



# Making Drupal Friendly for Editors and Clients

DrupalGovCon

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**Four Kitchens** builds websites and apps for organizations that depend on large-scale or unconventional content.

# Personalized Experiences

Drupal's extensibility allow us to create the perfect CMS for our organizations. How can we apply the same care to our internal UI?



 Add New Post

Posts

All Posts

Add New

Categories

Tags

 Media Links Pages Comments Appearance Plugins Users Tools Settings Collapse menuUpload/Insert 

Visual

HTML



Path: p

Word count: 0

## Publish

Save Draft

Preview

Status: Draft [Edit](#)Visibility: Public [Edit](#) Publish immediately [Edit](#)[Move to Trash](#)

Publish

## Format

- Standard
- Aside
- Link
- Gallery
- Status
- Quote
- Image

## Categories

All Categories [Most Used](#) Uncategorized[+ Add New Category](#)

## Tags

Add

# Add New Post

Enter title here

Add Media

Visual Text

**B** *I* ABC

Path: p

Word count: 0

Excerpt

Send Trackbacks

### Publish

Save Draft Preview

Status: Draft [Edit](#)

Visibility: Public [Edit](#)

Publish immediately [Edit](#)

Move to Trash Publish

### Format

- Standard
- Aside
- Image
- Video
- Audio
- Quote
- Link
- Gallery

### Categories

All Categories Most Used

Posts

- All Posts
- Add New
- Categories
- Tags

- Media
- Pages
- Comments
- Appearance
- Plugins
- Users
- Tools
- Settings
- Collapse menu

# Add title

Start writing or type / to choose a block

Document Block X

**Status & Visibility** ^

Visibility [Public](#)

Publish [Immediately](#)

Post Format Standard ▾

Stick to the top of the blog

Pending Review

---

**Categories** ▾

---

**Tags** ▾

---

**Featured Image** ▾

---

**Excerpt** ▾

---

**Discussion** ▾

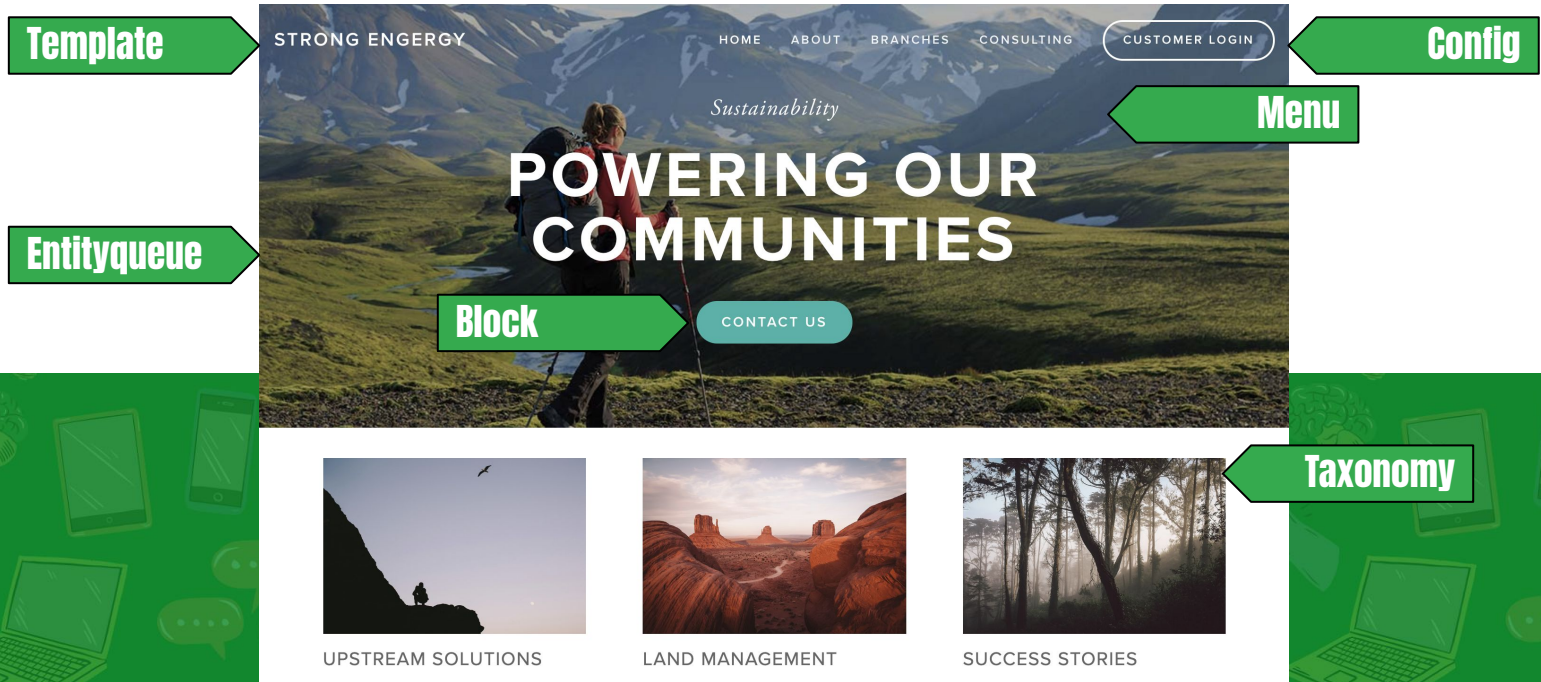
# Personalized Experiences

There is a price to pay for extensibility. Non-standard tools and interfaces create an editorial training gap for each new site.





Sometimes ‘node’ is a 4-letter word. A taboo term that you’d rather not use in front of clients. A signal we’re working under the hood.



The image shows a screenshot of a website for 'STRONG ENERGY' with several annotations. The website features a hero section with a hiker in a mountain landscape, the text 'Sustainability', and the main heading 'POWERING OUR COMMUNITIES'. A 'CONTACT US' button is visible. Below the hero section are three columns of content: 'UPSTREAM SOLUTIONS', 'LAND MANAGEMENT', and 'SUCCESS STORIES'. Annotations include: 'Template' pointing to the top navigation; 'Entityqueue' pointing to the hero section; 'Block' pointing to the 'CONTACT US' button; 'Menu' pointing to the navigation menu; 'Config' pointing to the 'CUSTOMER LOGIN' button; and 'Taxonomy' pointing to the content columns. The background is a green pattern with icons of a laptop, smartphone, and speech bubbles.

