We help good people achieve great things.
weADAPT is currently hosted on the open source CMS Drupal 7.

An upgrade to Drupal core is necessary as Drupal 7 will reach end of life in the next year. This means there's a requirement to upgrade the site to Drupal 9 (as Drupal 8 is end of life too!), which is a big undertaking as version 7 and 9 differ greatly, and the new version will need to be built from the ground up. Essentially, it will be similar to building a new site again, apart from importing all the existing content and users.

Given that the upgrade requires both an import and a rebuild, we tackled the scoping phase in two parts:

In part one we looked at migrating the data from Drupal 7 to Drupal 9.

In part two, we scoped recommendations to improve the user experience for both new visitors and existing members of weADAPT. Through this we explored how we could:

- tailor experiences to the user, based on their knowledge and understanding of the site
- create a more engaging and useful experience for the user
- encourage new users to understand the site’s purpose, benefit to them, and increase conversion (registration)
- create more useful interactions between different members on the site
- improve functionality to deliver a more relevant user experience
- create a more intuitive site navigation and architecture

See the following pages for further detail on the work completed for each section.
Part 1: Data migration

The data migration involves importing all site content, files and users from the current website’s database, into the upgraded website’s data structures. During the migration process the existing data structures (content types, taxonomy vocabularies, paragraph types etc) were recreated on a new Drupal 9 test website, including any custom fields. Data from these fields was also imported into the upgraded data structures.

Individual migration processes were created for each existing object type, with optional dependencies - for example we created a migration process for ‘users’ and another one for ‘user roles’. Because each user has at least one role, the ‘user role’ migration is a dependency of the ‘user’ migration. The same is applicable to content migration: since content pieces have authors, user migration is a dependency of content migration.

The migration has been executed in a dynamic way in order to allow content changes on the existing website. This means that content editing / adding new content on the existing website during the development of the migration process is not a problem, the final migration will mirror all content from the existing website.

The next phase of the migration process is to run through further import testing when we start the next phase of the upgrade.

Part 2: Improving user experience & site design

1a. Identifying the challenges

1. weADAPT’s site design is currently focused on providing a ‘tool’, rather than an experience to the user. While the tool element is important, communicating the strengths, value, benefits and reason weADAPT exists in a captivating way to users is equally important.

2. The homepage doesn’t provide new users with a clear picture of weADAPT; the onus is currently on the user to figure out what weADAPT does and how they can use it. This is problematic because it risks: 1) disengagement from the user; 2) lack of clarity about weADAPT is; 3) a limiting user experience, with missed opportunities to connect and share.
3. It seems that ‘Learn, Share, Connect’, instead of being a strong part of the site’s key messaging, have to some extent dictated the site’s navigation and architecture, when in actual fact, these are cross-cutting themes. For example, at present ‘Connect’ includes ‘Discussions’ and one could argue that by having a discussion with another person you are learning and sharing.

4. weADAPT has a diverse group of audiences, all of whom have varying knowledge of and engagement with the weADAPT site, as well as different specialisms and interests. At the moment I would argue the site ‘assumes’ you are a particular type of user - with prior knowledge of the tools available, an understanding of what weADAPT is and how to use it - who takes the time to figure everything out and read through much of the content.

5. The design of the site is now starting to look dated, and needs to be modernised to improve user engagement with content, and create a better user experience.

6. The discussion forums are currently underused, so there needs to be some exploration of how interactions can be improved, along with a simpler, rewarding user experience.

An overview of our recommendations

1. The site needs to engage with both new and returning users. It needs to be clear to new users what weADAPT is, how they can use the site and if it’s relevant to them. For ‘members’ it needs to be quick and easy for them to share content and see information that’s useful or relevant to them.

2. Clearer, more intuitive navigation and site architecture that promotes positive engagement with the site, and encourages meaningful interaction between users.

3. An engaging and modern design.

4. It’s important that the site caters for all the different audiences and doesn’t ‘assume’ the user has prior knowledge about weADAPT. It should also be accessible and communicate how weADAPT can be of use (or not of use) to them specifically.

