



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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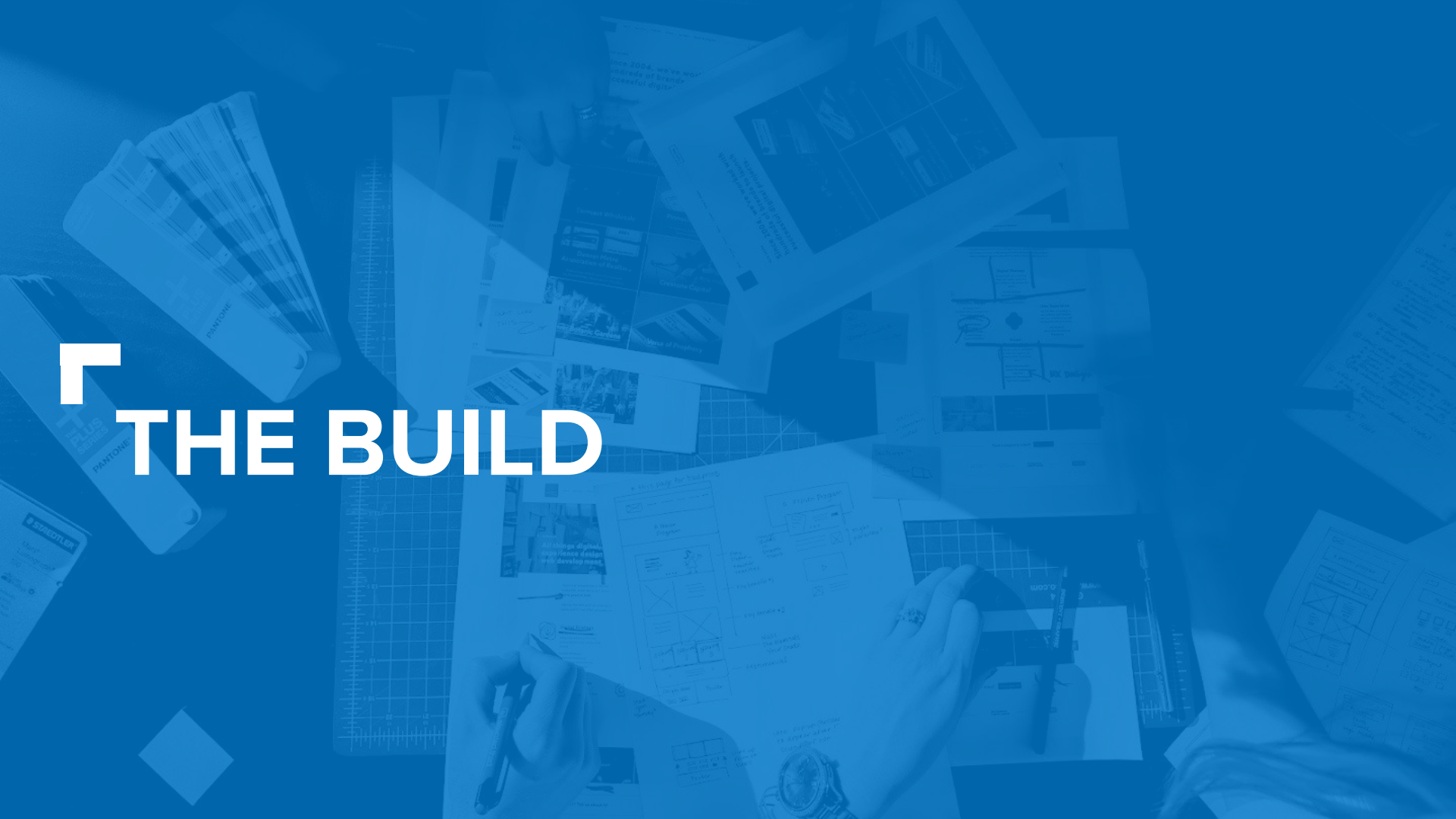
WHY ARE WE *HERE?*

