

THE
PRESENTATION
IS FINISHED.
NO FURTHER
EDITS, PLEASE

Report from Formal Drupal Usability Testing at the University of Minnesota Libraries

Drupalcon Boston 2008
Day 1, Monday 3 March

Documents for this presentation at:

<http://groups.drupal.org/usability>

Follow along online:

<http://tinyurl.com/ywrb4s>
(requires a Google login)

Why is the U of M interested in Drupal?

The University of Minnesota Libraries Are...

...Standardizing on a (Social) Platform

- Drupal as Library Web Applications "Glue"
- Drupal Powered Academic Community Sites
 - [HarvestChoice](#), [EthicShare](#)

How Did This Get Started?

- Barcelona Drupalcon Keynote
 - Dries: Usability!, Usability!
- We Have a Lab, You Have a CMS
 - Helping Drupal Helps Us



UNIVERSITY OF MINNESOTA
LIBRARIES

Why formal usability testing?

Because none of us can
unlearn how to use Drupal.

Because we can't forget what
a node is.

Because we know that
Post Settings,
Input Format,
and Display Fields,
are not commands

Because the people who care most about Drupal, can never use it for the first time again.

Currently in Use







What to test?

Drupal is highly customizable

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In most cases deployment of Drupal requires heavy customization of UI/modules/etc.

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In most cases deployment of Drupal requires heavy customization of UI/modules/etc.

What do we test that will be relevant to the most users?

The short answer:

Drupal 6.x core
CCK

Garland theme

The long answer

Tasks that required users to grok:

- CCK content types and fields
- Users, roles, and permissions
- Taxonomy (we're librarians, after all)
- Menus
- Blocks

The long answer

We had to be very careful in how we worded the tasks

- Tasks had to match the evaluator's mental model and vocabulary (i.e. a page is a page, not a node type)
- Tasks had to avoid terminology that appears in the Drupal interface

Personas

Initial persona set:

- Visitor
 - Anonymous user
- Content contributor
 - Authenticated user
- Site maintainer
 - Sub-admin
 - Editor
- Site admin
 - Installer
 - DB Admin
 - Server Admin

Personas

Initial persona set:

- Visitor
 - Anonymous user
- Content contributor
 - Authenticated user
- **Site maintainer**
 - Sub-admin
 - Editor
- Site admin
 - Installer
 - DB Admin
 - Server Admin

Evaluators

In order to find people who could succeed, the lab recruited people who had experience with the following:

Blog apps like Movable Type or WordPress

Other CMSs

but not Drupal.

These are our people

These are our people

the kind of people who we'd like to see using Drupal


These are our people

the kind of people who we'd like to see using Drupal

the kind of people we'd like to think could use Drupal

And this is what we found...

What *we* see

 **University**

a

- My account
- ▷ Create content
- ▼ Administer
 - ▷ Content management
 - ▷ Site building
 - ▷ Site configuration
 - ▷ User management
 - ▷ Reports
 - Help
- Log out

Home

Administer

By task

By module

Cron has not run. Please visit the [status report](#) for more information.

Welcome to the administration section. Here you may control how your site functions.

Hide descriptions

Content management

Manage your site's content.

Comments

List and edit site comments and the comment moderation queue.

Content

View, edit, and delete your site's content.

Content types

Manage posts by content type, including default status, front page promotion, etc.

Post settings

Control posting behavior, such as teaser length, requiring previews before posting, and the number of posts on the front page.

RSS publishing

Configure the number of items per feed and whether feeds should be titles/teasers/full-text.

Taxonomy

Manage tagging, categorization, and classification of your content.

Site building

Control how your site looks and feels.

Blocks

Configure what block content appears in your site's sidebars and other regions.

Menus

Control your site's navigation menu, primary links and secondary links, as well as rename and reorganize menu items.

Modules

Enable or disable add-on modules for your site.

Themes

Change which theme your site uses or allows users to set.

Site configuration

Adjust basic site configuration options.

Actions

Manage the actions defined for your site.

What *they* see



University

My account

Create content

Administer

Content management

- Comments
- Content
- Content types
- Post settings
- RSS publishing
- Taxonomy

Site building

- Site configuration
- User management
- Reports
- Help

Log out

HomeAdministerContent management

Workshop

EditManage fieldsDisplay fieldsAdd fieldAdd group

Identification

Name: *
Workshop

The human-readable name of this content type. This text will be displayed as part of the list on the create content page. It is recommended that this name begin with a capital letter and contain only letters, numbers, and spaces. This name must be unique.

Type: *
workshop

The machine-readable name of this content type. This text will be used for constructing the URL, of the create content page for this content type. This name must contain only lowercase letters, numbers, and underscores. Underscores will be converted into hyphens when constructing the URL, of the create content page. This name must be unique.

Description:
A library workshop.

A brief description of this content type. This text will be displayed as part of the list on the create content page.

Submission form settings

Title field label: *
Name

Body field label:
Description

To omit the body field for this content type, remove any text and leave this field blank.

Minimum number of words:
0

The minimum number of words for the body field to be considered valid for this content type. This can be useful to rule out submissions that do not meet the site's standards, such as short text posts.

Explanation or submission guidelines:

This text will be displayed at the top of the submission form for this content type. It is useful for helping or instructing your users.

Workflow settings

Default options:
☒ Published
☒ Promoted to front page
☐ Sticky at top of lists
☐ Create new revision

Users with the administrator nodes permission will be able to override these options.

Comment settings

Default comment setting:
☐ Disabled
☐ Read only
☒ Read/Write

Users with the administrator comments permission will be able to override this setting.

Default display mode:
☐ Flat list - collapsed
☐ Flat list - expanded
☐ Threaded list - collapsed
☒ Threaded list - expanded

The default view for comments. Expanded views display the body of the comment. Threaded views keep replies together.

Default display order:
☒ Date - newest first
☐ Date - oldest first

The default sorting for new users and anonymous users while viewing comments. These users may change their view using the comment control panel. For registered users, this change is remembered as a persistent user preference.

Default comments per page:
50

Default number of comments for each page; more comments are distributed in several pages.

Comment controls:
☐ Display above the comments
☐ Display below the comments
☐ Display above and below the comments
☒ Do not display

Position of the comment controls box. The comment controls let the user change the default display mode and display order of comments.

Anonymous commenting:
☒ Anonymous posters may not enter their contact information
☐ Anonymous posters may leave their contact information
☐ Anonymous posters must leave their contact information

This option is enabled when anonymous users have permission to post comments on the permissions page.

Comment subject field:
☐ Disabled
☒ Enabled

Can users provide a unique subject for their comments?

Preview comment:
☐ Optional
☒ Required

Forces a user to look at their comment by clicking on a "Preview" button before they can actually add the comment

Location of comment submission form:
☒ Display on separate page
☐ Display below post or comments

Save content typeDelete content type

"Yowza!"

Task 1

Create a form with some simple fields so users can list upcoming workshops.

“

OK I'm building a site, so I'll
start with Site Building.

”

“

Content Management probably isn't where I want to be right now, so I'll start with Site Building, then Blocks.

”

Site building

University

Home > Administer

Site building

Blocks
Configure what block content appears in your site's sidebars and other regions.

Menus
Control your site's navigation menu, primary links and secondary links, as well as rename and reorganize menu items.

Modules
Enable or disable add-on modules for your site.

Themes
Change which theme your site uses or allows users to set.

1. This is where they spent most of their time, but **nothing** on this page had anything they needed to complete their tasks.
2. They were looking for things that said "field" or "form".

“

If I can find anything at all
about forms...

”



A lot of this language is
unfamiliar... like content type.



Content management panel

The screenshot shows the Drupal University administration interface. The top navigation bar is blue with the University logo and the word 'University'. Below it is a breadcrumb trail: 'Home > Administer'. The left sidebar contains a list of links under the 'Administer' section, including 'My account', 'Create content', 'Administer', 'Content management', 'Comments', 'Content', 'Content types', 'Post settings', 'RSS publishing', 'Taxonomy', 'Site building', 'Site configuration', 'User management', 'Reports', 'Help', and 'Log out'. The main content area displays the 'Content management' panel, which includes links for 'Comments', 'Content', 'Content types', 'Post settings', 'RSS publishing', and 'Taxonomy'. Red arrows numbered 1, 2, and 3 point to the 'Content management' link in the breadcrumb, the 'Content management' link in the sidebar, and the 'Content management' link in the main content area respectively.

1. Confusion between content, content type, and create content.

2. People don't find what they're looking for here. Next stop: Site building/Site configuration...

3. Only get here after help desk call. :(

“

Story seemed very jargony to
me.

