

Heuristics, Principles and Methods, oh my!



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Overview

Status	Design in progress
Scheduled launch date	Q1 / 2018-19
Priority	High
Contact	jklein@ editing@
Addressed strategy/strategies	Output 3.4: Simpler editing on mobile web + apps
Links to relevant documentation	https://phabricator.wikimedia.org/T201547 [EPIC task]
Mocks	https://wikimedia.invisionapp.com/share/BVO0TWWYWNE
Last updated	18 - Sept - 2018

Background

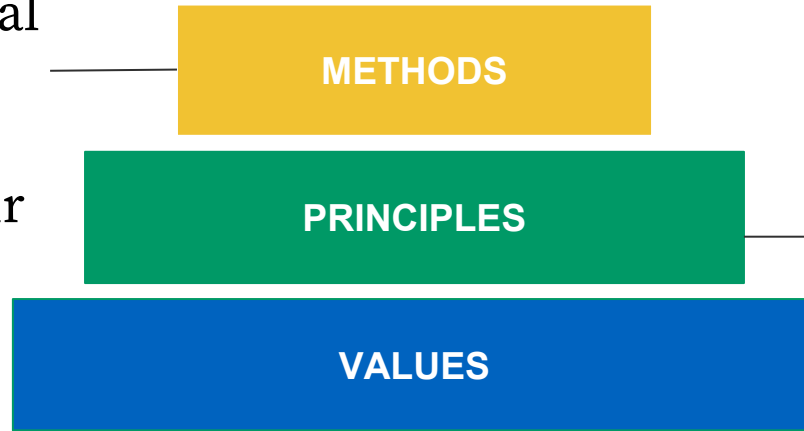
As the Editing team enters a phase of work focused on product evaluation, we are reviewing what methods we will use for assessment.

Some useful terms

- **Values** - a set of ideals to help frame conversations around product success
- **Principles** - a group of guidelines for best practices of design
- **Methods** - practical exercises and activities to help us achieve goals

Everything is informed by our values

Methods are central to our practice. They are *how* we will accomplish our mission.



Principles and **Values** are at the heart of our mission. They explain *why* we do what we do.

Wikimedia Foundation VALUES

- We strive for excellence.
- We welcome and cherish our differences.
- We are in this together.
- We engage in civil discourse.
- We are inspired.

□ Read more: [Wikimedia Foundation Values](#)



Design.Wikimedia

DESIGN PRINCIPLES

- This is for everyone.
- Content first
- Open to collaboration
- Trustworthy yet joyful
- Design for consistency

□ Read more: [Wikimedia Design Principles](#)



We strive for excellence

VALUES + PRINCIPLES

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**Can we use this approach
in our methods?**



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[IMG src](#)



What do we want to do? THE OPPORTUNITY

The Editing team is targeting new contributors in the annual plan for 2018-19. **Evaluating the current experience for contributors using the Visual Editor on the mobile web** is the first step towards helping us to understand what current workflows are like and how they might be improved to optimize for editor retention.



What don't we want to do?

- Alienate people with a super jargony output
- Redo research that's already done
- Focus on people who are just like us

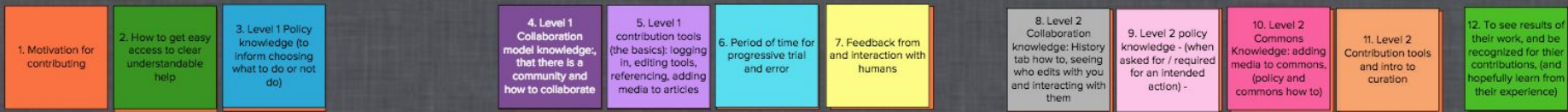
Building off the existing research

Motivation to contribute and access to concise help

Level 1 knowledge: policy, community, contribution

Time to learn at their own pace and receive feedback from humans

See the results of their work and be recognized for it.



