Heuristics, Principles and Methods, oh my!
## Overview

<table>
<thead>
<tr>
<th><strong>Status</strong></th>
<th>Design in progress</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scheduled launch date</strong></td>
<td>Q1 / 2018-19</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>High</td>
</tr>
<tr>
<td><strong>Contact</strong></td>
<td>jklein@ editing@</td>
</tr>
<tr>
<td><strong>Addressed strategy/strategies</strong></td>
<td>Output 3.4: Simpler editing on mobile web + apps</td>
</tr>
<tr>
<td><strong>Links to relevant documentation</strong></td>
<td><a href="https://phabricator.wikimedia.org/T201547">https://phabricator.wikimedia.org/T201547</a>  [EPIC task]</td>
</tr>
<tr>
<td><strong>Mocks</strong></td>
<td><a href="https://wikimedia.invisionapp.com/share/BVO0TWWYWN">https://wikimedia.invisionapp.com/share/BVO0TWWYWN</a></td>
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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
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

● We welcome and cherish our differences.
  ○ This is for everyone
  ○ Design for consistency

● We are in this together.
  ○ Open to collaboration

● We engage in civil discourse.
  ○ Trustworthy

● We are inspired.
  ○ Content first
  ○ Joyful
Can we use this approach in our methods?
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**

- Explore
- Define
- Make

**DELIVERY PHASE**

- Validate

We are here this quarter

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

Image source
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

VALUES + PRINCIPLES

- We welcome and cherish our differences.
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  - Design for consistency
- We are in this together.
  - Open to collaboration
- We engage in civil discourse.
  - Trustworthy
- We are inspired.
  - Content first
  - Joyful
We strive for excellence

VALUES + PRINCIPLES + HEURISTICS

○ This is for everyone
  - User control and freedom
  - Recognition Rather than Recall

○ Design for consistency
  - Match between System and the real world
  - Consistency and Standards

○ Open to collaboration
  - Error Prevention
  - Help users recognize, diagnose and recover from errors
  - Help and documentation
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!
Step 1:

Recruit evaluators

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

_ticket https://phabricator.wikimedia.org/T201550_
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
We want to know
How does the user interface perform when you: ________?

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

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

These are pulled and quoted directly from this document.
Scenario

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.

a book for my intro to Art History course

on wikipedia.org with Visual Editor

HTC Android with limited data plan
How to access Visual Editor

- 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.

Every task must be done in Visual Editor 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)

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

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

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

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

Worksheet
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.
Step 5

Run Test

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