

CITY OF BOSTON / DoIT

GA Drupal 8 Workbench Improvements



FRONT-END WEBSITE

The screenshot shows the front-end of the City of Boston website. At the top left is a red menu icon with the word "MENU" below it. To its right is the text "CITY of BOSTON" and "Mayor Martin J. Walsh". On the top right, there are links for "PAY AND APPLY", "PUBLIC NOTICES", "FEEDBACK", and "TRANSLATE", followed by a magnifying glass search icon. The main banner features a blue-tinted night photograph of the Boston skyline reflected in water. The text "welcome to" is in a small, white, lowercase font, and "BOSTON.GOV" is in a large, bold, white, uppercase font. Below this is a black square with a white letter "B" and a red horizontal bar underneath it. A thick black horizontal line spans the width of the page, with the text "TUESDAY, APRIL 10" centered between two shorter black horizontal lines. Below this, there are five circular icons in a row: a broom, a trash can, a building, a parking meter, and a tow truck. Under each icon is a blue heading and a line of text: "STREET CLEANING" with "Today is the second", "TRASH AND RECYCLING" with "Pickup is on a normal", "CITY BUILDING HOURS" with "All municipal buildings", "PARKING METERS" with "Parking meters are", and "TOW LOT" with "The tow lot is open".

MENU CITY of BOSTON | Mayor Martin J. Walsh PAY AND APPLY PUBLIC NOTICES FEEDBACK TRANSLATE

welcome to
BOSTON.GOV

B

TUESDAY, APRIL 10

- **STREET CLEANING**
Today is the second
- **TRASH AND RECYCLING**
Pickup is on a normal
- **CITY BUILDING HOURS**
All municipal buildings
- **PARKING METERS**
Parking meters are
- **TOW LOT**
The tow lot is open

BUILT ON DRUPAL CMS

The screenshot displays the 'Create Article' form in a Drupal CMS. The interface is organized into several key sections:

- Top Navigation:** Includes 'Workbench', 'Manage', 'Search', 'dev', and 'Subscription not active'. The user is logged in as 'content_author'.
- Secondary Navigation:** Features 'My Workbench', 'Create content', 'My edits', and 'All recent content'.
- Breadcrumbs:** Shows the path 'Home » Node » Add content'.
- Left Sidebar:** Contains tabs for 'Basic Information *', 'Sidebar Components', 'Components', 'Page Metadata', and 'Advanced'.
- Main Form Area:**
 - COMPONENTS:** A section for managing page components, currently showing 'Drawers'. It includes a 'Collapse' button and a list of components.
 - TITLE *:** A required text field for the article title.
 - NAVIGATION TITLE:** A text field for the in-page navigation title, with a note: 'The nav title is used to populate the in-page navigation. Please keep it short: one to three words is ideal. Example can be found on boston.gov/winter/'.
 - CONTACT:** A text field for the contact information.
 - DRAWER *:** A section for adding components to the page, featuring an 'Add Drawer' button and a dropdown menu with the option 'Add 3-Column w/ Image'.
- Right Sidebar:**
 - Moderation state:** Includes a 'Save as:' dropdown set to 'Draft' and a 'Schedule a status change' button.
 - REVISION LOG MESSAGE:** A text area for providing a log note for the update, with a prompt: 'Briefly describe the changes you have made.'
 - Buttons:** 'Save' and 'Preview' buttons are located at the bottom of the sidebar.

PROBLEMS

Workbench User Problem

City of Boston employees producing and editing content for Boston.gov are struggling to use the Drupal Workbench and often have to rely directly on DoIT staff because it is inefficient and unintuitive.

DoIT Business Problem

DoIT needs to improve the Drupal Workbench experience for content producers and editors so that their colleagues can easily and independently produce content for Boston.gov.

These changes will improve the quality of their colleagues' work experiences and the content they create, as well as free up resources for strategic innovation.

SOLUTIONS (v 1.0)

We believe that if we

Reorganize main navigation and rename key menu items

Revise “Create Content” descriptions and provide access to examples

Note: this also is meant to serve as a model for improving Components view.

Consistently support error avoidance and accessibility requirements

we will make the Drupal 8 workbench more intuitive and efficient for City of Boston content producers, streamline content producers and editors workload and improve their workbench experience, as well as hopefully free up DoIT’s resources to focus more on strategic innovation.

RESEARCH REPORT

WHAT WE DID

Comparative Research

- Google Docs
- Wordpress
- Wix
- Drupal 7
- Drupal 8

User Research

- Focus Group (5)
- Interviews (13)
- Contextual Inquiry
 - Demo Activities & Issues (7)
 - Full Process Task Analysis (4)

Analysis

- User Workflows (4)
- Affinity Mapping

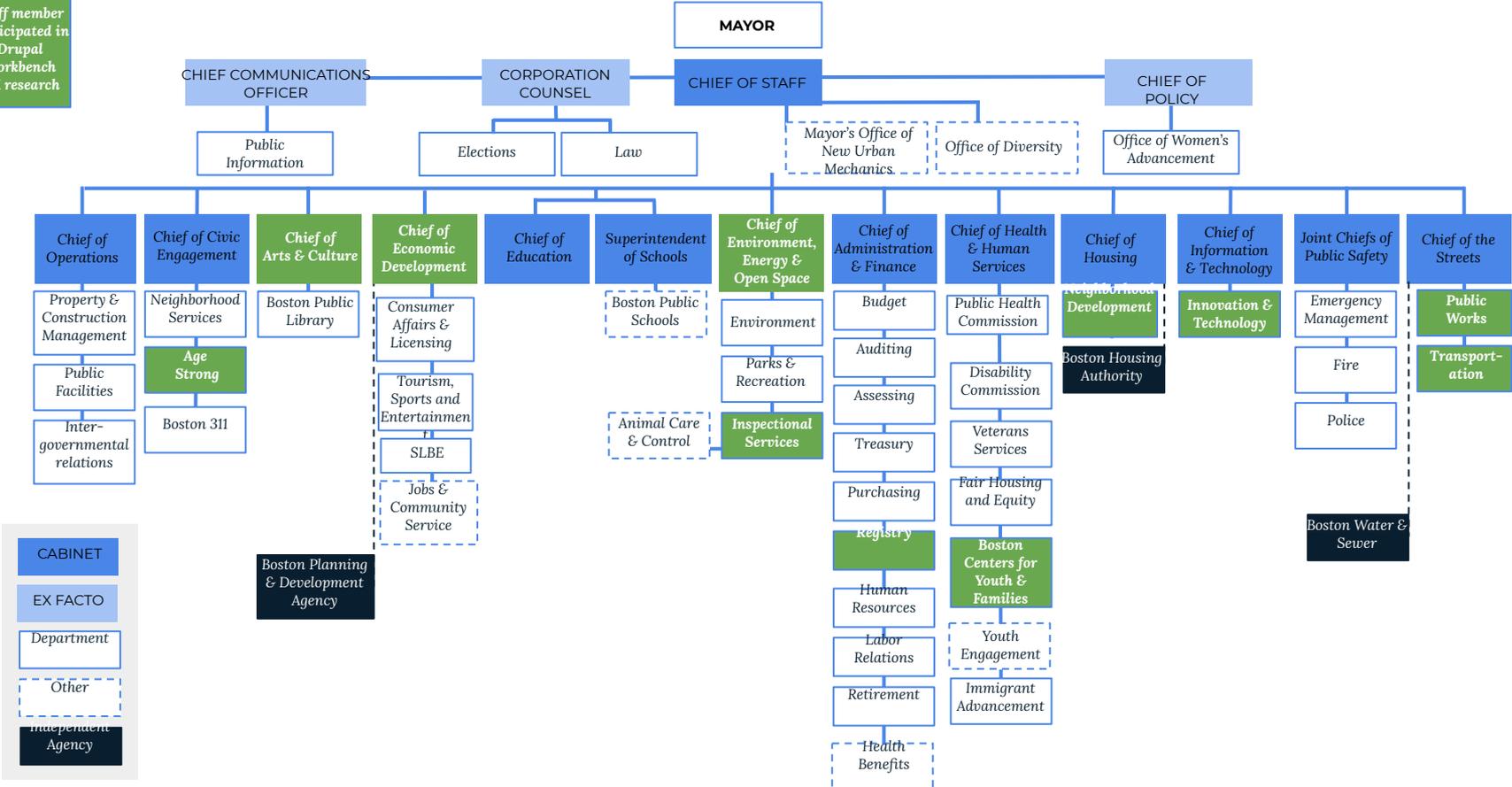
Prototype

Usability Testing & Feedback

- Usability Testing (4)
- Demo to DoIT Project Team (4)
- Demo to DoIT staff including developers & designers as well as research participants (15+)

