April 11, 2019

Empathy for Internal Users

Build and Train for Real Content Admins

Hosted by **Lily Berman and Nick Switzer**

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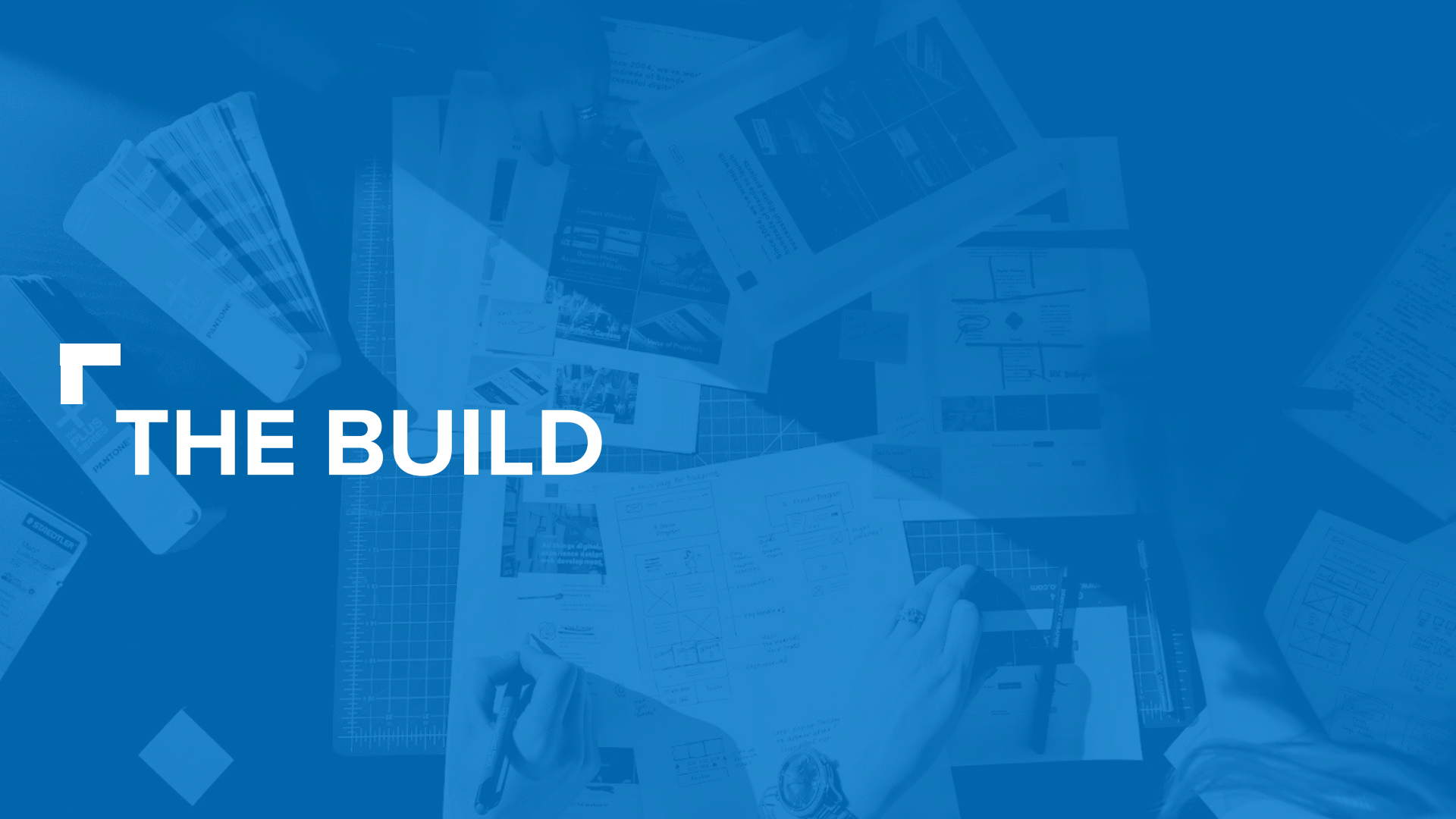
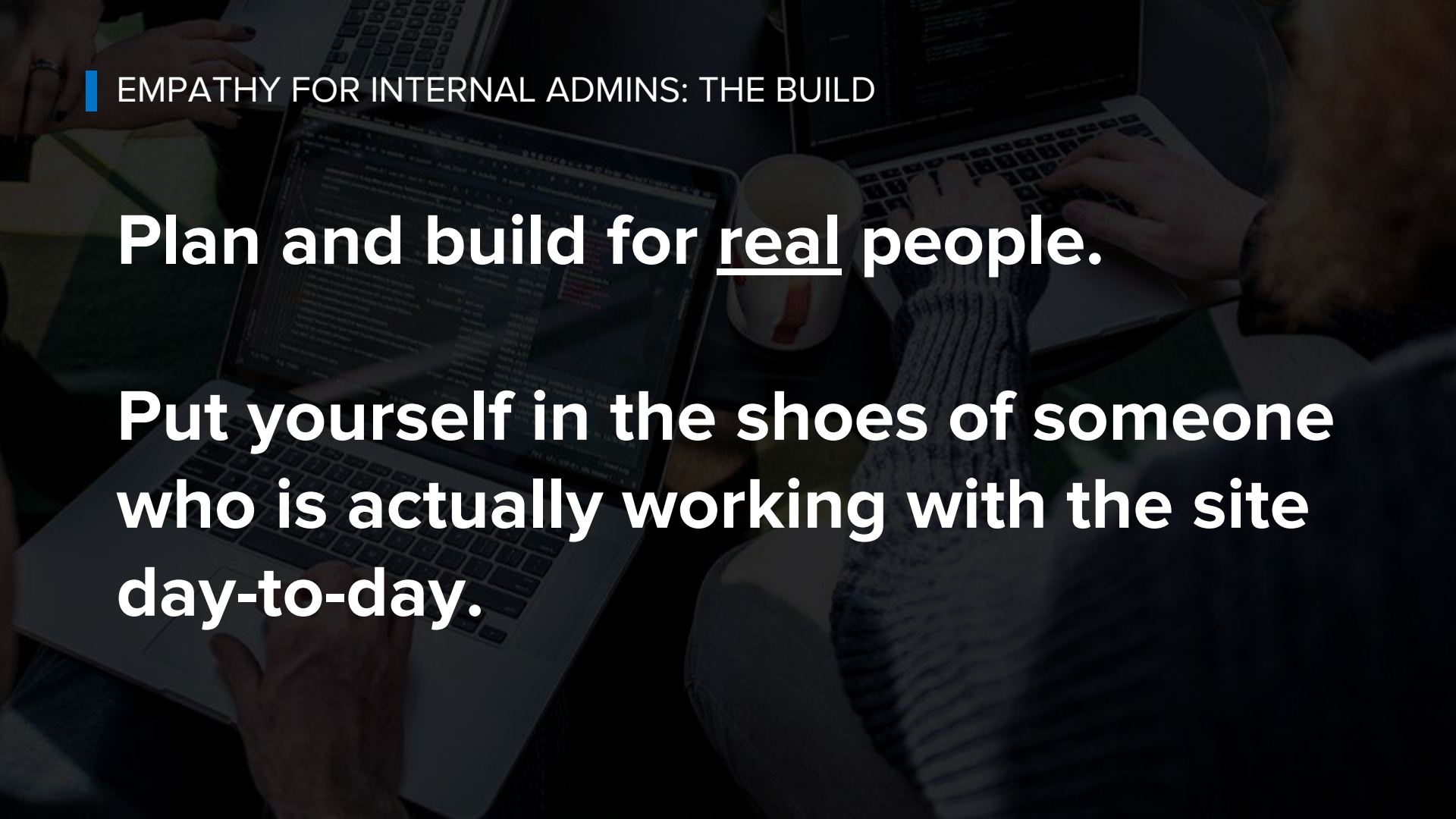
WHY ARE WE *HERE?*

