

CMS ASSIGNMENTS AND EDITORIAL WORKFLOW

Usability Report

May 2020

OUTLINE

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- 3 Results
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STUDY OBJECTIVE

OBJECTIVE

Test a proposal for a context panel in the CMS, including the actions area, editorial workflow transition and the assignments feature.

METHOD

METHOD

METHOD

1-hour remote, moderated **usability testing** on navigational prototype.

Zoom was used for this study.

PARTICIPANTS

5 participants were interviewed.

Public Website Team and **Platform Content and IA** were represented between participants.

SESSIONS

Prototype contextualization, with **free exploration** of proposal and eventual prompts.

6 tasks performed in the prototype.

Follow-up questions.

SYNTHESIS

Common themes in responses were extracted without excluding outliers.

Quotes were **paraphrased** and participants **anonymized** to preserve confidentiality.

Tasks

- Designate content for a team member to take a look at.
- Pass content to another team member.
- Designate someone to take a look at a piece of content for approval.
- Send content to an external stakeholder for approval.
- Request adjustments to a piece of content that's in review.
- Publish content.

RESULTS

Task Performance

Participant	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6
G95N	3	3	3	2	2	3
82GW	3	3	3	2	3	3
DA77	3	3	3	2	3	3
0S4U	3	3	3	2	3	3
5PA1	2	3	2	1	3	3

- 3 - Participant could perform task easily and with relative confidence
- 2 - Participant could perform task with prompting
- 1 - Participant couldn't perform task

RESULTS

When asked about their overall impressions of the proposal, participants reacted positively and with enthusiasm

SPA1 considers **forms and actions easily accessible** an improvement.

For 82GW, the **page organization** is very helpful. It's easy to see where content stands, to locate the latest revision and to **send content** to the next person.

G95M highlighted the following:

- The **actions menu** is very intuitive.
- There is a sense of **continuity** and **collaboration**.

DA77 highlighted that the CMS team did a great job and that:

- The **actions menu** is very intuitive.
- Having the **content state easily accessible** is helpful to make sure users knows what they're working with.

The way the content dashboard was designed made sense for OS4U, who also reported that assignments and Recent Activity are useful for **traceability**.

RESULTS

Recent Activity contributes to content traceability and management

For 5PA1, being able to **remain on the same page** and access revisions **ordered chronologically** is helpful when one wants to find content edited a few drafts ago.

GN95 appreciates the possibility to **capture updates** and **assignments** of a content and also expressed that it would be good if the communication about what was done could be housed on the CMS.

OS4U reacted to the Recent Activity panel as being “super useful” in that it’s helpful to know the **date of the action** and **which user** did it.

Recent activity

billie@va.gov 01/15/20 1:24pm ET

DRAFT
Assigned to [quinn@va.gov](#)
I adjusted the typo and requested info. It's ready for you.

quinn@va.gov 01/14/20 5:00pm ET

DRAFT
Requested changes
Title has a typo and data is outdated. Can you adjust?

billie@va.gov 01/05/20 9:50am ET

IN REVIEW
Assigned to [quinn@va.gov](#)
You are a better reference for this page. Can you take over?

[See full history](#)

Who and when

Content state

Action

Revision comment

RESULTS

Revision comments contribute to revision findability

A participant explained that, when looking for past revisions, they have an idea of date, but end up clicking through several revisions to find the correct one.

5PA1 stated that having revision comments is important as a way to:

- Create a **paper trail**.
- Know **what people did** with the content.
- Help **find content**, If necessary.

The screenshot displays a 'Recent activity' log with the following entries:

- billie@va.gov** 01/15/20 1:24pm ET
DRAFT
Assigned to [quinn@va.gov](#)
I adjusted the typo and requested info. It's ready for you. — Revision comments
- quinn@va.gov** 01/14/20 5:00pm ET
DRAFT
Requested changes
Title has a typo and data is outdated. Can you adjust? — Revision comments
- billie@va.gov** 01/05/20 9:50am ET
IN REVIEW
Assigned to [quinn@va.gov](#)
You are a better reference for this page. Can you take over?
- charlie@va.gov** 01/03/20 2:00pm ET
IN REVIEW
Assigned to [billie@va.gov](#)
It's now in a good place for you to take a look at.
- charlie@va.gov** 12/29/19 4:10pm ET
DRAFT
Saved revision
Added new Coronavirus data.
- charlie@va.gov** 12/28/19 1:20pm ET
Created a new draft

[See full history](#)

RESULTS

Better usability is needed to make it clear that a revision can be accessed via Recent Activity panel

It wasn't clear for most participants that they could access other revisions via Recent Activity.