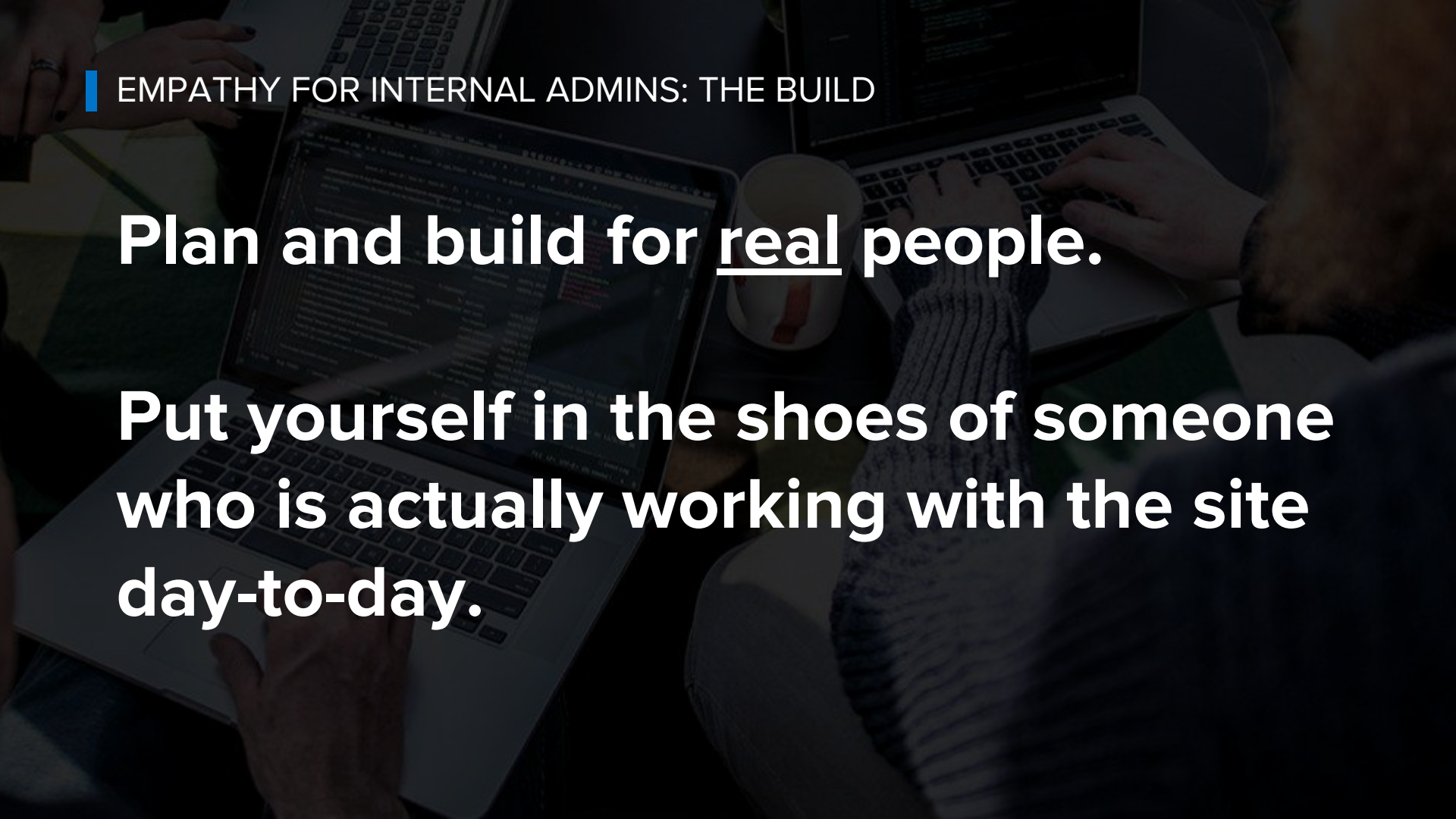
WHY ARE WE HERE?

