Page ID: #.# Applied Cognitive Task Analysis

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Applied Cognitive Task Analysis

Description

Enter the **Description** here (REQUIRED).

A structured approach used to identify the demands and challenges of a particular task (or scenario) as well as account for the cognitive skills and strategies required for successful and effective performance.

Applied cognitive task analysis (ACTA) is a three-step method that involves three types of interviews with expert users as interviewees:

- 1. **Task diagram interview** identifies the most cognitively challenging subtasks.
- Knowledge audit identifies the knowledge and skills deployed in service of the tasks.
- 3. **Simulation interview** identifies key events and decisions during simulated performance and probes to determine the cues, actions, and judgments that had a bearing at these timepoints.

ACTA was developed by Militello et al. (1997) during a two-year project for the Navy Personnel Research and Development Center (NPRDC) in an effort to overcome the difficulty and inaccessibility associated with traditional cognitive task analysis (CTA) methods. ACTA is distinct from CTA, which is primarily used only by experts in a cognitive field.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- List of sequence of actions in a task and cognitively challenging subtasks.
- List of skills, strategies, cues, and potential barriers to performance success.
- Table with subtask cues, patterns, actions, situation awareness, and possible mistakes.
- Compiled cognitive demands table.

Recommended Uses

Enter the Recommended Use here. If there are no details, insert N/A or TBD.

- To understand the demands of the existing task environment, including the workflow and pain points that should inform specific project goals.
- To specify interaction requirements for users to achieve their intended outcomes, including the information (cues) that should be available to support choice of action.

Commented [DG1]: Phase Attribute = Understand

Commented [DG2]: Phase attribute = Specify

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- Requires expert users (as interviewees).
- Training and practice required to effectively administer and analyze the data.
- Data analysis is time-consuming.
- · Reliability and validity are difficult to assess.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

 Method does not require specialized training or experience in a cognitive field (e.g., cognitive science or psychology), but is best accomplished with some professional support and/or with some accumulated amount of practice.

Commented [DG3]: Expertise attribute = Training and practice

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

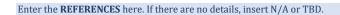
Cue, Task, Scenario

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References



Militello, L. G., Hutton, R. J., Pliske, R. M., Knight, B. J., & Klein, G., Randel, J. (1997).
 Applied cognitive task analysis (ACTA) methodology. Fairborn, OH: Klein Associates Inc.

- **Header** text can be edited, but **do not** change the text formatting.
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Document Properties

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Required Expertise	Select a Required Expertise: [] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [X] [Specify] [] [Produce] [] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Card Sorting

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Card Sorting

Description

Enter the **Description** here (REQUIRED).

A method that provides data on how users are likely to group concepts together and associate the items with named categories.

During a card sorting session, participants organize items or topics into categories that seem correct to them.

- In a **Closed Sort**, participants are asked to sort the items into prenamed categories.
- In an Open Sort, participants generate names for each grouping they create. Card sorting can be done with tangible cards (index cards or post-its) or using online software.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A report that captures comments made by participants during the session, including indications of where difficulties arose and perhaps 2nd or 3rd choices considered.
- A table of quantitative data, such as the number of times items were grouped together and the percentage of participants that chose any given name for a grouping.
- Metrics for low and high user-agreement, which may indicate that users understand
 information differently, that the content was not well understood, or that content can
 be included in more than one area.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

 To understand how users (or groups of users) process information that is or will be embedded in a system. Card sorting informs the organizational structure of a system (the information architecture) and preferred workflow, which may dictate design choices for menus, toolbars, and any other navigational aspect of the system or interface.

Commented [DG1]: Phase attribute = Understand

 To confirm organizational structure in a proposed design by testing and validating it with representative users.

Commented [DG2]: Phase attribute = Evaluate

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Card sorting is an inherently content-centric technique that does not take the users' tasks into consideration.
- May capture "surface" characteristics only, if participants do not consider what the content is all about.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

Method can be leveraged with minimal training and practice.

Commented [DG3]: Expertise attribute = DIY

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Information Architecture, Workflow, Validation

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

- Killam, B., Preston, A., McHarg, S., Wilson, C. (2009). Card Sorting. In Usability Body of Knowledge. Retrieved April 29, 2020, from http://www.usabilitybok.org/card-sorting
- Usability.gov (2013). Card Sorting. In usability.gov. Retrieved April 29, 2020, from http://www.usability.gov/how-to-and-tools/methods/card-sorting.html

References

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• N/A

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Document Properties

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Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [] [Specify] [] [Produce] [X] [Evaluate] [] [Measure]
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Page ID: #.# Cognitive Walkthrough

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Cognitive Walkthrough

Description

Enter the **Description** here (REQUIRED).

