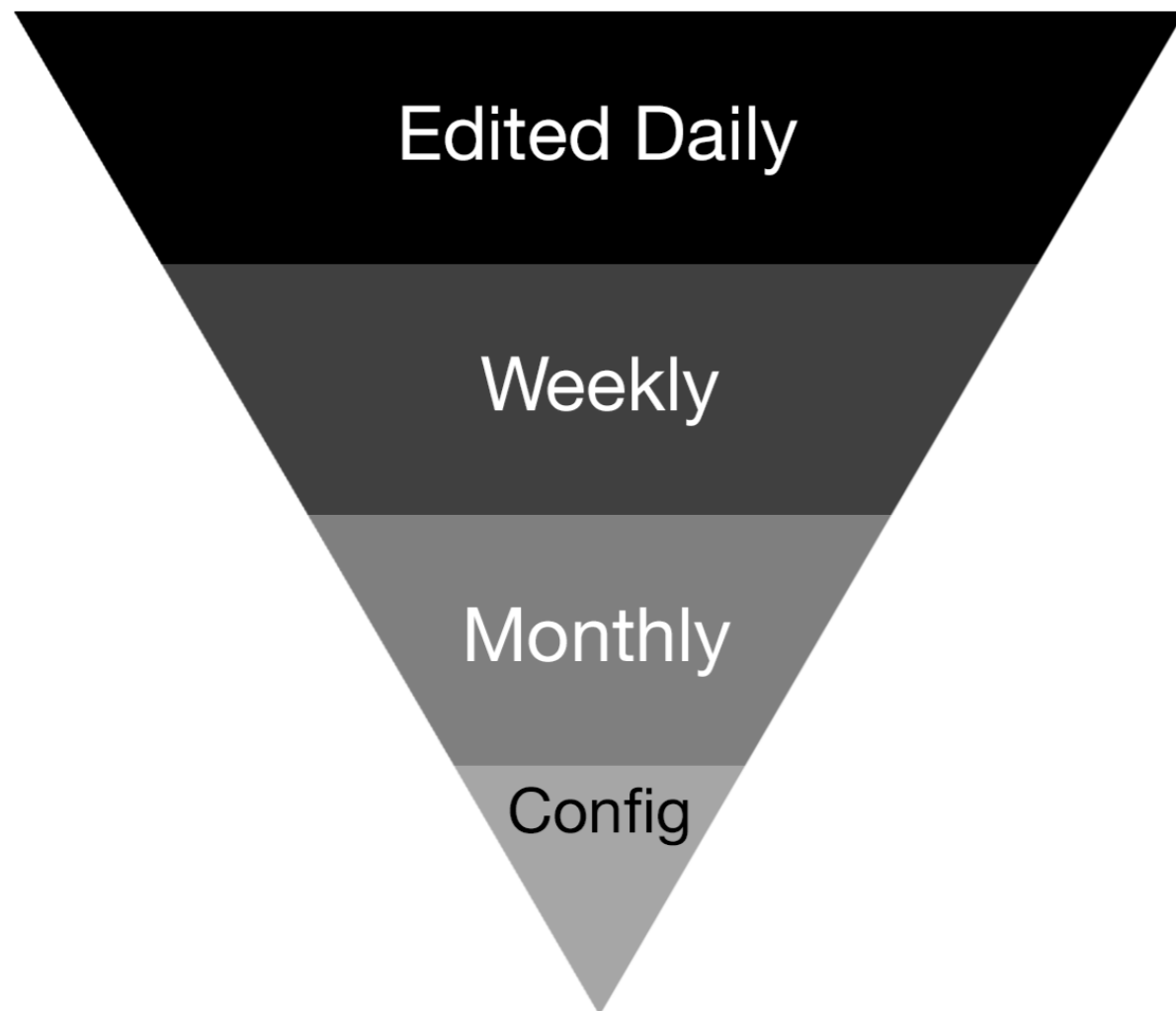
Hide Drupal-Speak

- Node, Entity, Taxonomy, Panel, Context, Views and even Modules: these are words for us
- Update the management menu links when appropriate
- Jammer & String Overrides