”

Content types panel

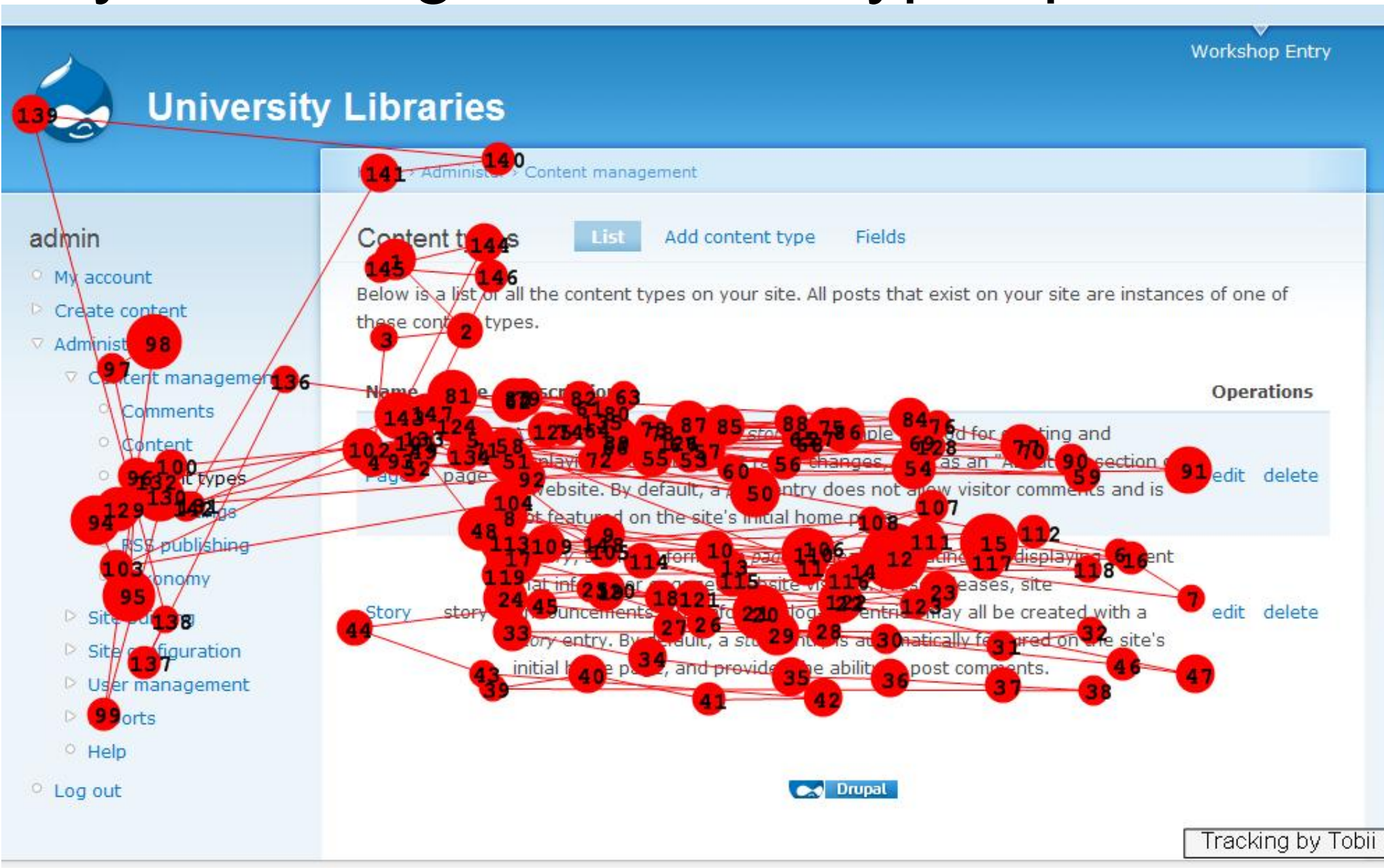
The screenshot shows the 'Content types' panel in a Drupal administration interface. The header includes the University logo and the text 'University'. The breadcrumb trail is 'Home > Administer > Content management'. The main heading is 'Content types', with tabs for 'List' (selected), 'Add content type', and 'Fields'. Below the heading, a text block states: 'Below is a list of all the content types on your site. The posts that exist on your site are instances of one of these content types.' A table lists the content types:

Name	Type	Description	Operations
Page	page	A <i>page</i> , similar in form to a <i>story</i> , is a simple method for creating and displaying information that rarely changes, such as an "About us" section of a website. By default, a <i>page</i> entry does not allow visitor comments and is not featured on the site's initial home page.	edit delete
Story	story	A <i>story</i> , similar in form to a <i>page</i> , is ideal for creating and displaying content that informs or engages website visitors. Press releases, site announcements, and informal blog-like entries may all be created with a <i>story</i> entry. By default, a <i>story</i> entry is automatically featured on the site's initial home page, and provides the	edit delete

Four numbered arrows point to specific elements: 1 points to the 'Fields' tab; 2 points to the text block below the heading; 3 points to the 'Operations' column header; 4 points to the 'Content types' link in the left sidebar menu.

1. Expecting this to be where fields are added.
2. One participant immediately backed out of here, saying "Oh, I'm back in Create content again" because of the descriptions.
3. Looking for the ability to create content and add fields here.
4. Expecting these links to be a "preview" of what the form looks like.

Eye-tracking on content types panel



“

I want to create the ability to
add forms, but I can't see
where they live.

”

“

Is a field a content type? Is a
concept of a field a content
type? Or is a field name a
content type?

”

Add Content Type page (1/2)

University

Home > Administer > Content management > Content types

Content types [List](#) **Add content type** [Fields](#)

To create a new content type, enter the human-readable name, the machine-readable name, and all other relevant fields that are on this page. Once created, users of your site will be able to create posts that are instances of this content type.

Identification

Name: *

The human-readable name of this content type. This text will be displayed as part of the list on the *create content* page. It is recommended that this name begin with a capital letter and contain only letters, numbers, and **spaces**. This name must be unique.

Type: *

The machine-readable name of this content type. This name must contain only lowercase letters, numbers, and underscores. It must also be unique when constructing the URL of the content type.

Description:

A brief description of this content type.

1. Several users added 'field' definitions here. They thought they could add the field forms to the 'page' they had created so that librarians could add workshops from the 'page' with the fields on it.
2. Fields tab was invisible (and empty)

Add Content Type page (2/2)

1. Core fields are in submission form settings, CCK fields are hiding under a tab.
2. With all fieldsets expanded, **this form is one yard long.**

Submission form settings

Title field label: *

Name

Body field label:

Description

To omit the body field for this content type, remove any text and leave this field blank.

Minimum number of words:

0

The minimum number of words for the body field to be considered valid for this content type. This can be useful to rule out submissions that do not meet the site's standards, such as short test posts.

Explanation or submission guide

This text will be displayed at the top of the submission form for this content type. It is useful for helping or instructing your users.

Workflow settings

Comment settings

Default comment setting:

☐ Disabled

☐ Read only

☒ Read/Write

Users with the *administer comments* permission will be able to override this setting.

Default display mode:

☐ Flat list - collapsed

☐ Flat list - expanded

☐ Threaded list - collapsed



A page, I think I know what a
page is.



“

A page, I'm thinking web
page?

”

“

What the heck is a book page?

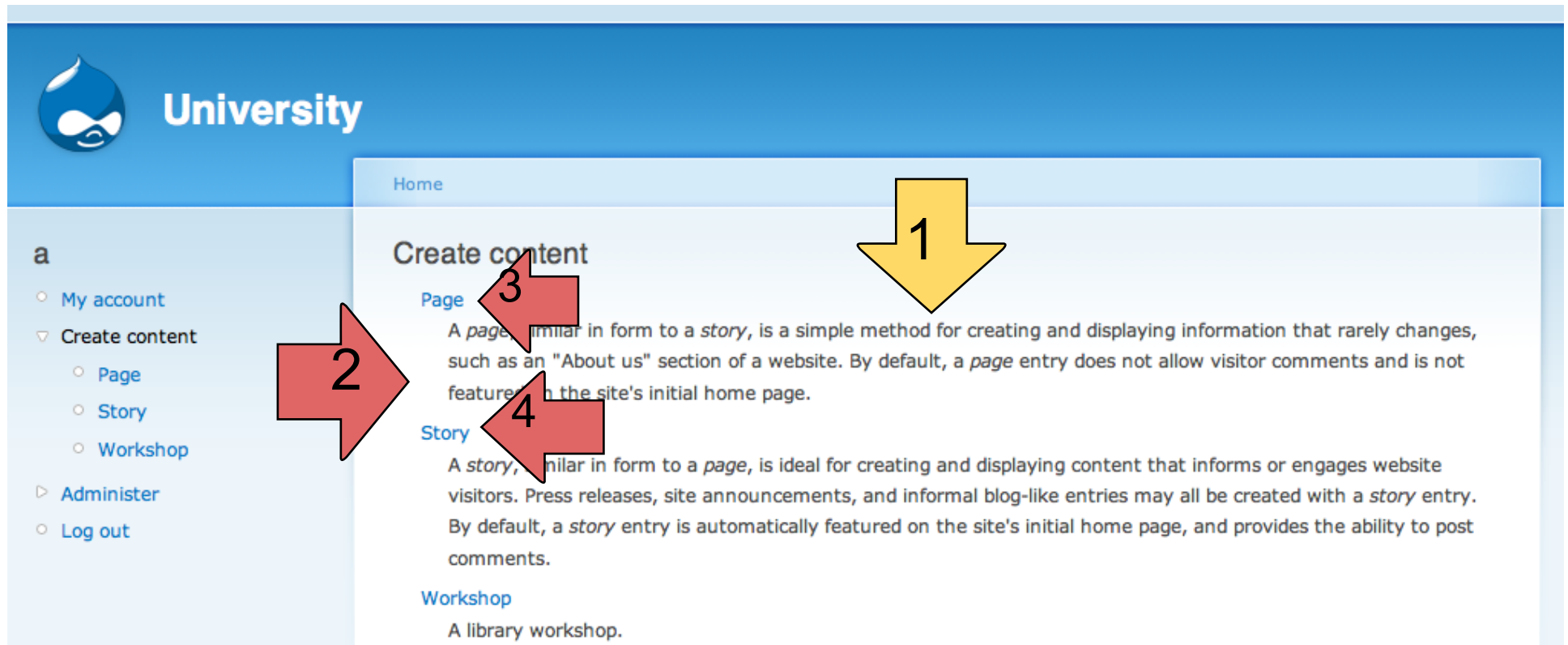
”

“

Am I creating a *thing* for creating web pages or am I *creating* web pages? Am I *creating* content or am I creating *a* content? Whoah, confusion.