A method for evaluating user interfaces by analyzing the cognitive process required by the user. Cognitive walkthrough (CW) was developed to bring cognitive theory closer to the practical design, development, and evaluation of user interfaces (Wharton et al., 1992).

Unlike other usability evaluation methods, such as heuristic evaluation, CW is a task-based method that focuses on:

- Understanding a system's learnability for new or infrequent users without prior knowledge or training.
- Assessing the extent to which the system or interface is designed to support
 cognitive processing and decision-making of the end users performing complex
 tasks.

CW is particularly effective for evaluating walk-up-and-use systems like websites or kiosks where users would have little or no training.

CW can be conducted by a single evaluator or a group of evaluators. The evaluator(s) choose a specific task from the pool of tasks that the system or interface is intended to support, and determines whether the user's background knowledge, together with cues from the interface, will lead to a correct sequence of actions in achieving the task goal and actions.

The evaluation is structured around four questions asked of every step in the task:

- 1. Will the participant adopt the expected goal?
- 2. Will the participant find controls in the interface appropriate for action toward the goal?
- 3. Will the participant select the action that seems likely to make progress toward the goal?
- 4. Will the participant evaluate the system's feedback for evidence that progress is being made toward the goal?

 $\begin{tabular}{ll} \textbf{Commented [MG1]:} Link to Heuristic Evaluation method page \end{tabular}$

Empirical evidence is still not available to support the claim that CW is better suited to user interface redesigns than heuristic evaluation, but this method does support the consideration of alternative interface approaches that heuristic evaluation does not support well.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A list of success stories, failure stories, design suggestions, and problems that were not the direct output of the walkthrough.
- A report on the design implications of each failure story with recommended user interface improvements, particularly on how to improve learnability of the system.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To understand the task environment using a pre-existing design solution.
- To refine development specifications and user interaction expectations.
- To identify areas for improvement throughout the iterative design cycle.

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- The value of the data is limited by the skills of the evaluators.
- Approach tends to yield a relatively superficial and narrow analysis that focuses on the words and graphics used on the screens.
- The method does not provide an estimate on the frequency or severity of identified problems.
- Relative to user testing, the method is associated with a greater tendency to report known concerns and issues that do not impact usability in actual use environments.
- Following the method exactly as outlined in the research is labor intensive.
- Groups of evaluators are needed to derive quality outcomes.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

Method is usually carried out by human factors engineers or cognitive psychologists.

Commented [DG2]: Phase attribute = Understand

Commented [DG3]: Phase attribute = Specify

Commented [DG4]: Phase attribute = Produce AND Evaluate

Commented [DG5]: Expertise attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Interface, Cue, Task, Goal

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

 Blandford, A., Bevan, N., Wilson, C., Werner, B., & Mascari, M. (2011). Cognitive Walkthrough. In Usability Body of Knowledge. Retrieved April 29, 2020, from http://www.usabilitybok.org/cognitive-walkthrough

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

Wharton, C., Bradford, J., Jeffries, R., & Franzke, M. (1992). Applying cognitive
walkthroughs to more complex user interfaces: experiences, issues and
recommendations. in Bauersfield, Bennett and Lynch, Eds. CHI'92 Conference
Proceedings, 381-388 Addison W. http://doi.acm.org/10.1145/142750.142864

Enter Related Content Section Details here...

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Document Properties

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Page ID: #.# Diary Study

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Diary Study

Description

Enter the **Description** here (REQUIRED).

A method used to collect qualitative data from users in their own words over a given time period.

Participants are provided a diary or journal to record their perceptions, thoughts, and attitudes about activities of interest. The activities could include those that happen in work, home, and/or leisure environments. Participants may draft entries freeform or they may also be provided with predefined questions that are answered repeatedly over time.

Diary studies are longitudinal and, depending on the scope of the project, last anywhere from several days to a month or longer.

Diary entries are traditionally provided by writing in either a paper or electronic diary or journal. Alternatives to text-based entries include photographs with descriptions, or entries recorded in some digital medium (audio or video).

At the conclusion of the study, a post-study interview with each participant is usually conducted as an opportunity to get clarification and probe for additional insights during discussion of diary entries.

Diary studies are almost entirely qualitative endeavors that are aimed at understanding the circumstances and environment in which users and customers are engaged. They afford the collection of insights derived from scenarios that can be difficult to create in laboratory settings.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A comprehensive report, along with relevant artifacts (e.g., diary entries, photographs, audio or video recordings).
- Depending on the methods used, the report may also include more quantitative data, such as the frequencies of recorded data.