WHO WE SPOKE WITH

Staff member participated in Drupal Workbench UX research



CABINET

EX FACTO

Department

Other

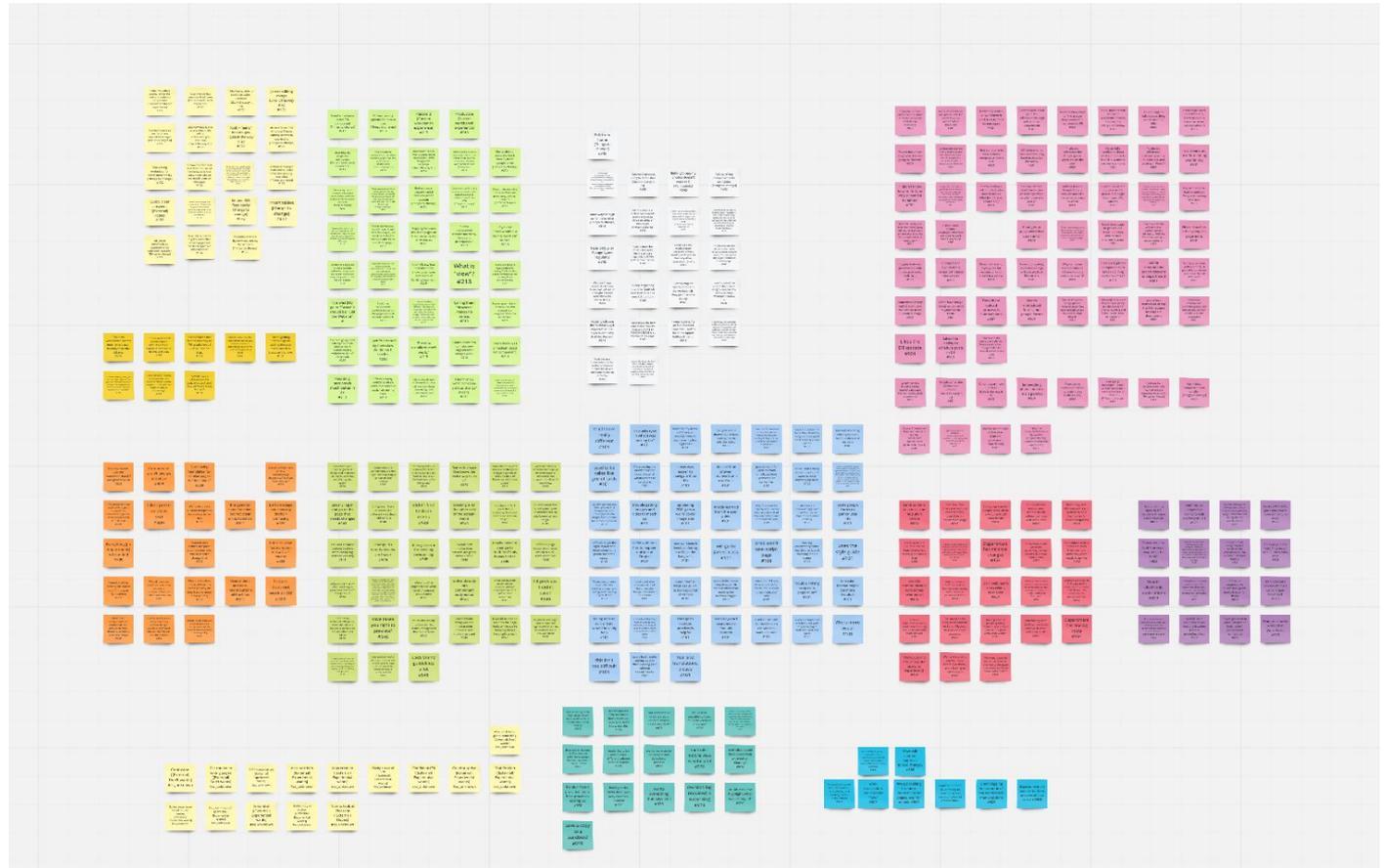
Independent Agency

WHO WE SPOKE WITH

	Frequent Users (5)	Regular Users (7)	Infrequent Users (3)
General	<p>Logs in at least multiple times per week</p> <p>Pretty to extremely comfortable with technology</p> <p>Primary communication role OR program role with communications responsibilities</p>	<p>Logs in at least multiple times per month</p> <p>Not to extremely comfortable with technology</p> <p>Primary communication role OR program role with communications responsibilities</p>	<p>Logs in at most once per month</p> <p>Not to very comfortable with technology</p> <p>Program role with communications responsibilities</p>
Activities	<p>Adds new information to existing pages</p> <p>Creates articles, events, blog posts, press releases, and/or public notices</p> <p>Reviews others' content</p>	<p>Adds new information to existing pages</p> <p>Creates events, public notices, press releases, and/or blog posts</p> <p>Reviews others' content</p>	<p>Updates/removes information from existing pages</p>
Pain Points	<p>Troubleshooting layout & formatting issues</p> <p>Remembering what all the different content layouts & components look like</p> <p>Workbench is slow</p>	<p>All the options are overwhelming</p> <p>Hard to remember what content or components are by their names</p> <p>Struggles with formatting & layout</p> <p>Triggers errors regularly</p>	<p>Does a lot of guessing</p> <p>Doesn't know where to go</p> <p>Hard time keeping up with site edits or keeping content fresh</p> <p>DoIT support/review bottleneck</p>
Wants	<p>Edit remotely/from phone</p> <p>Online training & user guide access</p> <p>More flexibility within components</p>	<p>Accessibility & translation support</p> <p>Alert of some kind when a page has been approved & published</p> <p>Easier preview experience</p>	<p>Access to user guide from within editor</p> <p>Just share the changes with someone at DoIT and have them edit the website</p>

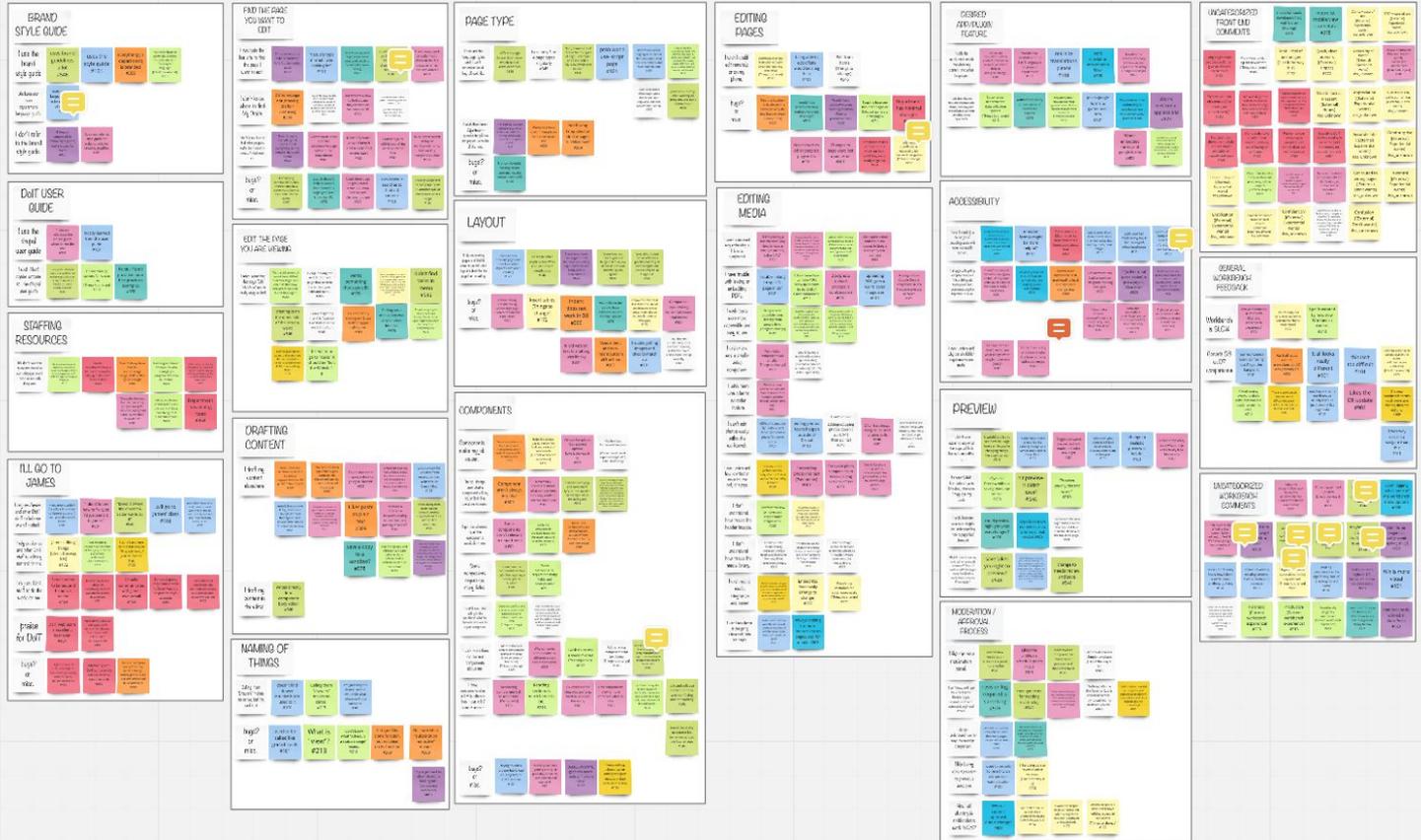
WHAT WE HEARD

We gleaned 327 distinct comments from focus group participants & interviews.