”

Create content page



1. People confused about page vs. story. Descriptions didn't help them to understand (and too long)
2. People thought "Page" and "Story" were the **only options**; didn't know that you could add more.
3. People think "Page" is a *whole* web page which they can put different things *into* (like forms).
4. "Story" term universally not understood.

Create content or content type?



The image illustrates the relationship between creating content and managing content types in Drupal. It shows two screenshots of the Drupal 7 user interface for a site named 'University'.

Left Screenshot: Create content page

The 'Create content' page shows a sidebar menu with the following options:

- My account
- Create content
 - Page
 - Story
 - Workshop
- Administer
- Log out

The main content area describes the 'Page' and 'Story' content types. The 'Page' type is described as a simple method for creating and displaying information that rarely changes, such as an "About us" section. The 'Story' type is described as ideal for creating and displaying content that informs or engages website visitors, such as press releases or blog entries.

Right Screenshot: Content types page

The 'Content types' page shows a sidebar menu with the following options:

- My account
- Create content
- Administer
 - Content management
 - Comments
 - Content
 - Content types
 - Post settings
 - RSS publishing
 - Taxonomy
 - Site building
 - Site configuration
 - User management
 - Reports
 - Help
- Log out

The main content area shows a list of content types on the site. Below is a table of the content types:

Name	Type	Description	Operations
Page	page	A page, similar in form to a story, is a simple method for creating and displaying information that rarely changes, such as an "About us" section of a website. By default, a page entry does not allow visitor comments and is not featured on the site's initial home page.	edit delete
Story	story	A story, similar in form to a page, is ideal for creating and displaying content that informs or engages website visitors. Press releases, site announcements, and informal blog-like entries may all be created with a story entry. By default, a story entry is automatically featured on the site's initial home page, and provides the ability to post comments.	edit delete

1. Back and forth and back and forth between Create Content and Create Content Type.

[35 minutes later.]

“

I think this is what I've been
wanting to do all along. I
wanted to add a field.

”

Add field

1. Once users get here, they grok the whole concept of adding fields very well.
2. The problem is it took them **30-40 minutes to find it** at all.
3. People don't notice the data types, they focus on widgets. Participant chose "Autocomplete Text" on Node reference because it said "text."

The screenshot shows a web interface for adding a new field. A green arrow labeled '1' points to the top navigation bar. A red arrow labeled '2' points to the 'Add field' button. A red arrow labeled '3' points to the 'Text' section of the field type options.

> Administer > [Content management](#) > Workshop

Workshop Edit Manage fields Display fields **Add field**

Create new field

Field name: *

Field type: *

Choose the type of value to store and an input method from the list below.

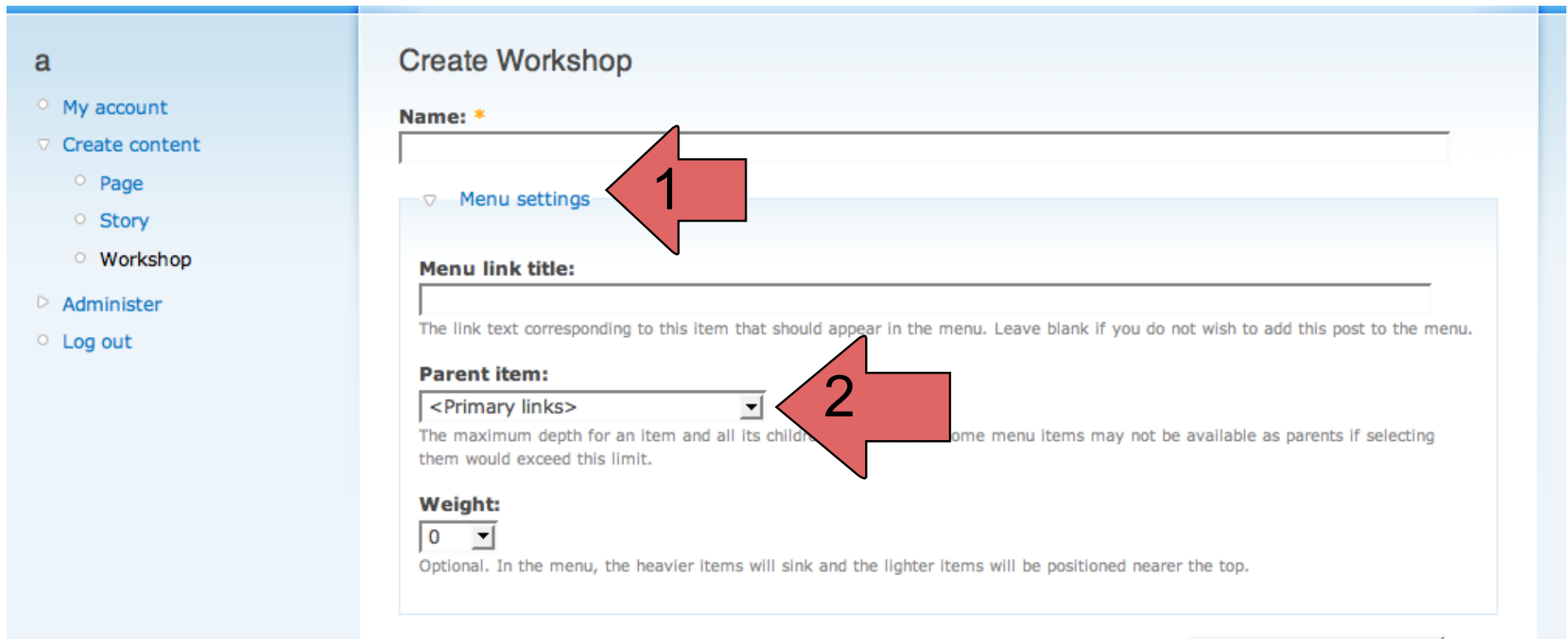
Text

Store text in the database.

- ☐ Select list
- ☐ Check boxes/radio buttons
- ☐ Single on/off checkbox
- ☐ Text Field
- ☐ Text Area (multiple rows)

Create field

Create node form (1/2)



The screenshot shows a web interface for creating a workshop. On the left is a sidebar with a navigation menu. The main area is titled 'Create Workshop' and contains several form fields. A red arrow labeled '1' points to the 'Menu settings' section, which is expanded. Another red arrow labeled '2' points to the 'Parent item' dropdown menu.

a

- My account
- ▼ Create content
 - Page
 - Story
 - Workshop
- Administer
- Log out

Create Workshop

Name: *

▼ Menu settings

Menu link title:

The link text corresponding to this item that should appear in the menu. Leave blank if you do not wish to add this post to the menu.

Parent item:

The maximum depth for an item and all its children. Some menu items may not be available as parents if selecting them would exceed this limit.

Weight:

Optional. In the menu, the heavier items will sink and the lighter items will be positioned nearer the top.

1. Several users **thought menu settings were required** information because of its prominence in the form.
2. **Parent item** was **universally not understood**. People stuck menu items at random places, and then did not realize what it meant. One suggested "child" might be better.

Create node form (2/2)

The screenshot shows a web form titled 'Create node form (2/2)'. The form has a 'Body:' section at the top, followed by a sidebar with various settings. A red arrow labeled '1' points to a 'Split summary at cursor' button. A yellow arrow labeled '2' points to the 'Body:' text area. A green arrow labeled '3' points to the 'Input format' section in the sidebar, which has two radio buttons: 'Filtered HTML' (selected) and 'Full HTML'. A yellow arrow labeled '4' points to the 'Revision information' section in the sidebar. At the bottom of the form are 'Save' and 'Preview' buttons.

1. **No one** understood the teaser splitter.

2. People looked here for form-related things.

3. Almost everyone understood what the HTML filter options do.

4. People didn't understand what these did either; mostly just clicked in and clicked back out again.



What happened!! Is this my
form, or a preview of my form,
or a page, or a story?



Home page with content

The screenshot shows the Drupal University home page. At the top left is the Drupal logo and the word "University". Below this is a sidebar with a user profile "a" and links: "My account", "Create content", "Administer", and "Log out". The main content area has a "Home" breadcrumb, a "Drupal workshop" title with "View" and "Edit" buttons, and a green message box stating "Workshop *Drupal workshop* has been created." Below the message is the date "Wed, 02/27/2008 - 15:32" and the user "a". The content of the workshop is "Classroom: Classroom B" and "Why is Drupal so hard to use?". At the bottom of the content area is a link "Add new comment".

Three numbered arrows point to specific UI elements:

1. Points to the sidebar area, indicating a loss of context.
2. Points to the green message box, indicating a problem with returning to the page.
3. Points to the sidebar area, indicating a misunderstanding of the form creation process.

1. Users completely lose context here.

2. Worse, when it's a page, they can't get back to it again.

3. Some users thought this was the form they had created. Or the page they'd be putting the form into later.

Task 2

Create an account for "Nancy Pearl" and give her access to create workshops

“

OK this feels very
straightforward.

”



User management. This is
where I want to be.



“

OK. This is easy!

”

“

So I want Nancy to be able to
create workshops, and edit her
own workshops.