 A report that has the potential to summarize how findings evolve and change over time, thus leading to a rich understanding of the end-to-end user experience from the customer perspective.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To provide a valuable source of data for use scenarios, task analysis, requirements elicitation, customer journey maps, and feedback on technology use and implementation.
- To gain an unrestricted view of what is most important to the users, especially when studying long-term product adoption.

Commented [DG1]: Phase attribute = Plan AND Understand AND Specify

Commented [DG2]: Phase attribute = Measure

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- Diary studies are unlikely to provide the rich or detailed understanding that can be realized from observational studies.
- Burden of the study involvement tends to be on the participants, which can make recruiting and full completion difficult.
- Other than frequencies of recorded data, quantitative data and analyses can be quite limited, if not negligible, due to the qualitative nature of the data.
- Self-reported data may not be equivalent across participants (e.g., one person's definition of a slow system may be different than others).
- Analysis of data may end up being conducted without enough participant clarification.
- Participants must remember to make entries at desired times, when they may not have the ability to do so.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

Method can be leveraged with minimal training and practice.

Commented [DG3]: Phase attribute = DIY

Techniques

On Hold

DO NOT ENTER

Glossary TermsEnter the **Glossary Terms** here. If there are none, insert "None."

Artifact

SourcesEnter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References
Enter the REFERENCES here. If there are no details, insert N/A or TBD.

• N/A

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Document Properties

Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A diary study is a method used to collect qualitative data from users in their own words over a given time period.
Required Expertise	Select a Required Expertise: [] [Hire a Pro] [] [Training and Practice Required] [X] [DIY]
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Page ID: #.# Ethnographic Study

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Ethnographic Study

Description

Enter the **Description** here (REQUIRED).

A holistic qualitative study of users in the context of their actual environment over an extended time period. Data is gathered through observation, interviews, and artifacts, such as documents and photographs.

Ethnographic research provides qualitative insights about users' situations, goals, constraints, and behaviors. These qualitative factors give a more comprehensive, nuanced view of users' perspectives than other research methods.

Typically, ethnography involves embedding the researcher in a target culture, society, or group for several months up to a full year. However, a modified method known as rapid ethnography allows for a faster study process.

Rapid ethnography uses regular, frequent meetings to report findings and iteratively finetune the focus of the research process. The technique can be used to quickly investigate or explore a specific question or theme in a limited amount of time. This approach is beneficial in health informatics, as rapid data gathering supports critical decision-making necessary on a shorter timeframe.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A comprehensive report, along with relevant artifacts, such as observer logs, diaries, photographs, audio or video recordings, and interview transcripts.
- Depending on the methods used, the report may also include quantitative data, such as time-and-motion information.
- A summary of qualitative insights about users' situations, goals, constraints, and behaviors that supports a more comprehensive, contextual understanding of the users' perspectives.

Recommended Uses

Enter the Recommended Use here. If there are no details, insert N/A or TBD.

- To define the problem addressed in a project and support decisions on scope.
- To understand the users' needs and support of the creation of personas.
- To understand the workflow of the operational environment and support the completion of task analyses.
- To identify interaction requirements for the system that will be designed.

Commented [DG1]: Phase attribute = Plan

Commented [DG2]: Phase attribute = Understand

Commented [DG3]: Phase attribute = Specify

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- The data can be highly interpretive and depends on completeness and objectivity of the observations made by the researcher.
- Cost to plan and conduct observations may limit use.
- Rapid ethnography may not be as comprehensive as longer-term ethnographic studies.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

 Specialized training is highly recommended. The method is best leveraged with some familiarity with contextual inquiry methods, to avoid observer bias.

Commented [DG4]: Expertise attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Qualitative, Contextual Inquiry, Persona, Artifact

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

 Cathy Herzon, C., Skrobe, R., Wilson, C., & Battle, L. (June 2009). Ethnography. In Usability Body of Knowledge. Retrieved April 29, 2020, from http://usabilitybok.org/ethnography.

 $\label{eq:References} \textbf{Enter the REFERENCES} \ \text{here. If there are no details, insert N/A or TBD.}$

N/A

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Document Properties

Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	An ethnographic study is a holistic qualitative study of users in the context of their actual environment over an extended time period.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [X] [Plan] [X] [Understand] [X] [Specify] [] [Produce] [] [Evaluate] [] [Measure]
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Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
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Page ID: #.# Focus Group

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Focus Group

Description

Enter the **Description** here (REQUIRED).