WHY ARE WE HERE?

When you're building a complex digital platform, a well-architected admin experience and practical, empathetic training are both necessary to set site owners up for success.



THE BUILD



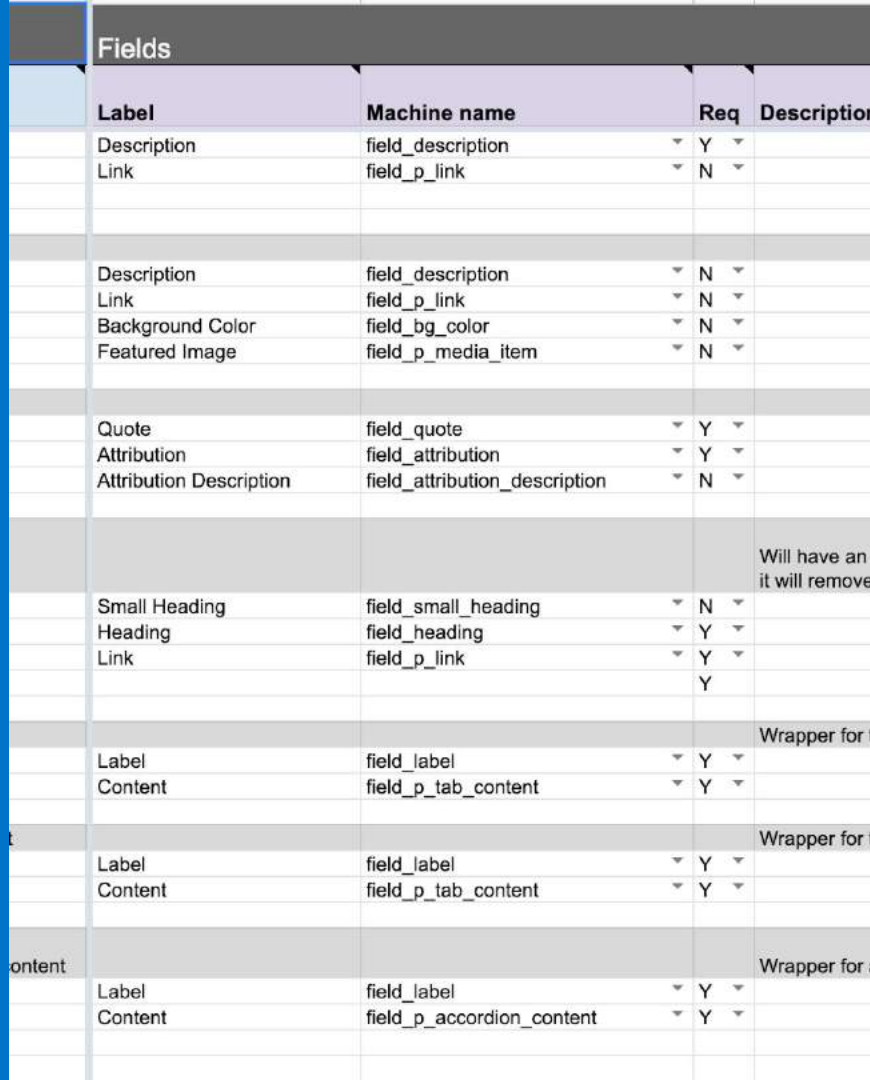
EMPATHY FOR INTERNAL ADMINS: THE BUILD

Plan and build for real people.

Put yourself in the shoes of someone who is actually working with the site day-to-day.

THE BUILD \\ PLAN

Don’t start in Drupal. Use a document that is easy to change to flesh out architecture early.



Fields

Label	Machine name	Req	Description
Description	field_description	Y	
Link	field_p_link	N	
Description	field_description	N	
Link	field_p_link	N	
Background Color	field_bg_color	N	
Featured Image	field_p_media_item	N	
Quote	field_quote	Y	
Attribution	field_attribution	Y	
Attribution Description	field_attribution_description	N	
			Will have an it will remove
Small Heading	field_small_heading	N	
Heading	field_heading	Y	
Link	field_p_link	Y	
		Y	
			Wrapper for
Label	field_label	Y	
Content	field_p_tab_content	Y	
			Wrapper for
Label	field_label	Y	
Content	field_p_tab_content	Y	
			Wrapper for
Label	field_label	Y	
Content	field_p_accordion_content	Y	