WHAT WE HEARD

We each grouped the comments into categories and subcategories creating our own affinity maps.



WHAT WE HEARD

- I don't know until I get the error that the Revision Log is required and I don't understand why I need to do it.
- I like the new moderation panel.
- I wish I knew while editing in the workbench what the character limit was for a given component.
- There are too many page types and I can't remember what they all look like.
- Workbench is SLOW
- Calling them "Drawers" makes no sense, but I'm used to it.
- Components make my job easier.
- Generic D8 vs D7 comparisons
- How will sharing & notifications work in D8?
- I can't edit photos easily within the workbench.
- I do not understand how to read the revision comparison
- I don't know how to find other people's drafts that I need to review/collaborate on.
- I don't know where to find My Drafts
- I don't refer to the brand style guide.
- I don't understand how to embed an image into the body of a page.
- I don't understand how to use the header images.
- I don't understand how to use the media library.
- I don't understand why certain fields/ requirements are useful.
- I don't understand why embedding a link is so complicated.
- I draft my content elsewhere
- I draft my content in the editor
- I get overwhelmed by all the components available to me.
- I have trouble with linking or embedding PDFs.
- I like being able to revert to previous versions
- I navigate the live site to find the page I want to edit.
- I rely on DoIT staff to do the work for me.
- I rely on existing pages and trial & error to decide what layout is best for the page I am creating.
- I rely on James and other DoIT staff to edit my content for me.
- I rely on James and other DoIT staff to help me when I'm stuck
- I should SAVE first before I go to Preview, otherwise I may lose my work.
- I struggle with getting our page copy to a 7th or 8th grade reading level, but I understand why it is important to do so.
- I think components view in D8 is different than it was in D7 (some + some -)
- I use the brand style guide
- I use the drupal user guide
- I want more than the current components allows me.
- I want something that says "Edit This Page" and is really easy to find.
- I wish data collection tools and processes were clearer, more integrated into workbench, and more centralized across departments.
- I wish I could do a better job of providing users with more accessible content.
- I wish I could edit remotely or on my phone.
- I wish I had easier access to the drupal user guide
- I wish I was better at designing interactivity into our pages.
- I wish Icons were more accessible and easy to use.
- I wish it was easier to see what the page will look like as I am editing it.
- I wish Preview was more helpful for understanding how a page had changed.
- I wish social media integration was easier.
- I wish the workbench could translate my content into other languages.
- I wish there was a better calendar feature.
- I wish there was a smaller video component.
- I wish there were department-specific templates for pages we make all the time.
- I'm not always sure what a component will be, do, or look like based on its name.
- praise for DoIT
- Some components require too many fields.
- We don't have time to master drupal so our webpages aren't as good as we wish they were.
- We have our own department language guide.
- What if I want to save my work, but not go straight to Preview? What if I want to switch the page's status from Draft to Needs Review from the Preview page?

(Paraphrased summaries of groupings made from the original 327 comments collected.)

WHAT WE HEARD - TOPLINE

Navigation

- I want to edit this page, but I can't figure out how to get to the editor from here.
- I am confused about how things are named and described.
- I struggle to find what I am looking for.

Moderation & Preview

- The new moderation tools seem helpful, but I'm still a little confused by them.
- I want to be able to see and compare revisions, but this way is confusing me.
- I don't trust Preview.

Errors & Help

- Help me avoid errors. Tell me the requirements.
- I want easier access to the DoIT user guide.
- I rely on DoIT staff when I can't help myself.
- I need more support to ensure my content is truly accessible to all of our users.

WHAT WE OBSERVED USERS DOING

EDIT A PAGE - SINGLE USER

User = Regular User, Windows OS, Chrome Browser



START OF TASK FLOW TRACKING
USER ALREADY LOGGED INTO WORKBENCH & GOOGLE ACCOUNTS

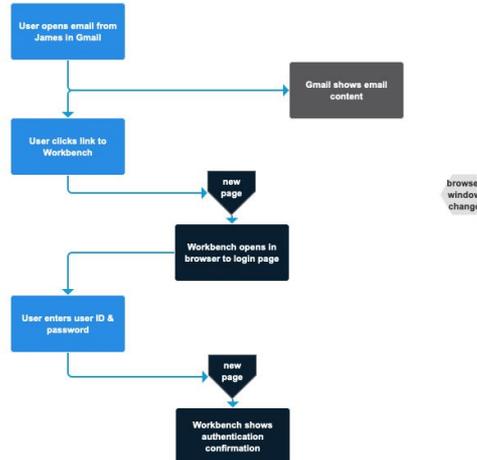


CREATE A BLOG POST - SINGLE USER + REVIEWER

User = Infrequent User, Windows OS, Chrome Browser
Reviewer = Frequent User, Mac OS, Chrome Browser



START OF USER TASK FLOW TRACKING
USER ALREADY LOGGED INTO GOOGLE ACCOUNTS

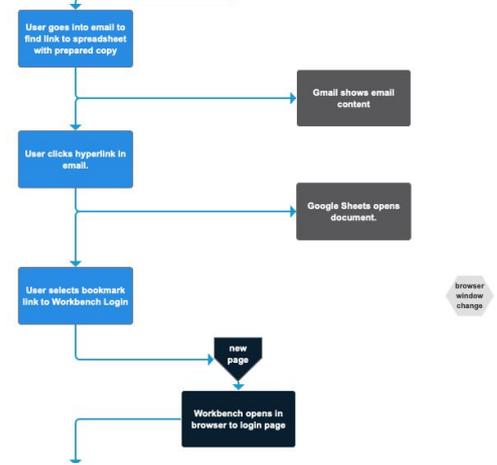


CREATE A PERSON PROFILE - SINGLE USER

User = Frequent User, Windows OS, Chrome Browser



START OF TASK FLOW TRACKING
USER ALREADY LOGGED INTO GOOGLE ACCOUNTS



WHAT WE OBSERVED USERS DOING

Navigation

- Navigating the live site to pages they want to work on
- Sharing URLs, help requests, and status updates via email in order to **collaborate**
- **Hesitating** and hovering over menu items
- Clicking into things and then clicking away because it **wasn't what they expected** or because they realized they **didn't need what they found** there

Errors

- **Triggering errors** because they had not seen that a field was required
- Only **realizing their copy was too long** for a component *after* they were in preview
- **Skipping accessibility-related fields** because they are not required by system

Moderation & Preview

- **Losing work** because they hadn't saved before clicking preview
- Being **unable to locate their drafts**
- **Uncertain about what to do** within the moderation area and sidebar menu
- **Uncertain about what would happen** when they change a page status

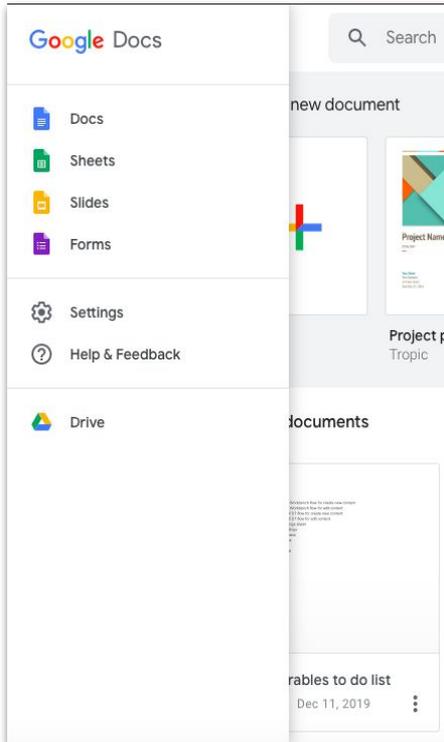
HEURISTICS COMPARISONS

NNG Heuristics	Google Suites	WordPress	Wix	Drupal 7 Workbench	Drupal 8 Workbench
Visibility of System Status	good	good	good	ok	ok
System-World Match	good	good	good	ok	ok
User Control & Freedom	good	good	good	ok	ok
Consistency & Standards	good	ok	good	ok	ok
Error Prevention	good	good	good	ok	ok
Recognition Over Recall	good	ok	good	improve	ok
Flexibility & Efficiency of Use	good	good	good	ok	ok
Minimal Design	ok	ok	good	improve	improve
Errors	good	good	good	ok	ok
Help Documentation	good	good	good	ok	ok

