Author Experience Testing Pittsburgh VAMC

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Outline

1. Study Goals	
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We wanted to learn how we could improve content entry and migration workflows for authors in the new CMS

1. Study Goals

Our goal was to learn what kind of learning curve the authors would experience in the new CMS, and what we could do to make the transition smoother.

- How much will the new CMS disrupt authors' productivity?

- How effective are the AX improvements we've already built?

- What changes can we make in the CMS to make it easier for authors to enter content?

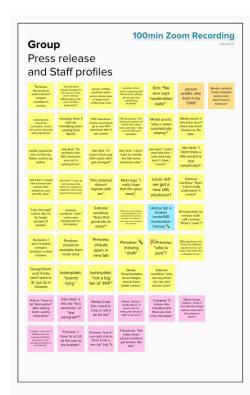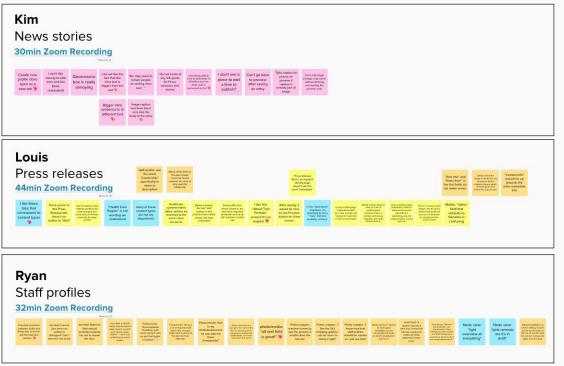- Where can we adjust the training plan to better meet author needs?

2. Research Method

We asked authors to practice migrating real content from their existing sites to the new CMS.

- Collaborative training and exploration of the migration workflow for
  - Press releases
  - Stories (formerly "Featured Story")
  - Staff profiles (for media contacts, byline-authors, and VAMC leadership)
- Contextual inquiry 1:1 sessions for further practice on those content types
- Discussion of dashboard needs (with prototype), specific UI elements, and training/rollout plans
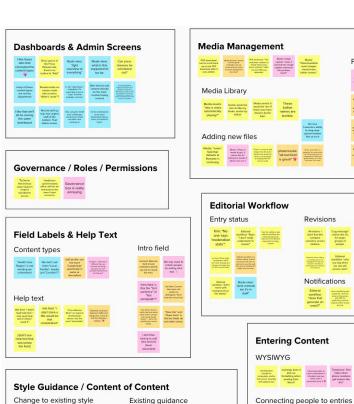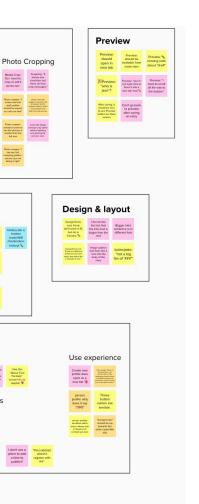
Comments grouped by source exercise

Opportunity backlog

3. Findings & Recommendations

Existing content is very inconsistent

- Much of the content on the existing Pittsburgh is inconsistent; even press releases have a huge amount of variety in formatting and content.
- Migration can't just be blind copy-and-paste, but needs a fair amount of thought and editorial guidance.
- We can't build the guidelines into the CMS when there are no guidelines.
- "Should press release location be the source of the press release (Pittsburgh) or the clinic location (Lafayette)?" [Kim and Ryan gave opposite answers, both very well-reasoned.]

Recommended user story

As a VAMC content editor responsible for migrating legacy content into Drupal, I have a migration playbook with guidelines for restructuring a variety of content types into the new content model and style guide.

Task-based dashboards will be a welcome change

- In Teamsite, every user has a personalized dashboard, with very inconsistent use. Authors were excited to see a single dashboard that would shared (among all authors at a single facility).
- Authors didn't care as much if the dashboard was pretty, as long as it made all their common tasks quick and easy to reach.
- "I'd like the dashboards to be more information-dense. Clean, but built for *work*."

Recommended user story

As an author, I want to be able to use a dashboard to coordinate work on my team and have quick access to my common tasks.