The Build \\ Three Focus Areas

1

Out of the box tools

2

The contrib ecosystem

3

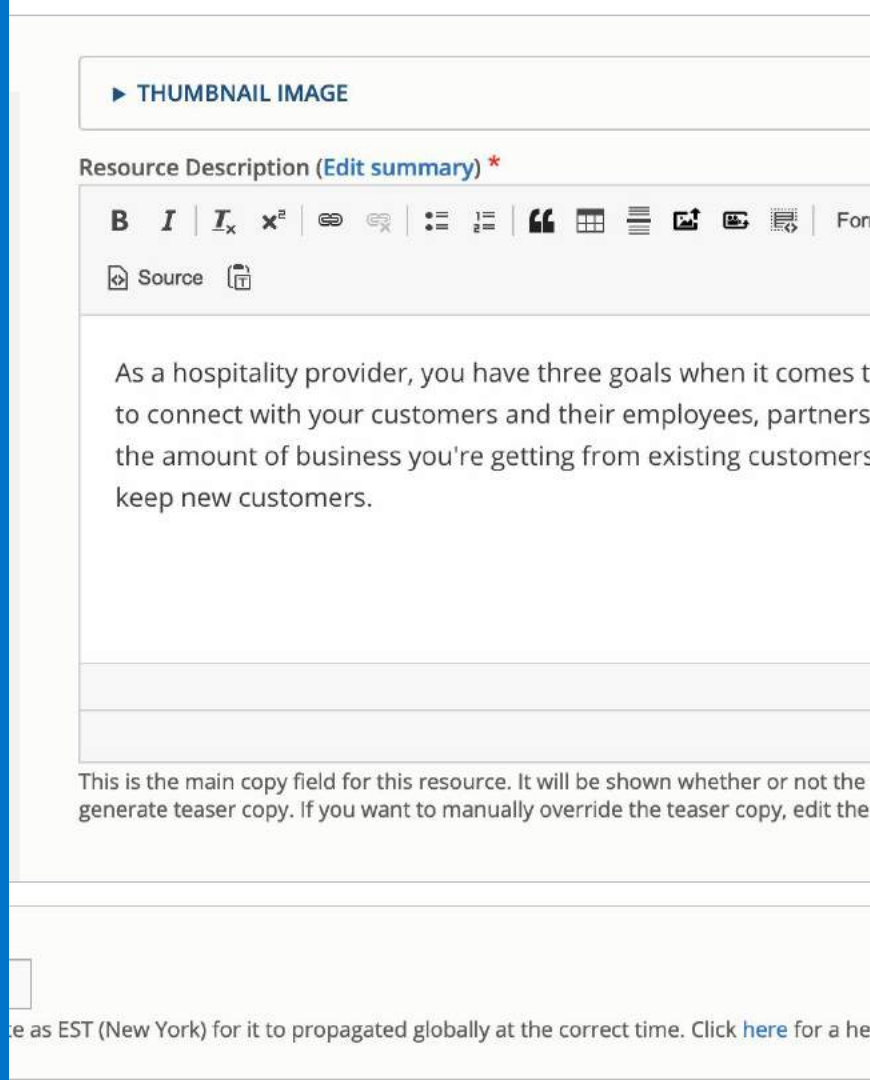
Custom and site-specific improvements

OUT OF THE BOX TOOLS

OUT OF THE BOX \\ FIELDS

Simple, clear, focused

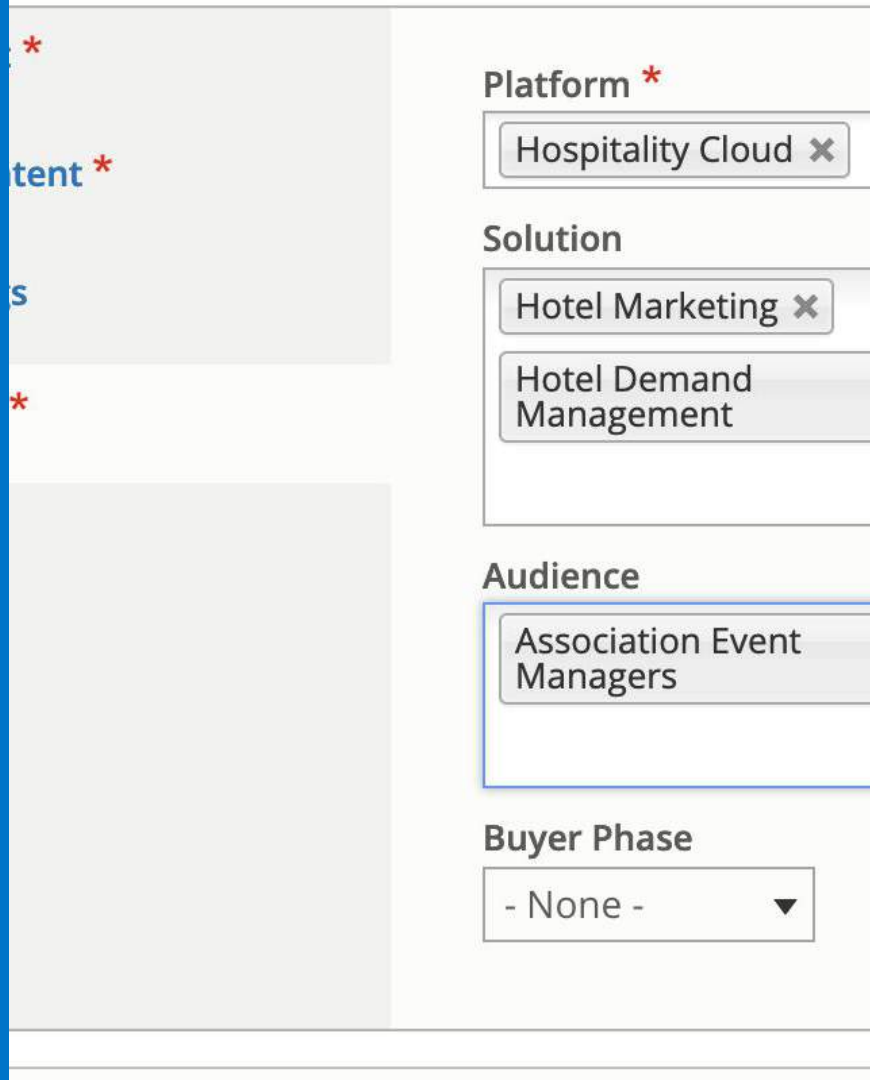
- Field names for real people.
- Help text that is actually helpful.
- Don’t be shy about requiring fields.
- Character limits and field sizes should make sense in the editor’s context.