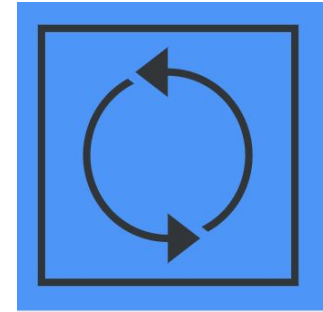
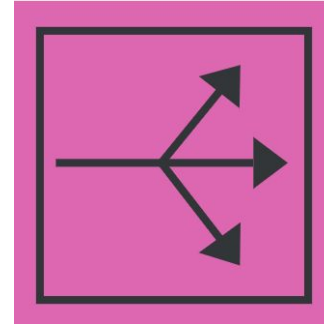
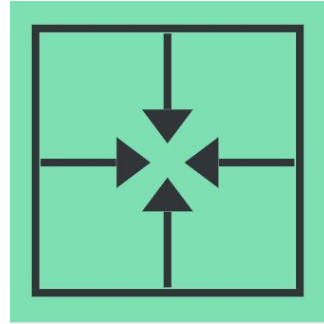
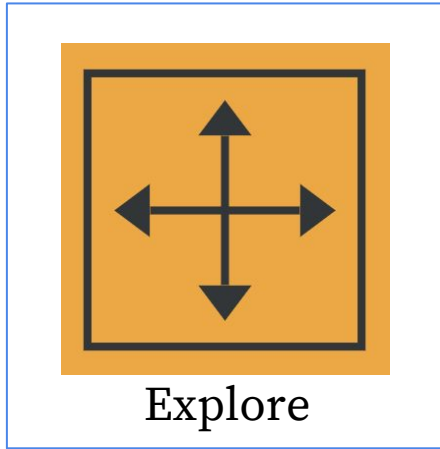
Level 2 knowledge: more advanced policy, community, and contribution skills, more about Commons, and intro to curation

□ What do new editors need to succeed?

Open Design Process

DISCOVERY PHASE

DELIVERY PHASE



We are **here** this quarter

□ Read more: [open design process](#)

Methods

HEURISTIC ANALYSIS + USABILITY STUDY

To address this opportunity we are implementing a two-pronged approach of:

- Heuristic Analysis - an *expert* review of the user interface
- Usability Study - an analysis of how *contributors* use the tools

Heuristic Analysis : gather a group of experts and methodically review the user interface against a set of established heuristics.



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Heuristic Analysis :
gather a group of experts
and methodically review
the user interface against
a set of established
heuristics principles.



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Some context

In 1995, Jakob Nielsen came up with 10 broad rules of thumb for user interface design. These became the industry standard for evaluation.

□ Read more: [Jakob Nielsen](#)

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10 Heuristics for User Interface Design

- Visibility of System Status
- Match between System and the Real World
- User control and freedom
- Consistency and Standards
- Error Prevention
- Recognition Rather than Recall
- Flexibility and efficiency of use
- Aesthetic and minimalist design
- Help users recognize, diagnose and recover from errors
- Help and documentation

□ These are pulled and quoted directly from [this article](#).

We strive for excellence

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We strive for excellence

VALUES + PRINCIPLES
+ HEURISTICS

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We strive for excellence

VALUES + PRINCIPLES
+ HEURISTICS

- **Trustworthy**
 - Visibility of System Status
 - Help and documentation
 - Consistency and Standards
- **Content first**
 - User control and freedom
- **Joyful**
 - Flexibility and efficiency of use
 - Aesthetic and minimalist design

**Enough theory, let's put
this into practice!**



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Step 1:

Recruit evaluators

- We welcome and cherish our differences.
- We are in this together.

👉 Ticket <https://phabricator.wikimedia.org/T201550>

Description

Problem:

Typically a heuristic review is done by a few different evaluators. This will allow us to combine a few different perspectives so that the review is not one-sided.

Goal:

This task is to identify who the evaluators will be in addition to [@iamjessklein](#)

List of Evaluators:

Design team members - [@Volker_E](#) [@RHo](#)

Design - Research team member: [@aripstra](#)

Engineering [@Esanders](#)

RTL Language: [@Amire80](#) (unconfirmed)

Community - [@Dank](#) [@Kerry_Raymond](#)

Step 2:

Provide Script

There already was a heuristic analysis done of the Visual Editor (but are outmoded/not done on mobile web) - so we pulled in the 5 core tasks identified from that.

✎ Ticket <https://phabricator.wikimedia.org/T202645>

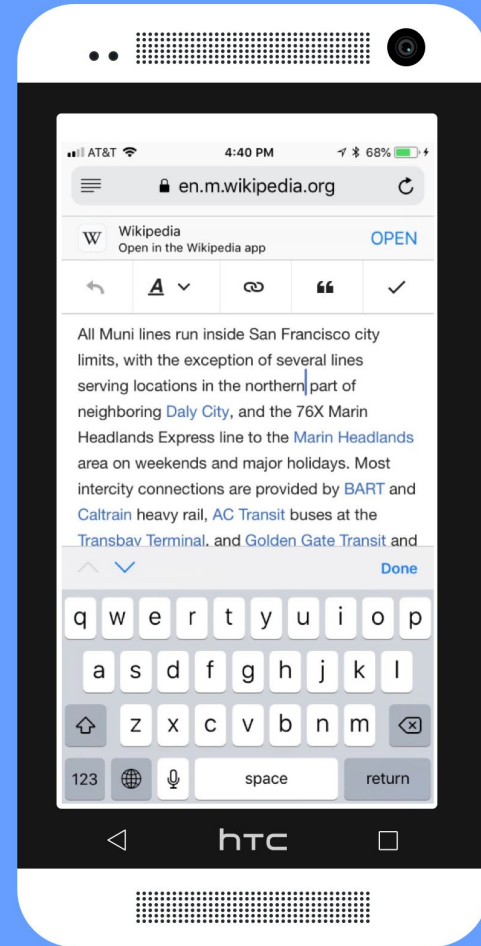
TASKS:

- Edit existing text
- Add new text
- Format text
- Add a link to another page on Wikipedia
- Add a citation

We want to know

*against our
values-based rubric*

How does the user interface perform when
you : _____ ?