**Template**

STRONG ENERGY

HOME ABOUT BRANCHES CONSULTING

CUSTOMER LOGIN

**Config**

*Sustainability*

**Menu**

**POWERING OUR COMMUNITIES**

**Block**

CONTACT US

**Taxonomy**

UPSTREAM SOLUTIONS

LAND MANAGEMENT

SUCCESS STORIES

Our internal audience think in terms of ‘pages’, but as site builders, we know all content is not created equally.

Can I edit that?



ACCESSIBILITY MATTERS



Can I edit that?

Sign up for our Newsletter

Subscribe



Feb 16 Upcoming  
Conferences

Events

CONNECT WITH INDUSTRY LEADERS AND  
LEARN ABOUT NEW TRENDS IN



Feb 9 Beyond  
Screen Readers

Code Quality

WE'RE COMING MORE AWARE OF THE  
TYPES OF BLOCKERS FACED BY SCREEN



Feb 2 Starting  
with Personas

Design, UX

WITHIN THE SUBJECTS OF ACCESSIBILITY  
THERE RUN A WIDE RANGE OF AUDIENCE

Can I edit that?

Can I edit that?

Can I edit that?

# Personalized Experiences

As ambassadors of the Drupal brand, it's our responsibility to carry the frontend design and build process to our backend interfaces.



# Log In Experience

The login screen is the editors first impression; make it a good one. In this case 'user' is a taboo, four-letter word.



# Log In Experience



## Student Portal

Logging into the Student Portal provides you with access to your courses and other student information to help you navigate student life from a distance. Log in using your university Access Account.

Log In

If you have trouble logging in or have forgotten your password, [contact our HelpDesk](#) for assistance.

## Remove barriers to entry

- Add a memorable URL to replace 'user' via redirects.
- Include a login button or user landing page.
- Add help text and contacts for tech support.

# Log In Experience

**Log in**

**Username \***

Enter your WebConference username.

**Password \***

Enter the password that accompanies your username.

**Editor Login**

**Username \***

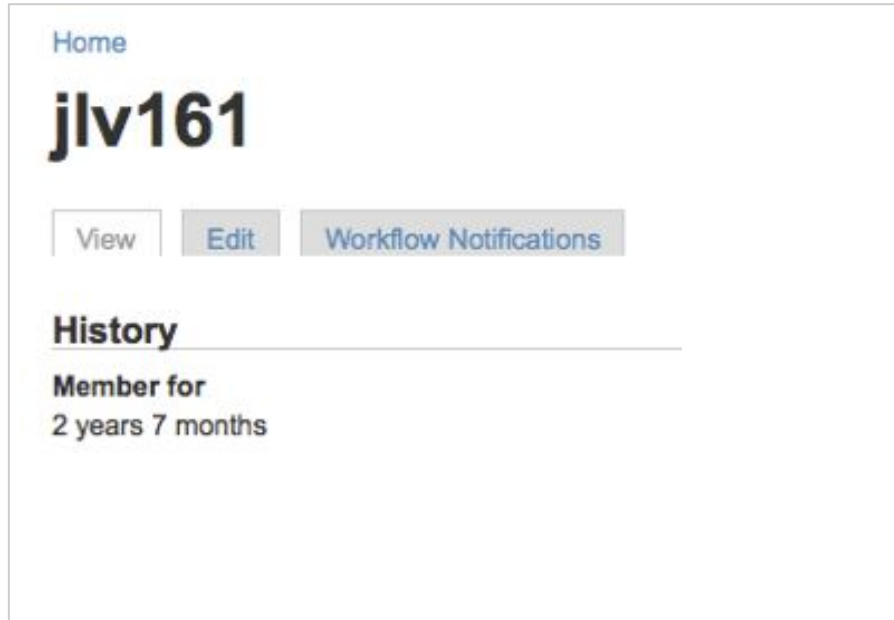
**Password \***

[Reset your password](#) or contact [support](#).

## Override the login form

- Provide contextual labels and instructions.
- Consider SSO access options when available.

# Log In Experience



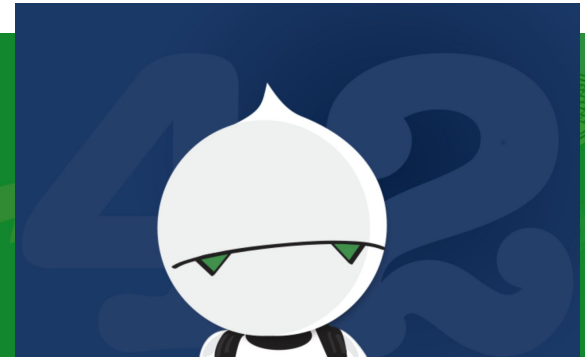
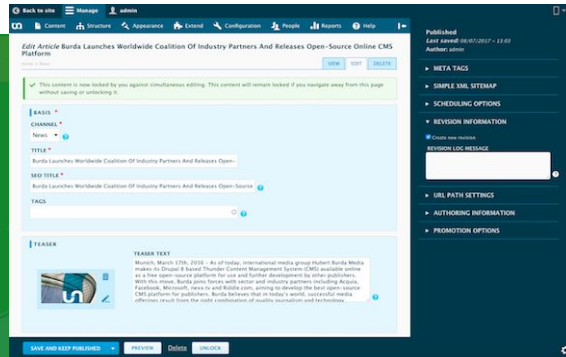
A screenshot of a user profile page in Drupal. At the top left, there is a blue link labeled "Home". Below it, the username "jlv161" is displayed in a large, bold, black font. Underneath the username, there are three buttons: "View" (white with a grey border), "Edit" (grey), and "Workflow Notifications" (grey). Below the buttons, the word "History" is written in bold black text, followed by a horizontal line. Under the line, the text "Member for" is followed by "2 years 7 months" in a smaller font.

## Choose a user path

- On login, Drupal directs users to their profile page.
- Instead, choose a more useful location based on common personas.
- Employ destination parameters in URLs.

# Admin Theme and Toolbar

Admin themes include editorial tools and create continuity between the backend experience between sites and over time.





# Dashboards

Provide a set of tools and reports that are most helpful to editors. This may be a single page or a collection of interfaces.



# Dashboards






Create content management screens to **replace the default content overview page**. Customize views per content type.

