Gutenberg Author Experience Usability and Recommendations

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Summary

The new Gutenberg editor in WordPress is a substantial change from the previous editing paradigm. While it offers authors who develop familiarity with the interface a more pleasurable and powerful editing experience, the changes to the WordPress interface introduced by Gutenberg can cause significant difficulty for new and untrained users. This group represents a critical user segment for a platform like WordPress. The overall usability of WordPress for this group would be enhanced by modest design changes to the interface that improve visibility and discoverability of key functionality, and which help to visually explain the new concepts underlying Gutenberg.

Background

Carleton College is in the process of transitioning to WordPress from Reason CMS, a small, industry-specific CMS that was initially developed in-house.

Carleton has decentralized content governance. Individuals with varied tech, communications, and design skills in multiple departments maintain distinct sites that share a common theme. Many of these authors only interact with the CMS once every few months, giving them little opportunity to gain the robust tool familiarity that results from regular use.

I, along with my colleague Doug Bratland, recently performed a series of user observation studies to identify pain points in the Gutenberg-enabled WordPress interface for these users. Over the course of three sessions we asked over 16 college administrative staff to perform basic content management tasks such as creating a page, entering and formatting content, placing images, saving and viewing the page, managing its position in the page hierarchy, and reverting to a prior version. In order to gauge the "raw" user experience of WordPress, and to account for the average infrequency which Carleton's user population interacts with WordPress, we did not provide any WordPress training. Only one participant had previously used WordPress.

Some details on the setup we were testing with:
- WordPress 4.9.9 with the Gutenberg 4.5.1 plugin
- Multisite enabled; users had the Editor role

- Nested Pages plugin enabled

Author Experience Findings

- **Finding 1: Most participants had difficulty discovering how to add Gutenberg blocks**
  - Most participants took a lot of time to discover how to create new blocks
  - These users expressed significant frustration
  - Few participants noticed the plus icon in the upper left; most who noticed it did not associate it with the blocks
  - Several users gave up before discovering this
  - Few users discovered they could hit return on the last block to create a new block. Those who did find this feature struggled to convert this new block to anything except a heading/list/quote/preformatted block (the options presented for block transformation from paragraph)
  - No participants used the "/" method of creating a new block
- **Finding 2: While editing content inside existing blocks was fairly easy for most participants, they often had difficulty selecting and managing the blocks themselves**
  - Since the block concept was unfamiliar to them, they did not have a clear goal for their efforts
  - Until hover, blocks do not appear to be discrete units of functionality, so it doesn't seem like they can be selected to then manipulate
  - This appeared to be due to the fact that blocks are not visibly labeled, and thus offered no clear affordance for selection
- **Finding 3: Most participants had difficulty finding and managing block options**
  - Most users did not readily discover that some of the controls on a block were located in the right sidebar
  - Several failed entirely to discover this
- **Finding 4: Several participants did not identify the page title field**
  - This issue occurred when editing an existing page
  - These participants assumed this text represented a heading at the top of the content
  - This appears to be due to a reliance on placeholder text for labelling. (Nielsen Norman Group on placeholder text)
- **Finding 5: Many participants had difficulty finding the post metadata**
  - This was difficult when a block is in focus and the "Block" tab is active
- **Finding 6: Many participants experienced confusion between preview and update actions**
  - It was common for participants to enter the preview without realizing that their updates had not been saved or published

- ○ It was common to attempt to return to the edit view using the back button. This is not handled well in WP, which caused further confusion
- ○ The word "Update" seemed ambiguous, as it could refer either to pulling updates from the server or pushing updates to the server. I.e., "what does this update"?
- **Finding 7: Most participants had difficulty identifying the revision state to be restored**
  - ○ Most participants found the interface for viewing the revisions confusing
  - ○ It was difficult to identify which side (e.g. left or right) would be reinstated when the "Restore this Revision" button was pressed
- **Finding 8: No participants took the Gutenberg tour**
  - ○ All considered it an annoyance and dismissed it
  - ○ This underscores the need to ensure the interface is intrinsically usable for users who have not had any training
- **Finding 9: Many participants had difficulty reordering blocks**
  - ○ Users who attempted to drag and drop blocks were often unsuccessful in their attempts.
  - ○ Typically they were not able to identify the small, invisible (until you find them) hot spots where the block could be dropped