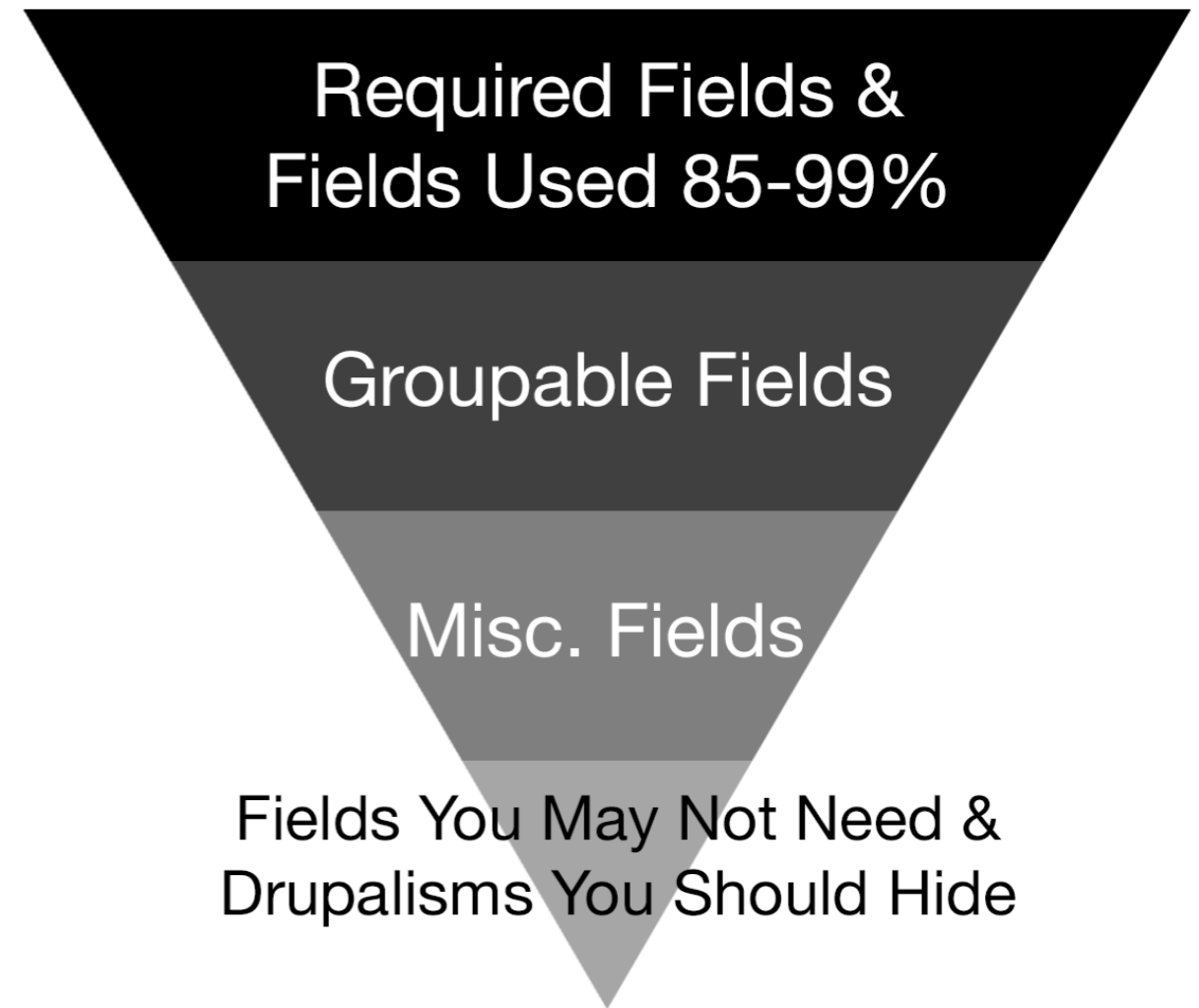
Practical Application

Prioritize Content & Fields

Types of Admin Content



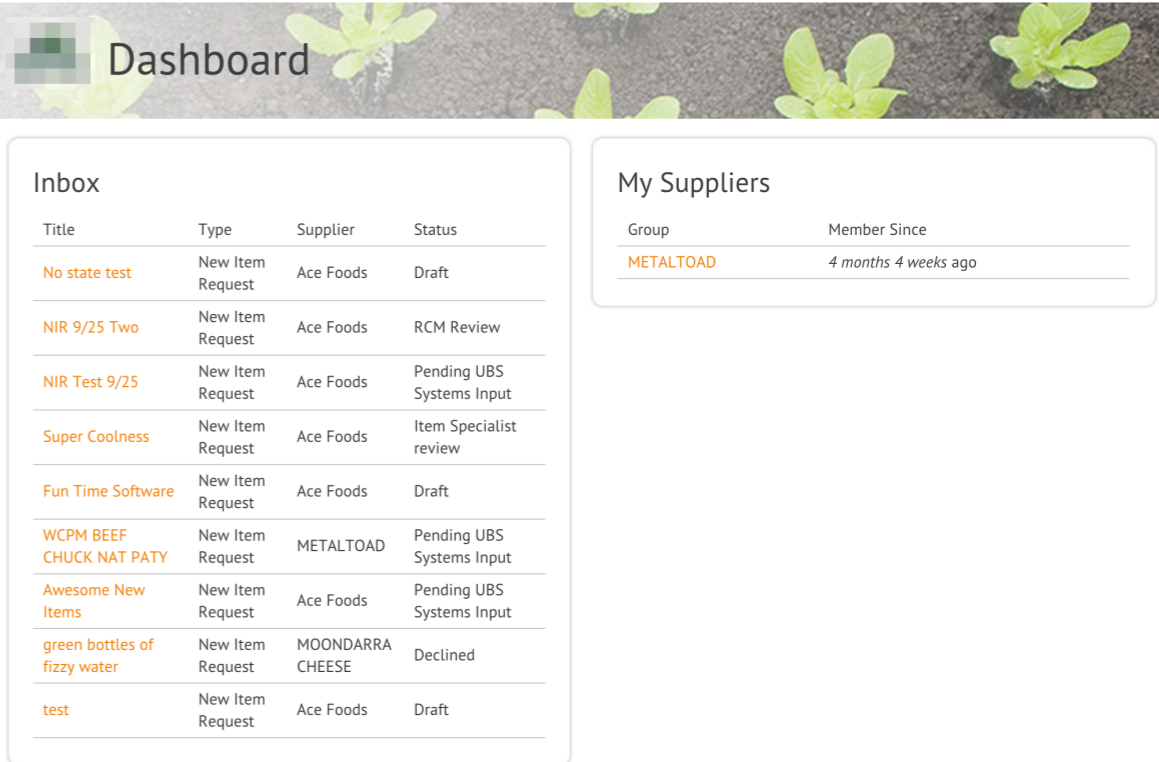
Field Priority in Forms



Practical Application

Dashboard (When Appropriate)

- Great for inboxes & todo lists!
- Can use views to create blocks that can be added to the dashboard
- The dashboard can be where some admins accomplish most of their work



The screenshot shows a dashboard with a header area containing a profile picture and the word 'Dashboard'. Below the header are two main sections: 'Inbox' and 'My Suppliers'.