## Manage News

Administration / Content / News

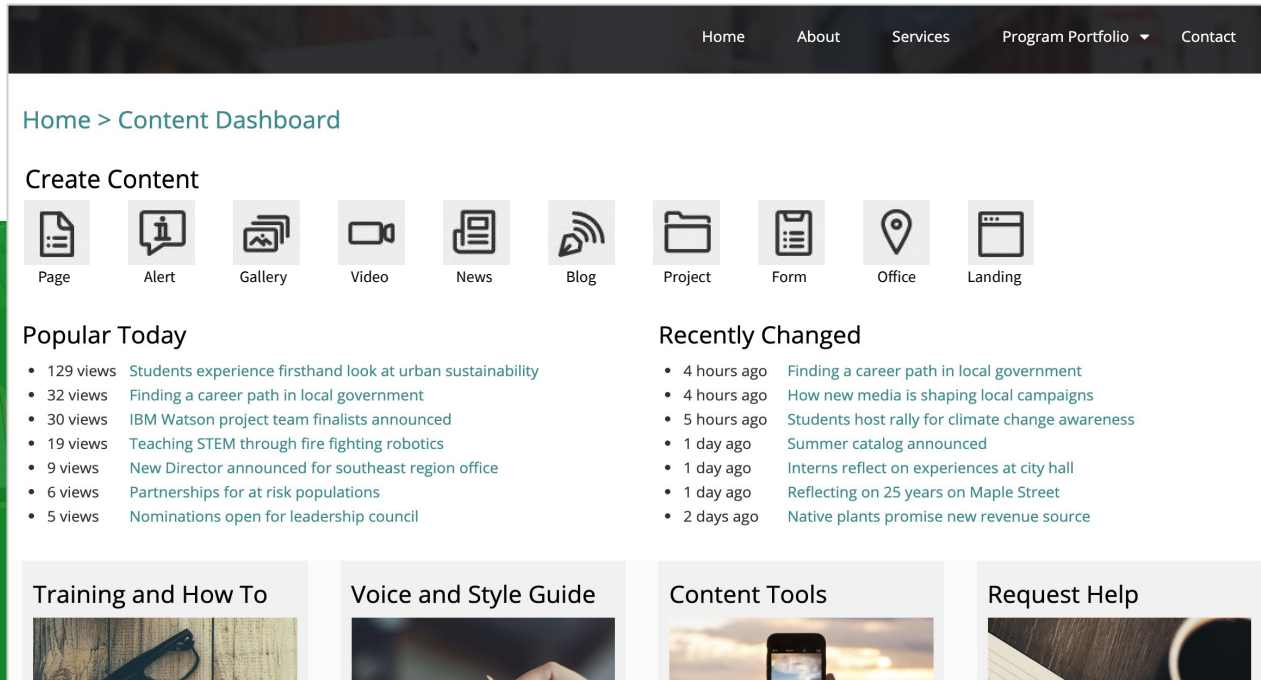
News articles are displayed on the 'News and Events' section of the website and within RSS feeds. Recent news articles may also be featured on other parts of the website in sidebars and ancillary content regions.

- **Promoted** content appears on the featured-news components of each section of the website.
- **Status** can be set to 'Published', 'Unpublished', 'Draft', or 'Needs Review' based on the content workflow states. Only published content will appear on the live site.
- **Post Date** refers to when the content was originally posted online. Lists of articles are sorted in reverse chronological order by their post date.
- **Changed Date** refers to the last time this content was updated. Sorting by this column will help you find recently edited news articles.

| Image  | Headline   | Author        | Topics           | Promoted | Status    | Posted | Changed | Operations |
|--|--|---------------|------------------|----------|-----------|--------|---------|------------|
|   | <a href="#">Intro to graph databases</a>                                   | David Diers   | Development      |          | Draft     | Jun 11 | Jul 20  | Edit ▾     |
|   | <a href="#">Dominos Pizza and legal requirements for web accessibility</a> | Evan Willhite | Development      | Yes      | Published | Jun 24 | Jul 20  | Edit ▾     |
|   | <a href="#">Decoupled Days Conference</a>                                  | Four Kitchens | Events           |          | Published | Jul 3  | Jul 20  | Edit ▾     |
|   | <a href="#">Google Analytics myths that just won't die</a>                 | Tom Lundin    | Digital Strategy | Yes      | Published | Jul 14 | Jul 20  | Edit ▾     |
|  | <a href="#">Introducing Gutenberg</a>                                      | Mike Goulding | Development      |          | Published | Jul 20 | Jul 20  | Edit ▾     |

# Dashboards

**Prioritize tasks** with landing pages. What are the top tasks your editors take on the site? Customize per user, role, or task.



Home About Services Program Portfolio Contact

Home > Content Dashboard

### Create Content

- Page
- Alert
- Gallery
- Video
- News
- Blog
- Project
- Form
- Office
- Landing

### Popular Today

- 129 views [Students experience firsthand look at urban sustainability](#)
- 32 views [Finding a career path in local government](#)
- 30 views [IBM Watson project team finalists announced](#)
- 19 views [Teaching STEM through fire fighting robotics](#)
- 9 views [New Director announced for southeast region office](#)
- 6 views [Partnerships for at risk populations](#)
- 5 views [Nominations open for leadership council](#)

### Recently Changed

- 4 hours ago [Finding a career path in local government](#)
- 4 hours ago [How new media is shaping local campaigns](#)
- 5 hours ago [Students host rally for climate change awareness](#)
- 1 day ago [Summer catalog announced](#)
- 1 day ago [Interns reflect on experiences at city hall](#)
- 1 day ago [Reflecting on 25 years on Maple Street](#)
- 2 days ago [Native plants promise new revenue source](#)

