

Drupal UI Tweaks

THE OTHER 20%

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The Goal

To discuss our place in
Drupal's usability evolution and reputation



Agentic Digital Media

Agentic is the human web agency. We authentically engage real people online.

We have core expert processes around web development and using online media for good.



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- Digital media



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- Social mission organizations
- Digital media
- Digital ecology





Topics of discussion



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- Usability defined - you might be surprised



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- Usability defined - you might be surprised
- A process towards more usable sites



Topics of discussion

- Usability defined - you might be surprised
- A process towards more usable sites
- Usable UI tips and tweaks



“Usability is the ease of use and learnability of a human-made object.”

<http://en.wikipedia.org/wiki/Usability>



Learnability



Learnability

- “It doesn’t work like that blog cms I’m used to”



Learnability

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- “Hard” often means “uncomfortable with the learning curve”



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- “It doesn’t work like that blog cms I’m used to”
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- Big question: how do we increase usability/learnability?



Learnability

- “It doesn’t work like that blog cms I’m used to”
- “Hard” often means “uncomfortable with the learning curve”
- Big question: how do we increase usability/learnability?
- Luckily, there is a plan ...



Drupal UX

<http://www.d7ux.org>



Drupal UX

<http://www.d7ux.org>

- I. Make the most frequent tasks easy and less frequent tasks achievable



Drupal UX

<http://www.d7ux.org>

1. Make the most frequent tasks easy and less frequent tasks achievable
2. Design for the 80%



Drupal UX

<http://www.d7ux.org>

1. Make the most frequent tasks easy and less frequent tasks achievable
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3. Privilege the Content Creator



Drupal UX

<http://www.d7ux.org>

1. Make the most frequent tasks easy and less frequent tasks achievable
2. Design for the 80%
3. Privilege the Content Creator
4. Make the default settings smart



Obvious D6 and D7 UX Improvements



Obvious D6 and D7 UX Improvements

- D6 drag-n-drop



Obvious D6 and D7 UX Improvements

- D6 drag-n-drop
- D7 big wins:
 - Better grouping of common tasks in admin theme, customizable toolbar, etc
 - Overlays
 - caveat about accessibility



From Drupal UX to Product UX



From Drupal UX to Product UX

- Framework versus product



From Drupal UX to Product UX

- Framework versus product
- If we know the use case, we can address the 20%



From Drupal UX to Product UX

- Framework versus product
- If we know the use case, we can address the 20%
- Goals
 - Streamline client workflow = happy client
 - We've heard it said: A client's job is NOT to run their website, but to run their business!
 - Developers feel good about a highly usable product
 - Drupal gets a good usability rep from happy client



Challenges to delivering better UX



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- Clients want more features, and expect that usability is included



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- Requires earlier (and more) client involvement, which means more management



Challenges to delivering better UX

- Clients want more features, and expect that usability is included
- Since usability is project-specific, clients need to be socialized into the fact that their 20% use case takes time and budget to address
- Requires earlier (and more) client involvement, which means more management
- Challenges are similar to client buy-in required for agile, responsive design or hybrid billing



The 3 Cs of Drupal UX



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- Core
 - A small few



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- Core
 - A small few
- Contrib UX
 - Some of us



The 3 Cs of Drupal UX

- Core
 - A small few
- Contrib UX
 - Some of us
- Custom UX
 - All of us



Contrib UX



Contrib UX

- The obvious: admin_menu
 - Groups common tasks
 - We can barely use a D6 site without it



Contrib UX

- The obvious: admin_menu
 - Groups common tasks
 - We can barely use a D6 site without it
- D7 toolbar
 - And various “improved toolbar” modules



Prioritizing UX

String overrides usability thread: <http://drupal.org/node/234334>

“I'm not sure I like how "Enabled" looks in the table header row. It pushes the text fields to the right and makes it look like the columns are misaligned. I also like having the ability to select all the rows at the same time. Letting the user know what the checkboxes are for is important though, and I'm no usability expert ...”

