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City of Boston, DoIT Drupal Workbench
User Research Protocol

Note: this research protocol has been revised from the original to reflect changes that occurred as the research was underway. Certain items that we did NOT end up completing have been retained, but are indicated with light grey font. Specifically, we determined that focusing our time with users on interviews and contextual inquiry were the highest and best use of our time. Therefore, we did not end up doing either mind mapping or process mapping exercises. However, we did use the mind-mapping questions to guide our initial focus group conversation.

Background

Client

City of Boston: Department of Information Technology (DoIT).

Users they serve include both the public and also employees from across all other City of Boston departments, 200+ of whom use DoIT's Drupal editorial workbench to create, edit, and publish content to the Boston.gov website.

Client's Situation

"Working with the us [City of Boston], you'll have the opportunity to affect how millions of people receive critical information about resources and services. At the helm of that information-sharing, are a handful of individuals who are not trained as content producers, regularly overworked, who want to give this information their best effort, but that effort is more often constrained than not. We need to provide them with an as easy to use as possible editorial workbench to do this part of their job."

Questions/Issues Client Wants Considered

What is intuitive or counterintuitive?

What can make the difference between having to ask a question over and over and be as easy as pie to remember to do?

What might make the workbench enjoyable to use?

Taxonomy
Layout
Workflow
"Rewards"

Research Methods

- Screener Survey - N/A DoIT is going to provide interview candidates that will fit into our four categories of user.
- Contextual Inquiry
- Mind-mapping
- Process-mapping
- 5-8 user interviews
- Surveys

Recruitment Methods

- DoIT staff will recruit users via direct email and internal eblasts
- Participants in DoIT's Social Media Working Group, a weekly meeting for staff from various departments creating and posting content for the City's social media accounts.

Target Participants / User Criteria

- City of Boston Employees, ideally from various departments

- Individuals who create, edit, and publish content to Boston.gov website using the Drupal workbench

Frequent workbench users + **High** level of comfort/confidence with technology	**Infrequent** workbench users + **High** level of comfort/confidence with technology
Frequent workbench users + **Low** level of comfort/confidence with technology	**Infrequent** workbench users + **Low** level of comfort/confidence with technology

Consent Form Copy

Research Study Consent Form

About the study
Duration: November 20th – December 11th, 2019
As a user experience design team from General Assembly, we are conducting a study to understand how city employees use the Drupal editorial workbench to create, edit, and publish content to the Boston.gov website. User interviews are an essential part of helping us get to know our target users and understand their expectations, needs, and desires in order to create a more useful and intuitive experience.

About the interview + your rights as an interviewee
We will be conducting in-person and/or remote interviews with city employees about their experiences with the workbench tool. During the interview, **we will be taking notes and/or recording audio for our reference**. All information provided to us by users both during and outside of interviews as part of this study will be **kept strictly confidential. We may use anonymized transcripts and quotes** as part of the reports and presentations we create in order to illustrate our users' general feelings and expectations relative to the workbench.

Should you wish to withdraw from the study, please notify us in writing by December 6th, 2019. Should this happen, all recordings and data collected will be destroyed and omitted from the final project deliverables.

We value and take seriously the time and effort given by interview participants.

By signing this form, you indicate your acceptance of the terms stated above. A copy will be provided to you upon request.

Engagement Script - Intro & Close-out

Any research activities with users should begin & end with this script

Introduction Script

Welcome the subject and thank them for their time.

Explain the reason for the interview:

- We are User Experience Design Immersive students at General Assembly conducting research for the Department of Information Technology to better understand how City employees use the editorial workbench in Drupal to create, edit, and publish content to the Boston.gov website.

Explain how the activity(s) will unfold, whichever one(s) we choose to do:

- The entire session should take approximately 30 minutes / less than an hour.

- We will be doing a….
  - *Process Mapping Exercise:* We'll ask you to write out, as best you can recall, your steps when creating, editing, and publishing content to Boston.gov. The purpose of this exercise it not to "test" you. We're really just trying to understand how you think about how you work and which of the steps in the process are easy to remember or have especially important for users.

  - ***Contextual Inquiry or "Show Us What You Do" Exercise***: We'll ask you to show us and talk about how you use the editorial workbench when creating, editing, and publishing content to Boston.gov. The purpose of this exercise it not to "test" you. We're really just trying to understand how you use the tool, what your processes are, any workarounds you might use, and any aspects of the workbench that are particularly easy or hard to navigate and use.

  - *Mind Mapping Exercise*: We'll ask you to help us complete a kind of map of ideas and concepts related to the editorial workbench that you use to create, edit, and publish content to the Boston.gov website. Our goal is to get a better sense of the activities and tools you use with when working in the workbench, as well as your feelings towards them.

  - ***Interview***: Some questions about your experience with the editorial workbench you use to create, edit, and publish content to the Boston.gov website.

Explain that their responses are confidential and will be used for:

- All of your responses will be kept anonymous and confidential. Any recordings will only be reviewed by me and my team members.
- Any transcripts, notes, and findings will be made anonymous.
- Our anonymized findings will be shared with the DoIT team as well as students and instructors at General Assembly. Findings may also be published in our personal portfolios.

