mediacurrent
Building an Intuitive Admin
UX for the Forgotten End-User
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 responsiblities 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

Broken content

Lack of **confidence**

Frustrated or **dissatisfied** editors

Lots of **support questions**

Misunderstanding

How do we make a great Admin UX?

How do we make a ~~great~~ *better* 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

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)ˌrärkē/
noun

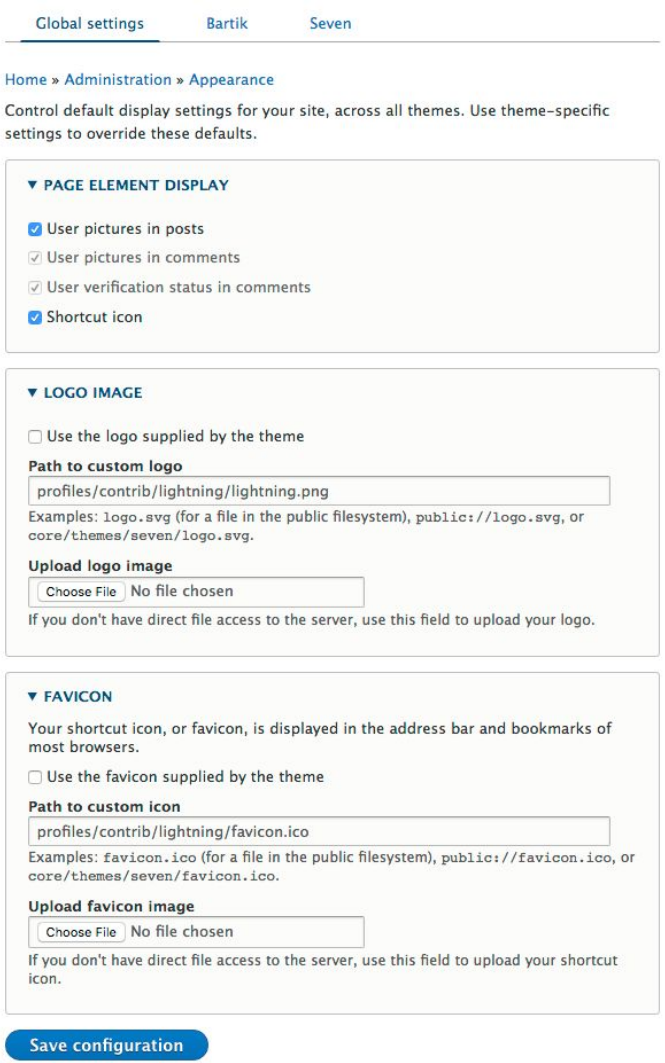
An arrangement or classification of things according to relative importance or inclusiveness.

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

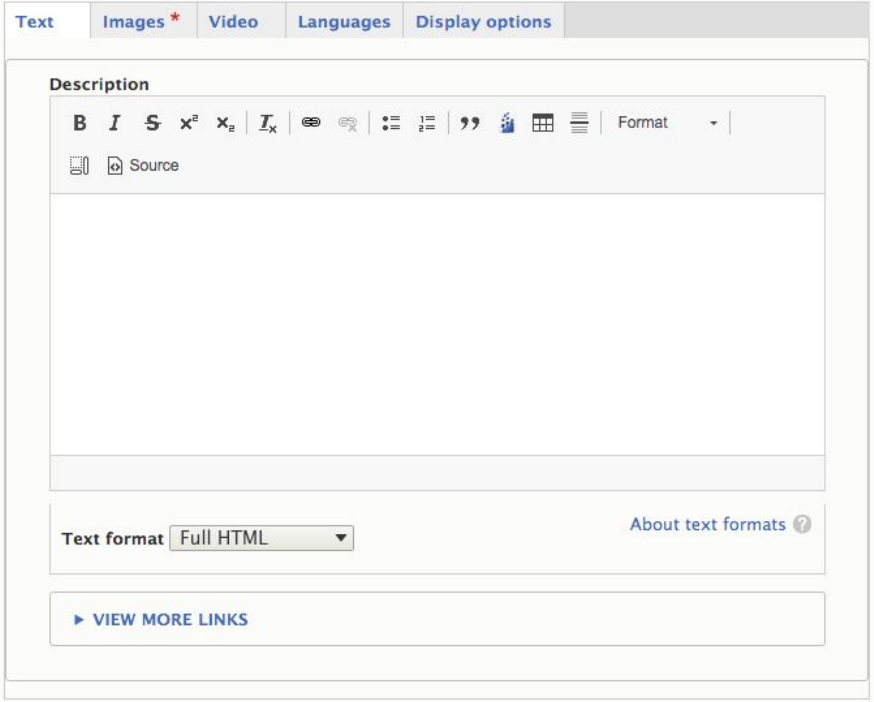
Fieldsets and Details

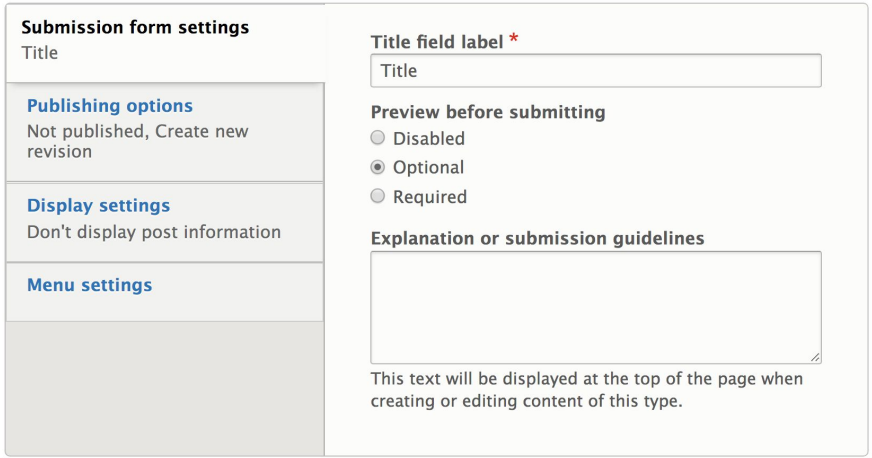
- Group related elements logically
- Fieldsets define clear semantic relationships
- Details visually separate groups of elements
- Labels help to define relationships
- Help text can also be added