A group discussion where five to 10 participants are led by a moderator through a series of questions aimed to uncover attitudes, beliefs, desires, and thoughts in relation to a given topic.

When the goal is to get feedback on a design solution, participants can spend part of the session working with a prototype. After participants have worked with the prototype, they can come together and discuss their reactions to the prototype.

Outcomes

Enter the Outcomes here. If there are no details, insert N/A or TBD.

- A set of detailed notes, transcripts of the sessions, and possibly audio and/or video recordings.
- A report that provides a summary of key findings and of the themes that arose in the sessions.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To identify the problem and get the information needed to reach consensus on the scope of the project.
- To gather information about users and their operational environments, including workflows for products and systems already in place.
- To gather opinions on concepts and design strategies and thoughts on system requirements for new design solutions.
- To measure product design post-launch for compatibility with previously recorded user data.

Commented [DG1]: Phase attribute = Plan

Commented [DG2]: Phase attribute = Understand

Commented [DG3]: Phase attribute = Specify AND Evaluate

Commented [DG4]: Phase attribute = Measure

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- More outspoken participants in focus groups can dominate and sway the conversations.
- The findings are based on subjective self-reporting that may not be entirely accurate.
- Conclusions must be drawn cautiously when group is a sample of convenience.
- Moderators must be trained to manage several group dynamics while also maintaining the appropriate line of questioning for the topic.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

 Method is best accomplished with some professional support and/or with some accumulated amount of practice.

Commented [DG5]: Expertise attribute = Training and

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Workflow, Prototype

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

- Wilson, C. (2006). Focus Group. In Usability Body of Knowledge. Retrieved April 29, 2020, from http://www.usabilitybok.org/focus-group
- Usability.gov (2013). Focus Groups. Usability.gov. Retrieved April 29, 2020, from https://www.usability.gov/how-to-and-tools/methods/focus-groups.html

References

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Document Properties

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Page ID: #.# Heuristic Evaluation

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Heuristic Evaluation

Description

Enter the **Description** here (REQUIRED).

A usability evaluation method in which one or more reviewers, preferably experts, compare a software, documentation, or hardware product to a list of design principles (commonly referred to as heuristics) and identify where the product follows and does not follow those principles.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

 A list of potential usability problems along with their associated design violations, typically categorized by severity and illustrated with screenshots.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To identify issues within the operational environment of the system when pre-existing design solutions and/or those of the competitors are available.
- To evaluate versions of the user interface at one or more timepoints during the iterative design cycle.

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- Does not include interaction with intended users of the product or application. As a result, it may identify issues that are not pertinent to the intended user and may miss issues that impact end user performance.
- Not a substitute for a usability test, as the two methods often uncover different types of usability issues.

Commented [DG1]: Phase Attribute = Understand

Commented [DG2]: Phase Attribute = Produce AND Evaluate

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

- Usability experts identify more issues than non-experts, but with training, non-experts
 are able to identify usability problems (Nielsen, 1992).
- A domain expert is needed to assess technical applications or products.

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Usability, User Interface

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

Nielsen, J. (1992). Finding usability problems through heuristic evaluation. *Proceedings* of the SIGCHI conference on human factors in computing systems (Monterey, CA): 373380.

Commented [DG3]: Expertise Attribute = Training and practice OR hire a pro

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A heuristic evaluation is a usability evaluation method in which reviewers compare a product to a list of design principles (commonly referred to as heuristics) and identify where the product follows and does not follow those principles.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Heuristic Evaluation - Participatory

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Heuristic Evaluation - Participatory

Description

Enter the **Description** here (REQUIRED).

An extension of a traditional heuristic evaluation in which user experience (UX) practitioners partner with work-domain experts to assess a system's design.

In a traditional heuristic evaluation, one or more reviewers, preferably experts, compare a software, documentation, or hardware product to a list of design principles (commonly referred to as heuristics) and identify where the product follows and does not follow those principles. The participatory heuristic evaluation is used for the assessment of highly technical or complex systems where domain expertise is crucial.

The addition of work-domain experts in the participatory heuristic more readily affords the assessment of:

- Task flow
- Suitability of the design to the task
- Suitability of the design to the user

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

 A list of potential usability problems along with their associated design violations, typically categorized by severity, illustrated with screenshots, and design recommendations.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To identify issues within the operational environment of the system when pre-existing design solutions and/or those of the competitors are available.
- To evaluate versions of the user interface at one or more timepoints during the iterative design cycle.