When explicitly asked to access revisions via the panel, most participants **clicked on the revision summary**, instead of on the timestamp.

Recent activity

quinn@va.gov 04/20/20 8:40am ET

IN REVIEW

Approved changes

Grape silver beet watercress potato tigernut corn groundnut.

Revision summary

billie@va.gov 01/15/20 1:24pm ET

IN REVIEW

Assigned to quinn@va.gov

Grape silver beet watercress potato tigernut corn groundnut.

Revision summary

quinn@va.gov 01/14/20 5:00pm ET

DRAFT

Requested changes

Grape silver beet watercress potato tigernut corn groundnut.

billie@va.gov 01/05/20 9:50am ET

IN REVIEW

Assigned to quinn@va.gov

Grape silver beet watercress potato tigernut corn groundnut.

[See full history](#)

RESULTS

A better visual cue is needed to help users understand on Recent Activity what revision is being displayed.

5PA1 reported that the current cue is not very intuitive.

G95N interpreted the different background color as indicating the latest draft.

DA77 interpreted the different background color as being related to the revision that is being displayed and expressed that it could prevent users from copying and pasting content from and to the wrong revision.

The image displays two side-by-side screenshots of a 'Recent activity' section, illustrating a design change for highlighting the current revision. Both panels list four activities with their status, assignee, and timestamp.

Left Panel (Current State):

- quinn@va.gov 04/20/20 8:40am ET**
IN REVIEW
Approved changes
Grape silver beet watercress potato tigernut corn groundnut.
- billie@va.gov 01/15/20 1:24pm ET**
IN REVIEW
Assigned to quinn@va.gov
Grape silver beet watercress potato tigernut corn groundnut.
- quinn@va.gov 01/14/20 5:00pm ET**
DRAFT
Requested changes
Grape silver beet watercress potato tigernut corn groundnut.
- billie@va.gov 01/05/20 9:50am ET**
IN REVIEW
Assigned to quinn@va.gov
Grape silver beet watercress potato tigernut corn groundnut.

Right Panel (Proposed State):

- quinn@va.gov 04/20/20 8:40am ET**
IN REVIEW
Approved changes
Grape silver beet watercress potato tigernut corn groundnut.
- billie@va.gov 01/15/20 1:24pm ET**
IN REVIEW
Assigned to quinn@va.gov
Grape silver beet watercress potato tigernut corn groundnut.
- quinn@va.gov 01/14/20 5:00pm ET**
DRAFT
Requested changes
Grape silver beet watercress potato tigernut corn groundnut.
- billie@va.gov 01/05/20 9:50am ET**
IN REVIEW
Assigned to quinn@va.gov
Grape silver beet watercress potato tigernut corn groundnut.

Both panels include a 'See full history' link at the bottom. The proposed state on the right uses a light blue background for the 'IN REVIEW' status of the most recent activity (quinn@va.gov 04/20/20 8:40am ET) and the 'DRAFT' status of the activity immediately preceding it (quinn@va.gov 01/14/20 5:00pm ET). Purple annotations with arrows point to these highlighted areas, stating 'Revision being Displayed'.

RESULTS

There are no defined rules regarding the use of the states *draft* and *in review*

GN95 reported that, when trained, was told to use only the states *draft* and *published*.

0S4U noted that the state *in review* is not used, even when content is in the official review phase. Content is kept in *draft* and, externally, people are told that it is ready to be reviewed. 0S4U attributes this for the fact that the CMS doesn't currently offer additional functionality when content state is *in review*.

5PA1 uses the *draft* state exclusively until content is published, but other members of their team use *in review* as well as *draft* for unpublished content.

5PA1 believes that a **sense of progression** in the content lifecycle is needed:

- Content that is a work in progress and not final should hold the state *draft*.
- Content that is being looked at should be in the state *in review*.
- Content that is *in review* and needs revisions should go back to *draft* state.
- If one is a reviewer, the expectation is to have the content as *in review*.

0S4U highlighted that the state *in review* would be important to have a more streamlined process with stakeholders.

RESULTS

While there is a similar understanding of what content in draft and content in review look like in terms of stability and editorial process, there are different interpretations regarding the use of the features send for review and assign

For DA77, the function of *Assign* is unclear. When asked to send content for peer review, DA77 chose *Send for review* instead of *Assign* because it seemed like a **specific action**.

When sending content to stakeholders, DA77 reported that they would request a review, as opposed to *Assign*, because of the **tone of the request**.

82GW made a parallel with PR reviews. If one only wants team mates to take a look at content, one would assign it and add a note. There's no need to have content in review.