Inbox

Title	Type	Supplier	Status
No state test	New Item Request	Ace Foods	Draft
NIR 9/25 Two	New Item Request	Ace Foods	RCM Review
NIR Test 9/25	New Item Request	Ace Foods	Pending UBS Systems Input
Super Coolness	New Item Request	Ace Foods	Item Specialist review
Fun Time Software	New Item Request	Ace Foods	Draft
WCPM BEEF CHUCK NAT PATY	New Item Request	METALTOAD	Pending UBS Systems Input
Awesome New Items	New Item Request	Ace Foods	Pending UBS Systems Input
green bottles of fizzy water	New Item Request	MOONDARRA CHEESE	Declined
test	New Item Request	Ace Foods	Draft

My Suppliers

Group	Member Since
METALTOAD	4 months 4 weeks ago

Practical Application

Add a Better Menu

The image shows a screenshot of a Drupal administration interface. At the top, there is a dark navigation bar with the following items: a home icon labeled 'Home', a hamburger menu icon labeled 'Menu', a bookmark icon labeled 'Shortcuts', and a user profile icon labeled 'tom@metaload.com'. Below this bar is a sidebar menu with the following items: 'Apps' (wrench icon), 'Content' (document icon with a dropdown arrow), 'Panopoly' (grid icon with a dropdown arrow), 'Structure' (hierarchy icon with a dropdown arrow), 'Appearance' (magnifying glass icon), 'People' (people icon), 'Modules' (hand icon), 'Configuration' (wrench icon with a dropdown arrow), and 'Reports' (document icon with a dropdown arrow). The main content area has a blue header with a logo and the text 'Panopoly Demo'. Below the header are two buttons: 'Homepage Demo' and 'Content Demo'. The breadcrumb trail shows 'Home » Homepage Demo'. The main heading is 'Homepage Demo'. At the bottom, there is a partial view of a content block with a green and white image.

Practical Application

Try Another Theme

Adminimal Theme

Content Help












Hello [writer@metaloat.com](#) Log out

Home » Add content

Create Article

Title *

Body

Normal **B** *I*           

body p

Text format Filtered HTML [More information about text formats](#)