1b. Our research - what others are doing

We looked at the format and structure of sites that provide online services to users, such as MailChimp, Asana, Trello, ResearchGate, Mendeley etc – while some are operating in a different sector to weADAPT, the way in which users interact with the site is not far removed from weADAPT. There are also commonalities between the way these organisations structure their sites to maximise user engagement and create a user experience that’s both positive and relevant. These sites all use a similar site architecture, which could be adapted for weADAPT’s purposes - to
modernise and simplify the site and improve the user experience, while retaining functionality and content. In short, there are lessons that can be learnt from these sites.

All the sites:

1. Are visually clean, simple and modern.
2. Use an uncluttered design that considers the user experience.
3. Have basic menu structures that streamline user journeys.
4. Have clearly signposted login areas.
5. Provide an overview and narrative about what they do.
6. At the 'overview' level of the site, they use simple, concise language to communicate - it’s a snapshot of what they do. For the user it enables them to get an understanding of the site and how they can interact with it.

Their homepages also structurally adhere to the same principles:

1. Section 1 (the hero): What we do and how you can benefit.
2. Section 2: Our strands of work and how you can benefit from each. They pre-empt the challenge and present the user with the solution.
3. End of the page: An action at the bottom of the page.

**Section 1: Hero area**

All tend to be designed in a very specific way:

- Explain their benefit in simple terms
- Use a simple menu structure
- Include a key action for the user
- Visually minimal and clear
Section 2: Middle sections

A clear overview of their different areas of work, all the time explaining how they benefit the user. They preempt the challenge and communicate the benefit.
Section 3: End of the page

This is an opportunity to encourage your audience to take action - ‘you’ve seen what we do, now get involved’.

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ResearchGate

Sites like ResearchGate also use the same style too:

- Visually clean, simple and modern.
- An uncluttered design that considers the user experience.
- Very basic menu structures.
- Clear login areas.
- They provide an overview and narrative about what they do.
- They use simple, concise language to communicate - this is an overview, a snapshot. For the user it’s a case of getting an understanding and then exploring what's relevant.

Structurally it adheres to the same principles:

- What we do and how you can benefit.
- Our strands of work.
- An action at the bottom of the page.
2. The weADAPT website

2a. Homepage

There are lots of ways we can improve the user experience on the weADAPT homepage. At present the homepage:

- Doesn’t have a clear architecture that enables intuitive user navigation. It needs a simplified layout with fewer distractions.

- It’s difficult to get a clear understanding how to use the weADAPT site or get a clear overview of what it does.

- There aren’t clear calls to action, i.e. registration, and the benefits of using the site aren’t communicated directly with the user.

- The menu structure can be simplified for improved navigation.

- The design needs to be updated to feel more modern and, more importantly, engaging!
2b. Revising the homepage

The revised structure of the homepage is designed to encourage interaction, and help the user to gain a better understanding of why and how they can use the site, and what the benefits are. There are various action points throughout the homepage which enable the user to find out more, explore content or join the weADAPT community.
2c. Sitemap

This simplified sitemap will help users to navigate in a more intuitive way throughout the site. We have also separated out ‘case studies’ and the ‘adaptation map’ as, at present, the map is being used as a primary entry point for case studies, which means it’s not easy for users to see the latest submissions, unless they switch the view to ‘list view’.

An observation of the current site was that research-related articles were getting mixed in with articles that are essentially weADAPT updates or news. We could resolve this by separating these content types out, or using the new dashboard/notifications (see below for more detail) to cater for weADAPT news.

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2d. weADAPT ‘members’ menu

1. **Your dashboard**  2. **Add content**  3. **Notifications**  4. **Messages**

We propose the introduction of a menu (and dashboard) for returning weADAPT members, in order to create a more tailored user experience.

1 - **Profile.** Displays the username once you have logged in, and when clicked links to the ‘member dashboard’ (see below for details).