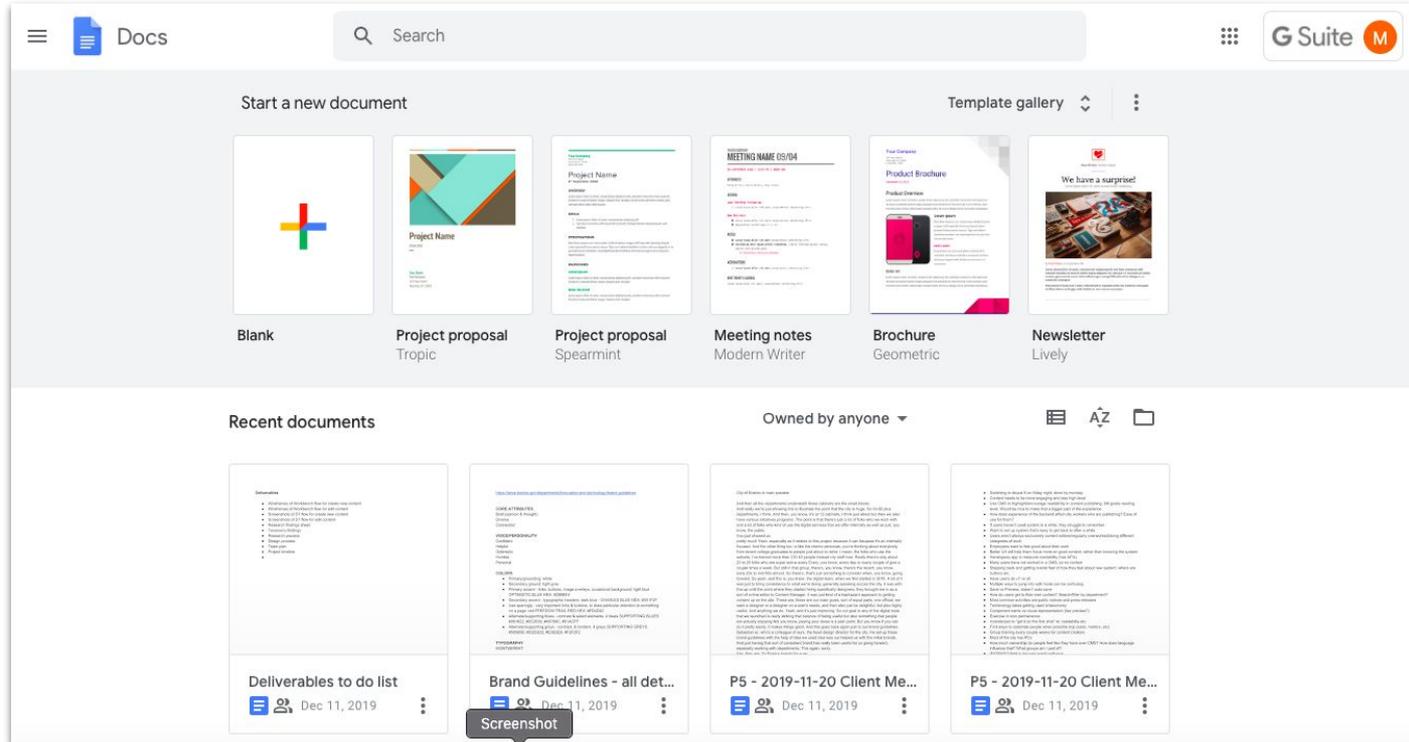
[*Detail heuristic analysis*](#)

MAIN NAVIGATION & DASHBOARD

Google Suite



The sidebar navigation menu for Google Docs is located on the left side of the interface. It features the Google Docs logo at the top, followed by a search bar. Below the search bar, there are several menu items: 'new document' with a plus icon, 'Documents' with a folder icon, and 'ables to do list' with a list icon. The 'ables to do list' item has a date 'Dec 11, 2019' and a three-dot menu icon next to it. The menu items are: Docs, Sheets, Slides, Forms, Settings, Help & Feedback, Drive, Documents, and ables to do list.



The Google Suite dashboard is the main interface for Google Docs. It features a top navigation bar with the Docs logo, a search bar, and the Google Suite logo. Below the navigation bar, there are two main sections: 'Start a new document' and 'Recent documents'. The 'Start a new document' section displays a grid of templates, including 'Blank', 'Project proposal Tropic', 'Project proposal Spearmint', 'Meeting notes Modern Writer', 'Brochure Geometric', and 'Newsletter Lively'. The 'Recent documents' section displays a grid of document thumbnails, including 'Deliverables to do list', 'Brand Guidelines - all det...', 'P5 - 2019-11-20 Client Me...', and 'P5 - 2019-11-20 Client Me...'. A 'Screenshot' tooltip is visible over the 'Brand Guidelines' document.

MAIN NAVIGATION & DASHBOARD

WordPress

The screenshot displays the WordPress dashboard interface. At the top, there's a navigation bar with the site name "UX Research, Strategy & Design", a refresh button, a notification icon, a "New" button, and a "Delete Cache" button. The user's name "Howdy, lastnotebook_jill05" is visible in the top right corner, along with "Screen Options" and "Help" dropdown menus.

The main content area is titled "Dashboard" and is divided into several sections:

- BoldGrid Notifications:** Includes "Post and Page Builder" (No issues to report!) and "BoldGrid Connect Key" (Premium Connect Key Installed!).
- At a Glance:** Shows "1 Post" and "5 Pages". It also indicates "WordPress 5.3 running Lodestar theme" and "Search Engines Discouraged". A note from Akismet states "There's nothing in your spam queue at the moment."
- Activity:** Features a "Recently Published" section with a post titled "Hello world!" from Nov 6th, 2:45 am. Below it is a "Recent Comments" section showing a comment from "A WordPress Commenter on Hello world!".
- Bottom Activity Summary:** A row of counts: All (1) | Mine (0) | Pending (0) | Approved (1) | Spam (0) | Trash (0).
- BoldGrid News:** A section for news updates.
- Quick Draft:** A section for a draft post.
- WordPress Events and News:** Lists upcoming events:
 - "Using Keysearch and SEMRush for Keyword Research" in Providence, RI, USA on Tuesday, Dec 10, 2019 at 6:00 pm.
 - "December 2019 Meetup - Let's Talk About WooCommerce" in Manchester, NH, USA on Wednesday, Dec 11, 2019 at 6:15 pm.
 - "WordPress Lunch and Learn" in Jamestown, RI, USA on Thursday, Dec 12, 2019 at 12:30 pm.
- People of WordPress:** Lists "Jill Binder" and a link to the "WordPress.org blog".
- WP Tavern:** Lists "Zero BS CRM 3.0 Improves UI, Changes Database Structure, and Becomes More Extendable" and "Gutenberg: One Year Later".
- Footer Links:** "Meetups", "WordCamps", and "News".
- Stats by Jetpack:** A bar chart showing "Top Posts" and "Top Searches". The "Top Posts" section shows a bar chart with values around 6.0, 2.0, 3.0, and 1.0. The "Top Searches" section shows a bar chart with values around 1.0, 1.0, and 8.0. Below the charts, it says "Sorry, nothing to report." and includes a "View all stats" button.
- Security Summary:** Shows "779 Blocked malicious login attempts" and "0 Spam comments blocked by Akismet."
- WPForms:** A section for form management.

MAIN NAVIGATION & DASHBOARD

Wix

Page: Home  

Add  Design 



WIX

Saved



Help

Site 



Upgrade

Preview

Publish 

j
Role: Owner

Set Up Your Site
1/4 Completed

Dashboard

Ascend by Wix

Customer Management >

Marketing Tools >

Financial Tools >

Settings >

Apps >

Upgrade

Edit Site

j
Not Published

Site Actions 

Domain: Not connected
[Connect Domain](#)

Website Plan: Free
[Compare Plans](#)

Mailbox: Not connected
[Get a Mailbox](#)

Ascend Plan: Free
[Compare Plans](#)

Let's Set Up Your Site
1/4 Completed

- Start Creating Your Site
- Publish Your Site >**
- Connect a Domain
- Get Found on Google

Get Ready For Business
0/4 Completed


1 Min

Publish Your Site

Go live so your site is online and people can see it.