Ask permission to record session.
Ask them to sign the consent form.

Before we start I have a 5 quick questions for you:

1. What department in the City do you work for, and what is your role in that department?
2. How often do you create or edit a page on the Boston.gov website?
3. How comfortable would you say you are with computers and digital technology in general?
4. What is the most common driver for you going on to the workbench to create or edit a page?
5. What kinds of content do you publish to the site?

 Great, thanks! Ok let's dive into …..

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ACTIVITY - see sections below.
Mind Mapping Exercise
Interview
Process Mapping Exercise
Contextual Inquiry or "Show Us What You Do" Exercise

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Parking Lot (if you have time to ask)
> Readability
> Rewards

Close Out Script
Thank them and share possible next steps.
- Thank you so much for your time! Your insights are going to be invaluable.
- If we have any follow-up questions, would it be ok if I reached out to again?
- Would you have any interest in participating in later usability tests of a rough prototype if we get to that point? Those tests are likely to be taking place in early December at City Hall and would probably take 30 minutes.

Researcher Post-Activity Summaries
Top 3 Insights
1.
2.
3.

Pull Quotes

Mind Mapping Exercise

> **The meeting room for our focus-group did not have the empty whiteboard or wall space to support a full mind-mapping exercise. We adapted the format, using these questions, gathering feedback on post-its, and asking participants to discuss their answers.**

We'll ask you to help us complete a map of ideas and concepts related to the editorial workbench that you use to create, edit and publish content to the Boston.gov website. Our goal for this exercise is to get a better sense of the activities, content, and tools you deal with when working in the workbench, as well as your feelings towards them.

FIRST - 10min Map:
- What kind of experience do you **_hope_** that someone from the public has when they come to Boston.gov? What do you want them to get out of visiting the site?

SECOND - 20min Map:
- What kind of experience do you **_have_** with the Boston.gov editorial workbench?

Questions to follow-up with:
- [If dissimilar from public user experience] Why do you think it's different? Do you think it would be helpful for your workbench experience to mirror [your feelings about public-facing Boston.gov]?
- What is the biggest pain point for you?

Potential topics to keep them on track:
- What it helps them do?
- What types of content they engage with?
- Which tools do they use within the workbench?
- Processes
- Feelings
- Challenges
- Neat things it does
- How it helps their mission
- What they wish it did?

If they don't discuss these, consider prompting at the end:
- *Add/edit copy*
- *Add media*
- *Add graphics*
- *Add icons*
- *Adjust layout, reorder sections,*
- *Save as draft*
- *Publish*
- *Taxonomy*

Interview

Some questions about your experience with the editorial workbench you use to create, edit, and publish content to the Boston.gov website.

- Tell us about your experience using the editorial workbench to create, edit, and publish content to the Boston.gov website.
    - What kind of content are you most often putting into your pages? What is its purpose?
    - What do you think you do most often within the workbench?
    - What are the biggest pain points now?
    - Are there features you want but don't have right now?
    - Are there any tools you use outside of the workbench to help you with content publishing?
    - Are there language, accessibility, or other considerations you have to keep in mind?
    - How much do Boston.gov brand guidelines (visual and voice) factor into your workflow, and if so, how?

Process Mapping Exercise

We'll ask you to write out, as best you can recall, the steps you take when creating, editing, and publishing content to Boston.gov. The purpose of this exercise it not to test you. We're really just trying to understand how you think about your content process and which of the steps in the Workbench are easy to remember or have key significance for users.

Scenario 1: Create NEW

You want to create a new page on the Boston.gov website. What are the steps you would take to accomplish this?

Scenario 2: Edit OLD

You want to make changes to an existing page or content on Boston.gov website, what are the steps you would take to accomplish this?

Contextual Inquiry or "Show Us What You Do" Exercise

We'll ask you to show us how you use the editorial Workbench when creating, editing, and publishing content to Boston.gov. The purpose of this exercise it not to test you. We're really just trying to understand how you use the tool, what your processes are, any workarounds you might have created, and any aspects of the Workbench that are particularly easy or hard to navigate and use.

Please describe what you're thinking, feeling, and doing and why as much as you can so I can learn from your process. If there are problems you often encounter, please describe them even if they don't occur.

Scenario 1: Create NEW
Pretend you are creating a new page on the Boston.gov website. How would you do this? Please start from the decision process to add content to the site.

Scenario 2: Edit OLD
Pretend you are making changes to existing content on the Boston.gov website. How would you do this? Please start from the decision process to change content to the site.

If they don't show, then prompt them as they are in progress >
- *Add/edit copy*
- *Add media (externally created) - from Workbench library AND from external library*
- *Add graphics (externally created) - where do they get them from?*
- *Add workbench native graphics/icons?*
- *Adjust layout, reorder sections, move "blocks" (however this is worded in this tool)*
- *Set authorship?*
- *Save as draft*
- *Publish*