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Commented [DG3]: Phase Attribute = Produce AND Evaluate

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Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Domain experts may not be able to add any further information to that of the heuristic evaluation of the usability experts, because of their lack of understanding of usability principles and rationale.
- The limited availability of work-domain experts may limit the number of expert
 evaluators that can be used, greatly reducing the number and scope of usability
 problems that can be found.
- Does not include interaction with intended users of the product or application. As a result, it may identify issues that are not pertinent to the intended user and may miss issues that impact end user performance.
- Not a substitute for a usability test, as the two methods often uncover different types of usability issues.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

- Usability experts identify more issues than non-experts, but with training, non-experts are able to identify usability problems (Nielsen, 1992).
- Inclusion of domain experts central to the participatory heuristic evaluation.

Commented [DG4]: Expertise Attribute = Training and practice OR hire a pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Usability, User Interface

Sources

Enter the $\mbox{\bf REFERENCES}$ here. If there are no details, insert N/A or TBD.

N/A

References

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A participatory heuristic evaluation is an extension of a traditional heuristic evaluation in which UX practitioners' partner with work-domain experts to assess a system's design.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
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Page ID: #.# Interview - User

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Interview - User

Description

Enter the **Description** here (REQUIRED).

A conversation with an informant that can range from being unstructured to a highly regimented set of questions that gather straightforward responses with no deviation or follow up.

Many formalized (i.e., method-based) interviewing frameworks exist. Interviewing is a useful way to collect in-depth information about users' needs, experiences, and perspectives on work. Interviewing is used, at times, in concert with other methods to triangulate toward an analytical goal, but often serves as the only analysis for some studies.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A timeline-ordered listing of the interviews with relevant demographic information from interviewees.
- Artifacts that provide detail sufficient for the study purpose, including but not limited to: notes, recordings, diagrams, descriptions of observations, materials shared by the interviewees, and any results from additional methods (e.g., ratings, rankings, answers to closed-response questions).
- A compilation of outcomes organized by interviewee, topic, and/or objectives, which captures high-interest responses (one-off insights and exemplary stories) and supports analysis of trends and emergent patterns.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

 To inform development and implementation of other methods within a project (observations, survey-questionnaires, task analysis, etc.).

Commented [DG1]: Phase attribute = Plan

To build an understanding of users' roles within an operational environment, including
perspectives on workflow and common issues and problem areas encountered within
existing systems.

 To obtain users' perspectives on emerging design solutions, which highlights preferences and supports the specification of requirements. Commented [DG2]: Phase attribute = Understand

Commented [DG3]: Phase attribute = Specify

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Managing and analyzing significant volumes of data can amount to a labor-intensive effort.
- Skill differences between interviewers and the consistency of approach might be vary when the effort is divided across a team.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

- Specialized training typically is required for many method-based approaches.
- Interviewing is generally a skill best accomplished with some professional support and/or with some accumulated amount of practice.

Commented [DG4]: Expertise attribute = Hire a pro

Commented [DG5]: Expertise attribute = Training and practice

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Artifact

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A user interview is a conversation with an informant to collect information about users' needs, experiences, and perspectives on work.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [X] [Plan] [X] [Understand] [X] [Specify] [] [Produce] [] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
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Page ID: #.# Keystroke Level Modeling

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Keystroke Level Modeling

Description

Enter the **Description** here (REQUIRED).

Used to improve the efficiency of human-computer interaction by identifying and eliminating unnecessary user actions. Keystroke level modeling (KLM) simulates how trained, expert users will perform on the system design.

This method is useful for comparing predicted performance across different variations on a user interface. However, it does not require users or a working prototype — only a description of the path through the design is needed.

With KLM, a given task flow through a user interface is broken down into pieces (keystrokes, mouse clicks, moving hands back and forth between the keyboard and mouse, etc.). A lookup table is then used to identify the interaction time for each piece. The total task time is calculated by adding all the actions together.

KLM is the simplest variant of the GOMS (Goals, Operators, Methods, and Selection) modeling method. It is among the few models of human-computer interaction that is based on empirical research.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

Predicted performance times for all tasks using each alternative interface approach.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To estimate cost savings associated with improved user efficiency.
- To predict performance improvements of design changes yet to be implemented and/or compare the efficiency of competing designs.
- To measure a design against performance criteria.

Commented [DG1]: Phase Attribute = Plan

Commented [DG2]: Phase Attribute = Produce

Commented [DG3]: Phase Attribute = Evaluate

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Valid only for repetitive tasks that do not entail problem-solving.
- Valid only for expert users who do not make any errors.
- Does not account for user context, such as interruptions or fatigue.
- Does not assess readability or layout of the user interface.
- Provides no insight into how useful or enjoyable the product under design will be.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

The quality of the KLM analysis depends highly on the experience of the modeler, who
must make accurate assumptions, such as that a good typist will take 0.12 seconds to
press a key.