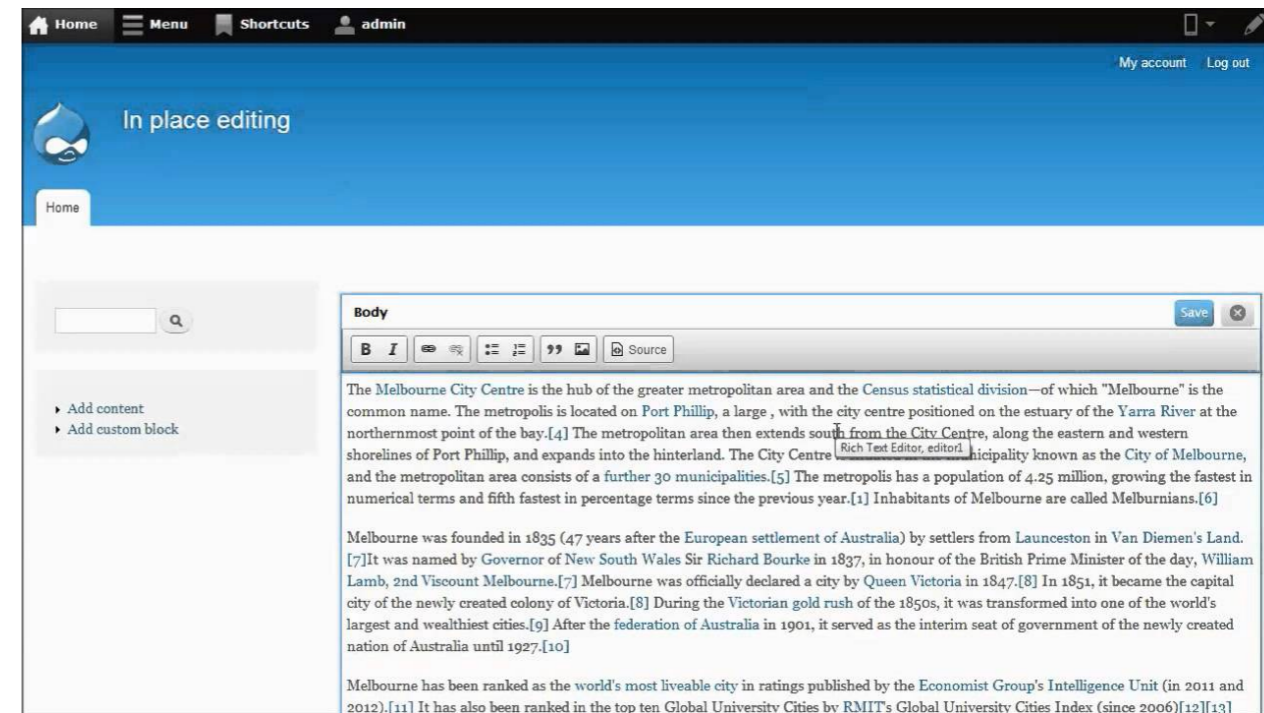
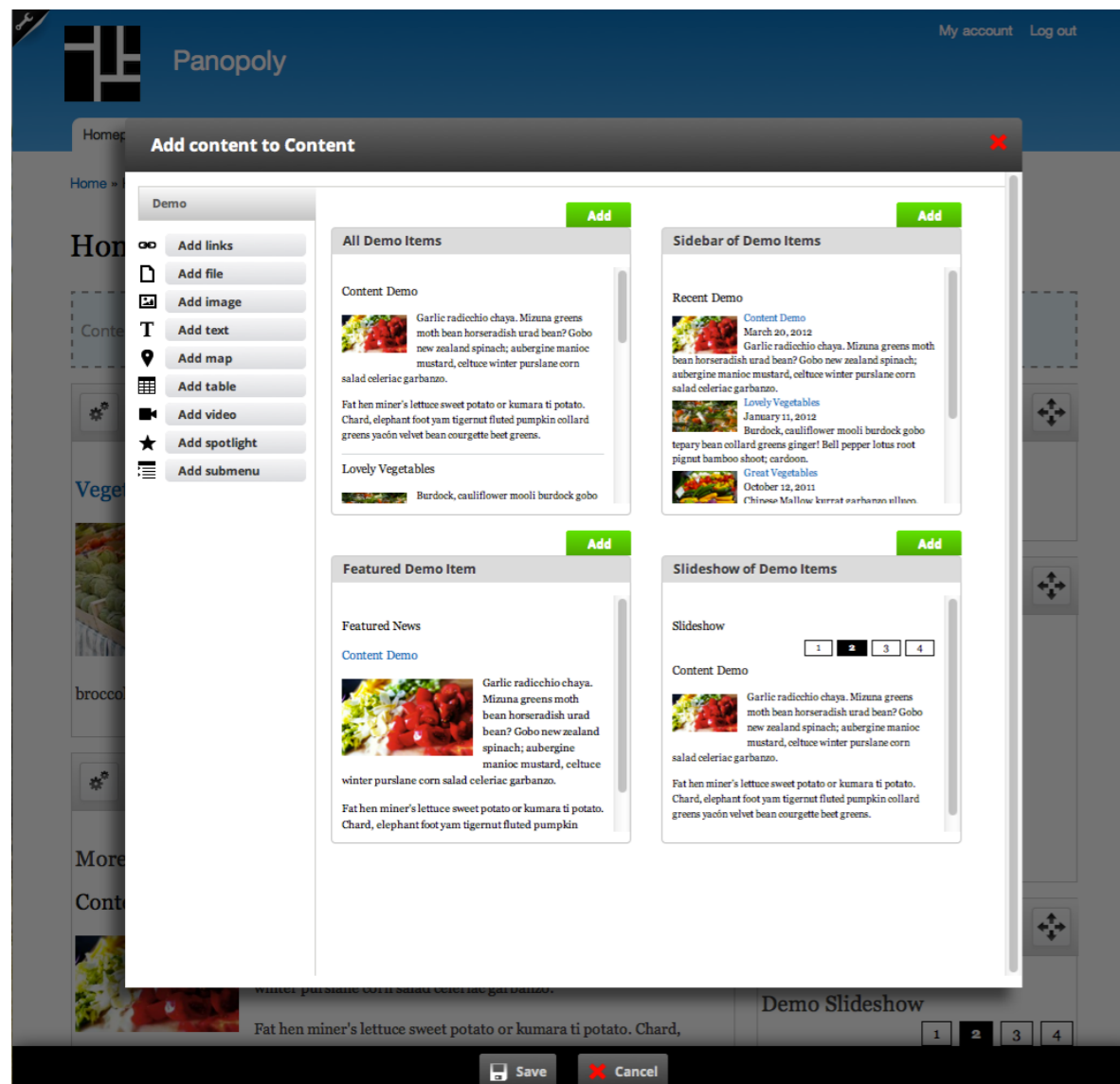
Image

