Dartmouth Content Repo Project
Edit News Article Page Usability Test:
Summer 2015 – Dartmouth College

Summary and Goals

Usability tests will be conducted with a select sampling of site editors and administrators at Dartmouth College to measure the effectiveness of a UI approach OHO has proposed for a new Drupal-based admin system for Dartmouth OPA admin/center site content, allowing said content to be shared between other Dartmouth sites through a common content repository (which we will refer to as the 'Shared Library' during the tests).

Among the features of this proposed system will be the ability for site editors to edit News Articles in a modular fashion, creating, editing and sharing distinct Drupal content types directly within the edited page that can then be passed on to the Shared Library. Our prototype is designed to simulate the experience of editing a pre-existing News Article page found on the Dickey Center site, though these workflows can apply to similar News pages on other admin/center sites.

We want to learn the following from these tests:

• How easy to use is our proposed UI for editing an existing News Article page? Are UI and nav controls used through the process discoverable, intuitive and helpful?

• Can our test users complete tasks in a reasonable amount of time, feel confident while performing tasks, and feel assured that those tasks have been completed properly?

• Can the site editors tested imagine this tool being used as part of their present workflow? Would it be beneficial, making it easier for them to do their jobs quickly and thoroughly?

• What changes are/might be needed to optimize this proposed workflow?

• What problems or challenges do our test users face using this tool? What can be improved? What is obstructive, unclear or unwieldy?

We are *not* testing:

Dartmouth Content Repo Project

Edit News Article Page Usability Test:

Summer 2015 – Dartmouth College

• Accessibility concerns
• Visual Design (color, typography, layout)
• Site-wide navigation
• Moderation of published content
• Workflows regarding content type management and administration

The goal is to have completed one round of usability tests with 4-5 site editors of Dartmouth's choosing on August 12. The tests will take place at a facility of Dartmouth's choosing – preferably the workstation used will resemble that used by most test participants. We should give ourselves about an hour to set up the environment and initialize the prototype and recording software. It would also be helpful if Dartmouth could compile a brief list of the participant's names and roles, in an arrival order of whatever is best for everyone's schedule. Members of the Dartmouth team are welcome to observe the tests and take notes.

Who should review this document?

- User Experience Architects (Dartmouth and OHO)
- Developers
- Project Managers
- Dartmouth stakeholders
- Dartmouth Web Services
- Dartmouth OPA

Methodology

This will be a formative/diagnostic test using a within-subjects design. Following an introduction, the tests will begin with general questions about how site editors currently perform routine site admin duties, followed by a series of usability tasks. Participants will be asked to rate how easy the task was to complete and how confident they felt while doing the task. We will ask participants to think aloud while performing these tasks. Because of this, we will not be using any formal time-to-task benchmarks to ascertain the optimal time a task should be completed by, but we will take note of the time taken to complete each task.

The structure of the sessions will be the same for all participants, though some questions may be changed as testing proceeds. There will be a specific A/B variant test concerning two different workflow approaches that will alternate between test subjects. After the usability test, each participant will complete the SUS (System Usability Scale). The goal is a SUS score of at least 60, using the standard SUS proscribed by usability.gov.

Dartmouth Content Repo Project
Edit News Article Page Usability Test:
Summer 2015 – Dartmouth College

1   Introduction | 5 min.

"Thanks for taking the time out of your day for this. We are scheduled to spend about 45 minutes to an hour together – is that all right?

"My name is David and I'm going to be walking you through this session today.

I work with a company called OHO located in Somerville, Massachusetts. We build Drupal-based websites and systems for the educational sector. Dartmouth has asked us to produce a new admin tool that we hope will make editng sites easier for you and your colleagues. We hope that with your help, we can make this tool as easy to use and helpful as possible.

I work with the User Experience Design team at OHO - what I do is learn as much as I can about the people who use the product so that I can make recommendations about how to best design it.

My role today is to ask questions and guide you through a series of tasks using the system, but most of all, *listen* to what *you* have to say.

We also have Kerry who will be taking notes and potentially asking additional questions at the end of the session – <u>especially</u> if i've missed something.

Your role is to:

- <u>Answer my questions as honestly</u> as you are comfortable,
- <u>Complete the tasks</u> I give you as best you can,
- <u>Talk about what you're thinking</u> as you work through each task.

The most important thing to keep in mind is that we are not testing *you* – This process is designed for <u>you to help us test our design</u> so we can learn what's working and what isn't. I did not have any hand in creating this prototype, so don't feel that you have to hold back any negative feedback – letting us know what you find difficult is really important to us, so we encourage you to be critical!

Do you have any questions before we begin? Is there anything we can provide to make you comfortable (a drink, better chair, etc)?