Commented [DG4]: Expertise Attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Usability, Efficiency, Human-Computer Interaction

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	Keystroke level modeling simulates how users will perform on the system design and helps improve the efficiency.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [X] [Plan] [] [Understand] [] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
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Page ID: #.# Literature Consultation

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Literature Consultation

Description

Enter the **Description** here (REQUIRED).

A methodical review of applicable publications (e.g., books, research articles, relevant blog posts, usability evaluations, conference abstracts, and private sector reports) on a selected topic. The resulting report evaluates and summarizes available published data (including gaps) as a basis for future investigation.

A literature consultation contrasts with a formal literature review (or systemic review), which is an established academic process that can take months. A formal literature review will typically involve complex inclusion/exclusion criteria and require multiple reviewers to assure the review is comprehensive.

A literature consultation is compressed into a shorter time period (from two weeks to a month), with less rigorous search and documentation requirements. A literature consultation is not an informal search, annotated bibliography, or collection of summaries of reviewed materials. It is an organized and structured approach to exploring available knowledge — including gray literature (information produced outside of traditional commercial or academic publishing) — on a topic of interest.

Outcomes

Enter the Outcomes here. If there are no details, insert N/A or TBD.

• A report that includes the objectives and focus questions, methodological details (e.g., search terms, searched databases, and articles reviewed, etc.), and a written discussion that synthesizes the data for an integrated viewpoint on the topic.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

• To understand the operational environment — e.g., factors that might impact workflow in a targeted context of use.

Commented [DG1]: Phase attribute = Understand

To support interface design choices — e.g., perceptual or cognitive factors that might impact visibility of a control on an interface.

Commented [DG2]: Phase attribute = Produce

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- A literature consultation is time intensive, if strictly observed.
- The lag between conclusion of work and its publication can introduce delays in current state of knowledge in a field.
- It can be difficult to determine reliability given varied publication standards. For
 example, peer-reviewed research articles will have strict standards that are not applied
 with all sources.
- The best results require access to libraries and/or databases for many of the journal articles, which is not always readily obtained.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

Method can be leveraged with minimal training and practice.

Commented [DG3]: Expertise attribute = DIY

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

None

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

N/A

References

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A literature consultation is a methodical review of applicable publications on a selected topic.
Required Expertise	Select a Required Expertise: [] [Hire a Pro] [] [Training and Practice Required] [X] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [] [Specify] [X] [Produce] [] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Screen Consultation

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Screen Consultation

Description

Enter the **Description** here (REQUIRED).

Involves a UX practitioner reviewing and providing informal feedback on a small number of interface designs (screenshots or a functional prototype). A screen consultation relies on the experience of the UX practitioner, and not that of actual users.

This method is more of an informal as-needed service than it is a formal method. It is suited to support weekly sprint reviews for Agile development. It can be used early in development to help avoid common design pitfalls and catch potential problems before they are committed to code.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

· Advice, mockups, or other documentation.

Recommended Uses

Enter the $Recommended\ Use$ here. If there are no details, insert N/A or TBD.

 To refine interaction requirements and/or identify potential usability issues with interface throughout the iterative design cycle — e.g., troubleshooting a screen layout or the workflow between screens.

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

 Practitioners risk providing poor recommendations if they do not spend enough time understanding the users and their needs.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

 $\label{local_commented} \textbf{Commented [DG1]:} \ \mbox{Phase attribute = Specify AND Produce } \ \mbox{AND Evaluate}$

• Service is best provided by a trained UX practitioner.

Commented [DG2]: Expertise attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Interface, Interaction

Sources

Enter the $\mbox{\bf REFERENCES}$ here. If there are no details, insert N/A or TBD.

• N/A

References
Enter the REFERENCES here. If there are no details, insert N/A or TBD.

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A screen consultation involves a UX practitioner reviewing and providing informal feedback on a small number of interface designs (screenshots or a functional prototype).
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [X] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
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Page ID: #.# UI Design Audit

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

UI Design Audit

Description

Enter the **Description** here (REQUIRED).

Assesses a user interface (UI) for compliance to style guides or design guidelines (such as the iOS Human Interface Standards for mobile devices). The audit report provides a list of instances where the UI design violates the guidelines.

Operating system developers, device makers, and application development environment providers often create guidelines for UIs to ensure consistency across their platform and provide the best user experience. Improved consistency allows new users to apply what they know from other applications to the new application.