[Publish Site](#)

Skip

Upgrade to Premium.

Get a free domain and remove Wix ads from your site.

[Upgrade Now](#)

Help [Visit Help Center](#)

We're Here for You
Ask any question & get the help you need.

MAIN NAVIGATION & DASHBOARD

D7

Home > Administration > My Workbench > Create content

My content **Create content** Scheduled Content Emergencies My drafts Needs review

Create content

- [Advanced Poll](#)
Advanced Poll adds additional poll functionality, cookie voting, write-ins and voting modes.
- [Article](#)
A text-heavy page for long-form, evergreen content.
- [Department Profile](#)
- [Emergency Alert](#)
Emergency alerts augment the homepage status component with emergency information when an emergency is active.
- [Event](#)
Event Details, used with the calendar and many other places throughout the site.
- [Guide](#)
Guides are the primary navigation pages for the website. Topic pages aggregate information about a topic to let a user know what information is here.
- [How-To](#)
Add a how-to content item.

MAIN NAVIGATION & DASHBOARD

D8

The screenshot shows the top navigation bar of a D8 dashboard. It features a dark red header with several navigation items: 'Back to site' (with a left arrow icon), 'Workbench' (with a wrench icon), 'Manage' (with a hamburger menu icon), 'Search' (with a magnifying glass icon), 'dev' (with a hamburger menu icon), and 'Subscription not active' (with a red 'x' icon). Below this is a dark grey bar with 'My Workbench' (with a list icon), 'Create content' (with a document icon), 'My edits' (with a pencil icon), and 'All recent content' (with a document icon). The 'My Workbench' item is highlighted with a blue background. Below the navigation bar is a dark grey section with the 'B' logo and the text 'My Workbench'.

Back to site Workbench Manage Search dev Subscription not active

My Workbench Create content My edits All recent content

B My Workbench

[Home](#) » [Administration](#)

Your most recent edits:

[SPARK Social: Back Bay Edition \(Published\)](#)

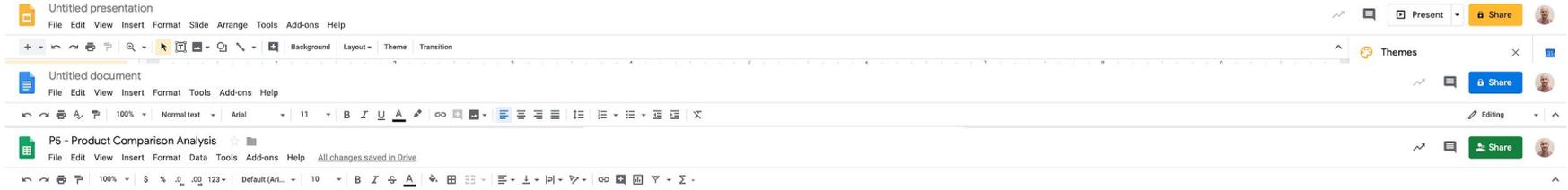
[edit](#)

Event - last changed 3 days 14 hours ago

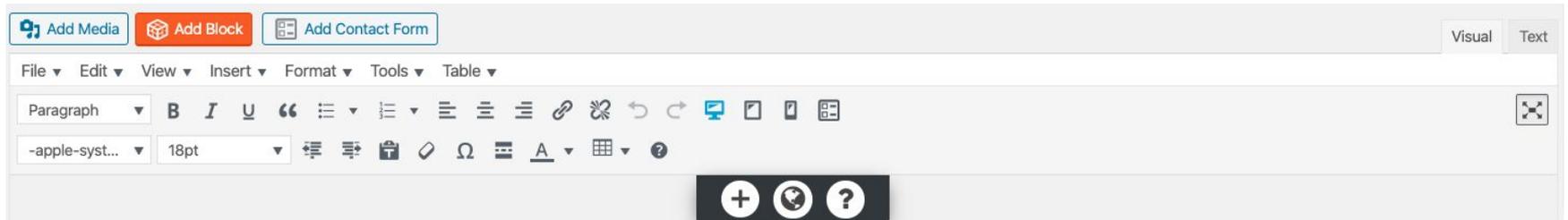
[> See all content you have edited](#)

EDITOR COMPARISONS

Google Suite



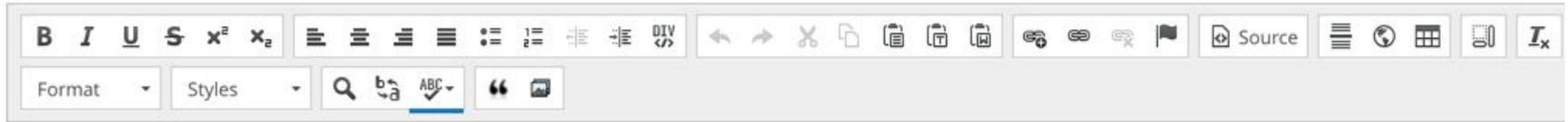
Wordpress



EDITOR COMPARISONS

D7

Body ^{*}(Edit summary)



D8



MODERATIONS COMPARISONS

D7

Workbench Schedule

<input type="checkbox"/>	Name	When content state is ...	Set content state to ...
<input checked="" type="checkbox"/>	Publish	Needs Review	Published
<input type="checkbox"/>	Unpublish	Published	Draft

Publish

Set content to Published after ...

Date Time

E.g., 11/22/2019 E.g., 03:34pm

Note: This schedule will only run when the current moderation state is Needs Review.

D8

Moderation state

Save as:

Change to

on

November 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

REVIEW

If changed, you must supply a relevant log note for this update.

Briefly describe the changes you have made.

Wordpress

Publish

Status: **Privately Published**

Visibility: **Private**

Public
 Password protected
 Private

Published on: **Nov 6, 2019 at 02:45**

, at :

ACCESSIBILITY ISSUES WE NOTICED

On public-facing website and in Drupal Workbench, contrast, fonts, links, and state changes often do not meet WCAG AA standards.

Boston.gov

Top Service Requests:



NEED TO KNOW:

- ▶ How to pay a parking ticket
- ▶ How to get a residential parking permit

Contact: [Mayor's Office](#)

Demolition Delay Application:
18-22 West Third Street, 30-40
West Third Street, 42-44 West
Third

LANDMARKS COMMISSION

NOTIFICATIONS PUBLIC RECORDS

BOS:311
Four ways to report non-emergency issues:



STREET CLEANING

There is no daytime street cleaning. Overnight street cleaning is on a normal schedule.



MORE CITY NEWS



content.Boston.gov

LATEST DRAFT

Content Structure

PUBLISHED + LIVE

USE CUSTOM LOG MESSAGE

Briefly describe this state change.

Post
A full body text

REVISION LOG MESSAGE

If changing moderation state, you must supply a relevant log note for this update.

Briefly describe the changes you have made.

SYNTHESIS

Workbench User Problem

City of Boston employees producing and editing content for Boston.gov are struggling to use the Drupal Workbench and often have to rely directly on DoIT staff because it is inefficient and unintuitive.

DoIT Problem

DoIT needs to improve the Drupal Workbench experience for content producers and editors so that their colleagues can easily and independently produce content for Boston.gov. These changes will improve the quality of their work experience and the content they create, as well as free up resources for strategic innovation.

SYNTHESIS

Workbench users need a way to:

- Navigate more easily because they are struggling to find, edit, and submit their content.
- More easily understand/imagine what options are available or required because the Workbench uses unintuitive, unmemorable, and unrecognizable naming conventions.
- More easily access help resources because they currently have to leave the Workbench or rely on DoIT staff to do so.

RECOMMENDATIONS REPORT

IDEATION

City of Boston's Brand Principles

“Less Not More. We teach and build tools, not rules.”

“Everyone is a designer, sometimes, without training.”

“Empower people, they will surprise you!”

Our Project Principles

Reduce frustration and streamline workflows

Encourage creativity and best practices

Increase confidence and empower content producers

IDEATION - BROAD STROKES

Solutions

- Incorporate visual examples, best practices, and more illustrative descriptions
- Facilitate access to the custom D8 Site Admin Guide as well as Brand Guide & tools
- Improve taxonomy and navigation by using more familiar terms for key actions & areas
- Clarify the moderation process and support users while easing their transition to D8
- Be clear and consistent in error avoidance & requirements
- Encourage content creators and editors to support all users of Boston.gov and meet accessibility compliance requirements

IDEATION - DETAIL

Help users create customized workbenches and templates to increase confidence and efficiency.