### Training and How To

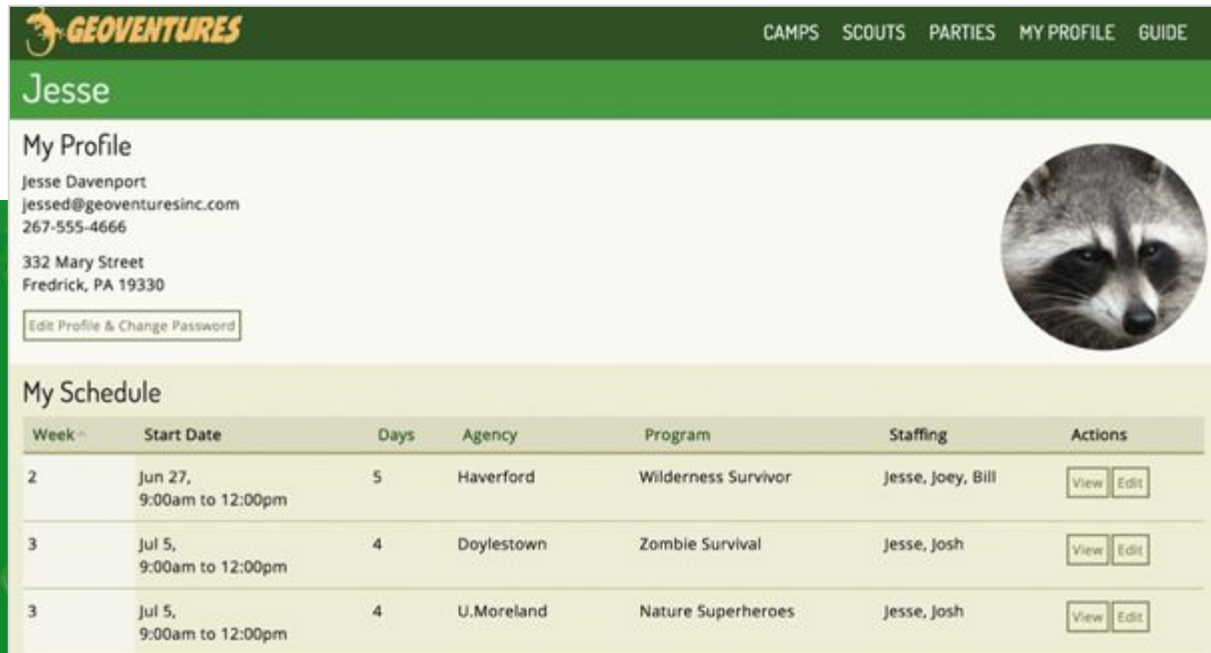
### Voice and Style Guide

### Content Tools

### Request Help

# Dashboards

Personalize dashboards through contextual filters. **Surface relevant content** based on user profiles and account settings.



**GEOVENTURES** CAMPS SCOUTS PARTIES MY PROFILE GUIDE

## Jesse

### My Profile

Jesse Davenport  
jessed@geoventuresinc.com  
267-555-4666

332 Mary Street  
Fredrick, PA 19330

[Edit Profile & Change Password](#)



### My Schedule

| Week | Start Date                   | Days | Agency     | Program             | Staffing          | Actions                                   |
|------|------------------------------|------|------------|---------------------|-------------------|---|
| 2    | Jun 27,<br>9:00am to 12:00pm | 5    | Haverford  | Wilderness Survivor | Jesse, Joey, Bill | <a href="#">View</a> <a href="#">Edit</a> |
| 3    | Jul 5,<br>9:00am to 12:00pm  | 4    | Doylestown | Zombie Survival     | Jesse, Josh       | <a href="#">View</a> <a href="#">Edit</a> |
| 3    | Jul 5,<br>9:00am to 12:00pm  | 4    | U.Moreland | Nature Superheroes  | Jesse, Josh       | <a href="#">View</a> <a href="#">Edit</a> |

# Dashboards

Create reports of **commonly referenced datasets** or completing common tasks. Export as files or feeds for sharing and archival.

Home » Administration » WebConf » Proposals

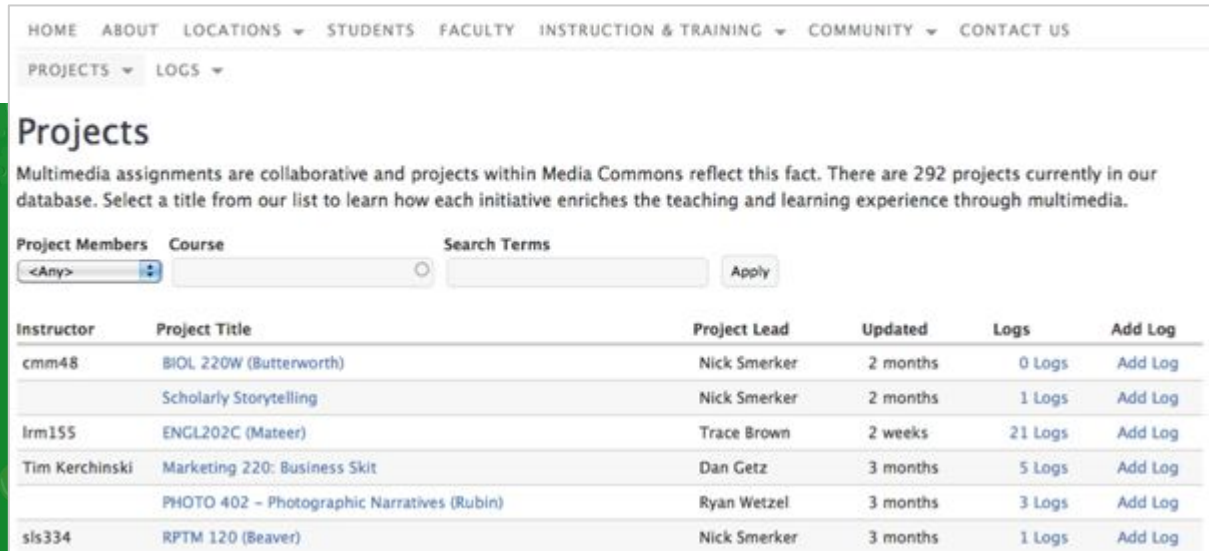
### Proposals: Vote and Discuss

This interface is for Track Chairs to vote and discuss proposals as they are submitted. View the proposal to read the full description and to leave comments for other committee members.