OUT OF THE BOX \\ REFERENCES

Great power, great responsibility

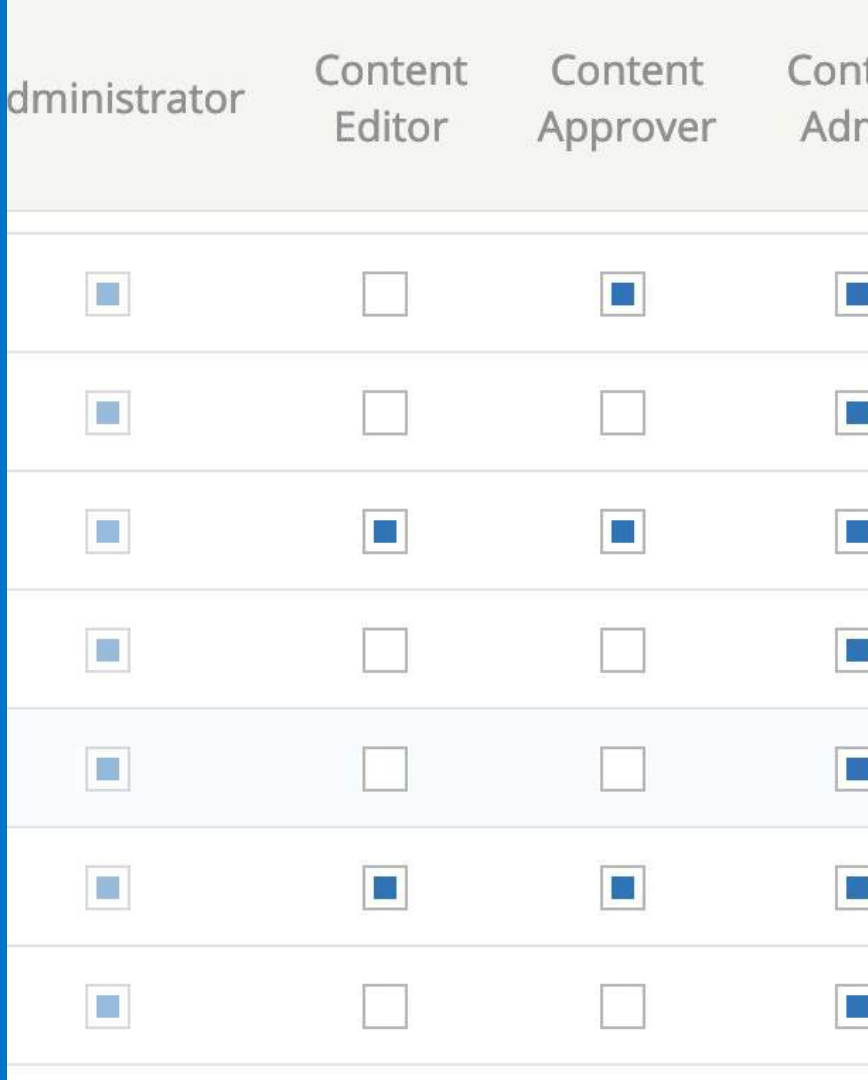
- Thoughtful limits.
- The right widget for the job.
- Views to provide focused lists of options.



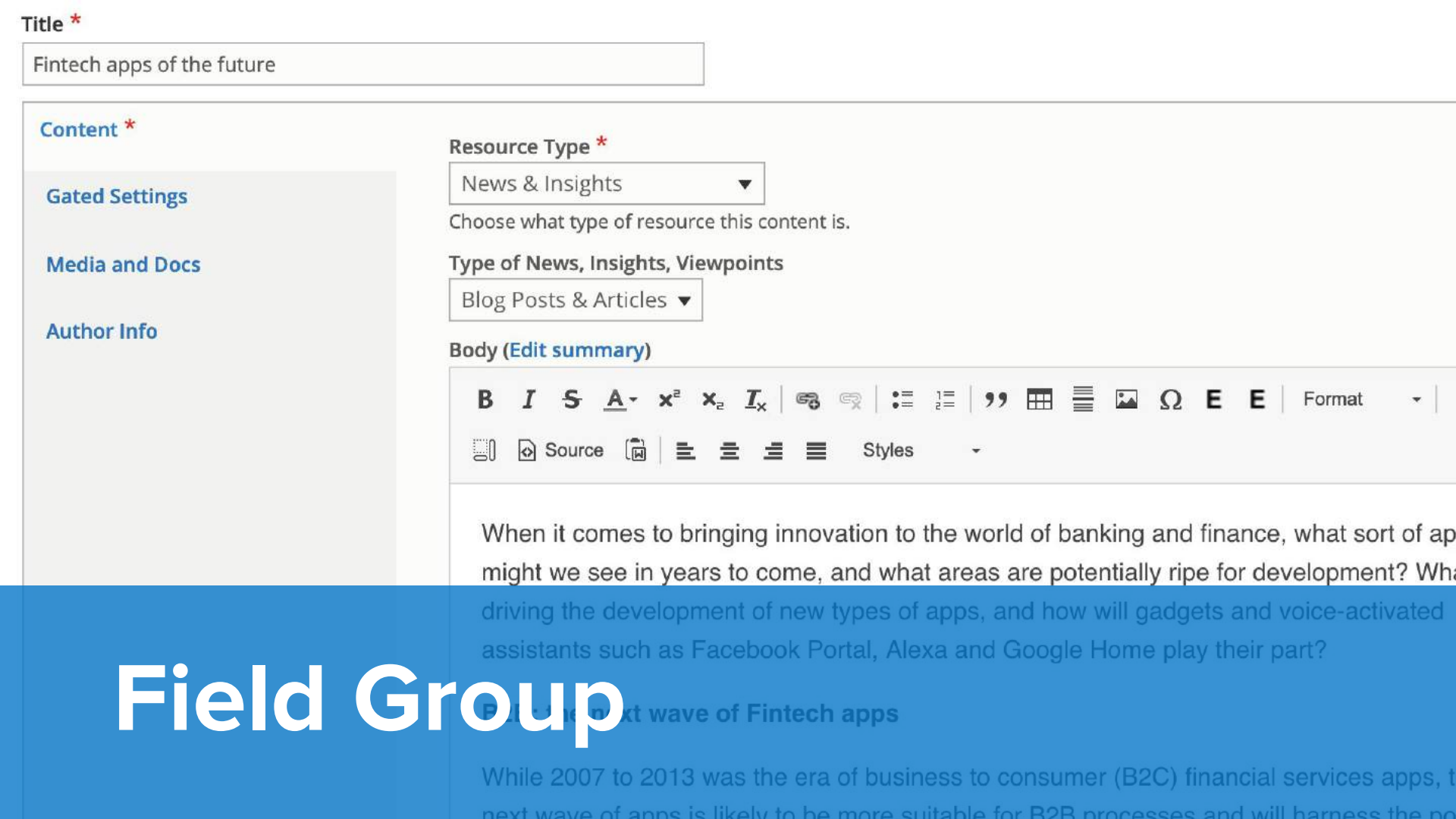
OUT OF THE BOX \\ PERMISSIONS

Focus & security

- Provide a focused editing experience.
- Principle of least privilege for UX and security.