Rob Loach

Overrides Import Export

Enabled	Original	Replacement
<input checked="" type="checkbox"/>	We weren't able to complete your order because your credit card transaction was	Your transaction was declined. Please call us at 800-360-6332 ext. 125 between 8:30-4:30
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Add row Save configuration Remove disabled strings



Beyond admin_menu/ toolbar



Beyond admin_menu/ toolbar

- Further to “Make the most frequent tasks easy,”
make the most frequent tasks easy to find



Beyond admin_menu/ toolbar

- Further to “Make the most frequent tasks easy,”
make the most frequent tasks easy to find
- Group most frequent editorial tasks into a single menu or block & make it somewhat pretty
 - “learnability” benefits from color queues in menus, etc



Beyond admin_menu/ toolbar

- Further to “Make the most frequent tasks easy,”
make the most frequent tasks easy to find
- Group most frequent editorial tasks into a single menu or block & make it somewhat pretty
 - “learnability” benefits from color queues in menus, etc
- Contextual links module in D7 core - like theme
“block edit hovers” in D6 - <http://drupal.org/documentation/modules/contextual>



An example of pretty groupings

Beyond War Portland

[View](#) [Edit](#) [Devel](#)

OREGON, UNITED STATES



Welcome to the Portland Chapter. Here you will be able to stay in touch with other Beyond War members, including your chapter leaders in Portland through bulletins and discussion forums. You can also easily connect with members from around the world, to share ideas and successes. Learn about local activities, including meetings, presentations, study groups, lecture series, and community events. Stay up to date on local peace-related news, and current events. We are looking forward to sharing in this online community with you - please [contact us](#) if you can't find what you're looking for.

ACTIVE SINCE: 2011

CHAPTER MODERATORS:
admin, testchadmin



THE LATEST FROM OUR CHAPTER

Join the New Portland Chapter Core Group

MAR 26/11 We will be meeting the first week of April. Email david.galiel@beyondwar.org for more information.

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BEYOND WAR PORTLAND

CHAPTER AREAS

[Beyond War Portland Home](#)

[Blog Posts](#)

[Discussions](#)

ADD CONTENT

[Discussion post](#)

[Event](#)

[Blog post](#)

ADMINISTRATION

[Manage Chapter Members](#)

[Add Members \(without invitation\)](#)

[Manage Comments](#)

[Manage Bloggers](#)

MEMBERSHIP

[Beyond War Portland Membership](#)

- [Create Chapter Blog](#)
- [Create Chapter Discussion](#)
- [Create Event](#)
- [Invite friend](#)
- [2 members](#)
- [Manager: System Admin](#)
- [My membership](#)



Our clients understand blocks



Our clients understand blocks

- We use blocks because most of our clients can easily learn to use them



Our clients understand blocks

- We use blocks because most of our clients can easily learn to use them
- We don't use context or panels because, as with views, we find that our clients find them too difficult to learn



Our clients understand blocks

- We use blocks because most of our clients can easily learn to use them
- We don't use context or panels because, as with views, we find that our clients find them too difficult to learn
- But those are wicked awesome modules



Custom UX



Custom UX

- The Wild West of usability



Custom UX

- The Wild West of usability
- Do our best not to degrade UX for the 80%



Custom UX

- The Wild West of usability
- Do our best not to degrade UX for the 80%
- Leave a ton of documentation in our wake (both for users and for future developers)
- “Did you patch core according to that google doc that’s not referenced anywhere?” - really, this just happened to us



Where's the Content?



Where's the Content?

- Train as early as possible on a “content alpha”



Where's the Content?

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- **Watch them use it** and act as a guide
 - *There is no greater moment of illumination in a Drupal project than watching someone use it. (me)*
 - Record this session (readytalk) - really, it makes everyone pay attention



Where's the Content?

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Where's the Content?

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- **Watch them use it** and act as a guide
 - *There is no greater moment of illumination in a Drupal project than watching someone use it. (me)*
 - Record this session (readytalk) - really, it makes everyone pay attention
- Tweak it to the use case as much as possible
- Rinse, repeat, as many iterations as possible



Don't underestimate the basics of learnability



Don't underestimate the basics of learnability

- Help text



Don't underestimate the basics of learnability

- Help text
- Examples



Help, please!



Help, please!

- “Type something here” is not very helpful - be as specific as possible



Help, please!

- “Type something here” is not very helpful - be as specific as possible
- Include dimensions or ratios for images, stylistic examples for text, dates, etc
- “Upload a screen capture to be used on the training landing page. The image will be resized to 100px wide (height will scale accordingly).”



