

VA.gov CMS: Author Experience Usability Testing, Round 1

Observe authors migrating content for key flows in the new Drupal CMS to determine which areas are working versus which will require inline help, improved labels, and training support.

[Field Guide](#)

Goals

- This document outlines the details for the first round of usability testing we'll conduct on the Drupal author experience.
- **Background:** VA.gov is migrating from Teamsite to Drupal.
 - Here is a scenario we want to avoid: *Your company needs a new system to manage content. The system is designed, implemented, and delivered. Then, the people who must use the system discover that it is as bad as, or worse than, the old system. You wonder why anyone bothered.*
 - Author experience (AX) ensures the CMS is built to ensure those who create and manage content can do so with ease. It also aims to avoid the pitfalls that all too often lead to systems that are worse than what they replaced. Author experience looks to remove the inconsistencies and cognitive hurdles that make it harder than necessary to work with content management systems.
- **Research questions:**
 - How much will a new CMS disrupt author productivity?
 - Authors have become Teamsite experts and this is really different
 - How does the VA support author needs?
 - Note: this is the point of intersection with the training strategy
 - Does tension between developer and author needs inhibit the author experience?
 - How does the Drupal CMS support workflows and processes authors expect?

- How does the Drupal CMS map to author conceptual models of content types, terminology, and overall organization?
- **Hypothesis:** We believe that this will feel like a good proof of concept to the participants and we will identify specifics that need to be adjusted. We will know this when we see participants largely succeeding with the new CMS.

Method

- What method of research are you planning?
 - ~~Contextual inquiry with authors Louis and Ryan to observe migration tasks~~
 - Co-creation with the 3 authors in Pittsburgh
 - Seeing them work together will help us learn about the interplay - highly collaborative team who works together
- Where are you planning to do your research? The sessions will take place onsite at the Pittsburgh VAMC.
- What will you be testing?
 - Prototyped author dashboard
 - Newly built Drupal CMS: complete migration and publishing tasks
 - A/B testing on the UI controls for 2 different content types (configure a form widget)
 - Tasks
 - Login, account management
 - Login form
 - Password reset (if email is working?)
 - Content type forms
 - Story &
 - Name of content type
 - Guidelines
 - Content type description
 - Fields
 - Text fields
 - Author byline
 - Image field, caption, cropping
 - WYSIWYG
 - Link field? Maybe get rid of for MVP
 - Editorial workflow (will be covered in PR and Story process)
 - Press release
 - Location

- Release date
- Downloads
- PDF
- Person profile: a generic "Person" in that we're using the same content type for: Authors of Stories, Media Contacts on Press Releases, Facility Leadership (and more in the future!)

Participants and Recruitment

- Participant criteria: all authors at VAMC Pittsburgh
 - VAMC Pittsburgh site contact: Shelley Nulph, shelley.nulph@va.gov
 - Public Affairs Specialist, VA Pittsburgh Healthcare System
 - Louis Skavnicky, Web Content Manager, VA Healthcare-VISN 4
 - Kimberly Graham, Visual Information Specialist, Public Affairs
 - Ryan Stubblebine, Visual Information Specialist & Webmaster, VAMCs.
- What is your recruitment strategy?
 - VA.gov CMS AX team is to set up and confirm recruits

When?

- Timeline: What dates do you plan to do research?
 - March 6 & 7, 2019
- Prepare: When will the thing you are testing be ready?
 - Test1.va.agile6.com will be ready on 3/2/2019 so authors can save their work
- Length of Sessions: How long do you estimate each session will be?
 - Contextual inquiry sessions will be 60 minutes
 - Co-creation workshop will be 90 minutes
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Team Roles

Please list the people who will be serving in each role. Include the primary phone number for moderator and the emails for moderator, notetaker, and observers.

- Moderator: Eileen Webb, Kevin Walsh
- Research guide writing and task development (usually but not always same as moderator): Jodi Leo

- Participant recruiting & screening: Eileen Webb
- Project point of contact: Jodi Leo
- Participant(s) for pilot test: N/A
- Note-takers: Howie Brande
- Observers: N/A

List email addresses for those who should attend and observe the sessions:

Jeff Barnes <Jeffrey.Barnes4@va.gov>, Andy Lewandowski

<Andrew.Lewandowski2@va.gov>, Shelley Nulph <Shelley.Nulph@va.gov>

Resources

- Related Research: [VA.gov CMS research: Facility, VAMC Pittsburgh author experience contextual inquiry](#) (02/08/2019)
- Project Brief: Project brief should live in the appropriate vetsdotgov-team product folder, simply paste a link to it here
- Discussion Guide Discussion guide should live in the appropriate vetsdotgov-team product folder, simply paste a link to it here
- Notes & Recordings Session notes and recordings should live in the appropriate vetsdotgov-team product folder, simply place links to them here.
 - Howie will be there to record sessions (this includes snapshots)
 - Eileen will create a readout deck
- Synthesis Link to any documents used for synthesis (Mural or Realtimeboard boards, excel sheets, other data outputs, etc.)
 - Sketches, backlog of stuff we need to change
 - A deck that will be ready for
- Lessons Learned Did you have any takeaways from the process of this research round that you want the team to remember for the future? Document them here.
- Read-Out/Results
 - Read-out presentation should live in the appropriate product repo and folder; paste a link to it here.
 - ** Don't forget to add a link to your research folder to the research tracker! <https://github.com/departement-of-veterans-affairs/vets.gov-team/blob/master/Work%20Practices/Research/Research%20History.md>

Appendix: Granular questions for the Moderator Guide

Question for Jeff Barnes: how much should this work include training needs or overlap with the training workstream? Usability testing: we'll find painpoints. No need to focus on

that as part of this but training team should be aware of what we learn and the priorities. E.g. video can focus on a content type that's tricky.

- How much is the author expertise and skill represented in the tools?
- How well have expectations been set regarding what authors can expect from the organization's communication channels?
- How flexible is the CMS to allow authors to manipulate content tied to tasks and needs of the authors?
- How well does the interface translate the storage model for authors?
- How much does the CMS reduce content risk?
- How do authors experience the actions, processes, and workflows?
- How well does the interface microcopy and terminology show a strategy that enables successful AX? (E.g. is "News" different than "Story" as a label)
- How consistent is terminology throughout the system so when an author encounters a new element, the layout and groupings make intuitive sense?
- How well are content attributes organized so authors can decipher the basic information (reference, file, alt text, caption).
- How has the system design helped authors create, represent, and maintain associations between content?
- How well is help text working in context?
- How well can departments follow a workflow that meets their needs?
- Who should we add to the CMS leaderboard for the diary study?