5PA1 reported a preference for the use of *Assign* if the recipient would **still need to make changes** to the content. For 5PA1, one uses *Assign* for the **recipient to "do something"**. On the other hand, the action *Send for review* should be used when the recipient is **not editing the content**.

5PA1 also noted that *Assign* and *Request Review* (checkbox) was confusing because there was *Send for Review* as an option on actions menu.

RESULTS

While there is a similar understanding of what content in draft and content in review look like in terms of stability and editorial process, there are different interpretations regarding the use of the features *Send for review* and *Assign*

When asked about the choice between *Assign* over *Send for review*, G95N said they didn't know. The *Request revision* checkbox was used with no expectation that the content would move to *in review* state, but as a way to **request someone's revision**. When asked about their understanding of the two functions, G95N reported that:

- *Assign* if for when content still has writing to be done, before it's in a place where it can be formally reviewed.
- *In review* is for when content is in a place where a manager can review it.

When asked to send content to a manager, 0S4U expected to have a way to inform them that the **revision is the last one**, as opposed to another round of back and forth.

When asked to explain why they chose the action send for review instead of *Assign*, 0S4U reported that assignment would only be used at the beginning of a project to **assign content to a group of people**.

RESULTS

Some participants understand the concept of 'assign' as containing specific actions to be completed.

82GW suggested that there might be no other **types of assignments** other than approving, requesting and sending.

In OS4U mental model, the label 'assign' is the **action of delegating or requesting someone else to do something**, whereas the other labels in the prototype such as 'review' or 'request change' are the specific **tasks that need to be done**. (e.g. "Assign John to request change")

RESULTS

Participants considered email notifications to be an essential feature of the prototype

Participants expected email notifications to be a supporting feature to the assignments workflow, and were gratified to see that it as part of the proposal.

Further observations:

- Some Stakeholders/SMEs only review content if there's a deadline defined. It'd be useful to be able to add a date when assigning content, that would be reflected on the email body.
- There is a practice to flag urgency on the email subject when revisions are sent for Stakeholders/SMEs.
- The difference between the two links in the email body is not yet clear.
- The email should make it clear to the recipient what they're supposed to do with the content.
- The emails could be direct about how to approve content from within the CMS and for those who don't access the CMS
- The link label *Review and approve content (requires login)* could give the impression that an external stakeholder can only approve content from within the CMS.

RESULTS

EMAIL SUBJECT

Charlie assigned you to review "Coronavirus FAQs: What Veterans need to know"

EMAIL BODY

charlie@va.gov assigned you to review the following VA.gov content.

Coronavirus FAQs: What Veterans need to know (IN REVIEW)

charlie@va.gov *This is ready for your approval.*

[See a preview](#)

Preview of how this content will appear on VA.gov. Reviewers without a VACMS login should provide feedback by replying to this email.

[Review and approve content \(requires login\)](#)

—

You're receiving this message because you've been assigned to review VA.gov content. If you believe you've received this message in error, contact cms-helpdesk@va.gov.

RESULTS

The content review workflow could benefit from a way to flag urgency or set a deadline

DA77 suggested that action forms offer the ability to add a **high priority flag**.

OS4U reported that it would be useful to flag when the content should be reviewed by, in order to help with accountability. Especially in the case of stakeholders, they **only review content if there is a deadline**.