Help, please!

- “Type something here” is not very helpful - be as specific as possible
- Include dimensions or ratios for images, stylistic examples for text, dates, etc
- “Upload a screen capture to be used on the training landing page. The image will be resized to 100px wide (height will scale accordingly).”
- Nobody will see help text at .6em
 - “Upload a screen capture to be used on the training landing page. The image will be resized to 100px wide (height will scale accordingly).”



Information Proximity



Information Proximity

- Proximity of documentation becomes even more important for certain types of projects
 - Staff turnover
 - Student organizations
 - Repeat training/documentation is rarely as intense when new features added
 - Train the trainer gets watered down over time
 - Developer turnover
 - RTFM doesn't work when there's no M, or if nobody knows where in the F the M is
 - We use blocks to place important information where it is most likely to be noticed (like the available updates page)



Backup and Migrate

Use this form to run simple manual backups of your database. Visit the [help page](#) for more help using this module

[\[more help...\]](#)

Backup

Restore

Destinations

Profiles

Schedules

Quick Backup

Advanced Backup

Quick Backup

Backup from to using

For more backup options, try the [advanced backup page](#).

This is a developer reminder

WARNING: the default profile excludes data from "files" table since it's close to 2GB and could bring the site down while dumping.

A better approach is to ask the host to dump that table separately, or to use an old backup if an exact sync isn't necessary for development purposes.



Provide Examples



Provide Examples

- Example node(s) for wysiwyg styles



Provide Examples

- Example node(s) for wysiwyg styles
- For complicated elements, provide copy/paste examples



Provide Examples

- Example node(s) for wysiwyg styles
- For complicated elements, provide copy/paste examples
- Examples better if they reflect client's style guide



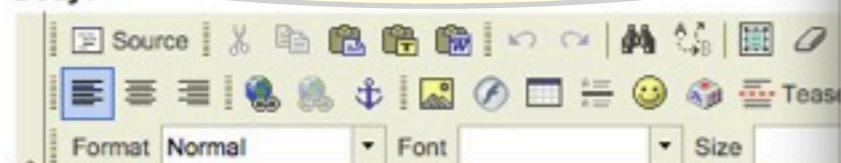
Provide Examples

- Example node(s) for wysiwyg styles
- For complicated elements, provide copy/paste examples
- Examples better if they reflect client's style guide
- Clone module in D6 & D7



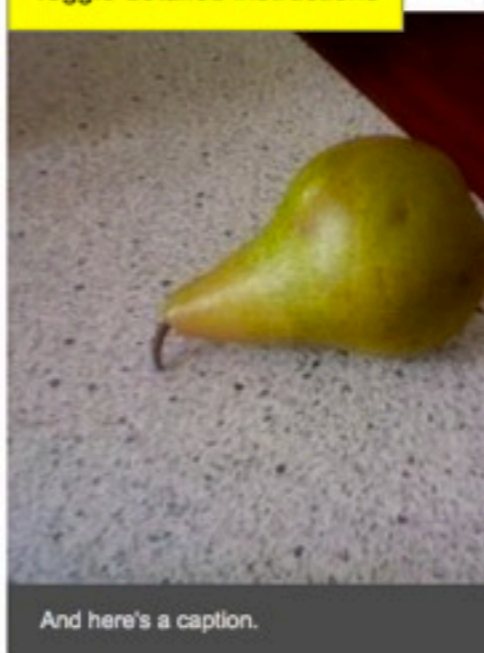
GET ARTICLE FORMATTING HELP

Body:



Switch to plain text editor

Toggle detailed instructions



And here's a caption.