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	
content				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**

A close-up photograph of a tabby and white cat peering out from inside a cardboard box. The cat's face is the central focus, with its large, green eyes looking directly at the camera. The box's interior is visible, and the lighting is soft, highlighting the texture of the cat's fur and the edges of the cardboard. The overall tone is warm and intimate.

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.

▶ THUMBNAIL IMAGE

Resource Description (Edit summary) *

B *I* | *I_x* x^2 |   |   |       | Font

 Source 

As a hospitality provider, you have three goals when it comes to connect with your customers and their employees, partners the amount of business you're getting from existing customers keep new customers.

This is the main copy field for this resource. It will be shown whether or not the generate teaser copy. If you want to manually override the teaser copy, edit the

OUT OF THE BOX \ \ REFERENCES

Great power, great responsibility

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

The image shows a partial view of a user interface. On the left, a list of items is visible, with some text like 'tent *' and 'S' and red asterisks. On the right, there is a filter sidebar with the following sections:

- Platform ***: A dropdown menu showing 'Hospitality Cloud' with a close button (X).
- Solution**: A list of options including 'Hotel Marketing' (with a close button X) and 'Hotel Demand Management'.
- Audience**: A dropdown menu showing 'Association Event Managers'.
- Buyer Phase**: A dropdown menu showing '- None -' with a downward arrow.

OUT OF THE BOX \ PERMISSIONS

Focus & security

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

Administrator	Content Editor	Content Approver	Content Administrator
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



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)

B *I* ~~S~~ A x^2 x_2 *I_x* | | | **E** **E** | Format

Source Styles

When it comes to bringing innovation to the world of banking and finance, what sort of apps might we see in years to come, and what areas are potentially ripe for development? What is 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?

Plotting the next wave of Fintech apps

While 2007 to 2013 was the era of business to consumer (B2C) financial services apps, the next wave of apps is likely to be more suitable for B2B processes and will harness the power of

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

- Any -

Tags

Choose some options

Apply



Kia Commercial



M&M Commercial



Burger King Commercial



Bumble Commercial

Entity Browser



2019 Amazon Sales & Advertising Acceleration Round-Table



Today's Logistics

Image *



Alternative text *

Volunteer with DCCO

Short description of the image used by screen readers and displayed when the image is not visible.

 [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 images.

1920x300

A large banner image with a blue background. The text "Focal Point" is written in large, white, sans-serif font. The background image shows hands typing on a keyboard and holding a smartphone.

Focal Point

1920x750

A smaller version of the banner image, showing the same blue background and "Focal Point" text, but with a different aspect ratio.

Browse

Filter

Layout

Search

simple paragraph ...

Layout

LAYOUT - RESOURCE COLUMNS

Your Open Community
Share Knowledge with 400 Beta Members (& Counting) from Over 300+ Institutions

DEVELOPMENT FORUM
Connect and Share Knowledge with an Open Community of Developers
Duis aute inure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
[Explore the Community >](#)

GET STARTED GUIDES
Consectetur Etur elit Sed do Eiusmod lorem ipsum Dolor
Amet Dolor Tempor etur Consectetur
Lorem Ipsum Dolor sit Amet ut enim Minim Veniam Tempor

DEVELOPMENT RESOURCES
23 MAR 2018 | TUTORIAL VIDEO
10.1 Development Deploy Process for FusionFabric.cloud Lorem Ipsum
2 MAR 2018 | TUTORIAL VIDEO
Version 2.3 Finastra Lorem Ipsum
Dolor sit Amet ut enim Minim Veniam
[View Resources](#)

Add

LAYOUT - TWO COLUMN

An Integrated Development Environment with Comprehensive Applications

Excepteur sint occaecat cupidatat non proident forme, sunt in culpa qui officia id.

Code Editor
Lorem ipsum dolor sit amet consectetur adipiscing elit

Build Automation
Dolor sit amet consectetur adipiscing elit

Debugger
Dolor sit amet consectetur adipiscing culpa qui

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.