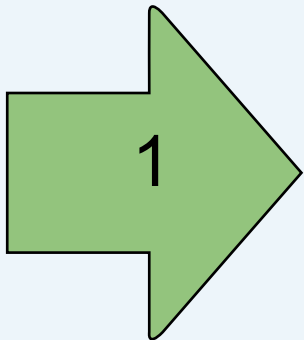
”

Permissions page

Permission		anonymous user	authenticated user
post comments without approval		<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. People understand what to do on this page, although they clicked "access rules" first.
2. Several commented that these should be sorted by content type.
3. Distinction between "edit own" and "edit any" wasn't always clear

access content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
administer content types	<input type="checkbox"/>	<input type="checkbox"/>
administer nodes	<input type="checkbox"/>	<input type="checkbox"/>
create page content	<input type="checkbox"/>	<input type="checkbox"/>
create story content	<input type="checkbox"/>	<input type="checkbox"/>
create workshop content	<input type="checkbox"/>	<input type="checkbox"/>
delete any content	<input type="checkbox"/>	<input type="checkbox"/>
delete any story content	<input type="checkbox"/>	<input type="checkbox"/>
delete any workshop content	<input type="checkbox"/>	<input type="checkbox"/>
delete own page content	<input type="checkbox"/>	<input type="checkbox"/>
delete own story content	<input type="checkbox"/>	<input type="checkbox"/>
delete own workshop content	<input type="checkbox"/>	<input type="checkbox"/>
delete revisions	<input type="checkbox"/>	<input type="checkbox"/>
edit any page content	<input type="checkbox"/>	<input type="checkbox"/>



Task 3

Classify workshops
by academic department.

“

This is starting to make a little
more sense here.

”

Taxonomy admin page

The screenshot shows the University Taxonomy admin page. The left sidebar contains a navigation menu with the following items: My account, Create content, Administer (expanded), Content management (expanded), Comments, Content, Content types, Post settings, RSS publishing, Taxonomy, Site building, Site configuration, User management, Reports, Help, and Log out. A green arrow labeled '1' points from the 'Content types' link in the sidebar to the 'Content types' link in the 'Content management' sub-menu. The main content area is titled 'Taxonomy' and includes a 'List' button and an 'Add vocabulary' link. Below this is a paragraph of introductory text about the taxonomy module. A yellow arrow labeled '2' points from the bottom of the introductory text to the table below. The table has three columns: Name, Type, and Operations. The table is currently empty, displaying 'No vocabularies available'.

University

Home > Administer > Content management

Taxonomy

List Add vocabulary

The taxonomy module allows you to categorize your content using both tags and administrator defined terms. It is a flexible tool for classifying content with many advanced features. To begin, create a 'Vocabulary' to hold one set of terms or tags. You can create one free-tagging vocabulary for everything, or separate controlled vocabularies to define the various properties of your content, for example 'Countries' or 'Colors'.

Use the list below to configure and review the vocabularies defined on your site, or to list and manage the terms (tags) they contain. A vocabulary may (optionally) be tied to specific content types as shown in the *Type* column and, if so, will be displayed when creating or editing posts of that type. Multiple vocabularies tied to the same content type will be displayed in the order shown below. To change the order of a vocabulary, grab a drag-and-drop handle under the *Name* column and drag it to a new location in the list. (Grab the handle by clicking and holding the mouse while hovering over a handle icon.) Remember that your changes will not be saved until you click the *Save* button at the bottom of the page.

[more help...]

Name	Type	Operations
No vocabularies available		

1. One user understood *content types* from the help text here and went on to complete much of the task.
2. People want tasks underneath the help text so they don't have to scroll back up.

“

Oh wow I can add related
terms!

”

“

I want to make a multiple level of hierarchy but I'm not sure how I would go about that.

”

“

I think I'll make this multiple select, and I'll set it to required.
Not tags, that's too *bloggy*.

”

Add vocabulary page

University

Home > Administer > Content management > Taxonomy

Edit vocabulary

▼ Identification

Vocabulary name: *

Academic Department

The name for this vocabulary, e.g., "Tags"

Description:

Description of the vocabulary; can be used by modules.

Help text:

Instructions to present to the user when selecting terms, e.g., "Enter a comma separated list of words".

► Content types

▼ Settings

☐ Tags

Terms are created by users when submitting posts by typing a comma separated list.

☐ Multiple select

Allows posts to have more than one term from this vocabulary (always true for tags).

1. The distinction between "term" and "vocabulary" not immediately clear.

2. Looks like re-working this section was a win; immediately understood what "tags" meant.

Task 4

Task 4

No one made it to task 4.

This is where they spent their
time instead.

“

I am trying to get back to that screen, that had that step by step layout.

”



None of this looks like what I'm looking for. I guess I'll see if I can search... Oh, I can't.



Admin

- [My account](#)
- ▷ [Create content](#)
- ▽ [Administer](#)
 - ▷ [Content management](#)
 - ▷ [Site building](#)
 - ▷ [Site configuration](#)
 - ▷ [User management](#)
 - ▷ [Reports](#)
 - [Help](#)
- [Log out](#)

Help

This guide provides context sensitive help on the use and configuration of and its modules, and is a supplement to the more extensive online [Drupal handbook](#). The online handbook may contain more up-to-date information, is annotated with helpful user-contributed comments, and serves as the definitive reference point for all Drupal documentation.

Help topics

Help is available on the following items:

- | | | | |
|---------------------------|------------------------------------|--------------------------|---------------------------------|
| ○ Block | ○ Database logging | ○ Menu | ○ Taxonomy |
| ○ Color | ○ Filter | ○ Node | ○ Update status |
| ○ Comment | ○ Help | ○ System | ○ User |

Home page

The image shows a screenshot of a Drupal University home page. The page has a blue header with the Drupal logo and the word "University". Below the header, there is a "User login" section on the left with fields for "Username:" and "Password:" and a "Log in" button. In the center, there is a "Welcome to your new Drupal website!" message with instructions to follow steps to set up the website. A list of steps is shown, with the first step being "1. Configure your website". To the right of the welcome message, there is a red arrow pointing left with the number "3". At the bottom right, there is a red arrow pointing up with the number "4".

1

2

3

4

User login

Username: *

Password: *

Log in

Welcome to your new Drupal website!

Please follow these steps to set up and start using your website:

1. **Configure your website**

Once logged in, visit the [administration section](#), where you can [customize and configure](#) all aspects of your website.

ditional modules

n one of the

promoted a post

1. New users read **every** bit of this text. **Line by line.**
2. Some also used this screen for navigation and didn't notice left hand navigation.
3. Missing overview "how does the system work" info here; users were forced to click around admin panel to figure it out. video tutorial?
4. **When this page goes away, it completely strands people**, as it's the closest thing we have to a tutorial.

“

It says it provides context sensitive help. But I don't see that anywhere.

”

“

Help was completely useless
to me.

”

Help page

The screenshot shows the Drupal University help page. At the top is a blue header with the Drupal logo and the word "University". Below the header is a breadcrumb trail: "Home > Administer". On the left is a sidebar with a section "a" containing links: "My account", "Create content", "Administer" (expanded), "Content management", and "Site building". The main content area is titled "Help" and contains a paragraph about the guide's purpose. Below this is a section "Help topics" with two columns of links: "Menu", "Node", "System", "Taxonomy", "Update status", and "User". A small "Drupal" label is visible below the links. Three red arrows with numbers 1, 2, and 3 point to specific areas: arrow 1 points to the top right corner, arrow 2 points to the "Help topics" section, and arrow 3 points to the "Drupal" label.

University

Home > Administer

Help

This guide provides context sensitive help on the use and configuration of [Drupal](#) and its modules, and is a supplement to the more extensive online [Drupal handbook](#). The online handbook may contain more up-to-date information, is annotated with helpful user-contributed comments, and serves as the definitive reference point for all Drupal documentation.

Help topics

- Menu
- Node
- System
- Taxonomy
- Update status
- User

Drupal

1. **No way to search the help!** One user also suggested a static "help" icon to represent contextual help on any page.

2. Users are looking for **task based** help topics. Drupal is overwhelmingly module-based. Users don't know what a module is!

3. Missing a **glossary**. One user suggested hover link on jargon in text which defines terms.

“

What I want to see is a simple
HTML form builder.

”



Is my module going to be a
workshop in this system?



Modules page (1/2)

The screenshot shows the Drupal 7 administration interface. The top navigation bar is blue with the Drupal logo and the word "University". Below this is a breadcrumb trail: "Home > Administer > Site building". The left sidebar contains a menu with "My account", "Create content", "Administer", "Content management", "Site building" (highlighted), "Blocks", "Menus", "Modules", "Themes", and "Site configuration". The main content area is titled "Modules" and has two tabs: "List" (active) and "Uninstall". A yellow box highlights a message about updates, with an arrow labeled "1" pointing to it. Below this is a large block of text explaining modules, with an arrow labeled "2" pointing to the start of the text and an arrow labeled "3" pointing to the word "extend". At the bottom, there is a link to "administration by module page".

Home > Administer > Site building

Modules List Uninstall

No information is available about potential new releases for currently installed modules and themes. To check for updates, you may need to [run cron](#) or you can [check manually](#). Please note that checking for available updates can take a long time, so please be patient.

Modules are plugins that extend Drupal's core functionality. Enable modules by selecting the *Enabled* checkboxes below and clicking the *Save configuration* button. Once a module is enabled, new [permissions](#) may be available. To reduce server load, modules with the *Throttle* checkbox selected are temporarily disabled when your site becomes extremely busy. (Note that the *Throttle* checkbox is only available if the Throttle module is enabled.)

