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## Field Guide

VA.gov CMS: Facility

Author Experience

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**VA.gov CMS Team**

#### Conducted January 8-9, 2018

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# Schedule

## Arrive in Pittsburgh, January 7

## Research Day 1, January 8

*Day's focus*: **Contextual inquiry** with Teamsite authors

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| --- | --- | --- |
| **1:30 PM** |  | Louis Skavnicky, Web Content Manager  VA Healthcare-VISN 4  Building 70 beyond the smoked doors |
| **3 PM** |  | Kimberly Graham, Visual Information Specialist, Public Affairs  Building 32, second floor, room 2A105 |
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|  |  |  |

## Research Day 2, January 10

*Day's focus*: **Contextual inquiry** with Teamsite authors, analysis, and work time

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| **Time AM/PM** |  | I’m in Building 32, second floor, room 2A105 |
| **Time AM/PM** |  | Author 2, name |
| **Optional** |  | Artifact analysis over lunch / dinner |

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# Research Team

### VAMC Pittsburgh site contact

Shelly Nulph, shelley.nulph@va.gov

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### DSVA team

Jeff Barnes

Jennifer Lee

### VA.gov CMS team

**Meghan Casey, point of contact for author experience, 612.723.5623**

Kevin Walsh

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# Field Research Checklist

### 2 days in advance

* Purchase or gather
  + Supplies: post-it notes, index cards, sharpies

### Day before

* Print all documents needed for the workshop
* Lay out all supplies needed for the workshop
  + Printouts
  + Post-it notes, sharpies

### Night before

* Aim to get a full night's rest
* Plug in all electronic devices to make sure they are fully charged on research day
* Fill water bottle and put it near your research kit

### Day of

* Plan to leave with double the time you estimate it will take for you to arrive in a timely fashion to the site
* Pack up your research kit
* When leaving the site, make sure to leave it tidy and to do a second check to make sure you haven't left anything behind

### Research complete

* Leave the site tidy, as or better than you found it
* High five!

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# Conversation Guide

**Informed Consent**

* Thanks for taking the time to chat with us today.
* Before we proceed, we need you to fill out a quick informed consent form.

## About the study (~3m)

* As I speak to you today, I may sound like I’m asking “why” a lot. That’s because I want to make sure I capture your details correctly.
* Before I ask you a few background questions, I want to remind you that your job is really easy, you just have to be yourself and act as you naturally would.
* I did not design anything you're going to look at today, I’m just collecting feedback.
* As we talk today, please be honest with your positive and negative thoughts.
* Nothing you say will hurt my feelings.
* I will now begin recording the session [Researcher: Make sure to begin recording]

## Background questions (~10m)

* What is your role here at VAMC Pittsburgh?
* Could I snap a picture of your business card?
* How long have you worked here?
* Who do you work with?
  + Who is your manager and what is their title? How often do you interact?
  + Who do you work most closely with?
  + Do you depend upon any other person or teams to do your job?
  + Who do you contact for support?
  + Which person is most accountable for the success of content on pittsburgh.va.gov?
* Have you had other roles here?
* How long have you done this type of work?
* When was the last time you used the CMS?
* Are there tasks you do regularly in the CMS?
* Are you planning on working on tasks that involve using the CMS today or soon?

**Thank you for answering those!**

## Interview questions (~40m)

* At any time today, did you assess what kind of work you have in store? If so, how? If not, how do you see what types of Teamsite work you have waiting for you?
  + What CMS work are you planning on doing today? A list of tasks or jobs would be great to hear or see.
    - When it comes to your work, which tasks are easiest to accomplish in Teamsite?
    - On the flipside, which tasks are the most difficult to accomplish in Teamsite?
    - What other kinds of tasks do you do related to website content that aren’t done in Teamsite?
* Earlier you mentioned you last used Teamsite [insert what participant said earlier] / or you need to use Teamsite to do some work today . Would you re-enact that experience for me now?
  + Think aloud as you go.
  + Start from the very beginning, even if that requires steps completed outside of Teamsite (E.g. checking email or a cheat sheet of some kind).
  + Would you tell me when you are done with this task?
  + Was there any urgency to doing this task? Was there a reason you did this task when you did it?
* Earlier you shared that the most complicated task to do in Teamsite is [use their words].
  + Could we observe while you do a mock task showing us how you would do that so we can see and hear how you get the job done?
    - How do you know when you are done?
    - About how long did it take you to do that?
* Can you tell us a little bit about what kind of training you received to manage content in Teamsite?
  + In retrospect, what was the most effective aspect of that training?
  + What could have been better about the training?
* If you encounter a problem using the CMS – for example if it’s not working properly or you have to do something you’ve never had to do before – what do you do?