The image shows a vertical stack of four widget configuration panels in a theme editor. Each panel has a title bar with a pencil icon for editing and a trash icon for deletion.

- SIMPLE - CTA BLOCK**:
 - Heading ***: Get in touch to learn how we can help you see more clearly.
 - Link**: LINK - DEFAULT
 - Link**: Get in Touch
- COMPOUND - FORM BAR**:
 - Daily Data Updates**: Numerator's data updates daily, so you can monitor changing behaviors and sentiments in real-time, with or without consultant guidance.
 - Omnichannel and Omniproduct.
- COMPOUND - CALLOUT**:
 - People, Not Panelists**: We know more about shoppers and what they buy. If you're looking for real-time, true omnichannel purchase data across all retailers, we've got you covered.
 - InfoScout OmniPanel™
- COMPOUND - STAT BAR**:
 - Strength in (Our) Numbers**
 - 400K panelists uploading receipts
 - 500 +
- COMPOUND - MEDIA BAR**:
 - Content Item**
 - Heading**: Fast
 - Description**: Get rapid consumer and shopper insights. Incoming receipts and triggered surveys are processed around the clock, making your

CUSTOM IMPROVEMENTS \ \ VIEWS

Views isn't just for the frontend!

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

Manage Resources

Home » Administration » Content

Title Content Access Resource Type Topic

Apply

Title	Content Access	Resource Type
Policy Brief - State Authorization Across State Borders	Public	Re
ED Negotiated Rulemaking: Thoughts, Updates, and New Position Papers from OLC, UPCEA, & WCET	Public	An
February 26, 2019 Coordinator Call	Private	Co Ca
SOS! SOS! Secretary of State Compliance Demystified	Public	Ta Po
Don't Wait Out the Federal Rulemaking: These State Authorization Related Federal Regulations are Currently Enforceable!	Public	An
Data Protection & Privacy - What Institution Staff Needs to Know!	Public	Pa W
February 2019 eNewsletter	Private	ef
2019 Special Interest Teams	Public	Re
ED Negotiated Rulemaking: Issue Summary and Seeking Your Input	Public	An
January 22, 2019 Coordinator Call	Public	Co Ca



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)

A young girl with blonde hair, wearing a white dress with a colorful floral pattern and blue shoes, is captured in the middle of swinging a bright yellow baseball bat. She stands on a green lawn. In the background, three adults are watching: a woman in a blue dress on the left, a man in a light blue shirt and khaki pants in the center holding a smartphone, and another woman in a teal shirt and blue pants on the right. The setting is outdoors in front of a large brick building with a dark roofline. There are various plants, including tall grasses and hydrangeas, and a closed patio umbrella visible. A white base is on the grass near the girl, and a pair of sunglasses lies on the pavement nearby. The sky is overcast.

At the training

AT THE TRAINING

Check your jargon at the door



AT THE TRAINING

Know your audience



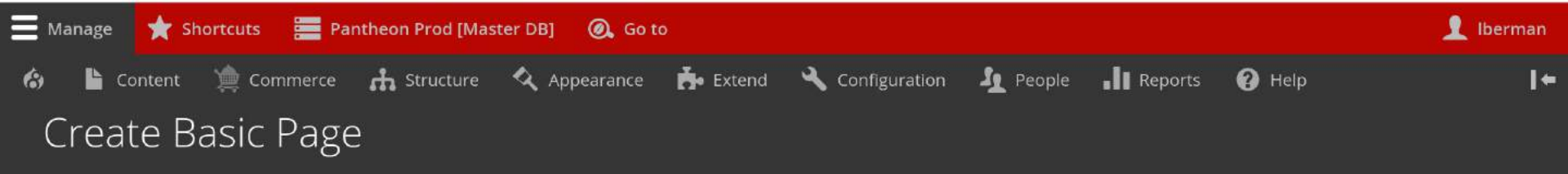
AT THE TRAINING

Roadmap and signpost



AT THE TRAINING

Start simple



The image shows the top navigation bar of a Drupal 8 administration interface. It features a red top bar with 'Manage', 'Shortcuts', 'Pantheon Prod [Master DB]', and 'Go to' (with a magnifying glass icon). On the right side of the red bar is the user profile 'Iberman'. Below the red bar is a dark grey navigation bar with icons and labels for 'Content', 'Commerce', 'Structure', 'Appearance', 'Extend', 'Configuration', 'People', 'Reports', and 'Help'. The main content area below the navigation bar is titled 'Create Basic Page'.