It is important that [update.php](#) is run every time a module is updated to a newer version.

You can find all administration tasks belonging to a particular module on the [administration by module page](#).

1. Yellow box was jarring (though most wouldn't usually see it)
2. Wall of text causes rest of page to go "below the fold." Also caused one user to back out of here immediately, saying "This is too complicated."
3. One user thought this was the wrong place to be, because it says modules "extend" Drupal's functionality, and fields should be built-in.

“

I see a lot of CCK, what is this
CCK?

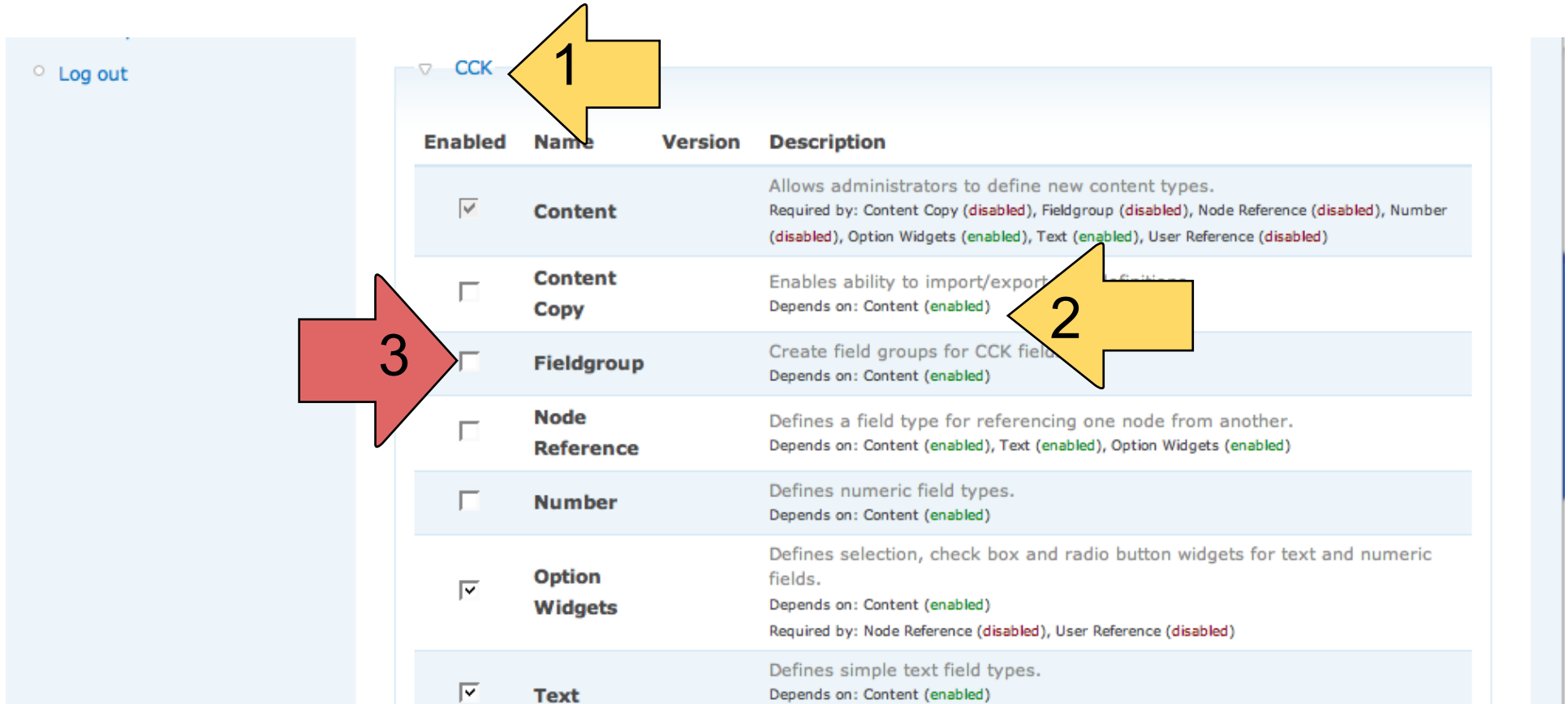
”

“

Oh! Finally! Fields!

”

Modules page (2/2)



Enabled	Name	Version	Description
<input checked="" type="checkbox"/>	Content		Allows administrators to define new content types. Required by: Content Copy (disabled), Fieldgroup (disabled), Node Reference (disabled), Number (disabled), Option Widgets (enabled), Text (enabled), User Reference (disabled)
<input type="checkbox"/>	Content Copy		Enables ability to import/export content. Depends on: Content (enabled)
<input type="checkbox"/>	Fieldgroup		Create field groups for CCK fields. Depends on: Content (enabled)
<input type="checkbox"/>	Node Reference		Defines a field type for referencing one node from another. Depends on: Content (enabled), Text (enabled), Option Widgets (enabled)
<input type="checkbox"/>	Number		Defines numeric field types. Depends on: Content (enabled)
<input checked="" type="checkbox"/>	Option Widgets		Defines selection, check box and radio button widgets for text and numeric fields. Depends on: Content (enabled) Required by: Node Reference (disabled), User Reference (disabled)
<input checked="" type="checkbox"/>	Text		Defines simple text field types. Depends on: Content (enabled)

1. Some users click "CCK" here expecting it to display a definition.
2. One user's eyes jumped to the green "enabled" text and thought field was already enabled, even after having read that the checkbox was how this was enabled.
3. This is the only place in the entire admin panel where there's prominent mention of a "field"

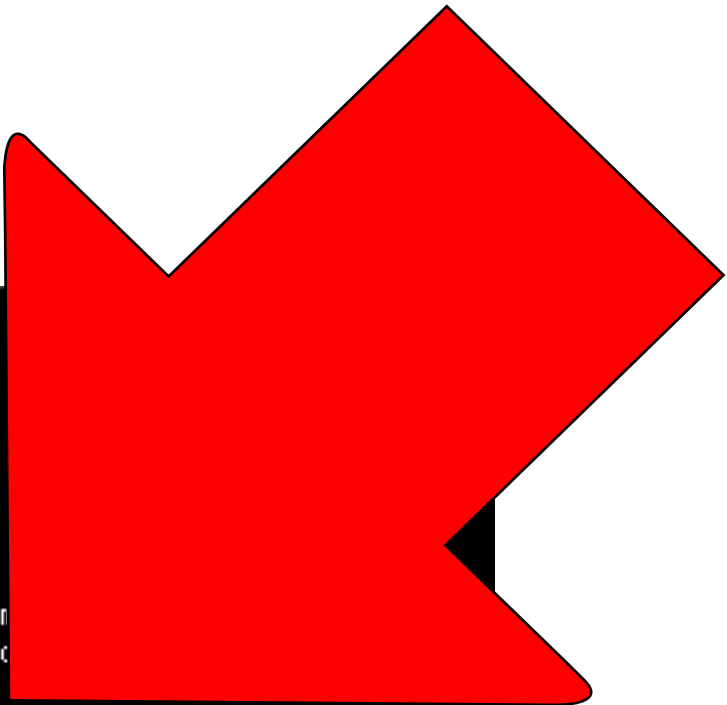
“

Right. I'm just going to add
them all - wow this might lock
up.

”

[it did.]

Next stop... php.ini!



```
; on your server or not.
expose_php = On

;;;;;;;;;;;;;;;;;;;;;;;;;
; Resource Limits ;
;;;;;;;;;;;;;;;;;;;;;;;;;

max_execution_time = 30    ; Maximum execution time of script (in seconds)
max_input_time = 60       ; Maximum amount of time each script that
                             requests data may spend reading input data
memory_limit = 48M        ; Maximum amount of memory a script may consume (8MB)

;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;
; Error handling and logging ;
;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;;

; error_reporting is a bit-field. Or each number up to get desired error
; reporting level
; E_ALL          - All errors and warnings
; E_ERROR        - fatal run-time errors
; E_WARNING      - run-time warnings (non-fatal errors)
; E_PARSE        - compile-time parse errors
```

“

...Interesting...