No file chosen

Upload an image to go with this article.
Files must be less than **4 MB**.
Allowed file types: **png gif jpg jpeg**.

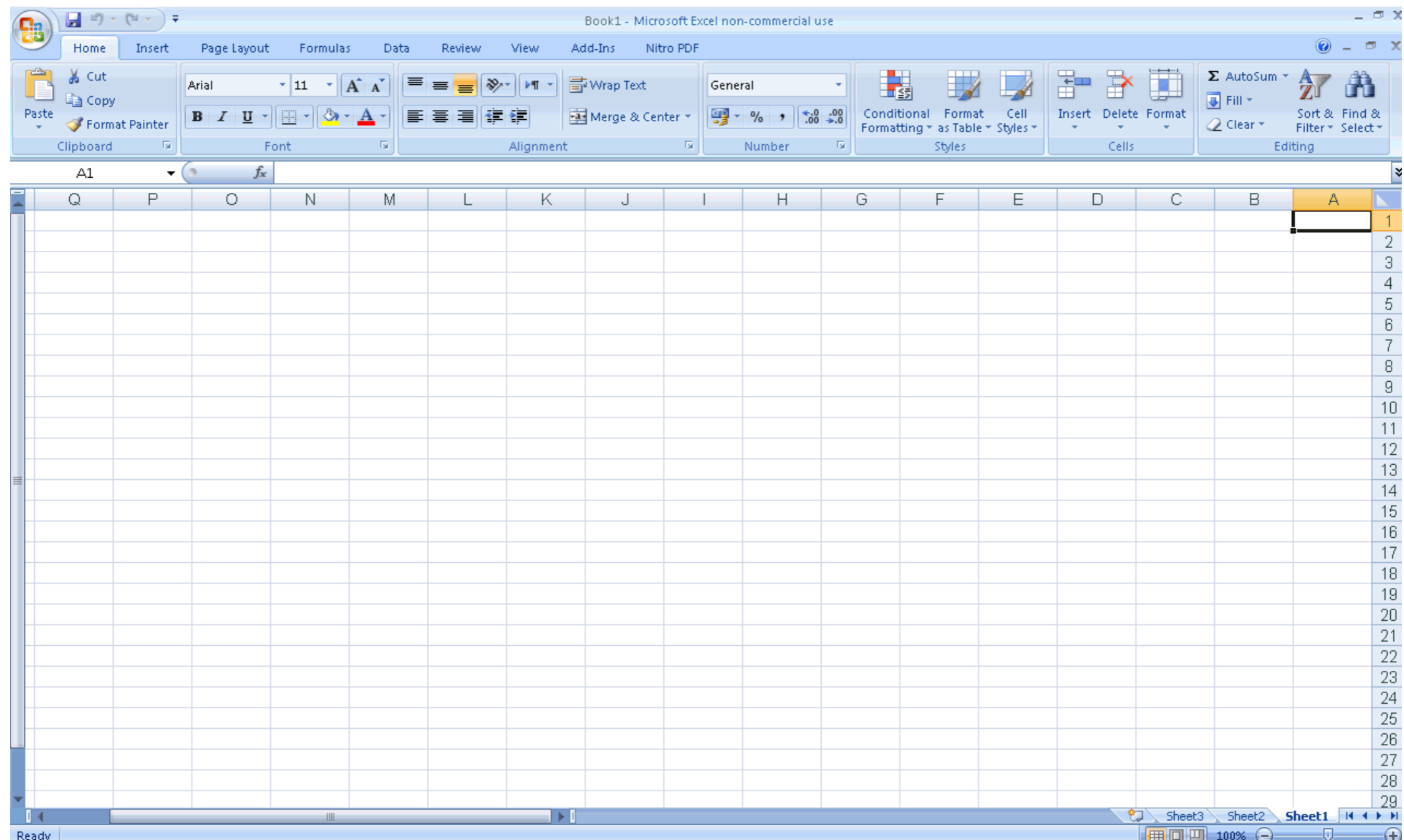
Practical Application

Take It To the Front-End With Panopoly or Spark



Practical Application

The Excel Challenge



Practical Application

Modules Worth Checking Out

- Field Group
- Field Collection
- Field Validation
- Media
- Rabbit Hole
- Revisioning
- Workflow
- Jammer
- LinkIt
- LoginToBoggan
- Draggable Views
- Entityqueue
- Inline Entity Form
- Shortcuts per Role
- Chosen
- Add Another
- Custom Contextual Links
- Responsive Theme Preview
- WYSIWYG + CKEditor Library
- Administration Views
- Navbar
- Adminimal Menu
- Link Checker
- Pathologic
- Content Menu
- Plupload
- Bootstrap Tour

Making This Work For Your Business

Getting Paid

Can Be Difficult to Justify

- The Admin is always one of the first things to suffer when either the budget or timeline are tight
- It is hard to quantify the productivity savings gained
- Some companies can't get past
 "It is functional... so it is done"
- They literally do not know what they are missing

Getting Paid



Tips

- Change your mindset when estimating to include time for the admin of each feature
- Actively account for this time in your SOWs
- Do not wait until the end of the project
- Make admin improvements sub-tasks that must be completed before completing a feature

Getting Paid



Tips (cont.)

- Show off progress in demos to the clients to increase their awareness
- Talk to the clients about the expected project lifecycle
- Get them thinking about the costs associated with training as they face employee turnover
- Don't just tell them... **show them!**

Getting Paid

Establish a Company Awareness