If it's okay with you, we will be recording our session. The main reason for that is it gives us a backup in case we miss something in our notes. If you aren't OK with this, we can just take notes. In any case, personal information we gather here will not be used outside of

Dartmouth Content Repo Project

Edit News Article Page Usability Test:

Summer 2015 – Dartmouth College

Dartmouth or OHO – it will only be used to assist the development of our product. It will be deleted when the project is finished"

If consented - <mark>**Start Recorder**</mark>

2   General Questions- Pre-Test Briefing | 10 min.

1) What is your role at Dartmouth? How long have you performed this role?

   _____

2) Do you support multiple websites? ☐ Yes ☐ No

3) How often to you make edits to each site? ☐ Several times a day ☐ Only once or twice a week ☐ Only once or twice a month ☐ Other _____

4) When you are managing site content, how long does it usually take you? How much of your workday involves managing your site(s)? _____

5) Apart from site maintenance, what do your duties cover in a typical day?

   _____

6) How would you describe your workplace? Very busy, relaxed, somewhere between the two? Are you interrupted frequently? _____

7) How would you describe your workstation? Do you use a laptop, a desktop, dual monitor setup, etc? _____

8) What OS (Windows, Mac, Chrome) and browser (Chrome, IE, Firefox, Safari) combination do you use most often? _____

9) Have you participated in a usability study before? Do you have any questions before we start?_____

3   Usability Tasks | 30 min.

Each task will be evaluated as follows:

Participant:

☐ **Completes the task without difficulty**

☐ **Completes the task with minor trouble but resolves issues on their own**
☐ **Is unable to complete the task**

This will be followed by a general discussion, with notes taken.

Participant will then be asked:

On a scale from 1 to 10, with1 being the hardest and 10 being the easiest, please rate how easy this task was to complete.

On a scale from 1 to 10, with1 being 'not at all confident' and 10 being 'very confident', please rate how confident you were while completing this task.

1   Edit Article Copy and Slideshow

Participant is presented with a representation of the James Dickey Center Homepage. The user is not logged into the site as yet.

Imagine you are Bob Smith, a site editor for Dartmouth's Dickey Center website. Recently you published a news article entitled 'Great Issues Scholars'. Later it was featured on the center's Homepage. A couple of days later, you find out that this article's content needs to be edited due to recent changes to the program.

You have been instructed to log into the site, and once logged in, unpublish and edit the 'Great Issues Scholars' page in the following way:

1. Change the title text of the article to read 'Great Issues Scholars *Program'*.
2. Change the intro text of the article to read 'Spend your first year on campus exploring the vital international issues of the day with visiting dignitaries, Dartmouth experts, and your fellow *colleagues*.' (instead of students)
3. Change the body text of the article to read at the bottom 'For more information, contact *Barry Allen*. (instead of Casey Aldrich)

4. Remove the image in the slideshow entitled 'Conflict Simulation'.

5. Apply your edits to the article and save the Global Issues Scholars page

6. Verify that changes are made and published by navigating back to the Homepage.

Success Criteria:

1. User clicks on callout on homepage to navigate to the 'Great Issue Scholars' page.
2. User prompts a login modal by clicking on the 'Last Updated' field – user logs in
3. User chooses 'Unpublish and Make Page Draft' from the Admin Header Bar.
4. User chooses 'Edit Page Draft' from the Admin Header Bar
5. User enters Article Content Editor through the upper 'pencil' icon, or in the Edit Page Footer ('Edit Article Content')
6. User edits appropriate text fields as instructed.
7. User chooses 'Remove' on slide entry marked 'Conflict Simulation' and after confirmation, deletes the slide. (User should ideally review the slideshow beforehand to verify that the correct slide has been removed later).
8. User finishes editing Article content by choosing 'Apply Changes and Return to Page' button.
9. User saves Article edits and page layout by choosing 'Save This Page Draft' in the Edit Page Footer
10. User chooses 'Publish This Page Draft' to publish the page.
11. User verifies that the changes have been published by returning to Homepage.

Probes

- How does this process fit in with the workflow in your office?
- How often do you log in to your site?
- How often do you add new pages to your site?
- How often do you edit existing pages to your site?
- Do you typically add pages one-at-a-time or in batches?
- How are you typically informed about needed edits? Who approaches you with these requests?

Dartmouth Content Repo Project

Edit News Article Page Usability Test:

Summer 2015 – Dartmouth College

2   Replace an Image in Existing Promo Box and Apply Share Settings

Participant can start where they left off for Task 1 (start at **Success Criteria** step 3).

A little while later, you are told that you must use a different photo titled 'Money Tree' for the 'Funding Opportunities' Promo Box found on the left hand side of the 'Great Issues Scholars' page.

1. Remove and replace the photo of the jumping kids by either uploading the file called 'money_tree.jpg' from a folder on your computer's desktop called 'my images', or choosing the Money Tree image from your site's Library.