- Templates with pre-filled content and specific drop-downs:
 - Highlight the role of the clone function to use existing live page as “template”
 - Allow user to create their own custom page type templates with a set of predefined components/options
 - Collaborate with high volume departments that want templates to create one or two custom page types.
- “Create/Add Content” [New Page] / “Components” choices:
 - Hide/show options on a per user or per department basis, include user in decision.
 - Include a “save this view” or “make this my view” button so that users can always see a preferred filtered or ordered list as their default.
 - Provide users with ability to “favorite” up to 5 options and show these “favorites” at the top of the list.
 - Create a “tool-tip” for users that highlights the fact that they can filter and order options in various ways.

Incorporate visual examples, best practices, and more illustrative descriptions into page and component selection processes to help avoid frustrations and increase users’ confidence in their decisions.

- Develop better language for components and page types:
 - More descriptive titles.
 - More illustrative copy that helps user imagine the utility and layout of component or page type.
- “Create/Add Content” [New Page] list – Add access to visual examples:
 - Link to page in DoIT Guide
 - Hover over with page example
 - Hover over with wireframe example
 - Link to existing “evergreen” page, perhaps dedicated to this purpose
- Make component selection more like “Create/Add Content” page, where each option includes descriptive copy and one of the visual example access solutions.

IDEATION - DETAIL

Incorporating visual examples cont...

- If component selection menu cannot look like “Create/Add Content” page, then:
 - Tool-tips when they hover on the dropdown providing a description and small wire-frame to show how the component elements look.

Incorporate accessibility requirements into content creation and explain their reasoning so that users are encouraged to both support public access to the website content and also meet compliance requirements.

- Identify any/all accessibility required fields, make them required (asterisk) and add a tool-tip or hint text for input fields.
- Ex: Make “Alternative Text” for all media (images/videos, etc) required.
 - Rename “Alternative Text” (if possible) to highlight its purpose
 - Highlight the SEO and Accessibility benefits of using this field for users in the hint text.

Improve menu taxonomy and layout by using more familiar terms for key actions and areas, including:

- Rename “Tasks” to something more intuitive, e.g. “Edit this Page”
- Relocate “Tasks”/[New name] to left-hand side, next to existing edit actions and have its menu appear on the left-hand side like other action menus.
- Rename “Create Content” and “Add Content” to “Create New Page” or “Draft New Page”
- Include menu option to access drafts from workbench homepage
- Remove translate button from menu if not active

Clarify the moderation process and support users while easing their transition into D8.

- Revision log prompt should make its purpose clear, and indicate that it is required (red asterisk)
 - Consider renaming or removing Revision Log [title] to clarify purpose
- “Preview” should not be available for unsaved work
- Save should be automatic, like in Google Docs
- Include link in editor to user guide to show moderation flow/steps

IDEATION - DETAIL

Incorporate access to the custom D8 user guide and Boston Brand and Voice style guides

- Link to anchors/pages within the guide from tool-tips and helpful hints throughout the workbench
- Include a link to the guides within the Main Nav

Be clear and consistent in error avoidance and requirements.

- Include character limit information in components when there is an actual character limit or a recommended word limit for either readability or formatting reasons.
- Prevent errors by
 - Making sure all required fields have a red asterisk
 - Highlighting required fields in an even more visual way - color the text or highlight the text with a pale yellow to draw the user's eye to the text more forcefully.
- Resolve errors by
 - Ensuring that the error alert message, error highlight, and user advancement prevention is applied consistently across the workbench.

Make the image upload process easier

- Make the Add Image the default tab in Upload/Choose Image pop-up - that is what users usually do (they don't pull images/media from the library)
- Make the image upload process the same no matter where the image is being uploaded
- In the preview step before the user hits the final "upload and select" button, show the user what the image will look like in the component they have selected (so if it is round, show the image as it will be cropped to circle, if it is thumbnail, show that cropping, if it is in a grid of cards, show how it would be cropped there and allow the user to edit the image before the final "upload & select action).
- Make it possible to upload images to the Workbench from Google Drive not just the HDrive

RECOMMENDATIONS (v1)

- 1. Reorganize main navigation and rename key menu items.**
- 2. Revise “Create Content” descriptions & provide access to examples.**
Note: this also is meant to serve as a model for improving Components view.
- 3. Consistently support error avoidance and accessibility requirements.**

RECOMMENDATION 1

Reorganize main navigation and rename key menu items.

- All user types – daily, weekly, monthly, rarely – negatively impacted
- Taxonomy often breaks natural language conventions
- A few key adjustments might have big positive impact

We believe that by making page editing actions more visible and intuitive, all users will have an easier time performing a core function of their workflow.

RECOMMENDATION 1a

Rename key menu items.

Current	Recommendation
My Workbench/Home	Dashboard
Create Content	Create New
All Recent Content	Everyone's Recent Content
Tasks	Edit
Latest Draft	Draft
Save or Preview	Save + Preview
Needs Review	Submit

RECOMMENDATION 1b - PUBLISHED

Streamline the Workbench Navigation.

Current



The screenshot shows the top navigation bar of a web application. The background is dark red. On the left, there are icons for 'Workbench', 'Manage', 'Search', 'dev', and 'Subscription not active'. On the right, there is a user profile icon labeled 'content_author', a 'Tasks' icon, and a green button labeled 'PUBLISHED + LIVE'. Below this bar, there is a white navigation bar for the 'CITY of BOSTON' website, featuring a menu icon, the city name, Mayor Martin J. Walsh's name, the city seal, and links for 'PAY AND APPLY', 'PUBLIC NOTICES', and 'FEEDBACK' with a search icon.

Recommendation



The screenshot shows a recommended content navigation bar. The background is green. On the left, there are icons for 'Dashboard', 'Create New', 'My Drafts', 'My Pending + Published', 'Everyone's Recent', 'Search', and 'Help'. On the right, there is a notification bell icon and a user profile icon labeled 'user_name'. The main content area features the word 'PUBLISHED' in large white letters, followed by 'Post | Age Strong Public Awareness Campaign Launched' and 'Last edited by user_name · Published just now'. On the far right, there is a white button labeled 'Edit'. Below this bar, there is a white navigation bar for the 'CITY of BOSTON' website, featuring a menu icon, the city name, Mayor Martin J. Walsh's name, the city seal, and links for 'PAY AND APPLY', 'PUBLIC NOTICES', and 'FEEDBACK' with a search icon.

RECOMMENDATION 1b

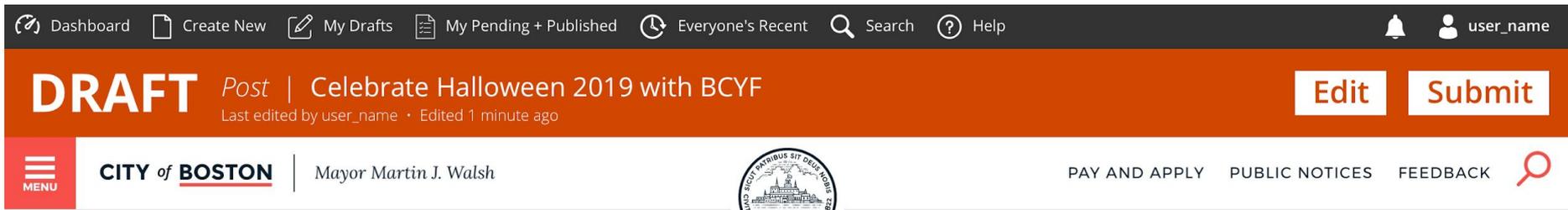
Streamline the Workbench Navigation.

Current



This screenshot shows the current navigation bar. It features a dark red header with icons for Workbench, Manage, Search, and a 'dev' indicator. A notification for 'Subscription not active' is present. On the right, it shows the user 'content_author', a 'Tasks' icon, and a 'LATEST DRAFT' badge. Below the header, a white bar contains the 'CITY of BOSTON' logo, the name 'Mayor Martin J. Walsh', a large yellow '[DRAFT]' watermark, and a 'PAY AND APPLY' button. A dark grey sidebar on the right contains a 'test' button and a close icon.

Recommendation



This screenshot shows the recommended navigation bar. It has a dark grey header with a menu of items: Dashboard, Create New, My Drafts, My Pending + Published, Everyone's Recent, Search, and Help. A user profile icon for 'user_name' is on the right. Below the header, an orange banner displays 'DRAFT Post | Celebrate Halloween 2019 with BCYF' and 'Last edited by user_name · Edited 1 minute ago'. On the right of the banner are 'Edit' and 'Submit' buttons. The bottom section features the 'CITY of BOSTON' logo, 'Mayor Martin J. Walsh', the city seal, and navigation links for 'PAY AND APPLY', 'PUBLIC NOTICES', 'FEEDBACK', and a magnifying glass icon.

RECOMMENDATION 1c

Streamline the Moderation Panel.

Current

Moderation state

Save as:

Change to

- ✓ Draft
- Needs Review

at

or [cancel](#)

REVISION LOG MESSAGE

If changing moderation state, you must supply a relevant log note for this update.