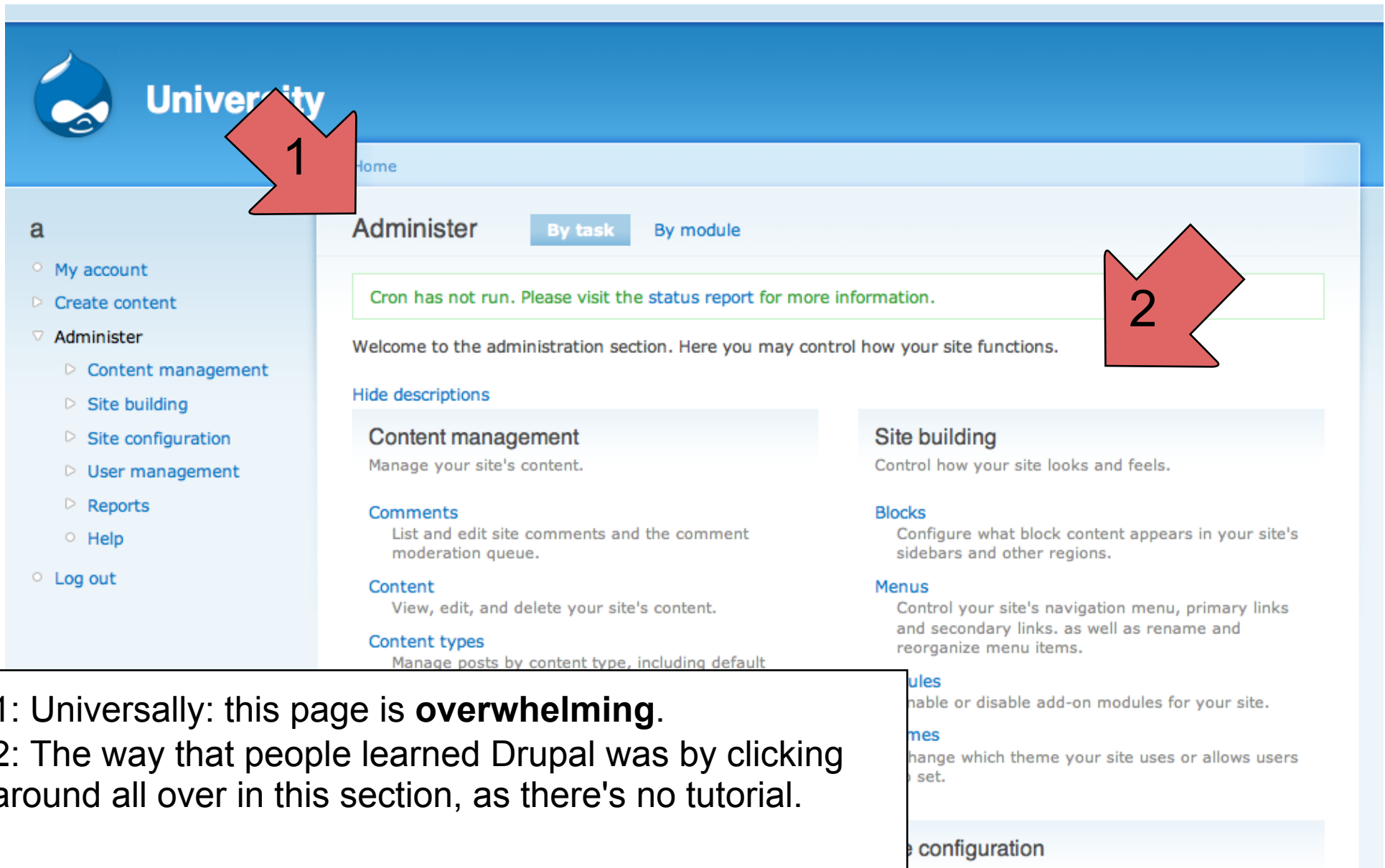
”

“

Well it starts off nice and
clean, but then... 0-60!

”

Administration panel 1



1: Universally: this page is **overwhelming**.

2: The way that people learned Drupal was by clicking around all over in this section, as there's no tutorial.



Where They Looked In The First 5 Seconds

Red Areas = Many Eye Fixations
X's = Mouse Clicks

“

What was *missing* ?? Probably
the opposite. What wasn't
there? There were so many
options...

”

Administration panel 2

The screenshot shows the University administration panel. The left sidebar contains a menu with items: My account, Create content, Administer (expanded), Content management, Site building, Site configuration, User management, Reports, Help, and Log out. The main content area has a 'Home' header, 'Administer' tabs (By task, By module), a green message box about cron, a welcome message, and a 'Hide descriptions' link. Below this are three main sections: 'Content management' (Manage your site's content), 'Comments' (List and edit site comments and the comment moderation queue), and 'Content' (partially visible). To the right, there are sections for 'Site building' (Control how your site looks and), 'Blocks' (Configure what block content appears in your site's sidebars and other regions), 'Menus' (Control your site's navigation menu, primary links and secondary links, as well as rename and organize menu items), 'Rules' (Enable or disable add-on modules for your site), 'Themes' (Change which theme your site uses or allows users to set), and 'Site configuration' (partially visible). Three yellow arrows with numbers 1 and 2 point to specific areas: Arrow 1 points to the 'Administer' menu item in the sidebar and the 'Cron has not run' message box. Arrow 2 points to the 'Site building' section and the 'Site configuration' section.

1. Users expect menus to expand/collapse like fieldsets.

2. Difference between Site Building and Site Configuration not clear enough.

Surprises

“

I didn't expect to feel so stupid.
I don't like feeling stupid.

”

“

I need a tutorial.

I need a tutorial.

I need a tutorial.

”

“

I need a tutorial.

I need a tutorial.

I need a tutorial.

I need a tutorial.

”

“

I already lost the page I just
created.

”

Surprises

- **We take our mastery of the "suck threshold" for granted.**

Common tasks that take us 30 seconds to do can take a new user over 30 minutes to *find*.

- **When users get stuck, they resort to "brute force."**

Clicking on *all* admin pages, expanding *all* fieldsets, enabling *all* modules.

Surprises

- **Tabs were invisible**

for key tasks, even on pages people had looked at multiple times for 20-30 minutes.

- ***No one* clicked on "content types" without direction.**

They hit create content, site building, input formats, actions, blocks, modules...

Surprises

- **Our help section is *completely* useless for new users.**

No glossary, no search. *Module-based* help topics, rather than *task-based*.

- **Interesting workarounds.**

One participant tried to create the workshop form by typing an HTML form into a block.

Stuff that was easy

Stuff that was easy

- **Logging in.**

Hooray! :)

- **Permissions page.**

Once they found it (after looking at "Access rules" first), they instantly understood what the page was for.

- **User management.**

This section was clearly labeled and instantly found.

- **Taxonomy.**

This was actually *shockingly easy* .

Ummm. That's it. ;)

Usability Improvements Gone
Wrong

Usability improvements gone wrong

- **Teaser splitter: huh?**

What's a teaser? What's a summary? What does this do?

- **Menu settings look like required information**
because of its prominence on the node add form.

- **Asking for help can kill your data.**

Hitting the "More information on input formats" link takes you away from the node/add form, and you *lose your form data* when you go back (in IE).

Usability improvements gone wrong

- **Password security checking.**

Several users backed out in a panic because they thought they'd caused an error condition due to **red** text.

- **Organization of administration page.**

Users visit Site building for everything, expecting to find things like "make a form" there.

- **Collapsible fieldsets don't conceal anything.**

People end up clicking on all of them to see what's inside.

Usability testing lessons learned

- **Give users early success.**

Have them complete a few "easy" tasks before you destroy their confidence. ;)

Usability testing lessons learned

- **Give users early success.**

Have them complete a few "easy" tasks before you destroy their confidence. ;)

- **You'll never look at Drupal the same way again.**

We all are experiencing "usability flashbacks" looking at the Drupal administrative interface. :)

Usability testing lessons learned

- **Give users early success.**

Have them complete a few "easy" tasks before you destroy their confidence. ;)

- **You'll never look at Drupal the same way again.**

We all are experiencing "usability flashbacks" looking at the Drupal administrative interface. :)

- **Usability testing is exciting, edge-of-your seat excitement.**

Same task done by 8 different people resulted in 8 different outcomes.

Let's make Drupal 7 **rock**!

- Drupal 6.1 is out, so UI, text, etc. cannot be changed.
- So...
Target improvements for Drupal 7 core and Drupal 6 contrib!



How can you help?

View the full results on <http://groups.drupal.org/usability>

Convert the results from groups.drupal.org into *issues* at: <http://drupal.org/node/add/project-issue>

- Title issues as "Usability UMN: <title>"
- Link to issues from the results on groups.drupal.org

Spec out solutions to the more complicated problems on the Usability group.

Q&A

Let's repeat this

Measure! Don't Guess

One of the best ways to measure is by Usability Testing. But we need access to resources to repeat this:

- Usability labs
- Lab facilitators
- Testing equipment
- Evaluators
- Observers
- Finances

Informal Usability Testing...

... can be just as valuable as formal testing.

- GHOP usability tests on installer found major usability bugs

To get full value, we need tools and resources to capture and process data and user feedback.

- Click Heat Map module is the first of such tools drupal.org/project/click_heatmap

by boombatower, a GHOP student

- Watch the Usability group for more details groups.drupal.org/usability

User Experience Goals

- High level UX considerations

Why do we need User Experience Goals?

- Support developers to build good UIs
- Set a standard for evaluating UIs
- Expectations and goals for all UIs (in Drupal)

Basically, make this...



... look more like this! :)



Brainstorming UX Goals



Brainstorming UX Goals

Browsers
↑ ↑ Expectations
post settings
Consistency → user settings
→ submit/tabs

User should be able publish content

and see it
and what my users see it
→ See what I produced

✓ - Offering users informative feedback (Content sensitive help)

- Context sensitive help

Where am I?

- TASK BASED

Did I succeed

- Overview tutorial

Start workflow

- Feedback on forms

Offer serious error handling

✓ - Terminology should not be ambiguous

- terms should be defined

- Help is glossary

- Turn a feature so it Linked ↔ Glossary module

- Short cuts Navigation *

- Work should flow

- URL Shortcuts

- Actions should be the target

- Drupal should not feel overwhelming to explore

- Design for browser

✓ - We measure the user experience, we don't guess

- Reflect the user mental model

✓ - Drupal should not feel overwhelming

User Experience Goals -- Draft

- **Measure the User Experience.**

Guessing the user interface isn't enough -- Drupal aims to *measure* the user experience. Feedback and data on users' experience and interactions with Drupal's user interfaces informs of usability issues.

User Experience Goals -- Draft

- **Measure the User Experience.**
- **Consistency.**

Consistency is a recognized property of usable interfaces. Drupal provides reusable user interface patterns for many user interface elements.