How will we test for that?

- Selected experts will independently run through a script on their mobile devices
- They will then answer a set of questions identified in the heuristic rubric
- We will meet as a group to review feedback
- Jess to synthesize and add to mobile Report



Persona



Knowledge Sharer
Yanko

Knowledge Sharers have a desire to share their topical knowledge with others and participate in Wikipedia's mission.

□ These are pulled and quoted directly from [this document](#).

Experience Goals

- To progressively make more advanced edits, so that he can become a more technically skilled editor
- To be a part of and participate in Wikipedia's collaborative process

End Goals

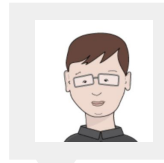
- To make articles, on topics he knows well, more useful and correct for himself and others
- To expand his tech knowledge and skills
- To build tangible proof of his tech expertise

Challenges

- Not aware of the rules and policies on how content should be written and/or cited for Wikipedia
- Not aware that he can interact with other users on-wiki

Scenario

*a book for my intro to
Art History course*



*on wikipedia.org
with Visual Editor*

*HTC Android with
limited data plan*

When reading, I find an interesting fact, so **I** make an edit on **my** phone

I want to see the edits that I'm making in context on the article **so that** I can easily share quirky facts about art.

*with those who might not have
access to this information otherwise*



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How to access Visual Editor

Every task **must** be done in Visual Editor mode.

- Click on the pencil to edit.
- Click back on the pencil and use the dropdown to find and click the eyeball icon to enter Visual Editing mode.

Task 1: Add new text, format part of the text

Step 1: Go to [this](#) article in your mobile web browser

Step 2: Find the section titled “*Legacy*”

Step 3: In this section, add a sentence that says:
“*The Mona Lisa appears in contemporary print and multimedia environments. One recent example of this is in the book (later made into a movie with the same title), The Da Vinci Code.*”

Step 4: In that same sentence, format the words “The Da Vinci Code” to be italics.

Task 2 - Link to another wikipedia article

Step 1: Go to [this](#) article in your mobile web browser.

Step 2: Find the sentence in the third paragraph that has the word “*composition*” in it.

Step 3: Edit that sentence to link the word composition to the Wikipedia entry for composition:

[https://en.wikipedia.org/wiki/Composition_\(visual_arts\)](https://en.wikipedia.org/wiki/Composition_(visual_arts))

Step 4: Save your edit.

Task 3 - Add new text with a new citation

Step 1: Go to [this](#) article in your mobile web browser

Step 2: Find the section on “*Display*”

Step 3: Add a sentence here saying: “*The work can be viewed in detail online.*”

Step 4: Add a citation to that sentence linking to the Louvre website:

<https://focus.louvre.fr/en/mona-lisa>

Step 5: Save your edit



Step 3:

Craft Feedback Worksheet

Now all the work that we did on Values and Principles meshes with the new addition of heuristics.

👉 Ticket <https://phabricator.wikimedia.org/T201549>

Section 8 of 20



Embraces all levels of technical expertise

We aim to support a very diverse audience. This is a core part of our mission. We strive to help users overcome any barriers that may exist between them and the knowledge our projects provide. These barriers could include accessibility, languages, device and network capabilities, levels of technical expertise, or many other circumstances. When improving the experience for a given group of people, we need to make sure we are not increasing the barriers for others. <https://design.wikimedia.org/>

Was editing an article simple enough *
that it could be easily learned?

Long answer text

Anatomy of Worksheet

VALUE

Instructions

Using the browser on a mobile device, follow the script for editing a wiki page while using the Visual Editor mode. As you do this, take a look at this handout and rate the dimensions on a scale of 1 - 3 (1 = Broken 2 = There are some things that can be fixed and 3 = it's great and it works well).