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## User stories we definitely want to cover

* Managing users (Louis, Ryan?)
  + A need for a new user account is identified
  + Add a user
  + Give them permissions to a workarea
  + Removing user
* Editorial workflow (Kim, Ryan, Louis)
  + A need for content is identified (offline?)
  + Content creation
  + Send content for review
  + Publishing
  + Sharing content through other channels (?) (Low priority)
  + Scheduling (?)
  + Archiving/deleting

## Wrap up questions

* Are there any other tasks you do related to
* Why do people use Teamsite here?
* What would you like to stay the same about your experience with Teamsite?
* What would you like to see work differently?
* Who else should we speak to for this research? Not necessarily a specific person, a type of person.
* **Done! Thank you.**

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# Debrief Guide

Debriefing Mindset:

* Instigate and push the team to widen the field of association and encourage them to experience the world in novel or original ways.
* Provoke ideation and push the team in extreme directions, listening for wherever a person says, “it’s like...” or “it’s almost like...” and tease out insight from there.

What did participants do? List a few activities that relate to what they were trying to accomplish.

How did participants characterize what they did? Use their words.

What did you see going on?

What surprised you?

What did you learn in that session?

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# Debrief: scoring dimensions for CMS

## Organizational maturity

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| Anyone can create/manage content |  | Writing is a skill that requires the right expertise and tools |

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| More content will solve the content problem |  | Realistic expectations have been set about what people can expect from the org's communication channels |

## Developer needs <> author needs

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| --- | --- | --- |
| The CMS was designed for storing and manipulating content |  | The CMS is flexible enough to manipulate content tied to tasks and needs of the author |

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| --- | --- | --- |
| Interface enforces info/data model on authors |  | Interface is a translation layer between the storage model and author experience |

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| --- | --- | --- |
| The CMS reduces technical and performance risks |  | The CMS reduces content risk |

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## Process spectrum

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| Computer processing was the focus |  | It is clear that author actions, processes, and workflows were the focus |

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| --- | --- | --- |
| Microcopy and terminology was written to serve information management |  | Microcopy and terminology is consistent and shows a strategy that enables successful author experience |

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## Conceptual spectrum

"Content management often requires authors to add information that they understand in principle, but have no meaningful name for. Maybe they can come up with a name; maybe not. But it is unlikely such a term will be meaningful the next day."

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| Terminology is based on function and does not prioritize mapping to the author tasks |  | Consistent terminology is used throughout the system so when an author encounters a new arrangement, the layout and grouping make intuitive sense |

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| The interface and flow enforces the info/data model on authors |  | Content attributes are organized so authors can decipher the basic information (reference, file, alt text, caption), the rendering options, and references. The system was designed to help authors create, represent, and maintain associations between |

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| Content is coupled with function (an association that does not come from any natural human behavior, E.g. prompting an author to add a link by requesting <a href="…">) |  | Associations between content is created by reference metadata – attributes that establish subject affinity |

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| Systems takes for granted that labels and microcopy will be understood by all |  | Help content is available in context (E.g. to explain labels) |

## Louis Scavnicky 13:30

### What’s your role?

I’m the web content manager for the VISN, i oversee 9 medical centers, plus the VISN site, and their social media accounts. I publish web content, graphic content, emails, sharepoint.

### How long

I’ve been with tthe VA for 10 years, VISN for two

### Who else do you interface with? Different facilities

Altoona, coatesville, lebanon, philly, wilkes-barre, wilmington, and field calls . A lot of troubleshooting

Sometimes PAO, some full time web people, a couple non-communication web people, executive assistant.

### What kind of stuff do you work with them on

Publishing content - services, feeatured stories

Changes to leadership directory, which has a separate workflow.

### Are you the only one? Or do they have access as well?

They all have access, but i’m just troubleshooting. We also push out content to all facilities.

### When you think about the work you do, do you depend on other people to do your job well?

I’m pretty well

If i’m waiting for content, that’s my only hangup. Sometimes files will be locked. Usually just a ticket to the support.

If someone starts to edit, no one else can edit

Files can be locked for six years.

Teamsite support desk

### How often do you have to get in touch with them?

Not too often lately.

Locked files, sometimes

Sometimes uploading different file types. Timesite will occasionally delete code.

