Working with Design
Processes & Experiences when collaborating with WMF Eng+ Product

version 1.0
Published 2020-01-10
Outline

Introduction Wikimedia Design team
Purpose and design principles

Responsibilities
What to expect from your designer

Product development and design process examples
Including Phabricator and its usage by the design team

Tools and documentation
Meeting common design tools
Statement of purpose

Design at Wikimedia makes sharing of all human knowledge easy and joyful. For everyone.

The User Experience Design teams goal is to ensure that Wikimedia products and communications follow a design process centered on the user. Based on research to understand people’s needs and motivations, we explore solutions that meet those needs.

We design in the open with a transparent and participatory process. We collaborate within the Wikimedia Foundation and with the global community of contributors. We create well-designed solutions, together.
Our design principles

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

We aim to support a very diverse audience. 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.
People come to Wikimedia projects for their content. Our solutions should help to facilitate its creation, consumption, and sharing — without getting in the way.

Our content (facts, images, quotes, etc.) is our most representative element, and needs to be emphasized in our solutions.
Open to collaboration

Our projects are collaborative. Discussion and sharing are key factors to consider.

To support diversity and a global mission, our solutions need to provide room for extension and customization to meet particular needs and foster different perspectives.
Wikimedia projects provide reliable educational knowledge. At the same time, our projects are a source of entertainment and satisfy human curiosity.

This requires us to find the right balance: we need to convey trust with our solutions and remain entertaining and fresh.
Design for consistency

It is important to rely on familiar concepts to facilitate understanding. People relate quickly and orient easily when we keep consistency in our design and maintain common patterns.
Designer responsibilities
Responsibilities by phase

- Work with product and eng lead to discover problem statements
- Divergence and Convergence of ideas (iterative design process)
**DESIGNER RESPONSIBILITIES**

**Responsibilities by phase**

- Contextualize generative and academic research to fit the product feature context
- Collate and synthesize relevant past and comparative/competitor materials
DESIGNER RESPONSIBILITIES

Responsibilities by phase

- Design solutions for problems that are agreed upon as team problem statements
- Present solutions to product & design teams to collect feedback & iterate
- Work with Community Relations Specialists to present solutions to the community as needed
- Build rough and/or high-fidelity mockups — particularly to explore, demonstrate and user test complex interactions.
DESIGNER RESPONSIBILITIES

Responsibilities by phase

- Build rough & high-fidelity mockups — particularly to explore, demonstrate and user test complex interactions.
- Take feedback from the product team and design team to iterate.
- Provide spec for what needs to be built.
- Support engineers to answer questions about specs & edge cases.
- Do the design sign off once something is built.
- Do evaluative user testing of a feature to validate assumptions if needed.
Responsibilities throughout

- Participate in team meetings and throughout parts of the development process
- Be collaborative and transparent about the design process throughout
- Be part of the team! I.e. attend offsites, remote team times, etc.
Product development and design process
Product development and design process

- **Hybrid Kanban process** used by the Reading Web team
- Example process by the Apps teams
  - Android Backlog
  - Example of a current release board
Hybrid Kanban used by Reading Web

Anyone can move cards from the backlog to col. 0 in the Kanban as nomination. Nominating doesn't mean the team will work on it. It but only that it will be discussed. As an individual you need to make the best case about your work at this point.

Product owner decides which card is worked on based on the case made by them or others.

It's also PO's responsibility to move it to the correct next step. Does it need product criteria? Does it need design at this stage or is it fleshed out agreed upon that it can directly go to "Ready for development" stage.

This diagram is indicative of the process and not detailed. Each vertical column might consist of multiple columns. But we do follow basic product development process of "product > research/design > feedback > estimate > build > review > qa > ship".

This is for feedback from the whole team. The card may bounce between this column and design / product multiple times.

Once everyone is on the same page about the card, it goes into Ready for dev.

multiple Eng. columns like Blocked, Code review, etc
multiplesign-off columns like QA, Design, Product
Separate Tech Debt & UX Debt columns

Bug/Backlog

Open Questions/Discussions

Tracking

Android Backlog

Product Backlog

Garage/Parking lot columns

Current release board

PRODUCT DEVELOPMENT AND DESIGN PROCESS

Android app release: v2.7.8e

Android app release: v2.7.4f

Android app release: v2.7.4e

Android app release: v2.7.4d

Android app release: v2.7.4c

Android app release: v2.7.4b

Android app release: v2.7.4a

Android app release: v2.7.4

Android app release: v2.7.3
Col 0. Backlog on the current release board contain cards picked from the permanent backlog.
Correct design brief

High level
Improve trust within consumers of Wikipedia

Mid Level
Improve appearance of page issues on the mobile website to increase awareness of particular issues within an article

Low-level
Change page issue link font size from 10pt to 13pts

https://docs.google.com/presentation/d/1wulY-EOHEaV95VSru6WxcD6ESc2tBqQ1WOkxXom2MzM/
Phabricator is used for managing product development process. Design team uses phabricator for a few things...

- Managing design debt
- Being assigned cards by product and engineering
- Giving feedback on design
- Doing design review
1. Managing design debt

Design has its own backlog column, managing this backlog and nominating things to be worked on by the team is its main purpose.

