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## Field Guide

VA.gov CMS: Facility

Author Experience

Field Research, Usability Testing

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**VA.gov CMS Team**

#### Conducted March 6-7, 2019

#### Related: [VA.gov CMS: Author Experience Usability Round 1, Test Plan](https://docs.google.com/document/d/11MBfZ8hgoqwv6QhPfwP8T0o9c4ZI3xYjqEGcz9jR8dM/edit?usp=sharing)

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# Schedule

## Preparation, March 6

*Day's focus*: **Team arrives** and gets prepared

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| **Hotel**  **Business Center** |  | Eileen, Kevin, Howie get together to prepare for next day's research.   * Run through full editorial workflow for Press Release & Story * Configure 3-5 A/B testing fields (likely on test.va.agile6.com) * Confirm 2-3 sets of sample content for authors to use as input during the session |

## Research Day, March 7

*Day's focus*: **Co-creation** with Pittsburgh authors, Kimberly, Louis, Ryan, Shelley

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| **10AM - 12PM**  **2A253 in 70** |  | Prompt and observe migration tasks:   * Press releases, Stories, Staff Profiles * Feedback on:   + Content type descriptions at /node/add   + Explanation or submission guidelines   + Field groupings and names   + Field labels   + Field description text   + Fancier widgets     - Media library widget(s)       * Cropping tool       * Alt text       * Image captions     - Author lookup   + Editorial workflow   + In-CMS Governance * Explanation of 2pm migration exercise |
| **1:45 - 2:30PM** |  | Contextual inquiry at authors' desks: observe content migration tasks and Pittsburgh collaboration methods |
| **2:30-2:45PM** |  | Walk to 2A253 in 70 |
| **2:45-3:15PM 2A253 in 70** |  | Comparative UI review/analysis: review alternative widgets   * Author selector: autocomplete vs browser * Governance: hierarchical select vs single giant list * “Featured” story or press release: set in the story node vs set on the landing page |
| **3:15 - 3:45PM** |  | Generative research on author dashboard wireframe.  What kind of context do people need and does this provide it? |
| **3:45 - 4:00PM** |  | What kind of rollout do you anticipate?  With Louis, Ryan and Kimberly   * Ask Rollout questions in the Conversation Guide * Gauge productivity changes anticipated by authors * Learn types of training they would find useful for themselves * Get 8 names for an author leaderboard, which we'll need for our diary study |
| **Evening** |  | Team debrief, synthesis, uploads artifacts to Confluence |

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# Participants

* **VAMC Pittsburgh site contact: Shelley Nulph**, [shelley.nulph@va.gov](mailto:shelley.nulph@va.gov)
  + Public Affairs Specialist, VA Pittsburgh Healthcare System
* **Louis Skavnicky**, Web Content Manager, VA Healthcare-VISN 4
  + *Building 70 beyond the smoked doors*
* **Kimberly Graham**, Visual Information Specialist, Public Affairs
  + *Building 32, second floor, room 2A105*
* **Ryan Stubblebine**, Visual Information Specialist & Webmaster, VAMCs.

# Research Team

### VAMC Pittsburgh site contact

Shelley Nulph, shelley.nulph@va.gov

### VA.gov CMS team

* Eileen Webb, Content Strategist
* Kevin Walsh, User Experience Engineer
* Howie Brande, Veteran Outreach Specialist

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# Field Research Checklist

### Day before

* Print/prep documents needed for the workshop
  + Sample content for them to paste into the Drupal CMS
  + Debrief guides
* 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

#### Before you leave for the research

* Plan to leave with double the time you estimate it will take for you to arrive and park in a timely fashion
* Pack up your research kit, including printouts

#### Onsite

* We will prep Shelley in the morning: we may ask her to leave for some segments of our discussions so that no one feels like their boss is listening in.
* Tech lead, Howie, to record each session and take careful/verbatim notes.
* Debrief lead, Eileen, to debrief after research session using the Debrief Guide and Scoring dimensions.
* Kevin, Eileen, Howie to ensure we get names of at least 8 more authors who we could contact for the future diary study.

### Research complete

* Leave the site tidy, as or better than you found it
* Make sure one person has the research artifacts in their possession. If possible upload videos, photos of notes, etc. to Confluence before flying.

