What is the current experience like for mobile web contributors using Visual Editor?
Overview

<table>
<thead>
<tr>
<th>Status</th>
<th>Design in progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled launch date</td>
<td>Q1 / 2018-19</td>
</tr>
<tr>
<td>Priority</td>
<td>High</td>
</tr>
<tr>
<td>Contact</td>
<td>jklein@ editing@</td>
</tr>
<tr>
<td>Addressed strategy/strategies</td>
<td><strong>Output 3.4: Simpler editing on mobile web + apps</strong></td>
</tr>
<tr>
<td>Links to relevant documentation</td>
<td><a href="https://phabricator.wikimedia.org/T201547">https://phabricator.wikimedia.org/T201547</a>  [EPIC task]</td>
</tr>
<tr>
<td>Mocks</td>
<td><a href="https://wikimedia.invisionapp.com/share/BVO0TWWYWNE">https://wikimedia.invisionapp.com/share/BVO0TWWYWNE</a></td>
</tr>
<tr>
<td>Last updated</td>
<td>23 - Sept - 2018</td>
</tr>
</tbody>
</table>
Open Design Process

DISCOVERY PHASE

Explore

Define

Make

DELIVERY PHASE

Validate

We are here

Read more: open design process
Our Approach

Usability Tests  +  Metrics Study + Heuristic Analysis

Image credits left to right:
Interactive design by SBTS from the Noun Project
Analytics by SBTS from the Noun Project
Usability evaluation by SBTS from the Noun Project
Heuristic Analysis: gather a group of experts and methodically review the user interface against a set of established heuristics principles.
Who was involved?

Heuristics:

- Internal and External Experts from:
  - Design
  - Engineering
  - Product
  - Accessibility
  - Right To Left

- Expert Representatives from:
  - The Hebrew and Indian wikis (2 out of the 12 targeted wikis)

All participants tested using a sandbox page created on the English Wikipedia
VALUES

WIKIMEDIA FOUNDATION
We want to know

How does the user interface perform when you: ________?

against our values-based rubric
VALUES

We are inspired

We welcome & cherish our differences

We are in this together

We engage in civil discourse
VALUES + PRINCIPLES

We are inspired
- Content first
- Joyful

We welcome & cherish our differences
- This is for everyone
- Design for consistency

We are in this together
- Open to collaboration

We engage in civil discourse
- Trustworthy
REPORT CARD: We welcome and cherish our differences

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Definition</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learnability</td>
<td>The structure is simple enough that it could be easily learned</td>
<td>😞</td>
</tr>
<tr>
<td>Language Comprehension</td>
<td>The in-tool terms, references, and instructions are obvious and written using simple, jargon-free language</td>
<td>😞</td>
</tr>
<tr>
<td>Proper Casing *</td>
<td>Case is appropriately used throughout labels, titles, and copy</td>
<td>😊</td>
</tr>
<tr>
<td>Visibility of System Status</td>
<td>The system always keeps me informed about what is going on, through appropriate feedback within reasonable time</td>
<td>😞</td>
</tr>
</tbody>
</table>

* Letter case is only relevant for languages that are written in Latin, Cyrillic, Greek, and Armenian alphabet.

Icons made by [https://www.flaticon.com/authors/roundicons](https://www.flaticon.com/authors/roundicons), CC 3.0 BY
REPORT CARD: We welcome and cherish our differences

<table>
<thead>
<tr>
<th>Dimension</th>
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<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nomenclature</td>
<td>I do not have to wonder whether different words, situations, or actions mean the same thing and all of the words follow platform conventions</td>
<td>😊</td>
</tr>
<tr>
<td>Conciseness</td>
<td>System Messages and Labels are succinct and use distinct wording</td>
<td>😊</td>
</tr>
<tr>
<td>Accessibility</td>
<td>This product is conforming to WCAG level AA as requirement and goes beyond where technically possible.</td>
<td>😞</td>
</tr>
</tbody>
</table>

Yes  Sort of  No
# REPORT CARD: We are in this together

<table>
<thead>
<tr>
<th>Heuristic</th>
<th>Definition</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistance</td>
<td>There was an obvious way to ask for help</td>
<td>😞</td>
</tr>
<tr>
<td>Documentation</td>
<td>Documentation for using the Visual Editor (aka &quot;help&quot;) is clearly written</td>
<td>😞</td>
</tr>
<tr>
<td>Explanatory</td>
<td>There are tool tips and information along the way that serve as guide posts for what I want to do</td>
<td>😞</td>
</tr>
<tr>
<td>Instructional</td>
<td>I'm guided through a process to complete my goal (the edit)</td>
<td>😞</td>
</tr>
</tbody>
</table>

- **Yes**
- **Sort of**
- **No**
<table>
<thead>
<tr>
<th>Heuristic</th>
<th>Definition</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognition rather than recall</td>
<td>I know what to do, in order to accomplish my goal, without needing help</td>
<td>😞</td>
</tr>
<tr>
<td>Error Prevention</td>
<td>I didn't run into any system errors</td>
<td>😞</td>
</tr>
<tr>
<td>Error Recovery</td>
<td>Error messages were expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution</td>
<td>😞</td>
</tr>
</tbody>
</table>