- Establish standards around admin experience that your team always strives for
- Always plan to implement a bare minimum of 2-4 hours to at least do some configuration changes
- Have a “Minimum Effort” then ask yourself, shouldn’t you always give your client more than that!?!?

Getting Paid

Make an Installation Profile

```
metaload.make *
1 |api = 2
2 core = 7.x
3
4 ; Admin tools
5 projects[admin_menu][type] = "module"
6 projects[diff][type] = "module"
7 projects[role_delegation][type] = "module"
8
9 ; User experience
10 projects[hierarchical_select][type] = "module"
11 projects[advanced_help][type] = "module"
12
13 ; Content
14 projects[views][type] = "module"
15 projects[ctools][type] = "module"
16 projects[transliteration][type] = "module"
17 projects[date][type] = "module"
18 projects[menu_block][type] = "module"
19
20 ; Security
```



Getting Paid

Iterate On the Process

- Continually re-evaluate and modify your companies opinions around admin UX
- Check in with stakeholders a few months after launch, ask for feedback on pain-points

So... To Sum It Up:

Closing Thoughts

Ask yourself:

Would I want to use this?

Closing Thoughts

Drupal provides all of the tools to create rich content management experiences.

It's up to **us** to use these tools.

It's up to **us** to properly empower the people...

Closing Thoughts

... and to empower the people,
we need to think like the people.



Q & A



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Join us for Sprints

Friday, May 13 at the Convention Center

First-Time Sprinter Workshop - 9am-12pm in Room 271-273

Mentored Core Sprint - 9am-6pm in Room 275-277

General Sprints - 9am-6pm in Room 278-282



So How Was It? - Tell Us What You Think

Evaluate this session - [Drupal Admin: It's Not About Us](#)

Thanks!