INLINE PHOTO

You have two options to embed an inline photo themed like the article main photo:

- Create a new element
- Copy and paste html from a working element, or from the generic example provided

Create a new element:

- Upload your big Popup Photo(s) in the fields provided above the article body.
- Place your cursor at the beginning of your text in the wysiwyg editor window (this will make it code)
- Click the "Insert/Edit Image" link in the editor window (we will choose a small Thumbnail image Popup Photo)
- Click "Browse Server"
- Choose from the list of images or upload a new image
- Choose "article_main_photo" under "Image preset"
- Click "Insert" then "OK"
- Click the "Source" button on the editor window (you will remain in source view for the remainder of the process)
- Before the tag for the image you just inserted, paste the following, replacing FILEPATH with the Popup Photo you want to pop up.

```
<div class="align_left"> <div class="article_photo"> <a onclick="popupwin('/mediapopup?caption=This is the photo\'s popup caption.',1000,600); return false;" href="">
```

- Modify the javascript caption to your liking (you must precede apostrophes with a backslash)
- After the tag for the image you just inserted, paste the following and modify the caption



UI tweak examples



UI tweak examples

- Better content sorting in D6 - in D7 core!



UI tweak examples

- Better content sorting in D6 - in D7 core!
- OG user management autocomplete with hook_form_alter - free in D7!



UI tweak examples

- Better content sorting in D6 - in D7 core!
- OG user management autocomplete with `hook_form_alter` - free in D7!
- Modal noderef in D6 - not in D7 yet



UI tweak examples

- Better content sorting in D6 - in D7 core!
- OG user management autocomplete with hook_form_alter - free in D7!
- Modal noderef in D6 - not in D7 yet
- Nebulous usability issues with wysiwyg editors, images, and file interfaces



Better Content Management D7

The screenshot displays the Drupal 7 administration interface for content management. At the top, a navigation bar includes links for Dashboard, Content (selected), Structure, Appearance, People, Modules, Configuration, Reports, and Help. On the right, it shows 'Hello admin' and 'Log out'. Below this, there are buttons for 'Add content' and 'Find content', and a link for 'Edit shortcuts'.

The main content area is titled 'Content' and has a sub-header 'Administration'. It features a '+ Add content' link. Below this are two filter sections:

- SHOW ONLY ITEMS WHERE**: Includes dropdowns for 'status' (set to 'any') and 'type' (set to 'any'), with a 'Filter' button.
- UPDATE OPTIONS**: Includes a dropdown for 'Publish selected content' and an 'Update' button.

At the bottom, there is a table listing content items:

<input type="checkbox"/>	TITLE	TYPE	AUTHOR	STATUS	UPDATED	OPERATIONS
<input type="checkbox"/>	This is a child	Child	admin	published	10/10/2011 - 20:15	edit delete
<input type="checkbox"/>	This is a parent	Parent	admin	published	10/10/2011 - 20:14	edit delete

Better Content Management in D6/D7 with VBO

Content

TITLE CONTAINS

TYPE
 PROMOTED
 PUBLISHED
 STICKY

CONTENT: THIS IS A SERVICE (FIELD_SERVICE_CHECKBOX)

Bulk operations

<input type="checkbox"/> <u>Title</u>	<u>Type</u>	<u>Author</u>	<u>Published</u>	<u>Edit</u>	<u>Updated date</u>
<input type="checkbox"/> Category Description: Charter rights new	Category Introduction	Fiona MacCool	Yes	edit	2011-10-07 16:43
<input type="checkbox"/> Workplace Safety and Insurance Board Basics - Instance - 82598 new	Webinar Instance	admin	Yes	edit	2011-10-07 12:57

http://drupal.org/project/views_bulk_operations and its list of “complementary modules”



D6 OG user management tweak

Before

List

Faces List Add members Manage Bloggers

List of users:

Add one or more usernames in order to associate users with this group. Multiple usernames should be separated by a comma.

Add users

After

List

Faces List Add members Manage Bloggers

List of users:

Add one or more usernames in order to associate users with this group. Multiple usernames should be separated by a comma.

Add users



D6 OG user management tweak

hook_form_alter

```
if ($form_id == 'og_add_users') {  
  // Add our custom pre-submit function in front of the regular submit handler  
  $form['og_names']['#type'] = 'textfield';  
  $form['og_names']['#autocomplete_path'] = 'mymodule/user_autocomplete';  
}
```

hook_menu

```
$items['mymodule/user_autocomplete'] = array(  
  'title' => 'OG user autocomplete',  
  'page callback' => 'mymodule_user_autocomplete_multiple',  
  'access callback' => 'user_access',  
  'access arguments' => array('access user profiles'),  
  'type' => MENU_CALLBACK,  
  'file' => 'mymodule.pages.inc',  
);
```