REPORT CARD: We are in this together

Yes  Sort of  No
## REPORT CARD: We are inspired

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Definition</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frustration</td>
<td>The experience was satisfying and didn't cause me frustration</td>
<td>😞</td>
</tr>
<tr>
<td>Freshness</td>
<td>Visual components feel crisp and contemporary</td>
<td>😞</td>
</tr>
<tr>
<td>User Control and Freedom</td>
<td>When I had to exit a task, I was easily able to do so</td>
<td>😞</td>
</tr>
<tr>
<td>Content first design</td>
<td>It is obvious while consuming content that there is a way to edit it</td>
<td>😞</td>
</tr>
<tr>
<td>Joy</td>
<td>How did you feel when you finished?</td>
<td>😞</td>
</tr>
</tbody>
</table>

- **Yes**: Green
- **Sort of**: Orange
- **No**: Red
**REPORT CARD:** We engage in civil discourse

<table>
<thead>
<tr>
<th>Dimension</th>
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<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistance</td>
<td>There was an obvious way to ask for help</td>
<td>🙁</td>
</tr>
<tr>
<td>Documentation</td>
<td>Documentation for using the Visual Editor (aka &quot;help&quot;) is clearly written</td>
<td>🙁</td>
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<tr>
<td>Explanatory</td>
<td>There are tool tips and information along the way that serve as guide posts for what I want to do</td>
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</tr>
<tr>
<td>Instructional</td>
<td>I'm guided through a process to complete my goal (the edit)</td>
<td>😞</td>
</tr>
<tr>
<td>Organization</td>
<td>You can easily find the functions that you need, when you need to find them</td>
<td>😞</td>
</tr>
</tbody>
</table>

![Yes](image1.png) ![Sort of](image2.png) ![No](image3.png)
We strive for excellence

We are inspired

We welcome & cherish our differences

We are in this together

We engage in civil discourse
Does the user interface perform well?

against our values-based rubric

No

Sort of / No
THE USER FLOW
Persona: Yanko, The Knowledge Sharer

Task 1: Yanko accesses the site, makes an edit and publishes it.
Where are we in the process (before, during, after the edit)?

What step did Yanko take?

Why did he take the action?

How did he feel at this point in the process? (joy, it didn’t feel good, pain)

What was going on during this pain point?

What actions happened behind the scenes to make this part of the process possible?
**Stage**

**Action**
- Performs Google search *
- Taps on link and reads Wikipedia article *

**Goal**
- Find article on Mona Lisa
- Confirm fact is in article

**Joy**

**Pain Point**

**Backstage Actions**
“Switching from Wikitext to VE opened a dialog window [welcome window] that forced me to go out of editing, even though I had not made any edit yet.”

“[Visual Editor] only allows editing the entire page, the particular section you want to edit is lost even when you tap on a section edit pencil.”

“It was hard to find the sections I wanted at the beginning because the introductory text is pretty long in a mobile view.”

“The most annoying part was finding the parts of the article I was supposed to edit. Mobile site apparently has no table of contents?? …”
DURING EDIT

Stage

Action

Taps 'check' icon
Taps 'publish' button
Provides edit summary
Taps 'publish' button
Provides 'CAPTCHA'

Goal

Joy

Backstage
Actions

Pain Point

What did the check button do? Not publish? This seems like what I'm supposed to click. What am I supposed to write here? I think I *might* be publishing Wait, what did I do now?

Opens Save dialog
Edit summary input
Content + edit summary sent off to API
View changes
Run tests for CAPTCHA, edit conflicts, abuse filters etc.
Display difference

if tests fail
CAPTCHA test runs
if tests pass
Success message

Visual difference display or Wikitext difference display
"It was frustrating every step of the way. I was pushed into wikitext editing several times when I tried to log in to the system."

...the check mark changes to [publish] at unexpected times. Not sure what it means.

The back caret on Save dialog and the return to save summary felt having the same function. I clicked the caret after reviewing my changes instead of going back at the bottom of the dialog. Good thing was that the already started edit message remained saved.

---

<table>
<thead>
<tr>
<th>Taps 'check' icon</th>
<th>Taps 'publish' button</th>
<th>Provides edit summary</th>
<th>Taps 'publish' button</th>
<th>Provides 'CAPTCHA'</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;What did the check button do? Not publish?&quot;</td>
<td>&quot;This seems like what I'm supposed to click.&quot;</td>
<td>&quot;What am I supposed to write here?&quot;</td>
<td>&quot;I think I <em>might</em> be publishing&quot;</td>
<td>&quot;Wait, what did I do&quot;</td>
</tr>
</tbody>
</table>

---

Selection mode: cursor in the document (therefore keyboard is probably visible)

Opens Save dialog

Edit summary input

Content + edit summary sent off to API

Run tests for CAPTCHA, edit conflicts, abuse filters etc.

if tests fail

CAPTCHA test runs

if tests pass

Success message

View changes

Display difference

Visual difference display

or

Wikitext difference display
“It was finicky and hard to make these simple changes on mobile, and it was a relief when they were accomplished successfully.”