Every administrative screen needs attention

- Drupal's default administrative screens are not task-oriented, and caused a number of frictions as authors moved through the site.
- "What's 'node'?" [Many content admin screens contain a breadcrumb link to Drupal's default /node page, which no one should ever be subjected to.]

Recommended user story

As an author, I want every administrative screen (especially the ones that are in the main admin menu) to be thoughtfully designed so I can do my job with the least amount of friction.

The steps and labels in the editorial workflow don't make sense

- The language and labeling used in the editorial workflow doesn't match words that the authors use to refer to that process.
- Workflow is inconsistently presented across screens, and it's not always clear what the user is supposed to do.
- There's a strong expectation that workflow changes trigger emails. (They don't.)
- "No one says 'moderation state'."

Recommended user stories

As an author, I need the workflow process to be represented consistently throughout the site so I can easily track the status of my content.

As an author, I need the workflow states to match the language and order that we use (this may mean adapting our training, adapting Drupal, or a bit of each).

Governance needs to stay out of the way

- Authors don't ever want to think about their region/location permissions: they want the CMS to know their permissions and fill all those fields by default.

- "Wow, this governance box is really annoying."

Recommended user story

As an author, I want the system to fill in all governance fields by default so I don't have to waste time setting values the CMS already should "know".

Authors only interact with a small subset of content types

- The CMS has 13 content types (and growing!), but any given author will only use a few of them in their regular work.

- "What are all these? Should I just ignore them?"

Recommended user story

As an author, I want the administration screens to make it easy to find the content types I need so I don't get distracted by (or misuse) the other types.

Fields within a content type are not relevant to every use of that content type

- Our content models merged similar content (e.g. media contacts, byline-authors, and leadership) into a single type. All entries ask for the full gamut of fields, even if they're only used for some types of content.
- "Many of these fields [in Staff Profile] are only used for Leadership entries."

Recommended user story

As an author, I want multi-use content types to have different entry experiences corresponding to different uses so I don't get sidetracked by extraneous fields.

Help text is easy to ignore if you think you don't need it, or you don't like it

- Authors are very resistant to following guidelines that they don't agree with.
- They skipped reading the help text entirely for fields they thought were "easy".
- They assumed the system would yell at them if anything was really important to pay attention to.
- When the help text was displayed below the field, it often got missed even if they were looking for it.

- "I don't want to rewrite the title to be sentence case."

Recommended user stories

As an author, I need the help text for a field to be displayed in different places on the form based on what kind of information it contains.

As an author, I want the CMS to notify or warn me if I'm not following important instructions.

"Introduction" fields are a (surmountable) hurdle

- The designs and models call for separate "Introduction" and "Body" fields (for style and reuse reasons) in many of the content types.
- None of the existing content is written to have the first sentence serve as an intro, and authors aren't used to thinking about content in these terms.
- 🎉 Help text worked well on these fields when it was *very* specific.
- "We may need to retrain people on how to write intro text."

Recommended user story

As an author, I need clear guidance on what kind of information belongs in the introduction and body fields so I can migrate (and create) content successfully.

Authors are quick to jump to HTML

- The complexities of Teamsite created a giant pool of power HTML users! The authors have a culture of jumping right to source code when they can't figure something out.
- The Drupal defaults for rich text fields give a *lot* of leeway in what code they'll accept.
- "There's no image button in this WYSIWYG. I'll just copy the <img> tag and put it in directly that way."

Recommended user stories

As a user, I want a consistent design experience across the site so I can find what I need (especially with assistive technology).

As an author, I need to be able to use HTML in my content without risking breaking the front end of the site.

Reusable media is great! The media browser is not.

- Authors love that they can reuse media in multiple entries.
- Default field labels and help text for media files are not helpful.
- Media is used a lot of different ways in different places, but has more-or-less the same interface for all uses.

- "These button names are terrible."

Recommended user stories

As an author, I want a media upload/selection/cropping experience that focuses on the use case I'm facing so that I don't get distracted or confused by additional fields and options.

As an author, I want to be able to bulk-upload files to the media library so I can reuse them across content.

As an author, I need a way to organize large numbers of media files so they don't all get thrown into a single bucket of chaos.

Preview is not tightly integrated to the rest of the site

- Authors appreciated preview, but found it a hassle to get to at the bottom of the editing form.
- They weren't sure how preview interacted with the editorial workflow states and entry revision history.
- Current preview behavior very easily results in duplicate nodes being saved.

