Therapy for your CMS: Improving the User Experience

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Philadelphia

May 4, 2011

About the University of Houston

- Established 1927
- 3rd largest university in Texas
- 12 colleges, 320 degree programs
- 38k FTE
- Carnegie-designated Tier One public research university
- Located in Houston, TX

About the UH Libraries

- Member of Association of Research Libraries
- 201 library staff
- Multiple libraries on campus
- Multiple CMSs
- 50+ content editors on intranet
- 30+ content editors on main website
- Varied familiarity with technology

UNIVERSITY of **HOUSTON** | LIBRARIES

OLD Intranet

University of Houston Libraries Intranet

#Dateformat(now(),"Mmmm d, yyyy")#

What's Hot

UH Libraries Learning Commons Pilot Project Report, LibQUAL Report 2007, LibQUAL Report 2006, Libraries' 2006 Institutional Effectiveness Report, 2009 Planning Budget Proposal, Strategic Directions Steering Committee, University of Houston Libraries Hurricane Response Plan (Word file), Revised Acquisitions and Collection Development Home Page, Systems Division Home Page, Library Building Project (Intranet), Library Building Project (Internet), Librarian Positions, Classified Staff Vacancies, Scheduled Interviews, Recent Librarian Appointments 2005 LibQUAL Results

Events

Dedication Celebration for Librarians Pumpkin Contest 2005, **2005 Awards Recognition Ceremony**, **2004 Awards Recognition Ceremony**, Jeff Retirement Jan 26,2007, Antonia Retirement - January 2007

General Resources

ARL Statistics, Ask POP, **E-Calendar**, **Instruction Statistics**, **Libraries Help Desk**, Librarians' Governance Documents, Library Committee Descriptions (Word), Library Hours, Library Policies and Procedures, Librarians by Name, Library Staff Telephone and E-Mail, UH-LIBNEWS (submit message), Logo Usage Information, Useful Internet Resources for Library Staff, Web Admin Tool, Web Server Logs, Weblogs, Wikis UH Libraries' Listservs, Question Point Login

UH Web Sites

Academic Calendar, Daily Cougar, Holiday Schedule, Human Resources Forms and Documents, Information Technology, Job Descriptions, Pay Structures, Manual of Administrative Policies and Procedures (MAPP), Online Directory, System Administrative Memoranda (SAM), UH Internet Connectivity Current Status, UH in the News, UH Today, University of Houston, UH Mail Codes, University of Houston Libraries, University of Houston System

Departments/Units

Acquisitions/Collection Dev.
  Textbooks
Administration
Branches
Circulation
Cataloging
Electronic Resources
Human Resources
Information Services
  Government Documents
  Information Skills
  Reference
ILS
Interlibrary Loan
Library Building Project
Library Development
Reserves
Special Collections
Systems Division

Committees

LMC, BSEC, Faculty Senate, Library Building Project Teams, LIDS, PCARC, Outreach CMC, SPAC, Strategic Directions Steering Committee, PWC, WMC, Travel, Marketing, Promotion, Safety Committee

Current Atomic Time

Intranet Redesign - 2008

- **Chose Drupal**
  - Powerful
  - Modular
  - Flexible
  - Active user community
  - Peer institutions using Drupal

Planning & Development

- Had clear goals
- Conducted surveys
- Utilized focus groups
- Added needed functionality
- Built what users wanted

UH Libraries Intranet

DEPARTMENTS

- :: Acquisitions
  - :: Electronic Resources
- :: Administration
  - :: Human Resources
- :: Branch Services
- :: Cataloging & Metadata Services
- :: Collections & Research Support
- :: Computer Systems & Networking
- :: Digital Services
- :: Information and Access Services
  - :: Interlibrary Loan
- :: Integrated Library System
- :: Liaison & Instruction Services
- :: Library Development
- :: Special Collections
- :: Web Services