D6 OGG user management tweak

mymodule.pages.inc

```
// Borrowed from tags autocomplete
function mymodule_user_autocomplete_multiple($string = "") {
  // The user enters a comma-separated list of users. We only autocomplete the last user.
  $array = drupal_explode_tags($string);
  // Fetch last user
  $last_string = trim(array_pop($array));
  $matches = array();
  if ($last_string != "") {
    $result = db_query_range("SELECT name FROM {users} WHERE LOWER(name)
LIKE LOWER('%s%%'", $last_string, 0, 10);
    $prefix = count($array) ? implode(',', $array) . ', ' : "";
    while ($user = db_fetch_object($result)) {
      $n = $user->name;
      $matches[$prefix . $n] = check_plain($user->name);
    }
  }
  drupal_json($matches);
}
```



OG D7 - autocomplete and meta data

People in group Group One ⊕

[Home](#) » [Group One](#) » [Group](#)

ADD A GROUP MEMBER TO *GROUP ONE*

User name *

Membership state

Active ▾

Select the state of the membership.

Membership type

Default ▾

Select the group membership type of the membership.



Entity references in D6: nodereference

Instance:

⊕ Eviction in the winter months - English - PDF [nid:75862]
Edit node

⊕ Eviction in the winter months - French - PDF [nid:75863]
Edit node

⊕

Add another item

Create a new Resource Instance
Open a modal window and create a new item in place.

You might notice a few extras here.



Modal noderef

Create Resource Instance

Title: *

▼ **Vocabularies**

Language:

File Type:

Indicate the file type of this instance: pdf, html, etc.

Instance URL:

Instance File:

Maximum file size: 32 MB
Allowed extensions: txt pdf ppt doc xls jpg gif png rtf

File size:

Notes:

Modal noderef

The image shows a modal window titled "Eviction in the winter months - English - PDF" overlaid on a web interface. The modal contains the following fields and elements:

- Title:** A text input field containing "Eviction in the winter months - English - PDF".
- Vocabularies:** A section with a dropdown menu for "Language" set to "English" and a dropdown menu for "File Type" set to "pdf". Below these is a note: "Indicate the file type of this instance: pdf, html, etc."
- Instance URL:** An empty text input field.
- Instance File:** A section showing a file icon, the filename "1294854633Evictionsinwinter.pdf", the size "72.66 KB", and the MIME type "application/pdf". A blue "Remove" button is next to the filename.
- File size:** A text input field containing "72.7 kB".

The background interface shows a list of instances with "Eviction in the winter months" and "Add another item" buttons. A black arrow points from the "Add another item" button to the modal window.

GENTIC

Modal noderef requirements



Modal noderef requirements

- noderef cck



Modal noderef requirements

- noderef cck
- modal_noderef http://drupal.org/project/modal_noderef
 - automodal
 - modalframe (core in D7)
 - edit links are custom, and will need to be integrated into D7 entity reference options



```
$path = drupal_get_path('module', 'mymodule');  
drupal_add_js($path . '/js/mymodule_modal.js');
```

```
// borrowed from automodal module  
(function ($) {  
  /**  
   * Add modal behaviour to all links with the given class.  
   */  
  Drupal.behaviors.YLRModal = function () {  
    var selector = '.ylr-modal';  
    var settings = {  
      autoResize: true,  
      autoFit: true,  
      width: 700,  
      height: 500  
    }  
    // Add a click handler to each modal link.  
    $(selector).click(function () {  
      $this = $(this);  
      settings.url = $this.attr('href') || '#';  
      if (settings.url.indexOf('?') >= 0) {  
        settings.url += '&'  
      }  
      else {  
        settings.url += '?'  
      }  
      // Add the flag to the end to make sure that the modal is opened correctly.  
      settings.url += 'automodal=true';  
      Drupal.modalFrame.open(settings);  
      return false;  
    });  
  }  
  $("a.modalframe-processed").each(function() {  
    alert('this');  
    $(this).attr('target', '_self');  
  });  
})(jQuery);
```



Entity relationships in D7



Entity relationships in D7

- References module - continues noderef tradition with no modal in D7



Entity relationships in D7

- References module - continues noderef tradition with no modal in D7
- Relation module - wow, but some hot sauce will be required to make it usable/learnable



Cheers!

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