THE CONTRIB ECOSYSTEM


Title *
Fintech apps of the future
Content *
Gated Settings
Media and Docs
Author Info
Resource Type *
News & Insights
Choose what type of resource this content is.
Type of News, Insights, Viewpoints
Blog Posts & Articles
Body (Edit summary)
Format
Source
Styles
When it comes to bringing innovation to the world of banking and finance, what sort of ap
might we see in years to come, and what areas are potentially ripe for development? Wha
driving the development of new types of apps, and how will gadgets and voice-activated
assistants such as Facebook Portal, Alexa and Google Home play their part?
While 2007 to 2013 was the era of business to consumer (B2C) financial services apps, t

Field Group

Add media

Publishing status | Provider | Media name | Language

- Any - | - Any - | | - Any -

Apply

Thumbnail	Media name	Provider
	EventBanner_Seattle	Image
	EventBanner_Seattle ABM	Image
	DrupalCon Banner 2019	Image

Media

Select Video

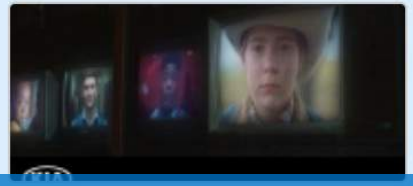
View Videos | Add Video | Manage all Videos

Title | Video Type | Tags

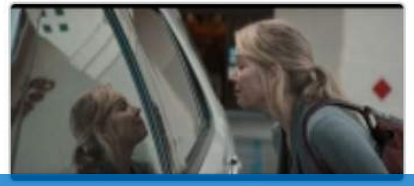
– Any –

Choose some options

Apply



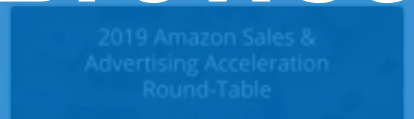
Kia Commercial



M&M Commercial

Burger King Commercial

Bumble Commercial



Entity Browser

Image *

Preview

Alternative text *

Volunteer with DCCO

Short description of the image used by screen readers and displayed when the imag

volunteer-banner.jpg (74.08 KB) Remove

Focal Point Preview

Home » Administration

Click an image to see a larger preview. You may need to scroll horizontally for more image

1920x300

1920x750

Focal Point

Structure Appearance Extend Configuration People Reports Help

Browse

Filter

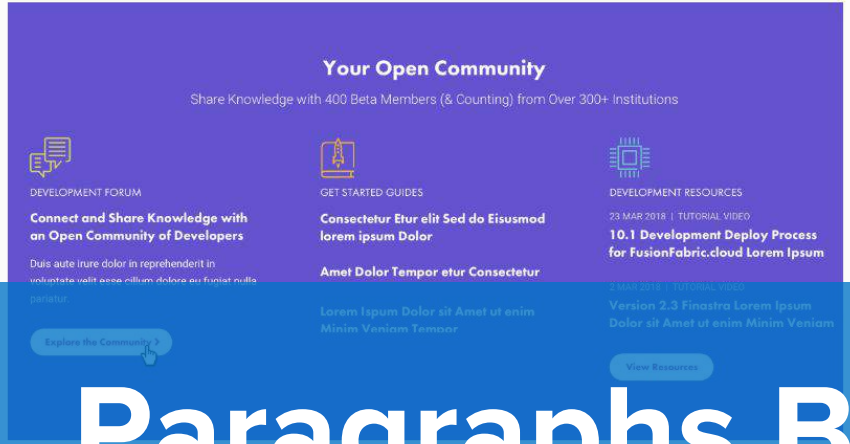
Layout

Search

simple paragraph ...