| SUBMITTED | TITLE   | TOPICS   | COMMENTS | VOTING                           | ACTIONS                                   |
|-----------|---|--|----------|----------------------------------|---|
| Jan-30    | <a href="#">Lifelong Learning with lynda.com</a><br>Jan Sheetz  | Accessibility, Content and Marketing,                    | 5        | ★★★★☆<br>Average: 2.1 (10 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-23    | <a href="#">A standards based approach to PDF document accessibility</a><br>Joel Goodman                                | Accessibility  | 4        | ★★★★★<br>Average: 4.1 (11 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-20    | <a href="#">Mindful Social Media: The Eightfold Path</a><br>Austin Matco, Debbie Green                                  | Marketing, Project Management and Leadership             | 3        | ★★★★☆<br>Average: 3.3 (10 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-20    | <a href="#">The Voyage of the Beagle: Biology, Evolution, and Content Strategy</a><br>Jeff Brennan                      | Content and Marketing                                    | 2        | ★★★★☆<br>Average: 3.9 (10 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-20    | <a href="#">Building a Better Battcave: Building a Collaborative WordPress Intranet</a><br>Mitch Connell                | Innovation and Design, Project Management and Leadership | 11       | ★★★★★<br>Average: 4.2 (10 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-20    | <a href="#">Making together: the merging journeys of UX, design &amp; development</a><br>Kelly Young, Maranda Hernandez | Usability  | 7        | ★★★★☆<br>Average: 4.1 (12 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-19    | <a href="#">Social Silo-Busting: Using the Google Analytics Social Report</a><br>Vanessa Hildie                         | Content and Marketing, Education and Training            | 6        | ★★★★☆<br>Average: 3.7 (9 votes)  | <a href="#">view</a> <a href="#">edit</a> |
| Jan-19    | <a href="#">Brain hack: unleashing the publisher within</a><br>Mo Hasan   | Content and Marketing                                    | 4        | ★★★★☆<br>Average: 4.2 (9 votes)  | <a href="#">view</a> <a href="#">edit</a> |
| Jan-19    | <a href="#">Banishing shame from education and work</a><br>Dwight Dietrich  | Innovation and Design                                    | 3        | ★★★★☆<br>Average: 3.5 (10 votes) | <a href="#">view</a> <a href="#">edit</a> |
| Jan-19    | <a href="#">Banishing shame from education and work</a><br>Marissa Smith  | Education and Training                                   | 5        | ★★★★☆<br>Average: 4.1 (9 votes)  | <a href="#">view</a> <a href="#">edit</a> |

# Dashboards

Out of the box, Views has **exposed filters and arguments** to sort and parse content.



HOME ABOUT LOCATIONS ▾ STUDENTS FACULTY INSTRUCTION & TRAINING ▾ COMMUNITY ▾ CONTACT US

PROJECTS ▾ LOGS ▾

## Projects

Multimedia assignments are collaborative and projects within Media Commons reflect this fact. There are 292 projects currently in our database. Select a title from our list to learn how each initiative enriches the teaching and learning experience through multimedia.

Project Members Course Search Terms

<Any>

| Instructor     | Project Title                               | Project Lead | Updated  | Logs    | Add Log                 |
|----------------|---|--------------|----------|---------|-------------------------|
| cmm48          | BIOL 220W (Butterworth)                     | Nick Smerker | 2 months | 0 Logs  | <a href="#">Add Log</a> |
|                | Scholarly Storytelling                      | Nick Smerker | 2 months | 1 Logs  | <a href="#">Add Log</a> |
| lrm155         | ENGL202C (Mateer)                           | Trace Brown  | 2 weeks  | 21 Logs | <a href="#">Add Log</a> |
| Tim Kerchinski | Marketing 220: Business Skit                | Dan Getz     | 3 months | 5 Logs  | <a href="#">Add Log</a> |
|                | PHOTO 402 - Photographic Narratives (Rubin) | Ryan Wetzel  | 3 months | 3 Logs  | <a href="#">Add Log</a> |
| sis334         | RPTM 120 (Beaver)                           | Nick Smerker | 3 months | 1 Logs  | <a href="#">Add Log</a> |









# Dashboards

Views Bulk Operations and Action Plugins lets editors **perform routine actions** over a large set of content.

Action

Geocode the address field ▾

Apply to selected items

| <input type="checkbox"/> | ID | IMAGE   | MAP   | NAME                        | DATE OF FIRST VISIT | LOCATION   | CHANGED    | TYPE                | ACTION                                |
|--------------------------|----|---|---|-----------------------------|---------------------|--|------------|---------------------|---------------------------------------|
| <input type="checkbox"/> | 1  |    |    | D.G. Yuengling & Son        | 2005-07-16          | 5th & Mahantongo Streets<br>Pottsville, PA 17901<br>United States<br><br>POINT (-76.1978365<br>40.6829446) | 2018-07-03 | Brewery             | <input type="button" value="Edit"/> ▾ |
| <input type="checkbox"/> | 2  |    |    | Anheuser Busch              | 2005-08-13          | 2351 Busch Drive<br>Fort Collins, CO 80524<br>United States<br><br>POINT (-105.0051165<br>40.617477)       | 2018-07-03 | Brewery             | <input type="button" value="Edit"/> ▾ |
| <input type="checkbox"/> | 3  |    |    | New Belgium Brewing Company | 2005-08-13          | 500 Linden Street<br>Fort Collins, CO 80524<br>United States<br><br>POINT (-105.066874<br>40.593415)       | 2018-07-03 | Brewery,<br>Brewpub | <input type="button" value="Edit"/> ▾ |
| <input type="checkbox"/> | 4  |  |  | Boscos Restaurant & Brewery | 2005-08-21          | 500 President Clinton Avenue<br>Little Rock, AR 72201  | 2018-07-03 | Brewpub             | <input type="button" value="Edit"/> ▾ |

# Dashboards

Cloning tools create **duplicate content** items, prepopulated with the values of an existing piece of content.

Home » Administration » GVPS

### Manage Events

Week  Days  Time  Venue  Price  Link  Staff  Notes  Status

| WEEK | START DATE   | DAYS | TIME              | AGENCY       | PROGRAM  | ACTIONS  |
|------|--------------|------|-------------------|--------------|----------|--|
| 1    | Mon, June 20 | 5    | 9:00am to 12:00pm | UpperDublin  | Heros    | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 1    | Wed, June 22 | 1    | 12:00pm to 3:00pm | Makoto       | Survivor | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 1    | Mon, June 20 | 5    | 1:00pm to 4:00pm  | U.Gwynedd    | Survivor | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 5    | 9:00am to 12:00pm | UpperDublin  | Art      | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 5    | 9:00am to 12:00pm | Haverford    | Survivor | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 4    | 12:00pm to 3:00pm | UpperMerion  | Survivor | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 5    | 9:00am to 12:00pm | Horsham      | Geo      | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 4    | 9:00am to 1:00pm  | Newtown      | Spy      | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 2    | Mon, June 27 | 5    | 9:00am to 12:00pm | Abington     | Jedi     | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 3    | Tue, July 5  | 4    | 1:00pm to 4:00pm  | U.Providence | Jedi     | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 3    | Tue, July 5  | 4    | 9:00am to 12:00pm | U.Providence | Explore  | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |
| 3    | Tue, July 5  | 4    | 9:00am to 12:00pm | Doylestown   | Z        | <a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Copy</a> |



# Dashboards

Weight creates **draggable interfaces** for editors to change the order of content in lists and menus.