User Experience Goals -- Draft

- **Measure the User Experience.**
- **Consistency.**
- **Understandable Language.**

Drupal aims to use language that is understandable by it's users. Help should be useful and readily accessible. Terminology should be unambiguous.

User Experience Goals -- Draft

- **Measure the User Experience.**
- **Consistency.**
- **Understandable Language.**
- **Not Feel Overwhelming.**

Drupal aims to not make the user feel overwhelmed. Drupal aims to make complex tasks seem simpler and hide unuseful or irrelevant user interfaces.

User Experience Goals -- Draft

- **Measure the User Experience.**
- **Consistency.**
- **Understandable Language.**
- **Not Feel Overwhelming.**
- **Informative Feedback.**

Drupal gives useful and helpful messages and details about users' actions to reassure the user, give them confidence and guide them to related tasks .

User Experience Goals -- Draft

- **Measure the User Experience.** Guessing the user interface isn't enough -- Drupal aims to measure the user experience. Feedback and data on users' experience and interactions with Drupal's user interfaces informs of usability issues.
- **Consistency.** Consistency is a recognized property of usable interfaces. Drupal provides reusable user interface patterns for many user interface elements.
- **Understandable Language.** Drupal aims to use language that is understandable by it's users. Help should be useful and readily accessible. Terminology should be unambiguous.
- **Not Feel Overwhelming.** Drupal aims to not make the user feel overwhelmed. Drupal aims to make complex tasks seem simpler and hide unuseful or irrelevant user interfaces.
- **Informative Feedback.** Drupal gives useful and helpful messages and details about users' actions to reassure the user, give them confidence and guide them to related tasks.

Let's Get Consensus

- Measure the User Experience.
- Consistency.
- Understandable Language.
- Not Feel Overwhelming.
- Informative Feedback.

This is a Working Draft.

Join the discussion and process:

- The Usability group: groups.drupal.org/usability
- This Document: groups.drupal.org/node/9252

Destined for a high level in the drupal.org Handbook
Possibly next to Drupal's mission and principles?

- drupal.org/mission
- drupal.org/principles



I wish there was a way to
switch between the backend
and see the results.



Conceptual Barriers

Conceptual barriers

- **Where do I start?**

Missing step-by-step, task-based, conceptual help, tutorials, and example content.

- **Where did my page go?**

Users often lose all sense of context.

- **What is "content?"**

The word "content" is used ambiguously throughout user interface. Content type, Content management, Create content...

Conceptual barriers

- **How do I add a form to my page?**

Drupal doesn't communicate its mental models well. Users thought content types were fields, content types were content...

- **Where's that key word?**

Words like "form" and "field" are hardly used in the interface, so users resort to guesswork.

- **What do my users see?**

No clear distinction between admin and user-level views. No way to **preview** things like node add forms as you're creating them.

Add user page

1. Some users thought this was an ERROR rather than suggestion.
2. Doesn't make sense to block a new user.
3. One participant commented that this was a really nice feature. :)

Spaces are allowed; punctuation is not allowed except for periods, hyphens, and underscores.

E-mail address: *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password: *

Password strength: **Low**

Confirm password: *

Passwords match: **Yes**

It is recommended to choose a password that contains at least six characters. It should include numbers, punctuation, and both upper and lowercase letters.

Provide a password for the new account in both fields.

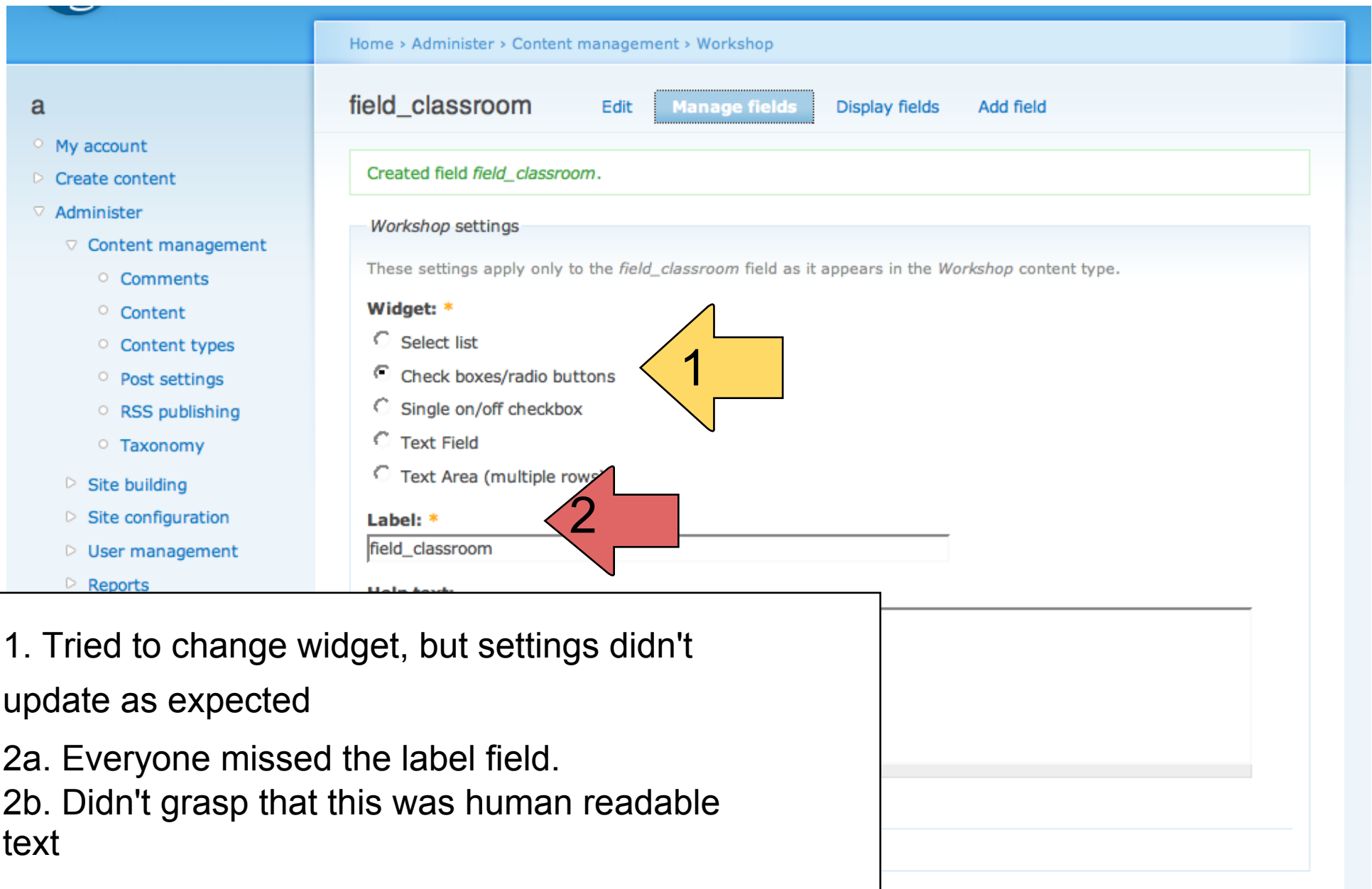
Status:

☐ Blocked

☒ Active

☐ Notify user of new account

Add field step 2 (1/2)



The screenshot shows the 'Manage fields' page for 'field_classroom' in a Drupal administration interface. The breadcrumb trail is 'Home > Administer > Content management > Workshop'. The page title is 'field_classroom' with tabs for 'Edit', 'Manage fields' (active), 'Display fields', and 'Add field'. A green message box at the top says 'Created field field_classroom.' Below this is the 'Workshop settings' section, which states: 'These settings apply only to the field_classroom field as it appears in the Workshop content type.' Under 'Widget: *', there are five radio button options: 'Select list', 'Check boxes/radio buttons', 'Single on/off checkbox', 'Text Field', and 'Text Area (multiple rows)'. A yellow arrow with the number '1' points to the 'Check boxes/radio buttons' option. Below the widget options is the 'Label: *' section, which contains a text input field with the value 'field_classroom'. A red arrow with the number '2' points to this input field. A text box at the bottom left contains the following text:

1. Tried to change widget, but settings didn't update as expected

2a. Everyone missed the label field.

2b. Didn't grasp that this was human readable text

Add field step 2 (2/2)

Global settings

These settings apply to the *field_classroom* field in every content type in which it appears.

☐ Required

Number of values:

1

Select a specific number of values for this field, or 'Unlimited' to provide an 'Add more' button so the users can add as many values as they like.

Warning! Changing this setting after data has been created could result in the loss of data!

Text processing:

☒ Plain text


1. Confused by "number of values", thought it had something to do with number of options.

Allowed values list:

The possible values this field can contain. Enter one value per line, in the format key|label. The key is the value that will be stored in the database and it must match the field storage type, *text*. The label is optional and the key will be used as the label if no label is specified.

—▷ [Php code](#)

Manage fields







University

[Home](#) > [Administer](#) > [Content management](#) > [Workshop](#)

Workshop[Edit](#)[Manage fields](#)[Display fields](#)[Add field](#)

This page provides a drag-and-drop interface for controlling the order of fields in the input form. To change the order of a field, grab a drag-and-drop handle under the Label column and drag the field to a new location in the list. (Grab a handle by clicking and holding the mouse while hovering over a handle icon.) Remember that your changes will not be saved until you click the Save button at the bottom of the page.