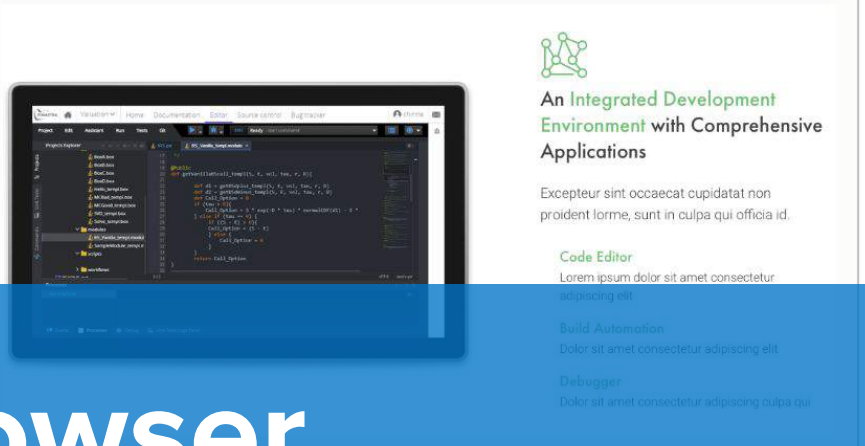
Layout

LAYOUT - RESOURCE COLUMNS



Add

LAYOUT - TWO COLUMN



Add

Paragraphs Browser

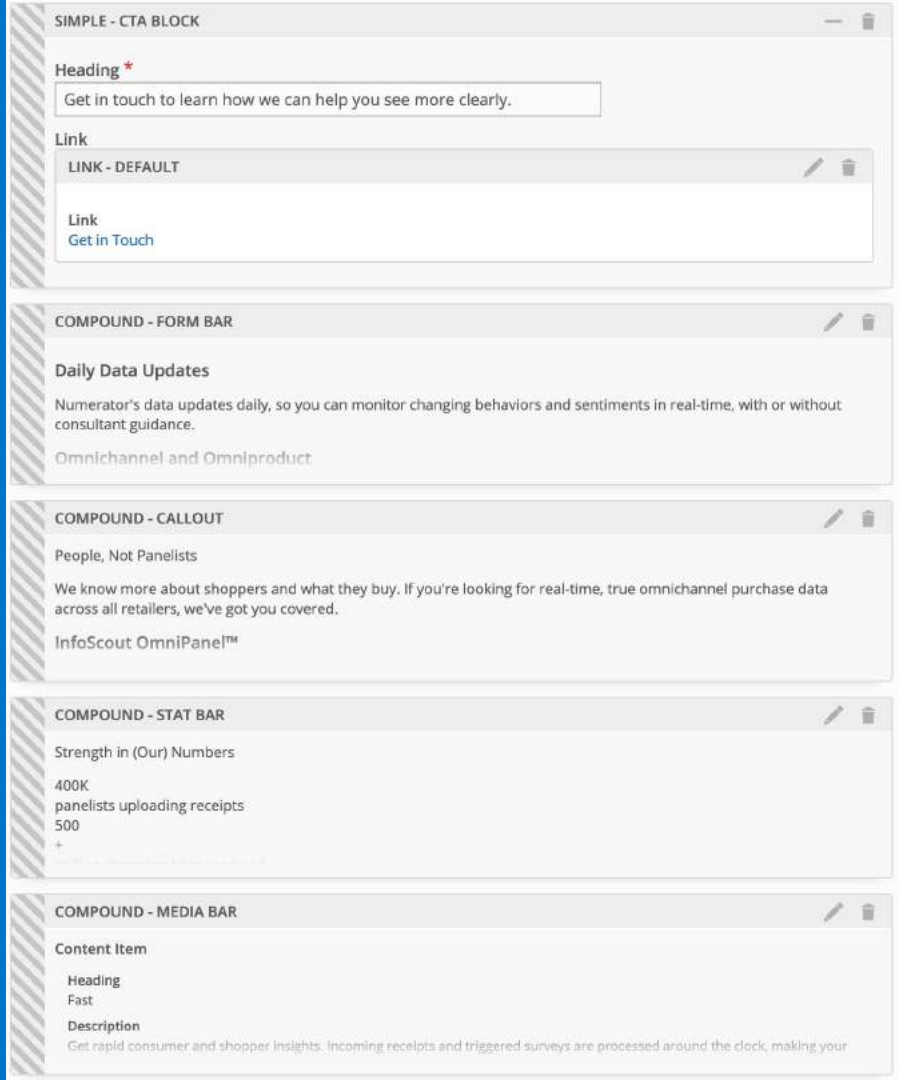
The Contrib Ecosystem: Honorable Mentions

1. Chosen
2. Linkit
3. Entity Embed
4. Metatag
5. Acquia Purge

CUSTOM AND SITE-SPECIFIC

CUSTOM IMPROVEMENTS \\ THEME

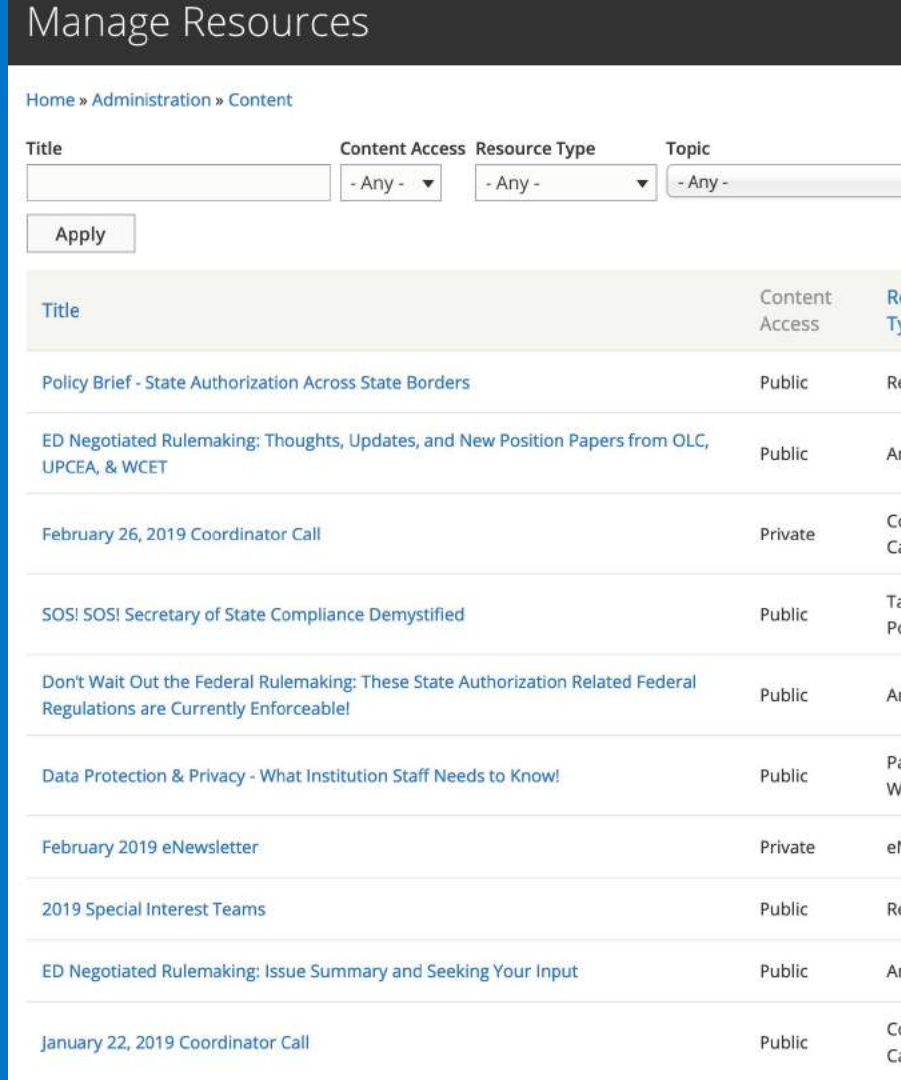
Focus your custom dev time on what provides the most value for site admins - and make it reusable.



CUSTOM IMPROVEMENTS \\ VIEWS

Views isn't just for the frontend!

- More focused content overview pages.
- Content moderation dashboards.
- Custom reports and data exports.