Briefly describe the changes you have made.

Recommendation

Required *
Describe the changes you have made to this page

RECOMMENDATION 2

Revise “Create Content” descriptions & provide access to examples.

- All user types frustrated and confused by page layout and components choices
- Many users view examples in admin guide while working
- Users said that the new Create Content page is “better” than the simple list menu they had in D7. By adding a few enhancements to new D8 Create Content page, we can also model what could also be done for “Components” to address users issues whether they are creating new content (less frequent) or updating existing content (more frequent).

We believe that by incorporating examples and illustrative descriptions of content and component types in the Workbench, we will help content producers make better, faster selections and they will feel more mastery of the Workbench.

RECOMMENDATION 2a

Make the content type descriptions more illustrative.

Current

Recommendation

Post

A full body text and image(s)/Videos of the press release or storytelling piece.

Use Posts for Press Releases, News, Announcements, and other time-sensitive content. Posts are more timely, concise, and dynamic than articles and are accessed through our News page.

Program and/or Initiative Guide

A content type for creating programs and/or initiatives.

These profiles share details, contacts, enrollment information, and engagement opportunities for initiatives like Boston Shines and programs like Camp Joy, for example.

Public Notice

A content type for displaying public notices.

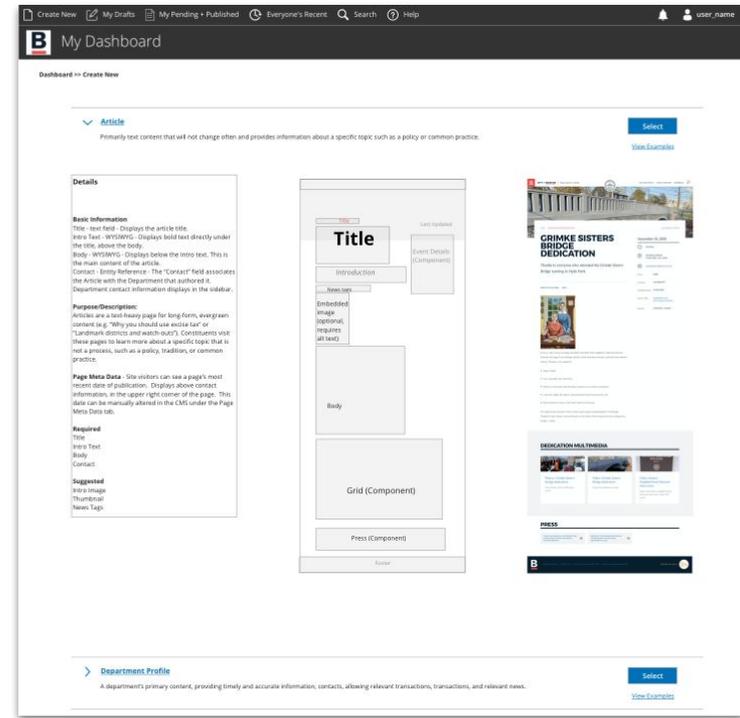
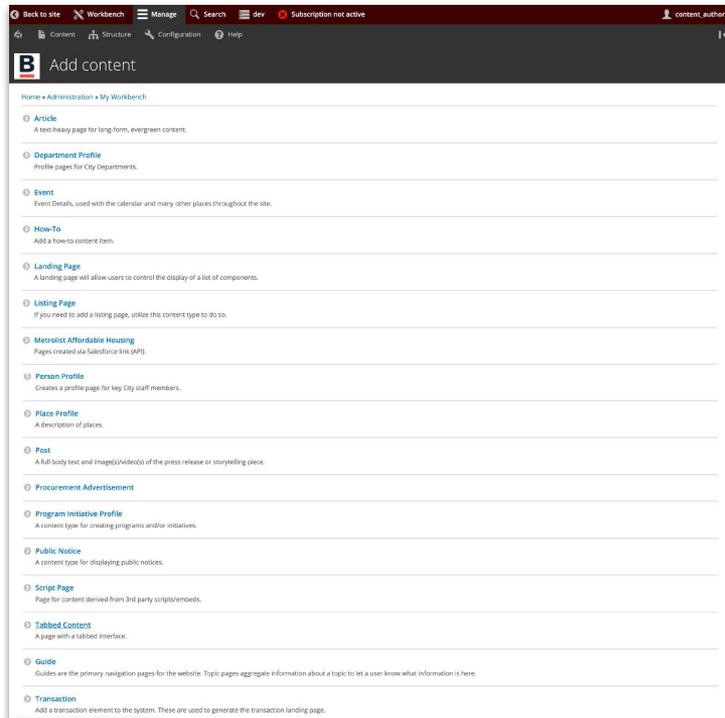
Required by Open Meeting law, a public notice needs to be legible and easily understood, must contain the date, time, place of meeting and agenda. If the agenda items change, you should updated the notice to let the public know.

RECOMMENDATION 2b

Provide easy access to visual examples.

Current

Recommendation



RECOMMENDATION 3

Consistently support error avoidance and accessibility goals.

- All user types expressed frustration about unclear component requirements
- Uncommunicated requirements trap users in repetitious loops, slow them down, and make them feel like *they* are doing something wrong
- Adjustments to information or page organization improve commonly used components like Image Upload, Text fields, and the Revision Log

We believe that by addressing at least a few of these issues for all users, we will achieve more streamlined workflows and reduce reliance on DoIT/admin guide.

RECOMMENDATION 3a

Consistently indicate whether or not a field is required.

Current

REVISION LOG MESSAGE

If changing moderation state, you must supply a relevant log note for this update.

Briefly describe the changes you have made.

USE CUSTOM LOG MESSAGE

Briefly describe this state change.

Recommendation

Submit Draft for Review ✕

Required *
Describe the changes you have made to this page

Schedule Post

RECOMMENDATION 3b

Consistently include information about character limits.

Turn the box red in the editor, once the user exceeds the character limit.

Add character limits to components where shorter copy is preferred (ex. Intro Text).

SHORT DESCRIPTION *

A brief description of the card. **Display is limited to 140 characters.**

SHORT DESCRIPTION *

If I write more than 140 characters this box turns red to tell me I am going to trigger an error and then I know that I have to edit my copy.

A brief description of the card. **Display is limited to 140 characters.**

RECOMMENDATION 3c

Reorganize the Image Upload pop-up to reduce errors and prioritize accessibility.

Current

Choose/Upload Image ✕

[Choose Image](#) [Add Image](#)

 45651775_100374574310828_1992583943072776192_n.jpg [Cancel](#)

Name *

Show in media library

Image *
 Alternative text

This text will be used by screen readers, search engines, or when the image cannot be loaded.

 45651775_100374574310828_1992583943072776192_n.jpg (27.08 KB) [Remove](#)

Add an image to the site media library.

[Upload and Select](#)

RECOMMENDATION 3c

Reorganize the Image Upload pop-up to reduce errors and prioritize accessibility.

Recommendation

Enter Image Information ✕



Image Name *

This text will show when hovering over the image.

Alternative Text *

Describe the image to help visually-impaired site visitors, improve search engine rankings, and as a fallback if the image cannot be loaded.

Add to Site Media Library
Everyone will be able to see this image when browsing the media library. Select for images that will be frequently re-used.

My Image.jpg
JPEG Image • 1024x768 pixels Remove

Back Upload + Insert

RECOMMENDATION 3d

Make minimal changes to improve color contrast, visibility of alerts, and recognizability of links to improve accessibility within Drupal Workbench.

Current

Post
A full body text

LATEST DRAFT

PUBLISHED + LIVE

Content  Structure

REVISION LOG MESSAGE

If changing moderation state, you must supply a relevant log note for this update.

Briefly describe the changes you have made.

Recommendation

Guide Select
Constituents will [View Examples](#)

DRAFT

PUBLISHED

EDIT

PENDING

 My Drafts

Submit Draft for Review

Required *
Describe the changes you have made to this page

Schedule Post

Submit

HAPPY FLOW

HAPPY FLOW > CREATE A BLOG POST - SINGLE USER

User = ANY User, Windows OS, Chrome Browser



USABILITY REPORT

TESTING MOCKUPS OF 1 & 2

What we Heard

- **Consistent positive feedback**

- This is easier to navigate than what I am used to.
- I would use “View Example” of the content layouts.
- Moderation seems simpler and easier to get through.

“I think this looks fun.”

“Ooo, I like this a lot more.”

“Oh, this is a really nice surprise.”

“Seems pretty self-explanatory.”

- **Conflicting feedback**

- I like this dashboard *vs.* I want more/different information in this dashboard.
- I want the edit options in a center pop-up *vs.* I want the edit options in a sidebar.