Label	Name	Type	Operations
 Name			
 Menu settings			
 Description			
 field_classroom	field_classroom	text	configure remove

Save

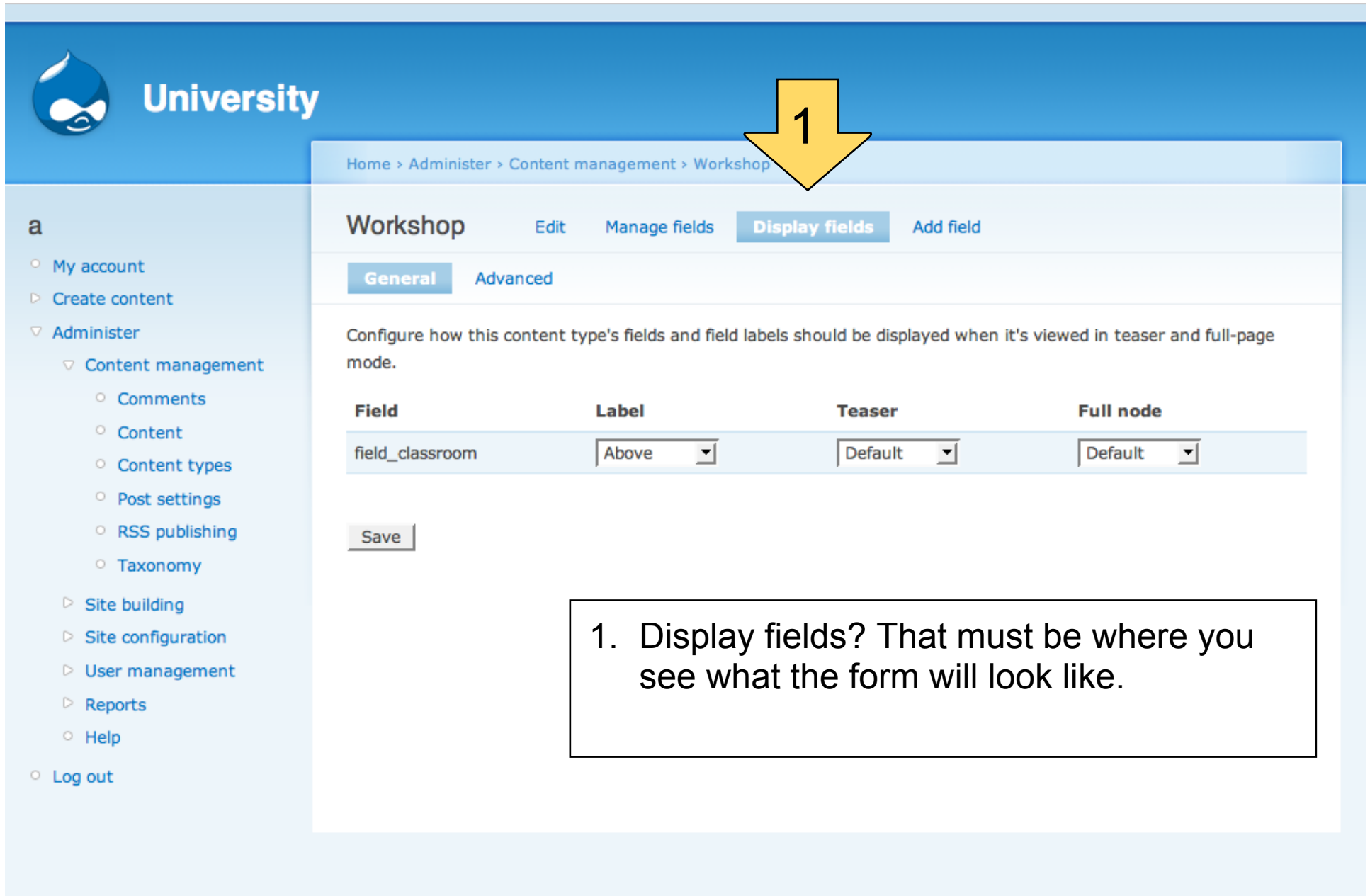
1

1. Save button confusing.

a

- My account
- Create content
- Administer
 - Content management
 - Comments
 - Content
 - Content types
 - Post settings
 - RSS publishing
 - Taxonomy
 - Site building
 - Site configuration
 - User management
 - Reports
 - Help
- Log out

Display fields



The screenshot shows the Drupal administration interface. On the left is a sidebar with a navigation menu. The main content area displays the 'Workshop' configuration page, specifically the 'Display fields' tab. A yellow arrow with the number '1' points to this tab. Below the tabs, there is a table for configuring field display in teaser and full-page modes. The table has columns for 'Field', 'Label', 'Teaser', and 'Full node'. One field, 'field_classroom', is listed with 'Above' for the label, and 'Default' for both teaser and full-page views. A 'Save' button is at the bottom of the table.

University

Home > Administer > Content management > Workshop

Workshop Edit Manage fields **Display fields** Add field

General Advanced

Configure how this content type's fields and field labels should be displayed when it's viewed in teaser and full-page mode.

Field	Label	Teaser	Full node
field_classroom	Above	Default	Default

Save

1. Display fields? That must be where you see what the form will look like.

Users administration page

University

Home > Administer > User management

Users

[List](#) [Add user](#)

Drupal allows users to register, login, log out, maintain user profiles, etc. Users of the site may not use their own names to post content until they have signed up for a user account. [\[more help...\]](#)

Show only users where

☐ permission is

☐ status

Update

☐ Unblock selected users

<input type="checkbox"/>	Username	Status	Roles	Member for	Last access	Operations
<input type="checkbox"/>	a	active		20 hours 53 min	3 sec ago	edit

1. Tried to add users here.
2. Wasn't sure what clicking name would do.

Add term page

University of Toronto

Home > Administer > Content management > Taxonomy > List terms

Add term to Academic Department [List](#) [Add term](#)

Identification

Term name: *

The name of this term.

Description:

A description of the term. To be displayed on taxonomy/term pages and RSS feeds.

Advanced options

Parents:

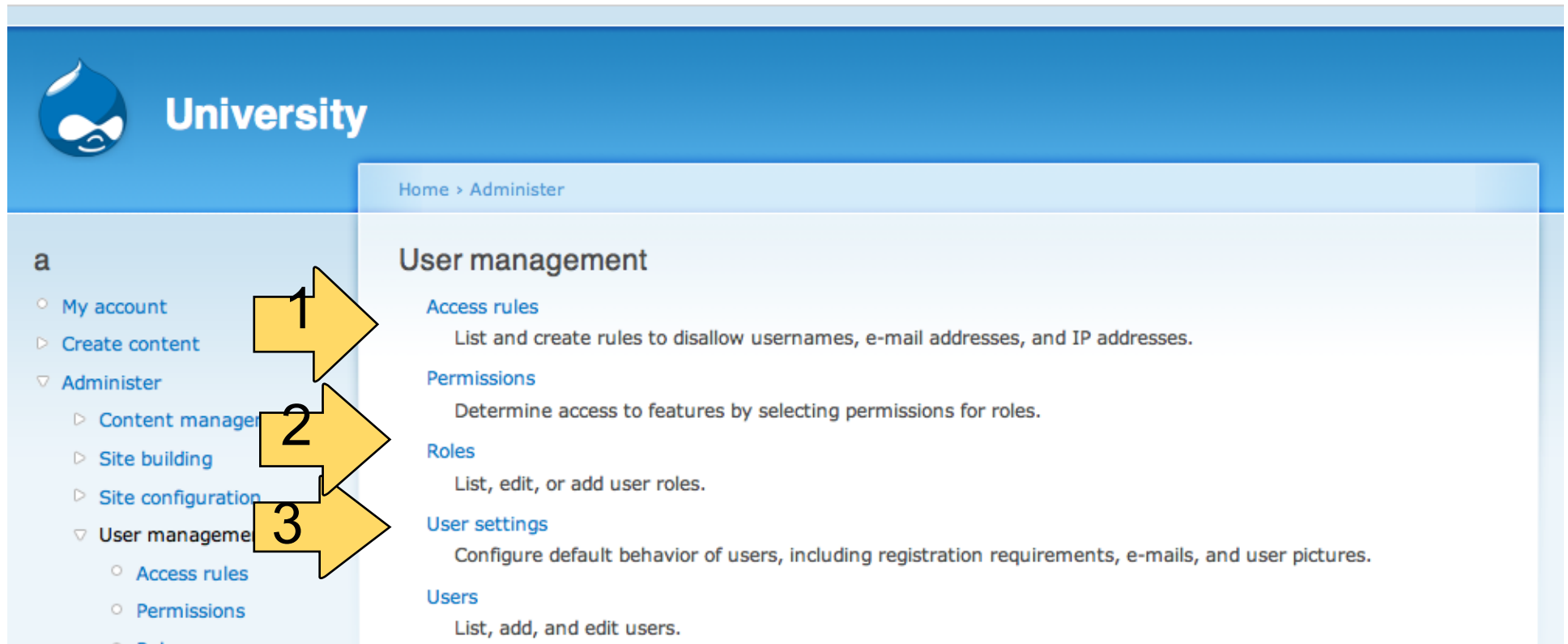
Parent terms.

Related terms:

Synonyms:

1. Adding terms was easy.
2. Users like getting back to this form after submitting it so they can add another term immediately.
3. Users were comfortable with both the form layout and the jargon. (but they were librarians)

User management page



1. Lots of people clicked "Access rules" looking for permissions.
2. Some users ignored "Roles" and assumed that only admin created librarians would use the site.
3. Some clicked User settings but instantly understood that was the wrong place to be.