Home » Administration » Content

## Manage Content: Project Order

By design, every program belongs to a single strategic program area. The programs and these groupings are illustrated in the tables below. The order (top to bottom) of the projects in a table illustrates the order that the programs are displayed on the website. You can click-and-drag a program by the cross-hairs to change its order. Commit all changes by clicking the 'Save' button at the bottom the page.

[Show row weights](#)

Strategic Area: Science, Technology, Engineering, and Math (STEM)

| TITLE                     | STATUS    |
|---------------------------|-----------|
| ⊕ Summer Dreamers Academy | Published |
| ⊕ Real-Life Math          | Published |

[Show row weights](#)

Strategic Area: Energy

| TITLE  | STATUS    |
|--|-----------|
| ⊕ Pittsburgh Green Innovators                              | Published |
| ⊕ Mid-Atlantic Solar Resource and Training Center (MASRTC) | Published |
| ⊕ Smart Grid Training and Resource Center (GridSTAR)       | Published |
| ⊕ National Energy Leadership Corps (NELC)                  | Published |


[Show row weights](#)

Strategic Area: Stormwater Management

| TITLE | STATUS |
|-------|--------|
|-------|--------|

# Dashboards

‘Views Entity Form Field’ and ‘Toggle Editable fields’ save time on redundant content tasks.

| WEEK | START DATE   | AGENCY      | PROGRAM | VENUE            | STAFFING   |
|------|--------------|-------------|---------|------------------|--|
| 1    | Mon, June 25 | Abington    | Explore | Alverthorpe Park | <input type="text" value="Sarah (174)"/> <br><input type="text" value="Crystal (40)"/> <input type="radio"/><br><input type="text" value="Jim (1)"/> <input type="radio"/><br><input type="text" value=""/><br><input type="button" value="Add Another Staffer"/> |
| 1    | Mon, June 25 | UpperDublin | Rebel   | Robbins Park     | <input type="text" value="Derek (58)"/> <input type="radio"/><br><input type="button" value="Add Another Staffer"/>  |
| 3    | Mon, July 9  | Doylestown  | Geo     | Central Park     | <input type="text" value="Cassie (39)"/> <input type="radio"/><br><input type="button" value="Add Another Staffer"/>   |
| 3    | Mon, July 9  | UpperDublin | Jedi    | Robbins Park     | <input type="text" value="Jim (1)"/> <input type="radio"/><br><input type="text" value="Crystal (40)"/> <input type="radio"/><br><input type="text" value=""/><br><input type="button" value="Add Another Staffer"/>   |

# Dashboards

## **Identify the tasks most common for your internal users:**

- What was that page I was editing yesterday?
- Did that new item get published?
- What events are displaying across all categories?
- Which products have a header image?
- What alerts are scheduled for the site?
- What are the metatags for each landing page?
- Which url redirects exist and when was it last accessed?

# Dashboards

## **Identify the tasks most common for your internal users:**

- A11y: What is the alt-text for images across the site?
- What reports do I need to share? CSV files of feeds?
- Stale content: Which products were not updated in a year?
- Performance: Which pages have the most traffic?
- Announcements: How can I post updates to editors?
- Support: Where do I go for help?
- Where can I find 'my' content?\*

# Field Types, Widgets, Formatters

Get to know the field types available in Drupal Core and contrib.  
Always use the right tool for the job.



# Field Types, Widgets, Formatters

Not everything needs to be a text-field. Field types and widgets add structure and validation to interfaces.

## Phone Number

Area code? Dashes? Dots?  
Extensions? Letters?

## Link

Relative vs absolute?  
Include protocol? Twitter?

## Price

Currency? Decimal?  
Thousands? Numbers only?

## Birthday

MM/DD or DD/MM? Long  
name? Include year?

## Address

Here's a field.  
You figure it out.

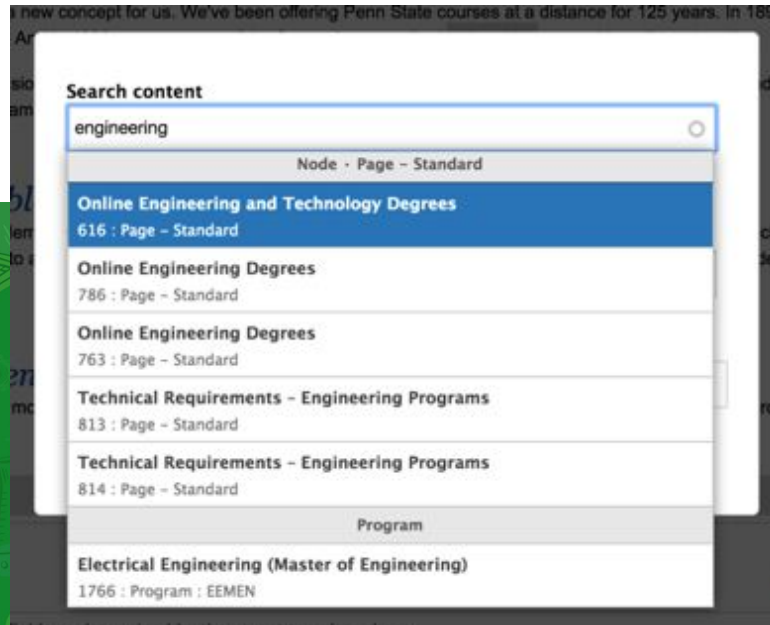
# Field Types, Widgets, Formatters

The Email, Telephone, and Date fields use HTML5 markup to inputs and include custom validation.



# Field Types, Widgets, Formatters

**Linkit** is a solution for internal linking. Editors should not have to 'go find the page and copy something' to create a link.





# Field Types, Widgets, Formatters

“Drop downs should be the UI of last resort” (Luke Wroblewski).

Some Drupal alternatives:

**Favorite Pies:**

Available Options:

- chocolate
- apple
- pumpkin
- blackberry

Selected Options:

- cherry
- meringue

**Select Team Members:**

|                      |                 |
|----------------------|-----------------|
| Gianluigi Buffon     | Xabi Alonso     |
| Alessandro Del Piero | Steven Gerrard  |
| Cristiano Zanetti    | Diego Cavalieri |
| David Trezeguet      | Fernando Torres |

Fantasy Soccer Team

**Simple Slider**

40

**Range Slider**

%421 - %780

\$421 \$780

**Slider Min**

50

**Pick an option\***

- Option 1
- Option 2
- Option 3
- Other (please type)

**Other**

My custom value!