2 - **Add content.** Enables the user to add content: case studies, news items, ‘noticeboard posts’ (see explanation below).
3 - Notifications. This bell icon is highlighted if you have new notifications. Notifications consist of: users you follow posting new content (see info below about the dashboard for more detail on this); a new user following you; your case study/article being read/downloaded a certain number of times, e.g. 10, 50, 100.

4 - Messages. This will enable users to interact with each other either individually or as a group.
2e. Discussion forums

Looking at the analytics for weADAPT’s discussion forums it’s clear to see that users are not engaging with this functionality.

Between Jan 2020 and November 2020:

- weADAPT’s most popular post had 918 page views, but only two comments were made.
- weADAPT’s tenth most popular page on the discussion forum had 99 views over the past year.

In the top 100 most popular discussions:

- 74% have had under 30 page views
- 50% of discussions have had under 15 page views
- 36% have had 10 views or under
- Over 70% of your discussions have had no comments

Discussion forums aren’t working, so what do we need to do about it?

Why aren’t people engaging?

People may not be engaging with the discussion forums for a number of reasons:

- You have to drill into the discussion content to understand what it’s about and whether or not it’s relevant. That takes a considerable amount of time and energy for a user.
- People don’t have a lot of time to work out whether or not a discussion is relevant to them.
• It may come down to a lack of awareness or interest in discussions.
• Some users may have mixed feelings about posting publicly in this way.

How do we overcome this?

weADAPT needs to move to a system where people can quickly and easily understand a) whether something is relevant to them, b) what it’s about c) the expected interaction. Using the top 100 most popular discussions from the last year as a sample, it’s easy to see that discussions fall into multiple categories:

- Events
- Webinars
- Training
- Focus groups
- Calls for expertise
- Jobs
- Scholarships
- Volunteering
- Funding opportunities
- Surveys
- Info/feedback

So we can also see users are repurposing the discussion forums to promote events, opportunities or training, or make requests - often these are not designed to be ‘discussions’.

By defining what these interactions are, and presenting them strategically around the site to maximise engagement, we should be able to increase interaction and engagement.

Our recommendation is that instead of discussions, they form a new content type, called ‘the noticeboard’ (interim name!). Noticeboard posts are:
• Posted by the user using the ‘add content’ button on the new user menu.
• Given a category (see suggested list below)
• Associated with themes/networks

These ‘posts’ then appear around the site on the member dashboard and on relevant theme and network pages.

But how can we still have conversations on weADAPT?

Two ideas for this are that we:
• introduce comment functionality with @user tagging for articles
• Utilise the new private/group chat functionality to support and promote discussion throughout the site in a more specific and targeted way.

<table>
<thead>
<tr>
<th>Discussion Type</th>
<th>User Group</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>weADAPT Articles</td>
<td>Individuals</td>
<td>Specific article comments &amp; @user tagging</td>
</tr>
<tr>
<td>weADAPT Noticeboard</td>
<td>Individuals &amp; Groups</td>
<td>Individuals &amp; Groups able to raise interest and facilitate discussion</td>
</tr>
<tr>
<td>Call for expertise</td>
<td>Individuals &amp; Groups</td>
<td>Individuals &amp; Groups able to raise interest and facilitate discussion</td>
</tr>
<tr>
<td>Survey</td>
<td>Event Hosts &amp; Attendees</td>
<td>Facilitate open discussion alongside events, endless opportunities to discuss ideas.</td>
</tr>
</tbody>
</table>

2f. Member dashboard

The member dashboard is the ‘home’ that users see when they are logged in. Here they can get the latest case studies, noticeboard posts, revisit bookmarked items (such as case studies and articles)
and find out who’s recently joined weADAPT. They can also update their own profile, view content they have submitted to weADAPT and view chat history.
2e. Registration

One of the challenges with the existing registration form is that it asks the user to input a lot of information immediately. This can be intimidating and potentially off-putting for the user.