- "Can I right-click to force this to open in a new tab?" (No.)

Recommended user stories

As an author, I want to be able to preview my content without interrupting my editing flow.

As an author, I want easy access to content previews from every step in the creation and editorial workflow so I can see what my changes will look like on the front end of the site.

"Who is JSON anyway?"

- The default node view screen doesn't display the content in a way that's helpful to authors.
- Clicking the "View JSON" tab shows the author... JSON.

Recommended user stories

As an author, I want the in-CMS node view to show me a readable, well-organized view of the content so that I don't have to go to preview or edit just to know what's on a page.

As an author, I want all the major pieces of the administrative interface to serve some sort of purpose for my regular work. I don't ever want to click an obvious link and be shown raw code or anything that looks like I may have broken the system.

Training can (temporarily) overcome questionable UX

- Authors were totally game to learn workarounds as we encountered rough spots. Their Teamsite experience has made them very hardy in the face of odd user interfaces.
- Training them together as a team helped them find meaning and explanations that worked for them quickly and effectively.

Recommended user stories

As an author, I want a sandbox server to play and practice in without fear of breaking anything as I learn.

As an author, I need training materials delivered in small chunks, so I can learn as I go.

Bugs

- "Owner" field doesn't always respect workbench permissions [since fixed, with a different field widget]
- Inline entity form fieldsets are collapsing after selecting files [since fixed, with a patch to module]
- When previewing, fonts didn't appear in IE on VA machines (they did appear in Chrome). Needs investigation.
- Preview screens don't consistently show publishing/editorial status. Needs investigation.
- Preview button can't be forced to open in a new tab.
- The caption on a story picture doesn't display the image's default caption (it only shows the override text; if there is no override text it displays nothing)
- History tab doesn't display node history.
- Revision diffing looks like it should work, but displays an empty screen.
- Sometimes the form edit fields appear to be grayed out/locked, on certain monitors (but they're not).

Summary: Research validated our MVP hypotheses for AX, already built into CMS

- Authors need clear, detailed help text (like currently found in *story*, *press release* and *staff profile*, but to a much lesser extent on other forms).
- Authors want a straightforward wysiwyg.
- Authors users want task-oriented dashboards.
- Authors want reusable, easy to use media.
- Authors like that editorial workflow that can be set to "optional" for certain users, by giving them publisher permissions.
- Authors found the content preview experience workable (the "decoupled" concept never came up).

For MVP: We got a ton of great insights, but nothing that requires a major pivot.

- The vast majority of our findings have clear implementation solutions.
- The following 6 slides indicate some issues we can address in Sprint 10, where the delivered value / effort ratio is highest.
- *None are critical* for MVP.
- After we story point these in the backlog, we'll figure out how many of them can be completed in the next sprint.
- The ones that can't be addressed right now will be prioritized for future sprints.

Field Labels & Help Text

Content types

"Health Care Region" is not wording we understand

We don't call them "Local Facility", maybe just "Location"?

staff profile: use the word "Leadership" specifically in name or description

Curation: "i feel this is different than we currently do things, because we can consider all stories to be featured"

Help text

title field: "i didn't read help text. i only read help text if i think i need it"

title field: "i didn't think a title would be that complicated".

"Press Release Blurb" on regional landing page doesn't use the word "boilerplate"

Potential confusoin between Suffix and things like Jr and IV, but the help text clarifies. 💖

[didn't see help text that was below the field]

Intro field

bio field: Main bio field should probably explictly say not to repeat the intro.

We may need to retrain people on writing intro text 📄

Intro field: is this the "first sentence" or "first paragraph"?

bio field: Current bios were not written to distinguish "intro" from the rest of bio

Intro field: It should clarify help text about what "search results" and "social media shares" -- we're not publishing to social media.

"flow into" and "flows from" in the bio fields do not make sense.

I don't like having to add intro and bio (feels redundant)

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Preview

Preview: should open in new tab

Preview: should be available from node view

Preview: missing note about "draft"

Preview: "who is json"?

Preview: "see if i can right click to force it into a new tab" (no)

Preview: "i have to scroll all the way to the bottom".