View | Edit | Panel layout | Revisions | Track | Panel content

Library News

- **Staff Awards Feedback**
  Posted on ⏺ *2 May 2011* in *Committees & Task Forces*
- **ADs Meeting - April 28, 2011**
  Posted on ⏺ *29 Apr 2011* in *AD's Meetings*
- **UH in This Month's Texas Digital Library Newsletter!**
  Posted on ⏺ *27 Apr 2011* in *Digital Services Department*
- **Intermittent problems with Gale Virtual Reference Library**
  Posted on ⏺ *27 Apr 2011* in *Electronic Resources*
- **Organizing the Evaluation of Electronic Resources**
  Posted on ⏺ *27 Apr 2011* in *Training Committee*
- **UH Benefits Fair 2011 Libraries Table**
  Posted on ⏺ *26 Apr 2011* in *Marketing Committee*
- **Library Day with UH Softball**
  Posted on ⏺ *3 May 2011* in *Fun Outside the Stacks*
- **Love Makes a Family photography exhibit now on 3rd floor**
  Posted on ⏺ *21 Apr 2011* in *Branch Services*
- **Libraries table at Earth Day Carnival a BIG success!**
  Posted on ⏺ *21 Apr 2011* in *Marketing Committee*
- **CMC Meeting Minutes - Apr 2011**
  Posted on ⏺ *25 Apr 2011* in *Collection Management Committee*

more

COMMITTEES

- :: AD's Meetings
- :: Bylaws & Governance Documents Committee
- :: Collection Management Committee
- :: Committee on Committees & Elections
- :: Communications Task Force
- :: Faculty Senate
- :: Grievance Committee
- :: Librarian Promotion Committee
- :: Librarians' Meetings
- :: Library Experience Advisory Group
- :: Library Management Council
- :: Marketing Committee
- :: Public Workstations Committee
- :: Safety Committee
- :: Signage Committee
- :: Strategic Directions Steering Committee

ADMIN

It improved communication throughout the Libraries.

Users could collect data via webforms.

It was visually more appealing.

Many processes and workflows were automated.

There was much more info about departments and committees.

But issues began to surface

Create content

- **Audio**

  Audio files.

- **Electronic Resource License**

- **Event**

  Events have a start date and an optional end date as well as a teaser and a body. They can be extended by other modules, too.

- **Excel Data**

  Data files in Excel, tsv, or csv format

- **External Links**

- **Fund Code**

- **ILS Files**

  These are files which the ILS Department is making available for folks to download (batch load files, etc)

- **Image**

  An image (with thumbnail). This is ideal for publishing photographs or screenshots.

- **Library Logos**

- **Page**

  A *page*, similar in form to a *story*, is a simple method for creating and displaying information that rarely changes, such as an "About us" section of a website. By default, a *page* entry does not allow visitor comments and is not featured on the site's initial home page.

- **Panel**

  A panel a page layout broken up into rows and columns.

- **PDF**

  PDF file that you want to be viewed

- **Poll**

  A *poll* is a question with a set of possible responses. A *poll*, once created, automatically provides a simple running count of the number of votes received for each response.

- **Possible Training Opportunities**

  Training which it is possible for staff to attend. Interested staff should fill out the Training Request Form.

- **Profile**

  A user profile built as content.

- **Serials Review Request**

- **Staff Award**

- **Staff Awards Ceremony**

- **Story**

  A *story*, similar in form to a *page*, is ideal for creating and displaying content that informs or engages website visitors. Press releases, site announcements, and informal blog-like entries may all be created with a *story* entry. By default, a *story* entry is automatically featured on the site's initial home page, and provides the ability to post comments.

- **Template**

For example, users had to choose between 24 content types.

Home / Homepage

Homepage

| View | Edit | Panel layout | Revisions | Track | Panel content |

▼ Display settings

[Show layout designer]

Top

⚙

View: homepage_news_headline-News Headlines   ⚙

▶ View information

Left

⚙

Technology_Tools: Block   ⚙

▶ Library Tools

View: homepage_uhresources_links-Page   ⚙

▶ View information

Center

⚙

Key_Library_Info: Block   ⚙

▶ Key Library Info

Daily Cougar feed latest items   ⚙

▶ Daily Cougar

(Save) (Cancel)

Some modules, such as Panels, were too confusing.