# Conversation Guide

## About the study (~3m)

* It's great to see all of you again! As a reminder, my name is Eileen, this is Kevin, and Howie. On the phone are \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.
* Let me walk through what we’re going to cover today.
  + We are here to work with you on and observe you use the new Drupal CMS to add sample content for workflows > press releases, stories, and profiles.
  + We'll be watching you add sample content into the new CMS so we can gauge how it is working for you and if it meets your expectations.
  + We're going to be asking you what you think about the new CMS and we'd like for you to think out loud as you are completing tasks and let us know what you think – positive or negative.
  + I did not design anything that you’ll see, I’m just collecting feedback. Nothing you say will hurt my feelings.
* Sometimes I may sound like I’m asking “why” a lot. That’s because I just want to make sure I’m understanding you fully.
* If it's okay with you, will now begin recording the session [Howie: Make sure to begin recording] **Without further ado, let's get started!**

## Interview questions for the 10-noon session (~60m, 20m per content type)

In this time together, we're going to ask you each to enter some key content into the Drupal CMS.

* Using the sample content we've provided, would you add this [press release/ story/staff profile] content to the tool you see in front of you?
  + Research note: avoid answering questions, ask participant to think aloud and attempt to work through questions (you are in observation mode).
* Follow-up prompts:
  + As you imagined a new CMS, is this what you expected to see?
  + Can you share reactions to labels or how components were named?
    - How does this compare or relate to what you do today?
  + How about the order of elements?
    - How does this compare or relate to what you do today?
  + How about the order in which you were asked to do things or the way things were associated?
    - How does this compare or relate to what you do today?
  + How would you describe the amount of time you spent on this?
  + At any point did you feel lost?
    - If yes, what may have helped you get back on track?

## Interview questions for the 1:45-4PM session (75m)

#### 1:45-2:30PM: **Contextual inquiry**

Observe content migration tasks with different UI controls and Pittsburgh collaboration methods.

#### Research notes: (1) get the staging site set up on the participant's computer, (2) get Zoom fired up on their computer and make sure to get permission to record + press the record button.

##### Migration tasks

* Louis: Stories at his desk (researcher: Eileen)
* Ryan: Press releases at his desk (researcher: Kev)
* Kim: Staff Profiles at her desk (researcher: Howie)

##### Questions

* Thank you for doing a few more content migration tasks with us. The purpose of this session is to see how you enter this content in here at your own desk. I will mostly be observing and would will ask you to:
  + Clarify any resources you may use to help you complete the tasks
  + Let me know if/why you would call Ryan, Kim (or anyone else) while you're completing the task
  + Please think aloud as you go

#### 2:45-3:15: **Comparative UI review/analysis – review alternative widgets and settings**

* Based on what we heard you say, we should focus on [add based on what was shared in the morning session]. Anything else?
  + Thank you for that.
  + Would you show me how you would use the tool to log in?
  + Using the sample content we've provided, would you add this [press release/ story/staff profile] content to the tool you see in front of you?

#### Research Notes: Observe authors' success rates with different settings

* Author selector: autocomplete vs browser
* Governance: hierarchical select vs single giant list
* “Featured” story or press release: set in the story node vs set on the landing page

#### 3:15-3:45PM: **Dashboard wireframe review**

Research note: be ready to share the dashboard mockup

* What is this thing we're looking at here? As you scan it, can you think aloud about what you're seeing?
* How does this relate to how you currently manage activities?

#### 3:45-4:00PM: **Roll-out questions**

* Are there any other CMS tasks you do on a regular basis that we did not cover today?
* What would you like to stay the same about your experience with Teamsite that you did not see here today?
* What would you like to see work differently?
* On a scale from 1 - 4, with 1 being minimal and 4 being excessive, how would you rate the amount of training you believe we'll need to do in order to successfully roll out the new Drupal CMS?
* Would you be willing to continue collaborating with us in future studies?
  + We are actively looking for more authors at other facilities who we might speak to. Would you be comfortable sharing names of colleagues who we might contact for future research?
  + Do you share information with other authors who we could contact?
* **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 the new Drupal 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) |