



# Building an Intuitive Admin

## UX for the Forgotten End-User

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Stephen Lucero





**DrupalCon**  
SEATTLE 2019  
APRIL 8-12



# Stephen Lucero

Lead Drupal Architect

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A true developer at heart, Stephen brings eight years of Drupal experience to his role as Lead Drupal Architect at Mediacurrent. 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.



# About Mediacurrent

# Who We Are

Mediacurrent is a full-service digital agency that implements world class open source software development, strategy, and design to achieve defined goals for enterprise organizations seeking a better return on investment.

# What is Admin UX?

# User Experience (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 our most frequently returning users?
- Who spends the most time on a site?



**Site Administrators**



**Content Editors**

# What is Admin UX?

- Apply UX practices to the administrator's interface
- 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 *better* ~~great~~  
Admin UX?

# The Excuses

(Spoiler: None of these are true)



## Less “valuable”

Learn key UX principles  
to make smart  
decisions



## Not enough time

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



## Too expensive

It costs too much  
to identify the  
issues.

# Some Solutions



## Learn UX basics

Since they're not publicly visible they're not worth the investment.



## 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

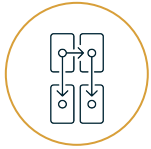
A dark blue-tinted photograph of four people standing in a row, each looking at a mobile device. From left to right: a woman with glasses and a light-colored jacket, a woman in a dark sweater and striped skirt, a woman in a striped shirt and dark pants, and a man in a dark shirt and pants. The background shows a window with a grid pattern.

# UX Crash Course

# Common Pitfalls



**Long** forms



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



**Unclear** labeling



Little or **no help text**



**Misleading** help text



Too much **information**



# Guiding Principles



Create a  
hierarchy



Stay  
consistent



Keep it  
simple



Leverage  
intuition



Be  
helpful

# Hierarchy

hi·er·ar·chy

/ˈhī(ə)rärkē/

*noun*

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

# Create a Hierarchy

- Group related elements logically
- Use clear labels to convey organization
- Use proximity to define relationships
- 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

[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

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

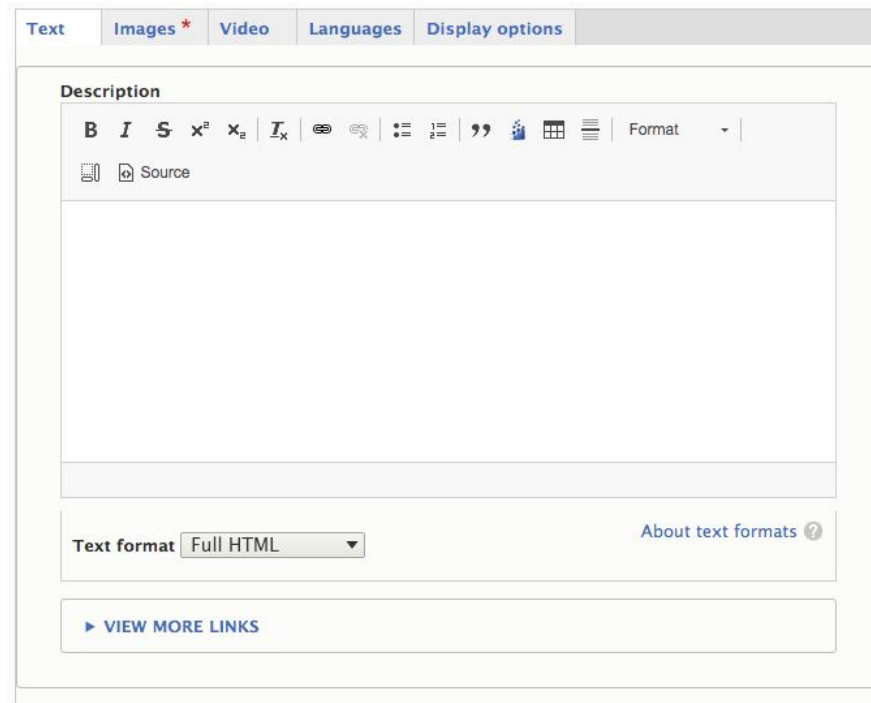
 

If you don't have direct file access to the server, use this field to upload your shortcut icon.

[Save configuration](#)

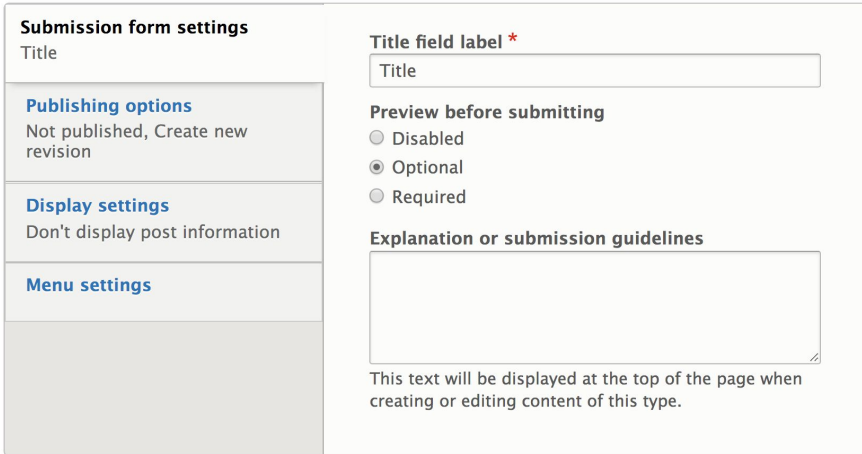
# Horizontal Tabs

- 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 user interface with vertical tabs on the left side of a form. The tabs are labeled: "Submission form settings", "Publishing options", "Display settings", and "Menu settings". The "Submission form settings" tab is currently selected and expanded, showing the following content:

- Title field label \***  
Title
- Preview before submitting**
  - Disabled
  - Optional
  - Required
- Explanation or submission guidelines**  

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

con·sist·ent

/kən'sistənt/

*adjective*

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

sim·ple  
/'sɪmpəl/  
*adjective*

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
- 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

in·tu·i·tive

/in't(y)oʊədiv/

*adjective*

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](#)





A dark blue silhouette of a person's head and shoulders, with their right hand extended forward, palm up, as if offering help or support. The background is a lighter blue gradient.

# Helpful

help·ful  
/'helpfəl/  
*adjective*

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](#)
- [Focal Point](#)
- [Paragraphs Previewer](#)
- [Pathologic](#)
- [Pathauto](#)
- [Redirect](#)



# Resources

# Where to Learn More

- Drupal user interface standards
  - <https://www.drupal.org/docs/develop/user-interface-standards>
- [Usability.gov](https://www.useit.com/)
- Admin UI and Javascript Modernisation Initiative
  - <https://www.drupal.org/about/strategic-initiatives/admin-ui-is>
- Distributions
  - [Lightning](#)
  - [Thunder](#)
  - [Rain](#) (mis\_rain)



# Contribution Opportunities

*Join Us!*

★ ★ ★ **Friday, April 12, 2019** ★ ★ ★

## Mentored Contribution

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9:00-18:00  
Room: 602

## First Time Contributor Workshop

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9:00-12:00  
Room: 606

## General Contributions

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9:00-18:00  
Room: 6A

#DrupalContributions



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A dark, blue-tinted background image of the Seattle skyline, featuring the Space Needle prominently on the left side.

# Thank you!

*What did you think?*

Locate this session at the DrupalCon Seattle website:

**<http://seattle2019.drupal.org/schedule>**

*Take the Survey!*

**<https://www.surveymonkey.com/r/DrupalConSeattle>**



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