Drupal terminology was unfamiliar.

Web Services spending too much time helping people.

The search functionality was miserable.

The Blocks page took 3 minutes to load.

Too many modules!

Took too long to do simple tasks.

Users needed ongoing training for the advanced as well as simple stuff.

Drupal terminology
w... ...iliar.

Web Services
spend...
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...ook
...d.

CMS UX
FAIL

To...

...g for
the advanced as well
as simple stuff.

Took too ...
simple tasks.

Don't the users of a CMS deserve a good user experience too?
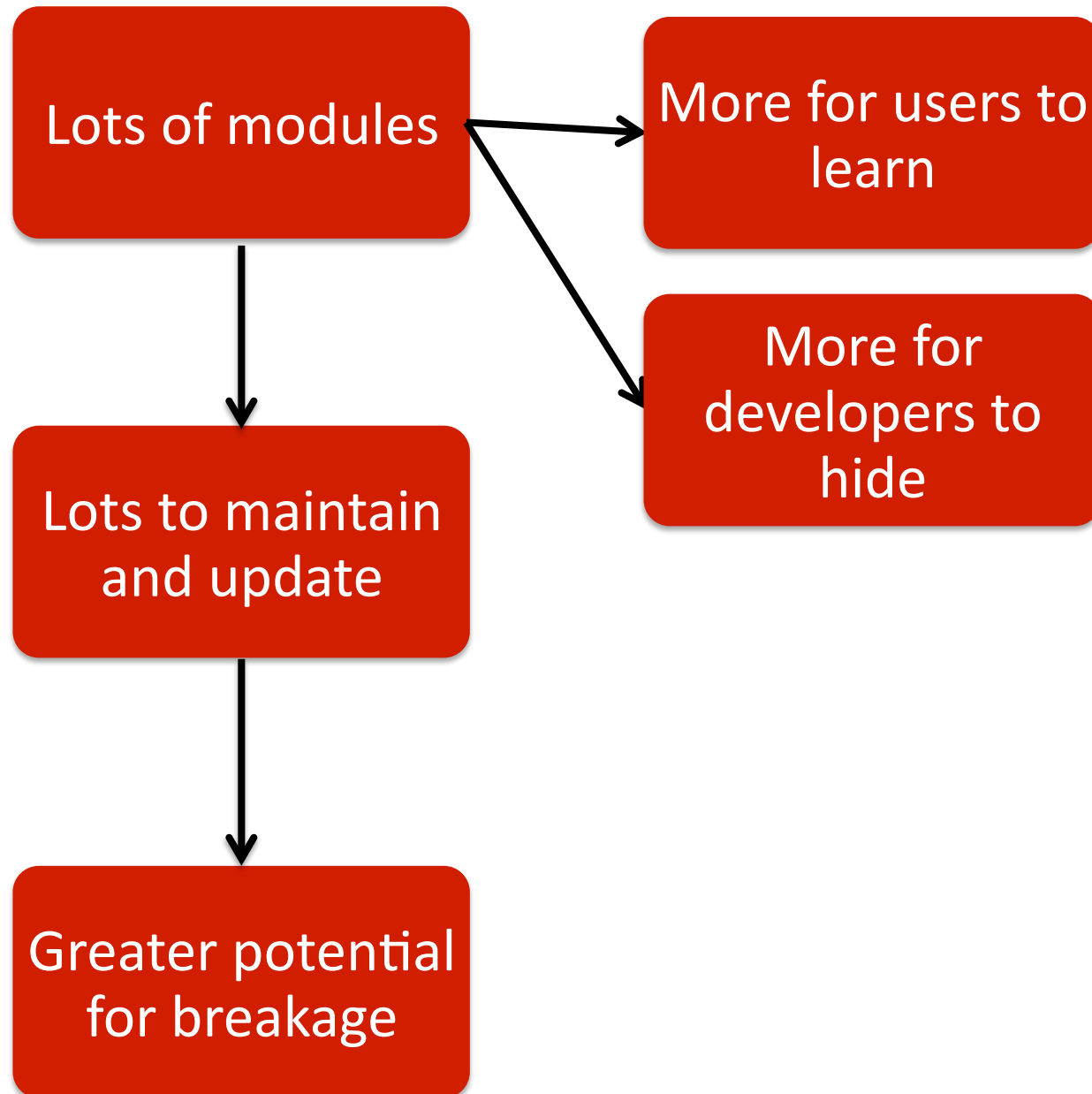
CMS UX Therapy