TRAINING

BACKSTORY

I did a lot of other things before I started doing this

- Maker of sandwiches
- Research assistant
- Professional baker (mostly pie)
- Photographer of graduating college students
- Door-to-door organizer (both knocking doors and managing canvas offices)
- Leader of traveling sustainability nonprofit
- Marketer and fundraiser for a French nonprofit

Before the training

BEFORE THE TRAINING

Strategically choose who will lead the training

BEFORE THE TRAINING

Clearly define client roles for QA and content entry

BEFORE THE TRAINING

Intentionally create a training outline (with ‘whys’!)

Here's what a training outline might look like

Basic Page

- Drupal 101
  - Content type
  - Field
- What is a basic page and when would you use it?
- View basic page
- Edit sample basic page (learn things that will apply sitewide)
  - How to use a WYSIWYG
    - Go through formatting options side-by-side with page
    - Image imbed - value of tagging content
    - Dropdown under "normal"
    - Source for pasting content
  - Relationships
    - Department - determines who can edit (locked down for most users)
    - Topic - helps admins find these pages
  - Options at the bottom
    - Url path settings
- Create simple basic page (to reference later in training, teach internal linking)

Structured Content

What is structured content and why would I choose to use it?

News (Basic page+)

- What is a news page and why would you use it
- Edit sample news page
- Placing news content - manually added to everywhere it appears (referencing news item you created)