Author Experience Themes

- **Theme 1: Participants had difficulty discovering information and affordances that only appear on hover (or which are only labeled on hover)**
  - ○ Users did not broadly explore the interface
  - ○ They paid direct attention to elements that were already visible on the page and which suggested the action/subject they were seeking
  - ○ The Gutenberg interface obscures many controls, either revealing them only on hover or using unlabeled icons that do not clearly communicate their purpose to users
- **Theme 2: Participants were very task-driven.**
  - ○ They dismissed the Gutenberg tour because it seemed to be in the way of their task
  - ○ They did not mouse around experimentally; they only moused to elements that appeared connected to their task
  - ○ The Gutenberg interface is currently highly dependent on the tour and/or experimental mousing around for user discovery of key functionality
- **Theme 3: The tabbed sidebar interface was broadly confusing for users**
  - ○ They had considerable difficulty understanding the conceptual link between the controls in the sidebar and the selected block in the main editing area.
  - ○ The tabbed modal nature of the sidebar also presented difficulty.
  - ○ As a result, users often failed to discover controls placed in the sidebar.

Other Research

- [WPCampus Gutenberg Accessibility Audit](#)
- [Gutenberg Usability Study from 10up, June 2018](#)
- [Gutenberg Publishing Flow Usability Study from 10up, November 2018](#)
- [Gutenberg for Professional Writers Usability Study from 10up, May 2018](#)

Author Experience Recommendations

- **Leverage the interface to explain the novel blocks concept directly and persistently**
  - We can't rely on the existing walkthrough interface; users don't click in to it, and it seems unrealistic to rely on memory for users who infrequently use a tool
  - Visibly identify blocks at all times and ensure that key actions (like adding or deleting a block) are persistently available.
  - Provide a conceptual framework for authors by labeling novel elements and actions.
- **Actions that are not context-dependent should be visible at all times**
  - A prominent example: editors typically wish to add new content at the end of the existing content. An "Add new content" button, visible at all times at the bottom of the gutenberg content, would provide a clear affordance for this task in a location where users look for it.
- **Reduce dependence on mouseover/hover effects for affordances**
  - Users should not have to mouse around the entire interface to discover key functionality
- **Use visible labels for actions and major elements in the Gutenberg interface**
  - Label each key action with a persistently visible label (e.g. "Add Block" next to the plus icon); avoid "mystery meat" (Related: [Nielsen Norman Icon Usability article](#), [Video: Icons Need Text Labels](#))
  - Distinguish the title and main content areas with clear, visible labels
  - Avoid placeholder text labels and instructions; persistently label and provide instructions for fields and blocks.
- **Strengthen the visual association between blocks and their options**
  - The current interface is difficult to use because it violates the gestalt [Law of Proximity](#).
  - We could resolve this by placing the options more closely to the block. They could be presented in a panel directly attached to the block, but that would likely require major rework of the Gutenberg codebase
  - Alternately, we can use another gestalt principle to visually associate these UI elements: [Similarity](#). One approach would be to cover all elements except the

current block and options tab with a semi-transparent black overlay (see concept mockup 2).

- **Visually identify each block**
    - It should be clear that each block is an interactive unit of content with persistently visible affordances. Labeling and/or using graphic elements to indicate the boundaries of blocks would provide this clarity.
    - If each block were persistently labeled, it would help make the interface more self-explanatory for users in a number of ways
        - Users could immediately recognize that their content was made up of multiple, separate, individually-editable elements, e.g. blocks
        - Users would have an interface element *other than the content itself* that they could use as a "handle" for selecting the block (as distinct from the content within the block)
        - Users could see the structure of the content directly overlaid on that content. This would be considerably more useful for understanding how the content is structured than the current Block Navigation interface.
- **Leverage common WordPress terminology** (Addresses issue 3)
    - "Document" is not used elsewhere in WP. The convention is to use the singular version of the name of the current post type (e.g. Post/Page/Etc.).
- **Replace "Update" with a clearer label**
    - Prefer less-ambiguous labels wherever possible
    - "Save" or "Publish" seem like good, less-ambiguous candidates
- **Increase size of drop area in Gutenberg**
    - The entire top half of the block below and the bottom half of the block above could be an active drop zone for block reordering, leaving no "dead zones"
- **Clearly identify the "selected" version in the revisions interface**