With leaps and bounds as well as stumbles and false-starts, we seek to continually improve ourselves, our projects, our communities, our world. - Wikimedia Foundation Values

PRINCIPLE

Quote from Style Guide explaining Principle

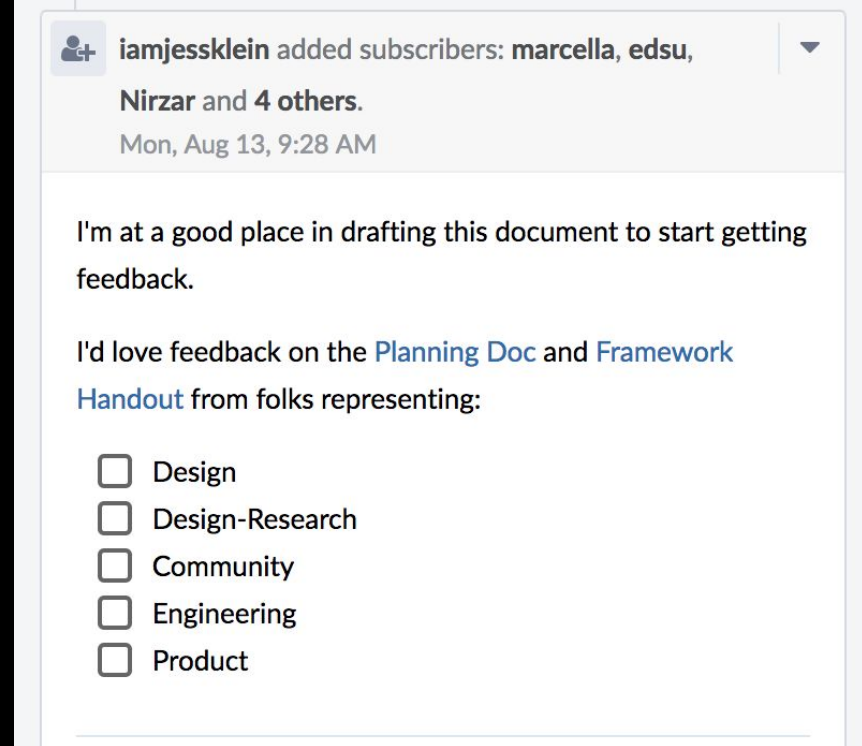
Link

Dimension	Rating	Description	Notes
<i>THIS IS FOR EVERYONE</i>	1 - 3	<i>We strive to help users overcome any barriers that may exist between them and the knowledge our projects provide.</i>	Wikimedia Design Principle
- accessibility		The product is A11y compliant	
- language comprehension		Terms, references, and instructions are obvious and written using Simple language.	Simple English
- device agnostic		The user has a positive experience in supported browsers.	
- embraces all levels of technical expertise		The structure is simple enough that it could be easily learned.	
- access		The editor can be used in lowbandwidth	
- human readable and jargon-free		Copy is written in a generally palatable manner.	

Step 4

Review of materials

We believe in transparency and openness so all of the work on this was documented in Phabricator and open for feedback.



A screenshot of a Slack message. The header shows the sender's name 'iamjessklein' with a plus icon, followed by 'added subscribers: marcella, edsu, Nirzar and 4 others.' and the timestamp 'Mon, Aug 13, 9:28 AM'. The message body contains the text: 'I'm at a good place in drafting this document to start getting feedback. I'd love feedback on the [Planning Doc](#) and [Framework Handout](#) from folks representing:'. Below this is a list of five categories, each with an unchecked checkbox: Design, Design-Research, Community, Engineering, and Product.

iamjessklein added subscribers: marcella, edsu, Nirzar and 4 others.
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- Design
- Design-Research
- Community
- Engineering
- Product

Step 5

Run Test

Plan the tests, run them and have an open session for conversation.

[IMG src](#)



Who will we test the product with?

Although we strive to design features for all humans, in the scope of this project we have identified a type of editor that represents the "persona" of users who we believe that we are in the best position to support and delight.

These users have one or more of the following attributes:

- * are using the browser on their mobile device to edit
- * are using Visual Editor within Wikipedia.org to edit
- * have interest/motivation to fix or improve existing pages (not create new pages or perform administrative functions)

...but we should test targeted wikis

If we use [usertesting.com](https://www.usertesting.com) to test, we will most easily be able to test with English Wikipedia due to the availability of people to both recruit and to do the translation. That said, our target wikis are *not* English.

Here's the pros and cons of what it would look like to recruit from the targeted wikis:

PROS

- Exact audience from target wikis
- Can replicate real-life scenarios such as lower bandwidth devices/plans, addressing potential issues with right-to-left languages
- Can comprehend the actual tooltips that have been translated.

CONS

- Difficulty in recruiting
- Length of recruiting period
- Potential need for translators at various points including creating protocol, during sessions, and after sessions are completed
-

This is the plan:

- Perform initial test on usertesting.com in English
- Follow up with tests that are focused on target wikis - prioritizing RTL - test if possible

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