“It was hard to do the tasks, the system would act irrationally (sic) (froze a few times, and jumped me around after pressing publish, understanding where I am in the article is difficult with a window only half an inch high...”
Task 1: Key pain points to solve

- Visual editor dropdown interaction
- Loss of scroll depth (changing states (reading to editing) but want to preserve their scroll depth)
- Saving edits
Persona: Yanko, The Knowledge Sharer

Task 2: Link to another Wikipedia page from within the article
**Stage**

**Action**
- Finds term in article that he doesn't know *
- Looks up term on Wikipedia *
- Finds where he was reading and saw the term
- Scrolls to top of page to find Edit pencil *
- Scrolls to find the term
- Selects term

**Goal**
- Understand subject of article
- Learn meaning of term
- Add a link to the article on the term
- Find the part of the page to make the edit

**Joy**

**Pain Point**

**Backstage Actions**
- Where did that edit pencil go?
- Did I lose the term, where is it?

Section-level edit pencils load the editor then scroll back to the correct section.
During Edit:

- Finds where he was reading and saw the term
- Scrolls to the top of the page to find Edit pencil
- Scrolls to find the term
- Selects term

Goal:
- Understand subject of article
- Learn meaning of term

Joy:

Pain Point:

Backstage Actions:

Section-level edit pencils load the editor then scroll back to the correct section.

Where did that edit pencil go?
Did I lose the term, where is it?
DURING EDIT

Scrolls to find the term
Selects term
Scrolls up and taps the link icon
Types term in search box
Scrolls and reviews search results
Selects article
Observes that article is now a link
Taps 'check' icon **

Find the part of the page to make the edit
Add link to term.

Publish edit

Did I lose the term, where is it?

Did it make a link? I can't tell.
I think I *might* be publishing...

The link "Inspector" is opened. (On mobile this looks like a full screen dialog)
As the user types, we query the API for matching articles to auto-complete their search.
Results include page descriptions and thumbnails where available.

The check icon closes the keyboard and switches the toolbars
"At first I thought it was simple, but then realized the complexity as I got into linking content."

"I thought citoid and the search inside the link inspector were both brilliant"
“Seeing the edit live straightaway is satisfying...”
Task 2: Key pain points to solve

- Loss of scroll depth (changing states (reading to editing) but want to preserve their scroll depth)
- Feedback status confirming link creation
Persona: Yanko, The Knowledge Sharer

Task 3: Add a citation to the article.
Stage

Action

Realizes his favorite movie about the painting isn't in the article

Goal

Find out if he can contribute this fact

Joy

Pain Point

Backstage Actions
While completing the third task to add the citation, I was a little unsure as to what "Title" meant and would have liked to have a tooltip or example title to help me enter the correct info (for e.g., letting me whether it was the title of the page, or the website as a whole that it was after).

There were more clicks than seemed necessary. When I clicked in the field to add the website, the keyboard blocked what I was typing. Then I had to say Done -- then Insert -- then hit the check mark -- then Publish. I was thinking, wait, am I still not done? “
I did not have a good sense of what the next steps would be, and once when I realized I'd made a mistake it was unclear how to exit out of editing without publishing changes.

The citation template was a process, although it didn't feel very guided.

I think adding a sentence and link is straightforward, adding the citation is confusing.
Task 3: Key pain points to solve

- User’s inability to correctly identify citation buttons
- Lack of understanding what kind of edit was made with citation automation
- General confusion about Error messaging
There is visual reference to the desktop editing tools which made it familiar to me, so I knew what was happening from having experience on desktop.

Another area that could use some support is following the user where they are within the edit. I found myself having to scroll to find the cursor, or scroll so that the keyboard wasn't blocking my text while I was writing.

My main issues were with the citation and quotes. I wanted more of guide or teaching experience here to explain to me what I was doing. I was often guessing what the words meant and wasn't sure if I left spaces incomplete if it would actually post. But I was surprised that it worked.

Switching between wikitext and visual editor and losing my edits is driving me bonkers!

I couldn't see what I was typing because of the lack of screen space.

It was unclear to me how to access Help. At any given point, when I was confused, wanted to drop a note to ask for help.

It was unclear how to exit both the visual editor and the wikitext mode...
Next Steps

1. Conclude study ✔
2. Brainstorm: Look at the pain points identify a hypothesis
3. Make prototype for hypothesis
4. Validate hypothesis through testing
Open Design Process

DISCOVERY PHASE

Explore

Define

Make

DELIVERY PHASE

Validate

We are here

Read more: open design process
Mantra Proposals:

- Make your own

KEEP CALM AND PROTOTYPE ON

GET EXCITED AND MAKE THINGS