After saving, it would be nice to see Preview button on View screen

Can't go back to preview after saving an entry

Dashboards & Admin Screens

I like these tabs that correspond to content types 💖

Once you're in the Press Release tab, there's no button to "Add"

Node view: "light overview of everything"

Node view: what is this supposed to be for

Can press releases be scheduled out?

many of these content types are not my department

Breadcrumbs on various node edit screens: "What's 'node'"?

In this "Operations" dropdown, I'm expecting to see a "copy" and also probably "archive"

[Kim tried to add content directly on the main /content listing screen]

Can the Publishing Approval Workflow and Waiting for Approval Worksflow be side-by-side like Staged and Recenty Published to reduce the amount of white space and need to scroll down

I like that we'll all be seeing the same dashboard

Recent stuff up top, less-urgent stuff at the bottom. That makes sense.

I like using the 'Draft' area on Monday morning to remind me what I was working on

I'd like dashboards to be more information-dense. Clean, but built for "work".

Governance / Roles / Permissions

Owner Hierarchical select doesn't respect workbench access

FIXED

Healthcare system/related office: will this be restricted to the ones I have access to

FIXED

Governance box is really annoying

made less annoying

Style Guidance / Content of Content

Change to existing style

title field: "i would like to know the reason why sentence case not title case."

title field: "*i have to tell my boss that there's a change to sentence case, who has to tell her boss"

title field: "i don't want to rewrite the title to be sentence case."

Existing guidance

I do not know of any VA guide for Press releases and stories

"Should press release location be the source of the press release (Pittsburgh) or the clinic location (Lafayette)"?

boilerplate: "seems long."

Enforcement of style

title field: "if i leave it that way [title case], will it get changed?

title field: "i'm probably over 150 characters, why isn't it yelling at me."

email field: "it doesn't specify it here but i know that VA has a policy to make all email addresses lower case"

Fields no one wants

Photo/media: "but in my limitedexperience no one asks for these [headshots]"

Meta tags: "i really hope that this goes away".

Photo/media: "Downloadable checkbox: we'll avoid using it until we get that higher resolution."

Many of the fields in [staff profile] don't make sense for media contacts etc, they're only used for leadership

Inconsistent existing content

Media Contact doesn't exist on a lot of existing press releases; that is a mistake and during migration we'll add people back in

Location: when we're migrating stuff from the old system, do we add new content (eg city/state).

Existing PRs have media contact in the text; when migrated wholesale we end up with duplicate contact info

Media Management

PDF download: had to scroll back up to see PDF download after it was added.

Media preview: "seems to have good metadata, but not necessarily the same as what's displayed in front end"

PDF download: "The maximum number of media items have been selected." after 1 of one PDF was uploaded.

Media: image caption: "does it override the image caption entered in the previous form?"

Media: "Downloadable asset images should have better names."

Photo Cropping

Media Crop: Do i need to crop or will it do for me"

Cropping: "It shows one checkbox but there are two crop messages."

Media Library

Media assets: "why is video automatically playing?"

media: would be nice to filter by folder, and/or by author

Media assets: it would be nice if there was more division by file type.

These button names are terrible.

We love Teamsite's ability to drag-drop-upload multiple files at once

Photo cropper: "I know now that staff profiles should be square so i will use that"

media: when the image is saved it's not showing it as the cropped square, which is weird given that that's the crop we use

Photo cropper: window screen to see the picture, is smaller than the full size

Can't edit image (change crop sizes) without deleting and starting the process over

Adding new files

Media: "name" field that defaults to filename is confusing

Media: "Show in media library" it seems like it's letting me decide if others can use it

There's no way to add images into the press release text body! [he went on to hardcode an img tag into the source code]

photo/media: "alt text field is great!" 💖

Photo name field: is it asking for the name of the file? I'm assuming it's for categorizing it within the media library, so i'll add "Last name, first name"

Photo cropper: "i like the 3x3 cropping guides, i can be sure i'm doing it right"

What Now? Post MVP:

In preparation for this research, we put special attention on improving the AX for the three content types being tested. We clearly saw the benefit of that effort, and need to put the same amount of attention on every other content type and screen in the administrative experience.

Thank you!

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