2. You must also change the Share settings for the Promo Box to allow the Promo Box to be sent to the Dartmouth Shared Library for other site editors to access.

3. After making these edits, save changes to the Promo Box and return to the Global Issue Scholars page.

Success Criteria:

1. *User clicks on callout on homepage to navigate to the 'Great Issue Scholars' page.*
2. *User prompts a login modal by clicking on the 'Last Updated' field – user logs in*
3. User chooses 'Unpublish and Make Page Draft' from the Admin Header Bar.
4. User chooses 'Edit Page' from the Admin Header
5. User clicks on 'Edit Promo Icon' (pencil) to enter the Edit Promo Box Content Editor
6. User chooses either 'Remove' > 'Browse' to enter the 'Add an Image' modal, offering a choice between uploading an image from the user's drive, or selecting an image from the user's local site Library, OR user chooses Edit to upload a new image from the user's drive. User selects the image specified.
7. User chooses 'Add Image To Promo Box' to return to Edit Promo Box Content Editor
8. User changes Sharing settings to 'Share with other sites'?
9. User finishes saving Promo Box edits by choosing 'Update Promo Box'

10. User returns to page by choosing 'Return To Page'.

Probes

- How does this process fit in with the workflow in your office?
- How do you typically search for and upload images in your current system?
- What kind of photos do you typically assign to Promo Boxes?
- What kind of editing is required of these photos? How do you edit the photos themselves?
- Is the concept of sharing clear to you? Does it make sense?

3   Add new Slide Image to Slideshow in Article

Participant can start where they left off for Task 2 (start at **Success Criteria** step 5).

You have discovered that there is a new image to be added to the Article Slideshow.

1. You must create a new slide for the article and use an image file called 'Undergrad Degree'. Title the slide 'Undergrad Degree' and add a caption that reads 'Undergraduate Degrees are Available in Global Health'

2. Add the new slide to the slideshow, and apply your changes to the Article.

3. Save and publish the Global Issues Scholars page

Success Criteria:

1. *User clicks on callout on homepage to navigate to the 'Great Issue Scholars' page.*
2. *User prompts a login modal by clicking on the 'Last Updated' field – user logs in*
3. *User chooses 'Unpublish and Make Page Draft' from the Admin Header Bar.*
4. *User chooses 'Edit Page' from the Admin Header Bar*

5. User clicks on 'Edit Article Icon' (pencil) to enter the Edit Article Content Editor
6. User selects 'Add New Slide' button
7. User chooses 'Browse' to enter the 'Add an Image' modal, offering a choice between uploading the image from the user's drive, or selecting

   an image from the user's local site library. User selects the requested image.
8. Use enters a title for the image and the caption requested
9. User chooses 'Update Slide'
10. User finishes editing Article content by choosing 'Apply Changes and Return to Page' button.
11. User confirms changes to slideshow by reviewing changes on the page.
12. User saves Article edits and page layout by choosing 'Save This Page Draft' in the Edit Page Footer
13. User chooses 'Publish This Page Draft' to publish the page.

Probes

- How does this process fit in with the workflow in your office?
- How do you currently edit slideshows? Is this process a better experience, worse, or just different?
- In creating a slide, are you more likely to upload an image from your drive than to search for an image in a library?
- How would you change the order of the slideshows, given what you've seen here?

4   **Download a Promo Box from the Dartmouth Shared Library (Content Repo)**

Participant can start where they left off for Task 3 (start at **Success Criteria** step 3)

Your manager has just come back from lunch and she has found out the 'Funding Opportunities' Promo Box must be swapped with another pre-existing Promo Box called 'Investment Opportunities', which you are told resides in the Dartmouth Shared Library. Before you can use this Promo Box on the Global Issues Scholars page, you must download it from the Dartmouth Shared Library to your local site Library. Please go ahead and do so.

Success Criteria:

Dartmouth Content Repo Project

Edit News Article Page Usability Test:

Summer 2015 – Dartmouth College

1. User clicks on callout on homepage to navigate to the 'Great Issue Scholars' page.

2. User prompts a login modal by clicking on the 'Last Updated' field – user logs in

3. User chooses 'Unpublish and Make Page Draft' from the Admin Header
4. User chooses 'Edit Page' from the Admin Header
5. User clicks on 'Download Shared Content' from the Edit Page Footer
6. User selects the checkbox next to 'Investment Opportunities'
7. User chooses 'Download To My Library' from the drop-down list.
8. User clicks on 'Execute' button, waits for success message.
9. User clicks on 'Done' to return to the page.

Probes

- Does the idea of a Shared Library make sense to you?
- Do you think you will create your own Promo Boxes more often than downloading them from the Shared Library?
- How often would you see yourself using this feature?

5   Remove and Add A New Promo Box – VARIANT A (one less modal/click)

Participant can start where they left off for Task 4 (start at step **Success Criteria** step 4 for both A and B).