- Do research on modules FIRST

- Pay attention to your peers

- Follow the "use only what you need" philosophy

- Find balance between usability and functionality

- Don't give users too many options

CMS UX Therapy

- "Remove" the extraneous stuff
- Create templates for multiple page layouts
- Create roles for basic users as well as advanced users
- Documentation
  - How certain tools work
  - Reasoning for choices
- Create and embed self-help within CMS
- Use Google Analytics on your Intranet

```
Lots of modules  →  More for users to
                     learn

            ↘        More for
                     developers to
                     hide

    ↓

Lots to maintain
and update

    ↓

Greater potential
for breakage
```

CMS UX Therapy

An investment in CMS simplification and respect for the user experience can yield an extremely powerful system run by satisfied, happy users.

Main Website Redesign – 2010

- Applied lessons learned from Intranet CMS failure
- Created help video tutorials
- Picked more appropriate modules to help with creating a good UX
  - Admin module
  - Content locking module
  - Workflow module
  - Pathauto module
  - Custom modules
  - WYSIWYG editor

Main Website Redesign – 2010

- Conducted continuous usability testing with content editors on the new CMS during development

- Today, content editors are more eager to use the CMS and are more interested in keeping their content current

> **Site Page**

> **Blog entry**

> **Poll**

> **Profile**

> **Webform**

> **Event**

For example, we limited content types to six.

Interlibrary Loan

This document is now locked against simultaneous editing. It will unlock when you navigate elsewhere.

TITLE: *

Interlibrary Loan

Menu settings

☐ Delete this menu item.

MENU LINK TITLE:

Interlibrary Loan

PARENT ITEM:

-- Services

WEIGHT:

-50

CAPTCHA: no challenge enabled

Save   Preview   View changes   Cancel   Delete

EDITOR GROUPS:

Administration
Catalog Stuff
Computers & Printing
Development
Digital Services
Electronic Resources
Gov Docs
Human Resources
InterLibrary Loan

Right Block

BODY:

B I U ABC Heading 2

Interlibrary Loan (ILL) supports scholarly research by:

- Borrowing materials not available from any UH library
- Scanning and delivering articles to Faculty members
- Delivering library materials to Distance Education students
- Lending UH materials to other libraries

For UH users

All UH students, faculty, and staff are eligible for ILL services. Use ILLiad to place requests, request renewals, and manage your ILL account.

Login for registered ILLiad users

ILLiad Registration

To register for an ILLiad account you need:

Editing pages is now simpler, and extraneous fields are hidden.

Editing Business

Core	Database Name	Operation
☑	Business & Industry	Delete
☑	Business Source Complete	Delete
☐	CountryWatch	Delete
☐	EconLit	Delete
☑	Emerald Fulltext	Delete
☐	Hoover's	Delete
☐	JSTOR	Delete
☑	LexisNexis Academic	Delete
☐	LexisNexis Statistical	Delete
☐	Mergent Online	Delete
☐	TableBase	Delete
☐	Value Line	Delete
☑	Wall Street Journal	Delete

Add Databases

Save

We also built custom tools to make it easy for content editors to maintain their resources.

Whether developing a website **or** a CMS, always consider the user experience!

Thank You!

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Presentation available:
http://slideshare.net/vacekrae

Background article:
Improving the Drupal User Experience,
http://journal.code4lib.org/articles/4578