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

Modules to Build a Hierarchy

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

Consistent

con·sist·ent
/kənˈsistənt/
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
/ˈsimpəl/
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
/inˈt(y)oōədiv/
adjective

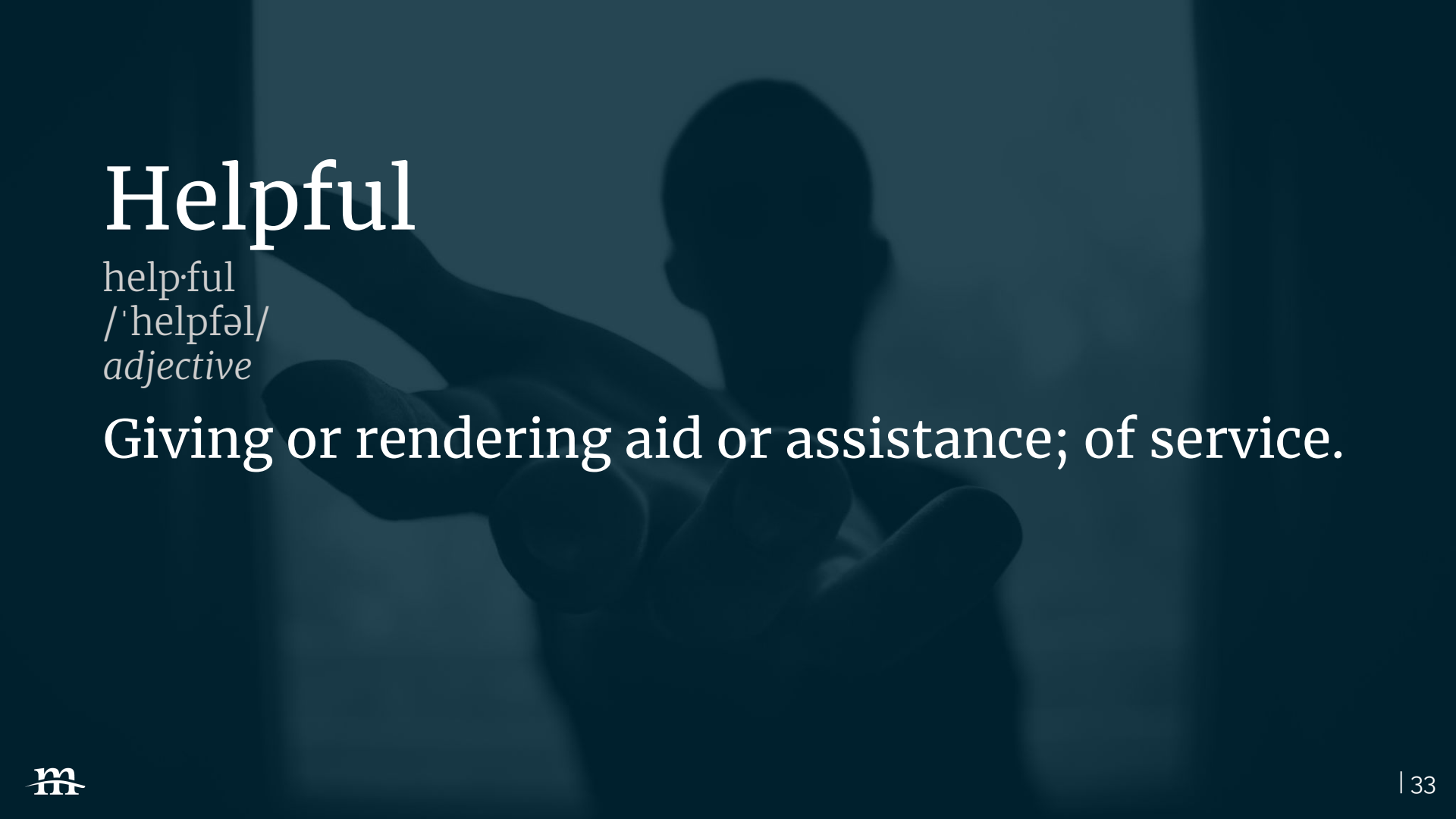
Using or based on what one feels to be true even without conscious reasoning; instinctive.

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



Helpful

help·ful
/ˈhelpfəl/
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
- Admin UI and Javascript Modernisation Initiative
  - https://www.drupal.org/about/strategic-initiatives/admin-ui-js
- Distributions
  - Lightning
  - Thunder
  - Rain (mis_rain)

Contribution Opportunities

Join Us!

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

Mentored Contribution	First Time Contributor Workshop	General Contributions
9:00-18:00 Room: 602	9:00-12:00 Room: 606	9:00-18:00 Room: 6A

#DrupalContributions

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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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