Sloth Bear

American Black Bear

Asiatic Black Bear

Brown Bear

Giant Panda

Sloth Bear

Sun Bear

Polar Bear

Spectacled Bear

# Field Types, Widgets, Formatters

**Computed Fields** populate based on programmable logic; or alter entity save logic; shortening the form and reducing user error.

## Time Sheet

Tom | Upper Providence | Nature Explorers Camp

View Edit Devel

Total Due

|                 |                    |                   |
|-----------------|--------------------|-------------------|
| Subtotal Wages  | Subtotal Mileage   | Total Payment Due |
| Total Hours: 19 | Total Miles: 150   | Total Due: 341.5  |
| Pay Rate: 16.00 | Mileage Rate: 0.25 |                   |
| Wages Due: 304  | Mileage Due: 37.5  |                   |

Billable Hours and Travel

| Setup         | Sunday         | Monday        | Tuesday        | Wednesday      | Thursday       | Friday         | Saturday      |
|---------------|----------------|---------------|----------------|----------------|----------------|----------------|---------------|
| Hours: 1:30   | Hours: 1:00    | Hours: 0:00   | Hours: 4:15    | Hours: 4:15    | Hours: 4:00    | Hours: 4:00    | Hours: 0:00   |
| Mileage: 0.00 | Mileage: 30.00 | Mileage: 0.00 | Mileage: 30.00 | Mileage: 30.00 | Mileage: 30.00 | Mileage: 30.00 | Mileage: 0.00 |

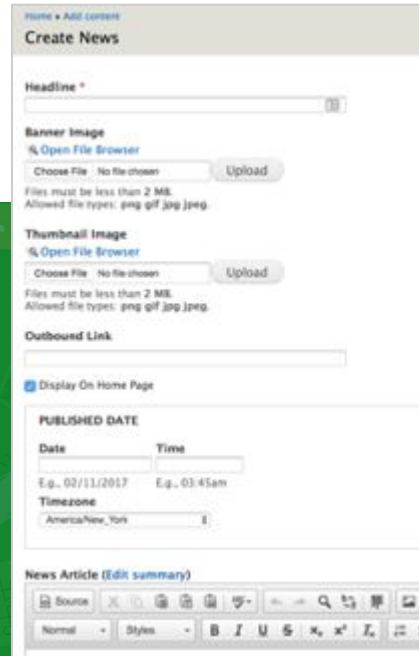
# Enhancing Forms

Drupal's extensibility empowers site architects. Without careful consideration, content forms can become unwieldy.



# Enhancing Forms

A great architecture is meaningless if clients can't use it. How can we tame content forms?



The screenshot shows a web form titled "Create News" with the following sections and fields:

- Headline \***: A text input field.
- Banner Image**: Includes a link to "Open File Browser", a "Choose File" button (showing "No file chosen"), and an "Upload" button. A note states: "Files must be less than 2 MB. Allowed file types: png gif jpg jpeg".
- Thumbnail Image**: Similar to the banner image section, with a "Choose File" button and an "Upload" button. Note: "Files must be less than 2 MB. Allowed file types: png gif jpg jpeg".
- Outbound Link**: A text input field.
- Display On Home Page**: A checked checkbox.
- PUBLISHED DATE**:
  - Date**: A date input field with the example "E.g., 02/11/2017".
  - Time**: A time input field with the example "E.g., 03:45am".
  - Timezone**: A dropdown menu with "America/New\_York" selected.
- News Article (Edit summary)**: A rich text editor with a toolbar containing options for Source, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Link, Unlink, and Undo.

# Enhancing Forms

Altering the **add and edit form titles** is a simple way to add direction to content editors.

## Create Session

Every year, it's our mission to give attendees the best experience possible. We can't do this without great sessions. So, bring it. Whether you're a seasoned veteran or new to the circuit, we want your idea.

**Proposals must be submitted by 11:59 p.m. on December 1.** The main speaker of any accepted session will receive a free conference registration. Any other speaker on the same talk may take advantage of early bird pricing. A maximum of two speakers per session is allowed.

Session Title \*

## Submit a Proposal

Every year, it's our mission to give attendees the best experience possible. We can't do this without great sessions. So, bring it. Whether you're a seasoned veteran or new to the circuit, we want your idea.

**Proposals must be submitted by 11:59 p.m. on December 1.** The main speaker of any accepted session will receive a free conference registration. Any other speaker on the same talk may take advantage of early bird pricing. A maximum of two speakers per session is allowed.

Session Title \*

~~Create Application~~  
**Join Our Team**

~~Create Timesheet~~  
**Track Your Time**

~~Create Alert~~  
**Set a Campus Alert Message**

# Enhancing Forms

Altering the **form submit buttons** is another way to provide context to the form action as content moves through a workflow.

SUBMIT PROPOSAL

Add Position to Job Board

Post to Newsfeed



# Enhancing Forms

**Field groups** and tabs can organize interfaces by content areas or help model your workflow. Also minimize content footprint.

The screenshot shows a web interface for editing an event. At the top, a green header contains the text "Edit Event : June 11 | Upper Moreland | Zombie Survival Camp". Below the header is a navigation bar with four tabs: "View", "Edit", "Repeats", and "Devel". The "Edit" tab is active. The main content area is divided into two columns. The left column contains a vertical list of tabs: "Event Details", "Marketing Details", "Registration \*", and "Staffing". The right column contains a form with the following fields:

- Title:** A text input field containing "June 11 | Upper Moreland | Zombie Survival Camp".
- Agency:** A dropdown menu with "Upper Moreland (351)" selected.
- Program:** A dropdown menu with "Zombie Survival Camp (16)" selected.
- Venue:** A dropdown menu with "Mason Mills Park (356)" selected.
- Visibility:** A section with three radio buttons:
  - Staff: Show User on internal staff portal page
  - Event: Show on Event on public camps listings
  - Event: Show on Event staff schedule and timesheets
- Body (Edit summary):** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, and other formatting options.

# Enhancing Forms

Use **field descriptions** to provide contextual instructions to site editors. Descriptions written with the stakeholder who use the field.