Concept Mockups

Concept Mockup 1: Hover labels replaced with visible labels on buttons, regions, and blocks; visible "Add block" button at end of content explains concept in situ; "Document" replaced with "Post"; "Update" replaced with "Save"
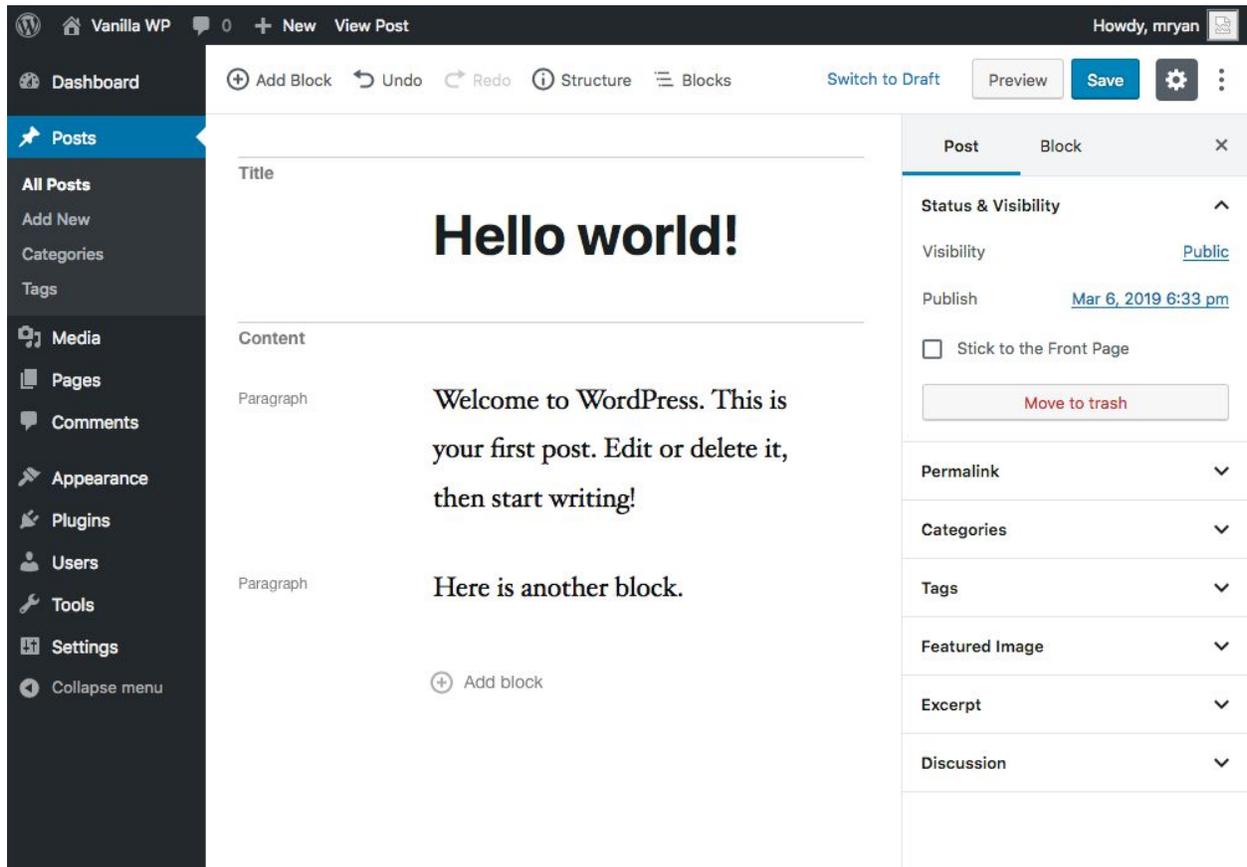
Concept Mockup 2: Currently selected block visually associated with options panel