[Home](#) » [Add content](#)

Title *

Banner *

Content

Body ([Edit summary](#))

B *S* *I*          Source  **E**

AT THE TRAINING

Show complex content side by side





Why Attend

Learn

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



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

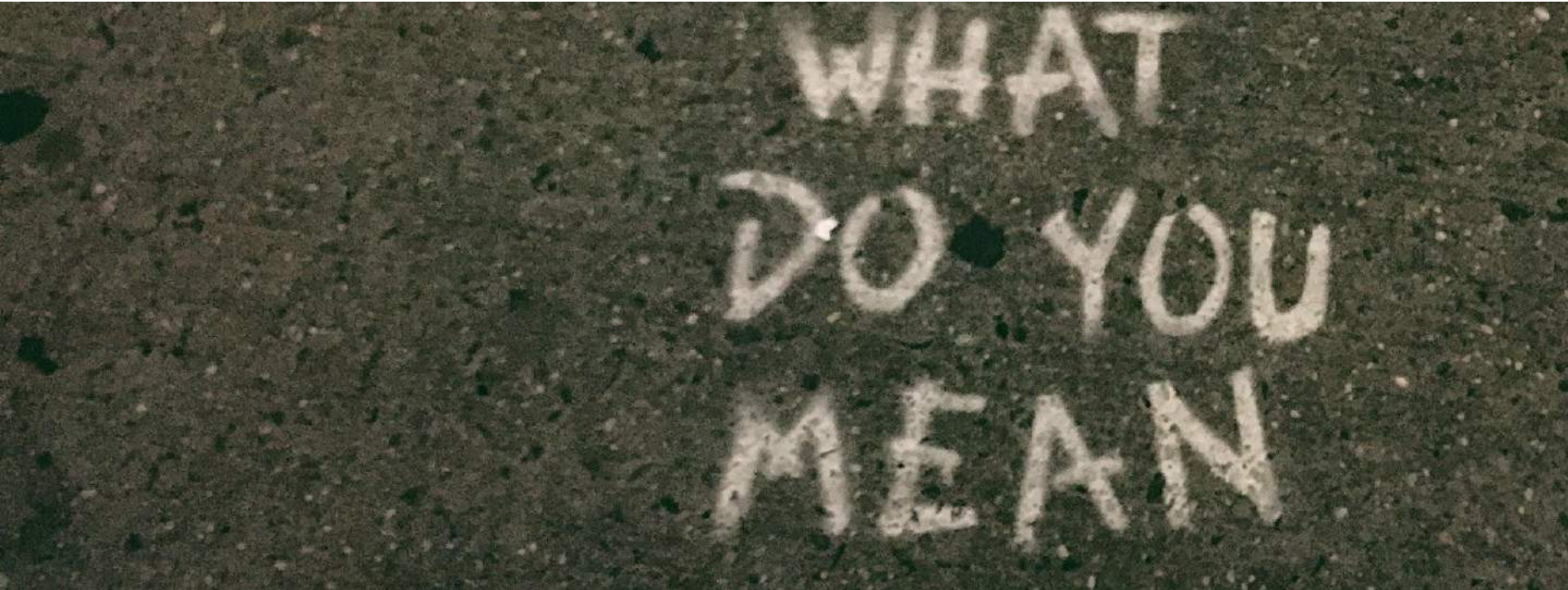
Description

B S I [bulleted list] [numbered list] [link] [unlink] [source] E

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

elevated
third

Booth #401



Thank You!