Stephen Lucero

Building an Intuitive Admin

UX for the Forgotten End-User

FORUM ONE™

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A true developer at heart, Stephen brings eight years of Drupal experience to his role as the Director of Engineering and Developer Operations at Forum One. 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 Forum One

We've been at this for 23 years.

We've partnered with more than 1,000 organizations and government agencies.

We've helped them better reach their mission on over 2,000 projects.

We are experts in digital strategy, creative, technology, data, and user experience.

We create experiences that make an impact.

Featured Clients

NATIONAL MUSEUM of AFRICAN AMERICAN HISTORY & CULTURE

The Pew Center for Arts & Heritage

MIT museum

Smithsonian Institution
NATIONAL MUSEUM of NATURAL HISTORY

U.S. COMMITTEE FOR REFUGEES AND IMMIGRANTS
USCRI

UNITEHERE!

MacArthur Foundation

seattlecenter

ALLIANCE FOR JUSTICE

NATIONAL ENDOWMENT FOR THE humanities

Fairfax County PUBLIC SCHOOLS
ENGAGE • INSPIRE • THRIVE

UNITED FOR NEWS ℠

What is Admin 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 the 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**
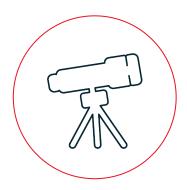
Misunderstanding

How do we make a great Admin UX?

How do we make a ~~great~~ *better* Admin UX?

How Does the Admin UX Get Neglected?

- Projects are sometimes built toward a front-end design
  - Ignores information architecture
- Admin ends up as a functional by-product
- Developers typically have much more Drupal familiarity
- Site-builders have very different goals
- Site-builders and developers often **avoid** entering content

The Excuses

Spoiler: None of these are true.

Less "valuable"

Since public users don't see the interface it isn't as valuable.

Not enough time

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

Too expensive

It costs too much to identify all the issues.

Some Solutions

Learn UX basics

Learn key UX principles to make smart decisions.

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

Little or **no help text**

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

Misleading help text

Unclear labeling

Too much **information**

Guiding Principles

Create a
hierarchy

Stay
consistent

Keep it
simple

Leverage
intuition

Be
helpful

Hierarchy *noun*

Hi·er·ar·chy | /ˈhī(ə)ˌrärkē/

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

F

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
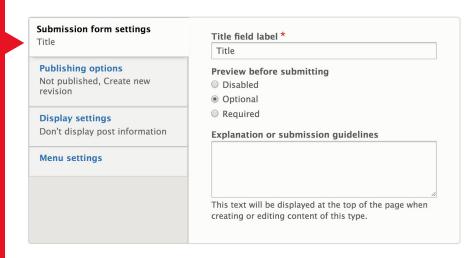- Help text can also be added

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
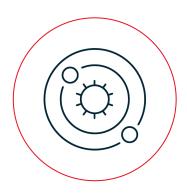- Entity Construction Kit (eck)
- Inline Entity Form

Consistent *adjective*
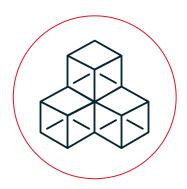
Con·sist·ent | /kənˈsistənt/

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 *adjective*

Sim·ple | /ˈsimpəl/

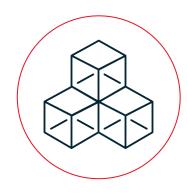Without unnecessary or extra things or decorations; plain.

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 *adjective*

In·tu·i·tive | /inˈt(y)o͞oədiv/

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 *adjective*

Help·ful | /ˈhelpfəl/

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

- Pathologic
- Pathauto
- Redirect
- Focal Point
- Photographs Previewer

Resources

Where to Learn More

1   Drupal user interface standards
https://www.drupal.org/docs/develop/user-interface-standards

2   Usability.gov

3   Admin UI and Javascript Modernisation Initiative
https://www.drupal.org/about/strategic-initiatives/admin-ui-js

4   Distributions
Lightning | Thunder | Rain

Thank you!