A multi-stage registration form, would make registration less imposing.
2f. Help boxes

Some areas of the site are more intuitive for returning members than new visitors. We would recommend that 'FAQ,' 'Help' or 'More info' boxes are added to the site, with links to FAQ page items in a new tab. This supports new users interaction with and understanding of the site without hindering returning users.
2g. More engaging pages

We would recommend a rework of key landing pages to create a more engaging and dynamic user experience.

For themes, this might be by:

- Giving the pages a stronger identity.
- Providing a short introduction that anchors to more content further down the page.
- Bringing new content into a more prominent position on the page - latest case studies, articles and noticeboard posts.
- Using icons to separate types of content more clearly, i.e. case studies, articles etc.
- Displaying numbers of article views.
- Introducing filters for popularity, category, how recent the item is, etc.
Feedback following presentation of proposed changes

We have included key feedback from the weADAPT team below. Some of the feedback has been addressed directly underneath the comment, and the rest would need to be considered during the next stage of the project. weADAPT feedback is in italics.

Homepage feedback:

- **Visibility of participating organisations, both small and big equally, is important. If there’s a way to capture this through the homepage that would be helpful.**
  This is something for us to explore through wireframe revisions.

- **Displaying clickable individual themes on the ‘Explore our research’ block could be difficult, we don’t want to exclude themes, but there are some that are more populated than others.**
  A way to resolve this could be to add a button which links through to the ‘Our research’ landing page or theme landing page, which includes links to case studies, articles, adaptation map and themes.

- **While we like the simplified layout of the homepage and understand the logic behind it, it seems a shame to not have some recent featured research on there. weADAPT produces around five or more articles or case studies a week. It’s a shame these are not on the homepage wireframe. Largely like the homepage wireframe but there needs to be more of an opportunity to showcase news items.**
  This is something for us to explore through wireframe revisions. Perhaps a block displaying featured research.

Dashboard feedback:

- **It’s great to be able to tailor content but the site needs to break down disciplinary silos, so we need to ensure users are not just being presented with a blinkered view of weADAPT - we want to open them up to other areas to increase knowledge integration.**

- **Include the latest network members to submit content to weADAPT on the dashboard - this could give them greater visibility.**
• Rather than new members, this could be latest members with similar interests or contributing content you are interested in (e.g. coming from the orgs mentioned in the earlier comment).

• One for the wish list, but related recommended reads might be nice to have.

• Mailings - If notifications aren’t sent via email, there’s an expectation for the user to log in and keep up to date with that - this is unlikely. Therefore a way of receiving notifications by email would be useful.

• Like the noticeboard feature, but it would be good if notices could be tagged or made to display with multiple themes networks so it appears in multiple places. These ‘posts’ could appear around the site, perhaps on multiple theme pages, networks, the dashboard area, sent out as notifications, and perhaps even connected with other content, such as articles or profiles, or tags.

**General feedback:**

• Important that any redesign still promotes weADAPT as a source of high-quality, reliable knowledge. Great that design is very user friendly and intuitive/nice to engage with, but don’t want this to compromise integrity and reputation of the platform.

• Themes - Not all themes have intuitive titles, so where used we will likely need a few lines to explain each. One homepage a solution may be to link to the theme overview (or our research!) rather than individual themes. If we have themes listed on the homepage we need to expand the page and include the themes with descriptors as an entry point.

• A key goal is to enhance and accelerate learning across the climate change adaptation sector.

• Focussing on discussion and live (but moderated) knowledge exchange in the upgrade would be central

• We would also like more notifications to the user’s inbox on stats, engagement with their content, profile etc.

• More videos and multimedia around the site would be great too as well as good use of high impact imagery/photos etc, though I understand this is also a bandwidth issue.

• Our FAQ can be the basis of any new help section, that is accessible around the site.

• A new placemark (case study) view is needed.

• We also need a robust way to create, maintain and manage microsites - also with a basic template (cookie-cutter) approach - new business model?
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