The government may also develop guidelines to ensure a standard functionality or usability across many products within a domain. Ensuring that these standards are met can significantly reduce the time and effort required to learn to use an application and is expected to reduce errors.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A completed checklist and results reported as pass or fail.
- A list of issues with impact ratings indicating severity of anticipated user frustration and dissatisfaction.
- Issues may also be prioritized as critical or non-critical with respect to anticipated
 impact on the users' experience, the organization's credibility and reputation, and the
 potential for harm to human life.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

• To determine whether the current design is in compliance with established style guidelines.

Commented [DG1]: Phase attribute = Evaluate

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

Guideline documents can be large, complex, and/or needlessly constraining. As a result,
if an evaluator is not immersed in the system or guidelines, it may take a significant
amount of time to perform an audit.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

• The evaluator needs knowledge of and familiarity with the applicable guidelines.

Commented [DG2]: Expertise attribute = Training and Practice

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

None.

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

N/A

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A UI design audit assesses a user interface for compliance to style guides or design guidelines.
Required Expertise	Select a Required Expertise: [] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [] [Specify] [] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Usability Walkthrough - Pluralistic

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Usability Walkthrough - Pluralistic

Description

Enter the **Description** here (REQUIRED).

A version of a traditional usability walkthrough in which groups of individuals engage to generate usability feedback on early interface designs.

In a traditional usability walkthrough, a target user is given the key tasks and works through them using a prototype. In the pluralistic variation, representative users and development team members walk through the tasks together with the aim of uncovering usability issues and discussing design solutions.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- A ranked list of usability concerns along with possible design or function changes to improve usability.
- Recommended improvements to user interface (UI) designs based on collaboration among representative users, subject matter experts, system developers, and usability specialists.
- Increased development team understanding of users' perspectives, goals, and limitations.

Recommended Uses

Enter the $\bf Recommended\ Use$ here. If there are no details, insert N/A or TBD.

- To test early paper prototypes the low-fidelity artifacts can spur more creative thinking among participants.
- To come to consensus on a design involving different user types.

Commented [DG1]: Phase attribute = Produce AND

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Low-fidelity prototype cannot mimic functional production software.
- A limited number of tasks/screens can be evaluated in this setting.
- Analysis of group produced data must account for "group think."

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

• This approach is best accomplished when moderated by a usability expert.

Commented [DG2]: Expertise attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Prototype, User Interface

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

 Werner, B. and Wilson, C. (2005). Pluralistic Usability Walkthrough. In Usability Body of Knowledge. Retrieved April 29, 2020 from http://usabilitybok.org/pluralistic-walkthrough

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

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Enter the Related Content Section Header here...

User Testing

- Prototype development
- · Identify key tasks
- Identify representative participants
- Recruiting

Enter the Related Content Section Header here...

Focus Group Moderation

- Running a focus group
- Identify representative participants
- Recruiting
- Affinity mapping

Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A pluralistic usability walkthrough is a version of a traditional usability walkthrough in which groups of individuals engage to generate usability feedback on early interface designs.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Usability Review - Unmoderated

Primary Content

Title

Enter the **Title** of the **Method** here (REQUIRED).

Usability Review - Unmoderated

Description

Enter the **Description** here (REQUIRED).

A method based on heuristic evaluation that is intended to be performed by reviewers who may have clinical or task-based expertise but are not usability experts.

As with a traditional heuristic evaluation, reviewers compare a software, documentation, or hardware product to a list of design principles (commonly referred to as heuristics) and identify where the product does not follow those principles. However, with an unmoderated usability review, a larger number of reviewers is required (i.e., 10 or more versus 2-3). Manual or automated forms can be used to gather and consolidate results from multiple reviewers.

The approach is motivated by reports by Nielsen (1989; Molich & Nielsen, 1990) arguing that reviewers do not have to be usability experts: When aggregated, the evaluations made by "several" reviewers will find "most" of the issues identified by more expensive methods.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- Screen-by-screen list of comments and findings submitted by end users. Associated
 with each comment/finding will be the submitter's clinical role, the task that was being
 carried out, and the severity of the finding.
- A report with general comments about system usability from the reviewers.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To identify issues within the operational environment of the system when pre-existing design solutions and/or those of the competitors are available.
- To evaluate versions of the user interface at one or more timepoints during the iterative design cycle.