- **Consistent “close, but not quite” feedback**

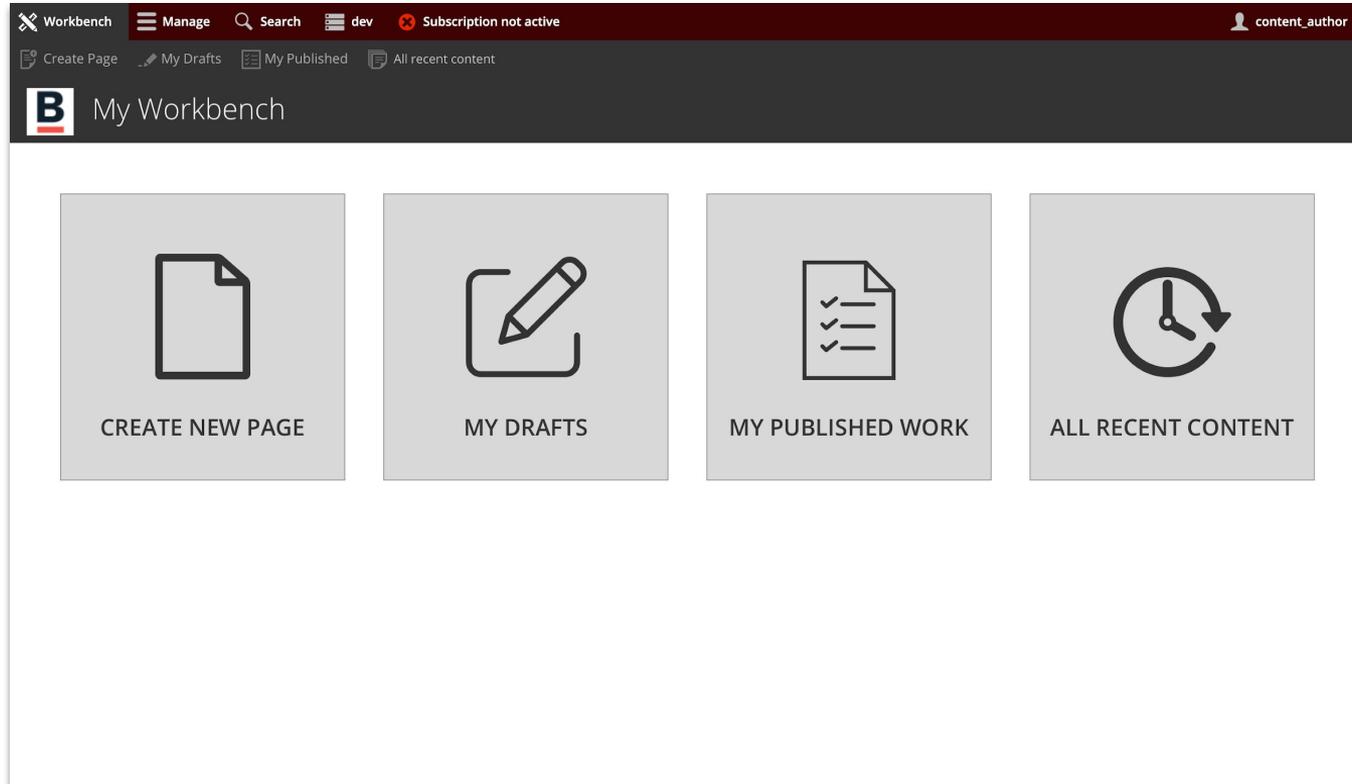
- I want to see examples of published pages as well as the mockup examples.

What we Observed

- Users very quickly and easily navigating to where they needed to go.
- Users being excited — “ooo”, “ahs”, and body language that suggested sudden active excitement about something, such as leaning into the screen or sitting up attentively.

ITERATION BASED ON FEEDBACK

Dashboard v1



ITERATION BASED ON FEEDBACK

Dashboard v2

The dashboard features a top navigation bar with links for Dashboard, Create New, My Drafts, My Pending + Published, Everyone's Recent, Search, and Help. A user profile icon labeled 'user_name' is in the top right. Below the navigation is a dark header with a 'B' logo and the word 'Dashboard'. The main content area has 'Grid View' and 'List View' toggles. It contains several sections: 'Create New', 'My Drafts' (with a dropdown arrow), a table of draft items, 'My Pending + Published', and 'Everyone's Recent'. The table has columns for Title, Type, and Last updated, with an 'Edit' link for each row. A 'See All' link is at the bottom right of the table.

Dashboard

Create New My Drafts My Pending + Published Everyone's Recent Search Help

user_name

B Dashboard

Grid View List View

Create New >

My Drafts ▾

Title	Type	Last updated	
My Very Important Draft	Post	2 hours ago	Edit
My Other Article	Article	3 days ago	Edit
My Event	Event	5 days ago	Edit
My Other Event	Event	6 days ago	Edit
My Other Other Article	Article	7 days ago	Edit

See All

My Pending + Published >

Everyone's Recent >

ITERATION BASED ON FEEDBACK

Visual examples on content selection page

Back to site Workbench Manage Search dev Subscription not active content_author

My Workbench Create content My edits All recent content

Step 1. Select a content type for your page

Home >> Administration >> My Workbench

- Article**
Primarily text content that will not change often and provides information about a specific topic such as a policy or common practice.
SELECT
[View Layout](#)
- Details**
Required info
Common components
Images to have prepared
Troubleshooting
SELECT
[View Layout](#)
- Department Profile**
A department's primary content, providing timely and accurate information, contacts, allowing relevant transactions, transactions, and relevant news.
SELECT
[View Layout](#)
- Event**
Events show all of the details about an event including title, descriptions, dates, location, and contact.
SELECT
[View Layout](#)
- Guide**
Constituents will get snapshots of information on a topic from many departments or groups within city government. The purpose of a Guide is to organize and present content by the way a user thinks about a problem or issue, provide information and services, and route the user to deeper information where necessary.
SELECT
[View Layout](#)
- How-To**
Shows visitors how to complete a task—such as paying a parking ticket—including ability to take steps, see deadlines, download forms, and contact appropriate staff.
SELECT
[View Layout](#)
- Landing Page**
Although additional Landing Pages can be created, its intended use is as the Homepage. Constituents use its global navigation, search, and promoted content on the page itself, to explore content and be informed of important updates. The homepage should not be used as a content-destination.
SELECT
[View Layout](#)

Person Profile
This page is for a person in city government or anyone with a bio on the website. Constituents will use these pages to learn more about the people behind their government, as well as locate contact information when they need to reach out.
SELECT
[View Examples](#)

Place Profile
Highlights a city-managed place, including parks, cemeteries, community centers, or City Hall itself. Constituents visit these pages to learn more about a place, its location, view photos, and find links to relevant resources.
SELECT
[View Examples](#)

Post
Use Posts for Press Releases, News, Announcements and other time-sensitive content. Posts are more timely, concise, and dynamic than articles due to their news-worthiness focus and are often accessed through our News page.
SELECT
[View Examples](#)

Details

Basic Information
Title
Intro image
Thumbnail
Intro Text
Body
Contact
News Tags

Related Content
Note the "Related Content" vertical tab in the editing interface to allow the editor to associate this Post with other Places, Programs/Initiatives, People, Departments, and other content.

Image Guidelines:
Intro Image Field
Recommended File Type: jpg
File Types Allowed: png, gif, jpg, jpeg, svg
Recommended Size: 2000x460
Automatic sizing: Will scale up or down to meet size requirements and then crop to dimensions if necessary.
On Tablet and mobile, image sizes will automatically scale down to:
Tablet Dimensions: 768x400
Mobile Dimensions: 480x270

Thumbnail
Recommended File Type: jpg
File Types Allowed: png, gif, jpg, jpeg, svg
Recommended Size: 625x625
Automatic sizing: Will scale up or down to meet width of 625 and then scale the height to maintain the aspect ratio.

DEMONSTRATION

[VIEW PROTOTYPE](#)

SOLUTIONS v2.0

Additional recommendations

- Develop a new **Components menu** with tailored options, illustrative descriptions, visual examples, and more intuitive naming conventions (in the style of Create New).
- Create **customized dashboards** to increase flexibility and efficiency.
- Collaborate with very high volume departments to develop **custom templates**.
- More deeply **embed help tips** and access to user guide throughout the Editor.
- Provide users with access to the **Brand Guidelines** from within the Editor.
- Embed either **Grammarly or Hemingway** in text editor fields to encourage more accessible writing that matches Boston's optimistic and informative voice.
- Provide users with **translation** capability.
- Implement **accessible design recommendations** from City's April 2019 blog post to both front and back-end.
- Make the **Add Image** the default tab in Upload/Choose Image pop-up.



THANK YOU!!