*Examples of “Design debt” tasks:*

- **T117000 - If a user navigates to same page more than once, show suggestion to save that page**
- **T186116 - Introduce animation on graphics in the app onboarding screens**
- **T187206 - Surface page issues on articles more prominently to Android app users**
- **T165382 - Update the app icon to be i18n-friendly**
2. Being assigned cards by Product & Eng

Any card that needs attention from design or needs actual design should be assigned to the designer.

Here’s a doc for tips on writing phab cards that are helpful to design: https://docs.google.com/document/d/18iBq5hGtYgZAAedJpEIn2UQsWpLPVrNHFKKexBKkpw
3. Giving feedback on design

The designer will often post solutions or links to solutions on Phab. This also serves as a place for community and team to provide *directional feedback*.

Detailed feedback about interfaces, interaction, and visual design is instead better provided on InVision or Zeplin.

- **T190838 - Add multiple language selection to app Settings**
- **T191515 - View of "Other languages" an article is available in should show app languages in a preferred list**
### 4. Doing design review

Once a task is done, it should be in an environment that is accessible to the designer. The easier it is to access early stage prototypes the better.

*For example, on Android, gerrit patches can be checked out directly in Android Studio, or via an Alpha build of the app.*

The Designer’s responsibility is to match and verify what is provided with the original spec, then sign off and pass it for Product Review.

**NO CHANGE THAT AFFECTS USER EXPERIENCE SHOULD BE RELEASED TO PUBLIC WITHOUT DESIGNER’S SIGN OFF.**
Some things that impact user experience while using a digital product.

- Interface changes
- Interaction changes
- Adding/removing/modifying of any functionality
- Significant change in performance
- Visual design changes - TEAM DESIGNER IS THE APPROVER of these changes (Color, Typography, Layout)
WORKING WITH DESIGN

Tools and documentation
Google Docs, Slides and Spreadsheets are typically used for presenting:

- Design briefs
  - E.g. [Android multilingual support](#); [Page Issues (MW)](#)
- Product design ideas/pitches
  - [Mobile app editing toolbar](#)
- Comparative analysis
  - [Explore feed comparative analysis](#); [Editing on iOS](#)
- Findings from user studies and testing
  - [Android Multilingual user testing](#); [Testing with Movement mbrs iOS](#); [New Wikitext editor](#)
- Documenting product design specifications
  - "[On this day] Android design doc"
Onwiki Community & Development

Mediawiki is also where wireframes, mocks and links to prototypes are provided to aid Community consultation on product development.

- Community consult on Android micro-contributions
- Web/Print_Styles
- Content_translation/V2
- Initial iOS Nearby (Places) mediawiki page (not example)

Phabricator is used to capture Design research & Design-centric tasks. Some examples:

- Sample design [EPIC] task
- Sample design feature task format
- Sample research (user testing) task
Sharing Mocks, prototypes and transitions

1. Invision

Used to present wireframes, workflows, interfaces, interactions, and visual designs to stakeholders.

We use it to comment on particulars, request iterations, and provide general feedback. Also used to perform usability testing in some cases.

Examples

- Edit wikidata description prototype
- “On this day” feature in Android
Sharing Mocks, prototypes and transitions

2. Zeplin

Tool to deliver a design to engineering. It reduces overhead on creating long spec documents. Zeplin automatically integrates into our process.

Examples:

- Android board example screen
- Sample Editing UI on Zeplin
Sharing Mocks and Prototypes (cont.)

3. Github/YouTube

Misc interactive prototypes and non-interactive videos to show transitions, etc.

4. Phabricator (within tickets or ‘Pholio’ mocks)

Less common since constantly uploading images to Phab is tiresome.
User testing & feedback

- **Remote unmoderated testing** on [Usertesting.com](https://usertesting.com)
- **Moderated/Guerrilla testing**
  - Both internal (Design Strategy Research) & 3rd party agencies conduct in-person testing
  - Mobile apps uses a survey to recruit a pool of participants specifically for testing
- **A/B testing and limited releases**
  - Releasing to certain wikis & monitoring results and feedback from the Community
- **User surveys** – running short usage surveys on Google Forms or Qualtrics
- **Monitor user feedback channels** – Apps have a “Chore wheel” where each week a member reports on feedback from OTRS, the App store and SM mentions
### Reviewing

- **Reviewing latest changes**
  - **Mobile Apps** use [Android Studio](https://developer.android.com/studio) or [XCode](https://developer.apple.com) to review patches latest developer patches in Android or iOS respectively.
  - **Web teams** can usually see latest patches on [Betalabs](https://www.betalabs.com) or [Testwiki](https://testwiki.com).

- **Screencapture/casting**
  - **Android tool**: nifty opensource tool to screencap or screencast your mobile.
  - **Other mobile screencast tools**: DU recorder, Quicktime (connecting iOS devices to Mac).
Case studies

A work in progress compilation showing how design is integrated into the WMF product process.

https://docs.google.com/presentation/d/1c49D2jCEVx0YZ461hEewy6eoVZhk05KCh8nPbGItCk/