The screenshot displays a web form editor interface with a sidebar on the left and a main content area on the right. The sidebar contains the following menu items: Overview Page \*, Course Planning Tools, Program Contacts, Resources Page, Program-wide Elements, and Synchronized Fields. The main content area is divided into three sections:

- RECOMMENDED ACADEMIC PLAN LINKS**: Features a plus icon, a 'Title' input field, and a 'URL' input field. Below the fields is a description: "Link to the RAP generated in the DUS tool. The link title should follow the form: 'Agribusiness Management Recommended Academic Plan' or 'BSVIC Recommended Academic Plan - Accounting Option'. A program may have more than one RAP if it includes multiple options of if the academic requirements have changed." and an "Add another item" button.
- DEGREE AUDIT**: Features a plus icon and a single input field. Below the field is a description: "Make sure the desired degree audit has been added to the site as a separate content type. Begin typing the name of the degree audit, and select the appropriate degree audit from suggested items in the pop-up. A program may have more than one Degree Audit if it includes multiple options or if the academic requirements have changed." and an "Add another item" button.
- Course Check Sheet**: Features a plus icon and a single input field. Below the field is a description: "Make sure the desired course check sheet has been added to the site as a pdf content type. Begin typing the name of the check sheet, and select the appropriate check sheet from suggested items in the pop-up. Check sheets are primarily used for undergraduate certificates." and an "Add another item" button.



# Enhancing Forms

**Field permissions** provides granular control to view and edit values based on the user's role. (But add access controls cautiously.)

| PERMISSION                                    | ANONYMOUS USER           | AUTHENTICATED USER                  | ADMIN                               | PAYROLL                             | STAFF                               |
|---|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Create own value for field <i>Pay Rate</i>    | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Edit own value for field <i>Pay Rate</i>      | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Edit anyone's value for field <i>Pay Rate</i> | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| View own value for field <i>Pay Rate</i>      | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| View anyone's value for field <i>Pay Rate</i> | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

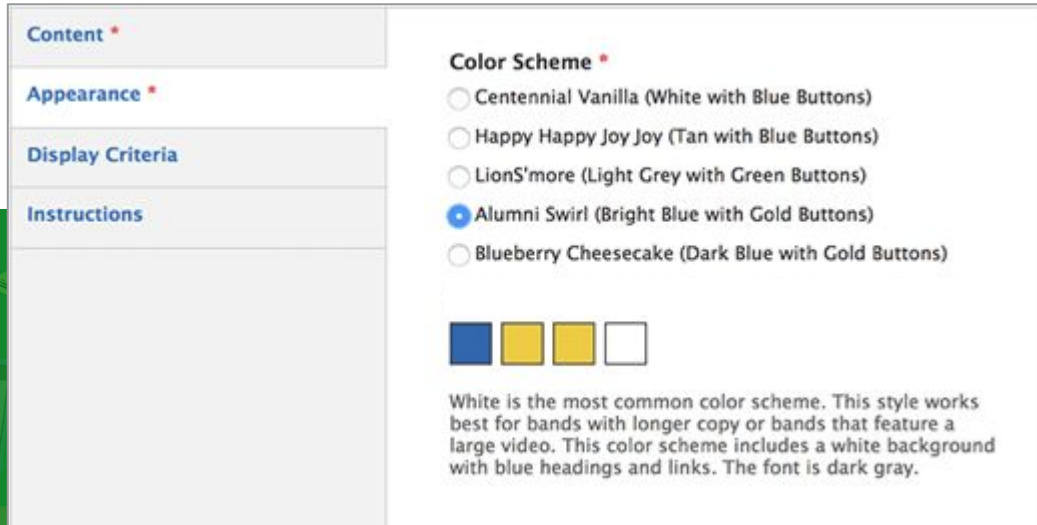
# Enhancing Forms

The **Clientside Validation** module adds inline error handling on forms. **Validation Plugs** are easy to define in a custom module.



# Enhancing Forms

Attach **custom CSS and JS** to progressively enhance forms to take control of the presentation layer.



The image shows a configuration panel for a form, with a sidebar on the left and a main content area on the right. The sidebar contains four sections: 'Content', 'Appearance', 'Display Criteria', and 'Instructions'. The 'Appearance' section is currently selected. The main content area is titled 'Color Scheme' and lists five options, each with a radio button. The 'Alumni Swirl' option is selected. Below the list are four color swatches: a blue square, a yellow square, a white square, and a white square. Below the swatches is a paragraph of text explaining the white color scheme.

**Content \***


**Appearance \***

**Display Criteria**

**Instructions**

**Color Scheme \***

- Centennial Vanilla (White with Blue Buttons)
- Happy Happy Joy Joy (Tan with Blue Buttons)
- LionS'more (Light Grey with Green Buttons)
- Alumni Swirl (Bright Blue with Gold Buttons)
- Blueberry Cheesecake (Dark Blue with Gold Buttons)



White is the most common color scheme. This style works best for bands with longer copy or bands that feature a large video. This color scheme includes a white background with blue headings and links. The font is dark gray.

# Enhancing Forms

Consider where to **redirect a user** after saving content. What is the next step? Adding another? Viewing a thank you page?

## Thank You

Your application has been submitted.

Thank you for your interest. We will be collecting and reviewing applications for the next several weeks. You will be notified by the hiring department should we choose to move forward with your application. Please contact [Jim@GeoVenturesInc.com](mailto:Jim@GeoVenturesInc.com) if you have any questions.

# Enhancing Forms

Theme **form display modes** to reduce their footprint. Hide seldom viewed fields in groups. Define preview modes for paragraph.

**Card Collection** Edit

**Featured Event**

IC Diversity & Inclusion Discussion  
[View all events](#)

**Card Collection** Edit

**Featured Events - Two**

IC Diversity & Inclusion Discussion

**Spotlight Collection** Edit

**Card Collection** Edit

**Featured Event**

Thursday 8 AM  
IC Diversity & Inclusion Discussion  
Hockett Family Recital Hall  
[View all events](#)

**Card Collection** Edit

**Featured Events - Two**

Thursday 8 AM  
IC Diversity & Inclusion Discussion  
Hockett Family Recital Hall

Friday 8 AM - 10:30 AM  
Business Development  
Northstar House, Casa Del Polaris  
[View all events](#)

**Card Collection** Edit

In an increasingly competitive market there are **high expectation** on our open source community.

**Embrace** your user's stories. **Discover** their frustrations and workarounds. **Share** with the community.

# Thank You!



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@nJim