At the training

AT THE TRAINING

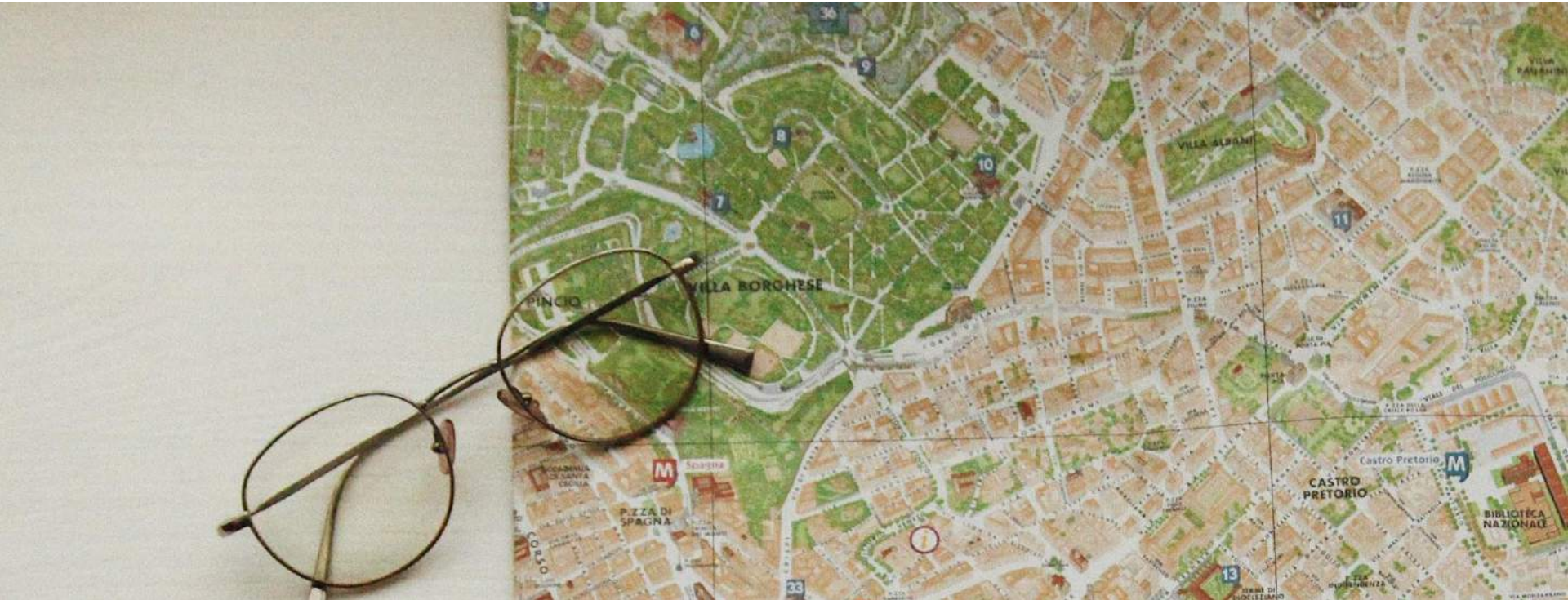
Check your jargon at the door

AT THE TRAINING

Know your audience

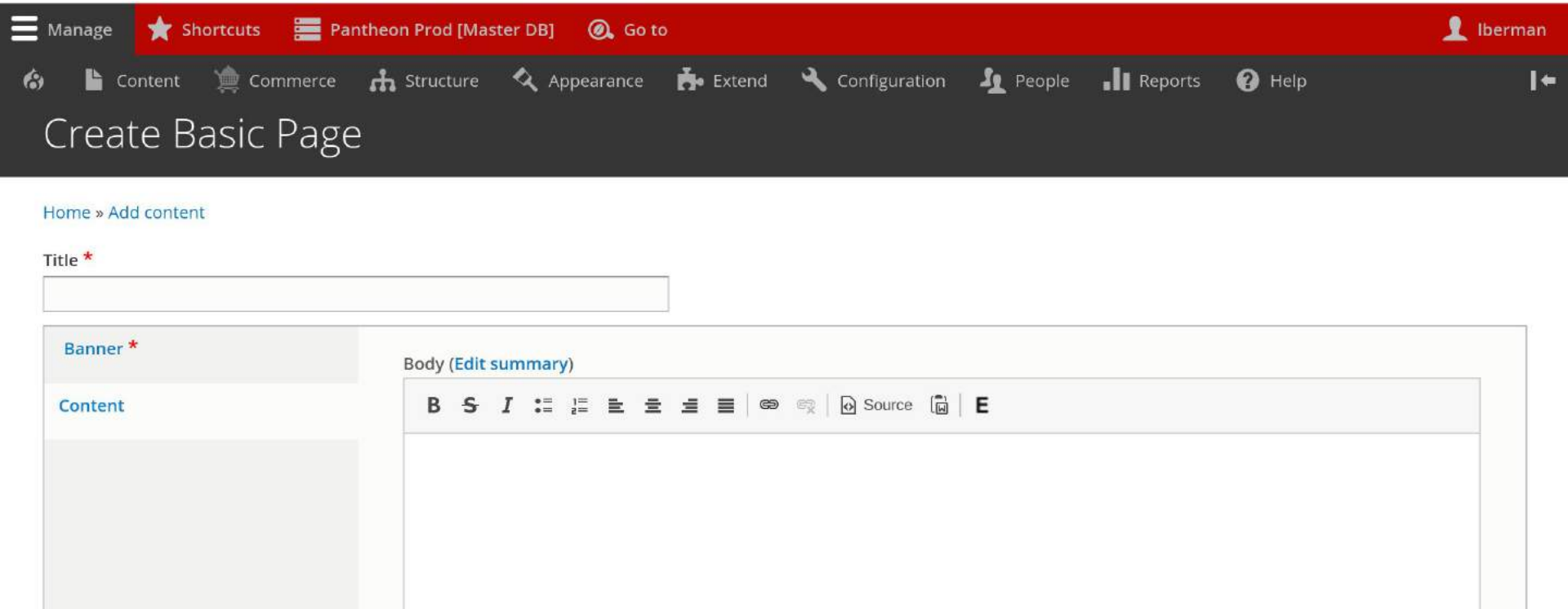
AT THE TRAINING

Roadmap and signpost



AT THE TRAINING

Start simple



AT THE TRAINING

Show complex content side by side

Shortcuts | Pantheon Prod [Master DB] | Go to | lberman | Edit

Content | Commerce | Structure | Appearance | Extend | Configuration | People | Reports

Volunteer With Us

Contribute your knowledge and skills to DrupalCamp Colorado

Become a Volunteer

Why Attend

Learn

Summits, trainings, sessions and sprints provide opportunities to engage with thought leaders from the Drupal community and beyond.

od [Master DB] | Go to

ucture | Appearance | Extend | Configuration | People | Reports | Help

Mountains 02
Image Type
Background

Remove
Replace

Callout Content *

Simple - Call Out

Contribute your knowledge and skills to DrupalCamp Colorado

Become a Volunteer

Subheading
Volunteer With Us

Add Content

▸ SETTINGS *

Simple - Reason

Sub-heading
Why Attend
Set the small text above the large text

Heading
Learn
Set the large text

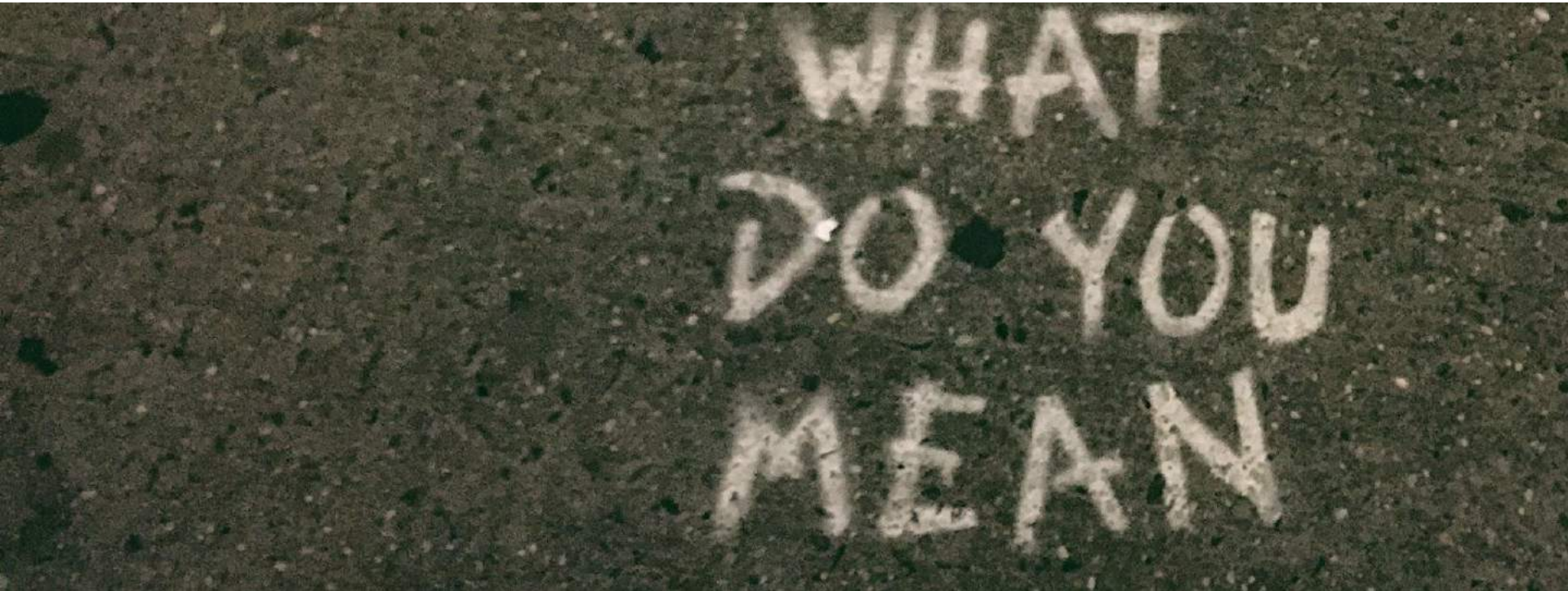
Description

B S I | Source | E

Summits, trainings, sessions and sprints provide opportunities to engage with thought leaders from the Drupal commun
and beyond.

AT THE TRAINING

Ask the right questions



After the training

AFTER THE TRAINING

Send training documentation

AFTER THE TRAINING

Build touch points for questions into your scope and timeline

Contribution Opportunities | **Friday, April 12**

1

Mentored Contribution

9 am - 6 pm

Room 602

2

First Time Contributor Workshop

9 am - 12 pm

Room 606

3

General Contribution

9 am - 6 pm

Room 6A

DrupalCon Housekeeping

Locate this session at the DrupalCon Seattle website
https://events.drupal.org/seattle2019/sessions/empathy-internal-users-build-and-train-real-content-admins

Take the DrupalCon survey
https://www.surveymonkey.com/r/DrupalConSeattle

Come Talk to Us!

Booth #401

elevated third

Thank You!

elevated third | 535 16th St. Suite 900, Denver, CO, 80202 | (303) 436-9113