### Talk about, even today, what are two or three things you have to do in Teamsite today.

Nothing today.

### What about in general?

News content, press releases, news releases, leadership directories, location changes, clinic changes. Changes to services.

Occasionally we’ll get requests for whole new sections of content.

### What is the process for creating a news release, from the moment the need is identified?

My boss, Communications manager for VISN, suggests the need.

Feature stories and Press releases: Sharepoint template form that sends an email to.

Or Already in a Word format, it gets emailed to me

Steps

1. Login
2. Go to Workarea > Internet\_pittsburgh
3. Go to More button, click New content tiem
4. Click content type pressrel
   1. Some sites have different content types
5. Fill out form
   1. Copy paste content into wysiwyg
6. Date created as distinct from press release date.
7. We can schedule
   1. How important is that? Good to have.
8. We would also like also expire content
   1. Eg traffic restrictions for a weekend
9. Review
   1. We don’t use the Teamsite review process. It’s very clumsy. We have access to staging.
   2. I’ll publish and send an email.
10. Does this press release template meet much of your needs?
    1. It’s very basic. When i publish press releases, i create stuff with dreamweaver, then copy and paste into the wysiwyg.
11. Photos and multimedia
    1. You can include a file, like a js for slideshows
    2. Navigation bars, fancy looking boxes, stylesheets.
    3. Videos
       1. We’re not allowed to embed youtube.
       2. We have our own media player, and our own player.
       3. HQ manages the videos for QC. Uploads and puts PGH VAMC video on a PGH youtube playlist.
12. You can’t unpublish it, you have to delete it.
    1. There is no trash or archive
13. Preview
    1. Test2 example: Go to publish Deploy to staging, Andy Castle set this up for me.
    2. Not all sites have staging, Jenny HL can set it up for other sites.
    3. With a comment, which is saved in the revision history. I use the comments all the time. Mostly for internal use. There two boxes, Lluis doesn’t use the first one, which Jenny HL says shows up in the workflow.
    4. Figures out URL manually. [va.www.w2k8.internet.staging.va.gov/pittsburgh/test2.asp](http://va.www.w2k8.internet.staging.va.gov/pittsburgh/test2.asp)
    5. Staging is always up to date with everything, because when you publish to production it also updates staging.
14. File Workflow
    1. Education files that get uploaded straight to
    2. It sends me an email to whoever he picks in the workflow
    3. What it looks like:
       1. He goes to import, batch uploads
       2. He’s not part of public affairs so he can’t publish directly. If we could give him permissions to just one folder we would.

I created a guide to create news releases, for my backup: Ryan from Pittsburgh V

What’s the difference between News releases, Press releases

Featured story,

### Would it make sense for your boss to do this?

No.

Some of the PAO might do it, but not here, where there’s a staff.

### Adding a new user

va.gov/cms

Maintain POC - all the power

Maintain site user

### Email notifications

See screen recording. Live link would be a helpful start.

### Training

Web solution - monthly or quarterly remote trainings when i first started

3 Conferences every year -- 2009 to 2011.

Most of it is handson learning

There are tutorials specific to Teamsite, specific to VA.

Every once and awhile i’ll look at it to send to someone. I don’t really go there anymore.

If they update the site they’ll change certain ones, like an emergency page.

Normal operations - 5000 people got a notification

They had a new tutotiral to let us know that changed happened

Tutorials for specific processes, depending if you’re an Editor or Reviewer.

Publishing, importing maintained by the CMS team

Lots of screen grabs.

Occasionally additional word docs from Jenny HL’s team.

### What kind of training to you prefer for a new system?

I’m more of a learn-by-doing. Reading a screen doesn’t do much for me. Virtual is fine.

### Emergency notification

Checkbox to turn it on/off.

# Kimberley Edwards

## What is your role?

My title is officially Visual Information Specialist. Mostly a graphic designer, have been the main web person, the backup webmaster.

VIS is a generic title for lots of people. Mostly a graphic designer: Newsletter, annual report, posters, brochures, social media.

### How did you become backup webmaster?

I started same day as Louis S, 10 years ago. Visual design and web work. We split, he mostly did web, and i did more standard graphic design. When Louis went to VISN, i filled in for a year or two, while we fill that position. Transitioned away, came back, transiitioned away again. I don’t do VISN, just VAMC Pittsburgh: UD and Heinz, Inter and Intra.

### Who else are you typically working with, clients, partners?

So many people. Most common request: Internal sources, intranet requests. 1:1s, open office hours for our leadership that change constantly. Huge research department constantly updating their files. Even though it’s a very specific audience for inters, but still changes a lot.