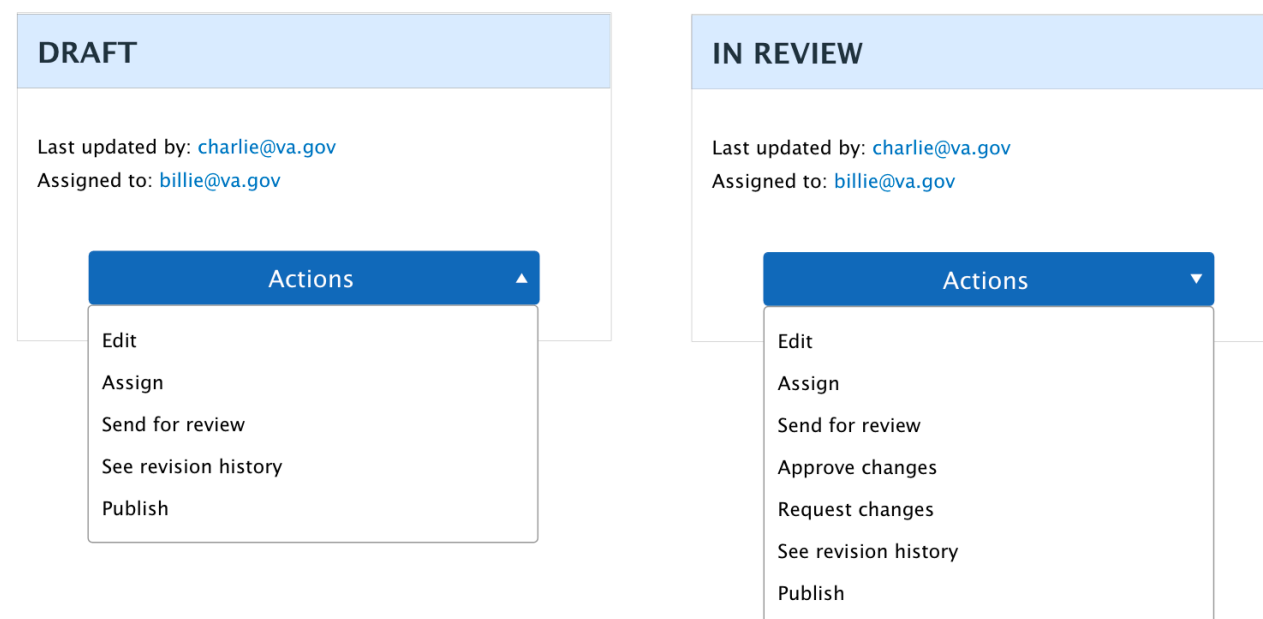
RESULTS

Changing options in the actions menu do not yet create context and clarity for users

For 5PA1, the purpose of the menu changes weren't clear and they suggested that it remains the same at all times or have it be contextual to each person and their role in assigning or approving reviews.

5PA1 commented that the actions *Send for review*, *Approve changes* and *Request changes*, together, is confusing.

OS4U believes that additional actions available when content is *in review* is useful, specially when differentiated in the Recent Activity.



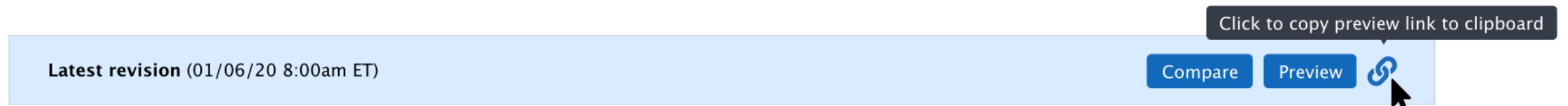
RESULTS

Preview url copy: small tweak, big win

Before interacting with it, participant 0S4U expressed the desire to have the *Preview icon* provide the link of the preview page.

GN95 needs to slack the preview url to send to stakeholders. Having the url accessible in one click seemed useful to them.

DA77 and 5PA1 reacted with enthusiasm to the ability to copy preview url in one click.



RESULTS

Participants used to the edit tab had to adjust to its new location in the actions menu

5PA1 and G95N mentioned that they didn't know where the edit functionality was.

0S4U was used to accessing the Edit functionality immediately visible via the tab, but wasn't hindered by its new location in the proposed design.

RESULTS

The size of the text boxes in forms does not include the use case of comprehensive revisions

0S4U and 5PA1 mentioned that the size of text boxes in the forms need to be bigger and allow a fairly amount of text in order to accommodate more text. If a person is doing a comprehensive review, they might need to include more explanation.

DRAFT

Last updated by: charlie@va.gov

Assign to:

Add a message (optional)
Provide more information about what needs review.

3 lines

RESULTS

Lone, but insightful findings

Recent Activities could show only the last few revisions. Usually, editors only go back to the last few ones and the revision comments would be helpful to identify the desired revision.

One participant interpreted that clicking on a Recent Activity timestamp creates a filter for what a specific user did on a document, organized chronologically backwards.

A confirmation mechanism on the publish form is important for accountability and prevent accidental publishing.

One participant wondered if the link icon links the current page to another page.

After a content is published, until it's not fully deployed, the button *Visit VA.gov destination for this content* could be replaced by *Preview* (and the preview link). There's a practice to send around the preview link to inform that the content is going live.

The label *Latest Revision* was interpreted by one participant as being the actual latest revision.

The CMS role reviewer could be used to let SME/Stakeholders approve reviews in the CMS.

NEXT STEPS

How do we move forward?

Define what the MVP is.

Map and track opportunities for improvement - nice/must haves and short/long term.

Prioritize what improvements will be incorporated in the MVP.

Adjust email templates and test them against SME/Stakeholder workflows.

Define a rollout plan for the redesign and new features

Other thoughts?

RESOURCES

The following resources were used to accomplish this study:

Research Plan

Conversation Guide

Navigational prototype in Adobe XD

Thanks!

Feel free to contact us with questions:

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