You have found out the 'Funding Opportunities' Promo Box must be replaced by another called 'Investment Opportunities', which resides in your site's Library. You had downloaded it from the content repository earlier. Now you must remove the 'Funding Opportunities' Promo Box from the Global Issues Scholars page and add the 'Investment Opportunities' Promo Box from your site's Library. Please go ahead and do so.

Success Criteria:

1. *User clicks on callout on Homepage to navigate to the 'Great Issue Scholars' page.*
2. *User prompts a login modal by clicking on the 'Last Updated' field – user logs in*

3. *User chooses 'Edit Page' from the Admin Header Bar*
4. User clicks on 'Remove Promo Icon' (X) to remove the 'Funding Opportunities' Promo Box
5. User chooses Add Promo Box 'From Library'

6. User chooses the Promo Box called 'Investment Opportunities' from the list shown and chooses 'Use this Promo Box' to create the Promo Box
7. User returns to page by choosing 'Return To Page'. The selected Promo Box will now appear on the page.
8. User saves Article edits and page layout by choosing 'Save This Page Draft' in the Edit Page Footer
9. User chooses 'Publish This Page Draft' to publish the page.

ALTERNATE WITH VARIANT B

Success Criteria:

1. *User clicks on callout on Homepage to navigate to the 'Great Issue Scholars' page.*
2. *User prompts a login modal by clicking on the 'Last Updated' field – user logs in*
3. *User chooses 'Edit Page' from the Admin Header*
4. User clicks on 'Remove Promo Icon' (X) to remove the 'Funding Opportunities' Promo Box
5. User chooses 'Add Promo Box'
6. User chooses 'Add Promo Box From Library'
7. User chooses the Promo Box called 'Investment Opportunities' from the list shown and chooses 'Use this Promo Box' to create the Promo Box
8. User returns to page by choosing 'Return To Page'. The selected Promo Box will now appear on the page.
9. User saves Article edits and page layout by choosing 'Save This Page Draft' in the Edit Page Footer
10. User chooses 'Publish This Page Draft' to publish the page.

Probes

• Do you think it would be more likely for you to edit an existing Promo Box, or

to remove that Promo Box and create a new one from scratch?
• What kind of impediments did you come across throughout this process?
• What did you find helpful about this process?

6   Create a New Basic (General Page)

You have been given instructions to create a new page for a new program offered by the Center. Create a new page and select a page layout that would be best for the types of content you would like to add.

Success Criteria:

1. User chooses 'Edit Site' from the Admin Header
2. User chooses 'Pages' from the 'Edit Site' menu
3. User chooses 'Add A Page' from the 'Pages' menu
3. User enters a new page title
4. User chooses a layout from the choices offered through the drop-down list
5. User chooses 'Next' to create a new page with the layout requested

Probes

• How often do you add new pages to your site?
• Do you typically add pages one-at-a-time or in batches?
• What kind of templates to do, or would you, use the most?
• Was the labeling and language used in the UI controls concise and clear enough?

4   Follow-up Questions - Debrief | 10 min.

1) On a scale of 1 to 5 (1 = very unlikely, 5 = very likely), how likely is it that you would continue to use this tool to edit articles? _____

2) On a scale of 1 to 5 (1 = very unlikely, 5 = very likely), how likely is it that you would recommend this tool to your colleagues? _____

3) On a scale of 1 to 5 (1 = more difficult to use, 5 = easier to use), how does this tool compare to other admin tools you use? _____

4) If I told you that my developers told me they fell behind schedule and could only implement one feature, what feature would you tell them to implement (i.e., what is the one feature you saw/talked about today that you couldn't live without)?

_____

_____

5) If I told you that my developers found some extra time, what would be the next feature you would tell them to implement? _____

_____

6) If I told you that my developers suddenly ran behind schedule again, what feature would you tell them not to bother with (i.e., what is the one feature you saw/talked about that you wouldn't miss if it was never developed)? _____

_____

7) If I told you that my developers completed all of their work and had extra time, what enhancement would you tell them to add? _____

_____

5   System Usability Scale (SUS) | 5 min.

		Strongly Disagree				Strongly Agree
1	I think that I would like to use this system frequently.	1	2	3	4	5
2	I found the system unnecessarily complex.	1	2	3	4	5
3	I thought the system was easy to use.	1	2	3	4	5
4	I think that I would need the support of a technical person to be able to use this system.	1	2	3	4	5
5	I found the various functions in this system were well integrated.	1	2	3	4	5
6	I thought there was too much inconsistency in this system.	1	2	3	4	5
7	I would imagine that most people would learn to use this system very quickly.	1	2	3	4	5
8	I found the system very cumbersome to use.	1	2	3	4	5
9	I felt very confident using the system.	1	2	3	4	5
10	I needed to learn a lot of things before I could get going with this system.	1	2	3	4	5