Homepage updates weekly or daily

Weekly report gets published on our webpage

A couple times a month it gets updated.

Public Affairs specialist does a lot of features, once a month at least.

Screenshare

* Local brief
* It’s difficult to push all our news out. News comes out in clusters. There are three options
  + 1 thing in the rotating banner
  + 1 feature
  + 1 other thing

### What each of these for? Do you have guidelines?

I have my own internal guidelines

Rotating banner: more static (eg flu shots)

Local brief: Greater importance.

Web feature: Local specific

### Do you have a calendar?

No, just as stuff comes in?

All the public affairs specialists work with different people, very specific groups

* One waiting to come out, transgender patient and their story. Very personal
  + **Does that get pushed elseshwere?**
  + Yes. social media. Also GovDelivery.
  + Newsletter three times a year, Annual report.
  + Social media

### What’s the Trigger

* + We’ll hear about a story, but we’ll also ask people for stories.
* Three public affairs specialists
  + Keith
  + Sheila
  + Hope
  + One of us just left for another job.

### 

### Scheduling

At some point we want to

* Schedule for major event
  + Veterans Day
  + Event for Vietnam Vets getting an

Teamsite’s scheduling feature has failed several times

### Do you do other content updates on the site?

List of Services

* *Do you write those services specific to Pittsburgh?* Occasionally we’ll get it from outside, i don’t ever get enough information for these pages. We’re understaffed to be comprehensive.
* We did some direct scheduling updates
  + We added a lot of boxes

Example for editing teamsite

* Nutrition services
  + Request comes in
    - Research dep’t uses an infopath/sharepoint form, executive office just emails. Other hospitals use Leaf.
  + The way that i do the Make an Appointment red box is by editing the source code and adding the divs.
  + With my two monitors ic an do stuff side by side
  + Preview is instant, it’s working today. va[www.cms.webdev.va.gov](http://www.cms.webdev.va.gov)

Public Affairs requests

* Not tied at all
* How do you prioritize?
  + Criteria
    - You’ll get bumped ahead if it involves patient care.
    - Anything with a hard deadline (event), also.
* Example: Transplant page
  + New URL, new page
  + Probably a services page
  + Services has its own template
  + If template was not complete, would go back to ask for more.
  + Character limits on Short description field but we don’t know what they are until you try to validate the form.

## WYSIWYG

* Link
* Photo
* I usually get annoyed and then just use Source Code
* Paste as text.
* Louis usually does the video
* 50/50 use photo button vs source code
* Upload photo after

## Workflow

I’ll often publish to staging instead of using the Teamsite review process, because i’m usually talking to people outside of Teamsite. I’ll send an email, they’ll let me know if changes are needed.

### Would it be helpful to be able to generate that email from within the CMS?

It doesn’t bother me to have to use email for editorial workflow. I like to review first in staging.

Research sends me a lot of documents to replace old with new. No review, QA on my own.

With all of our web features, local briefs, new pages, major edits that are not just copy editing, i like to have people sign off, because they may want to change the message of the content they are sendin gout.

### Do you have authority to push back on requests?

Yes and no. It’s usually gone through Shelley. I usually feel very comfortable going back to Shelley about the request. If it’s something that we both agree shouldn’t be going out as it is, we’ll go back to source.

Doesn’t happen too oftne. Exmpale: someone wanted an interactive schedule to request time with a super cool microscope. Had to be on public site because people outside of VA and VAMC pittsburgh want to use it. But Teamsite couldn’t handle.

### When people are requesting new content, are they working with PA specialists?

Yes. so i have no issue going back to them if i have quesitons

### PA specialists are those writing it?

Yes

If i end up writing it, i’ll usually go to a PA or Shelley or our writer/editor.

### Feedback loops?

We use google analytics. Don’t look at it so much.

### Content testing?

No, would love to, with employees for intranet.

Anything that

### Permissions

### Dashboard

I have one person that sends me things to review.

When i hit view i don’t get information. The links don’t all work.

Never used Favorites.

Work In Progress, i do use.

I don’t know if there’s a way to cancel my changes that never got approved.

I have used the versions to see if anything got mixed up.

### Mass deletion

Request a bunch of deletion of folders.

I would find folder, and remove section by section. In teamsite it takes a minute per item. But in CC Professional i can do it much faster.

Deleting things and archiving is very frustrating.

There are probably hundreds of things that can be deleted.

Leadership

### When i stepped away i just let