 $\label{lem:commented} \textbf{[MG1]:} \ \mbox{Link to Heuristic Evaluation method page}$

Commented [DG2]: Phase Attribute = Understand

Commented [DG3]: Phase Attribute = Produce AND Evaluate

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- Requires many reviewers, which may not be as efficient as using professional reviewers.
- Not a substitute for a usability test, as the two methods often uncover different types of usability issues.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

 Method intended for end-user reviewers without usability expertise, but facilitation of sessions best accomplished with some training and practice.

Commented [DG4]: Expertise Attribute = Training and

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Usability

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

- Nielsen, J. (1989). Usability engineering at a discount. In Salvendy, G. and Smith, M.J. (Eds.), Designing and Using Human-Computer Interfaces and Knowledge Based Systems, Elsevier Science Publishers, Amsterdam, 394-401.
- Molich, R., and Nielsen, J. (1990). Improving a human-computer dialogue. Communications of the ACM 33, 3 (March), 338-348.

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	An unmoderated usability review is a method based on heuristic evaluation for reviewers who may have clinical or task-based expertise but are not usability experts.
Required Expertise	Select a Required Expertise: [] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Usability Test - Formative

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Usability Test - Formative

Description

Enter the **Description** here (REQUIRED).

An assessment test that compares the usability of a design against specific measurable performance and/or satisfaction goals.

Usability testing is performed iteratively throughout the design and development process. Key goals of testing are to inform design decisions with targeted user data and estimate user performance within a particular system design.

An evaluation involves developing a test plan, recruiting representative users to participate, conducting test sessions, analyzing results, and disseminating findings. Testing may occur in the field, in a simulated environment, or remotely/virtually.

An essential distinguishing factor of usability testing, compared to other usability inspection methods, is the inclusion of representative end users attempting realistic tasks with the system or a representation of the system.

Usability testing is commonly described as either formative or summative in style. Because it is meant to help "form" the design of a product, a formative usability test can be performed earlier in development than a summative evaluation and typically requires a lower level of effort.

When used with more exploratory testing, the facilitator may employ the "think aloud" technique, in which participants to verbally report their experiences and thought processes while completing the tasks during testing.

Results of a formative usability test can be less formal than in a summative evaluation, as suits the needs of designers, developers, project managers, and other project participants.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

Commented [MG1]: Link to Usability Test - Summative method page

- A summary of measures for efficiency, effectiveness, and satisfaction. Examples include
 task time, the number of steps participants took to complete the tasks, accuracy,
 completeness, and the results of a satisfaction questionnaire.
- A list of usability problems categorized by severity and frequency. The rankings can be determined by the impact and persistence of the problem.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To understand the task environment using a pre-existing design solution.
- To refine development specifications and user interaction expectations.
- To identify areas for improvement throughout the iterative design cycle.

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

- Requires a solid foundation of quality research aimed to understand the context of use, realistic use scenarios, and user needs early in the design process.
- Runs the risk of focusing on ease of use without proper evaluation of the system's
 usefulness to end users.
- More time-consuming and resource intensive than other methods, such as heuristic evaluation or cognitive walkthrough.
- Artificial or contrived environments may produce results that do not generalize to actual work conditions (Rubin & Chisnell, 2008).
- Not all problems will be found with small samples of users (Faulkner, 2012).

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

- Training in experimental design and research methods is highly recommended.
- Testing sessions should be conducted by an experienced facilitator/moderator.

Techniques

On Hold

DO NOT ENTER

Commented [DG2]: Phase = Understand

Commented [DG3]: Phase = Specify

Commented [DG4]: Phase = Evaluate

Commented [DG5]: Required Expertise = Hire a Pro

Commented [DG6]: Required Expertise = Training and Practice Required

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Usability, Context of Use, Use Scenario, Efficiency, Effectiveness, Satisfaction

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

- Faulkner, L. (2003). Beyond the five-user assumption: Benefits of increased sample sizes in usability testing. Behavior Research Methods, Instruments, & Computers, 35, 379-383
- Rubin, J., & Chisnell, D. (2008). Handbook of Usability Testing. Indianapolis, IN: Wiley Publishing, Inc.

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A formative usability test is an assessment test that compares the usability of a design against specific measurable performance and/or satisfaction goals.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [X] [Understand] [X] [Specify] [] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Usability Test - Summative

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Usability Test - Summative

Description

Enter the **Description** here (REQUIRED).

A form of validation that is performed late in the design process, when the system or application is significantly developed.

Usability testing is performed iteratively throughout the design and development process. Key goals of testing are to inform design decisions with targeted user data and estimate user performance within a system design.

An evaluation involves developing a test plan, recruiting representative users to participate, conducting test sessions, analyzing results, and disseminating findings. Testing may occur in the field, in a simulated environment, or remotely/virtually.

An essential distinguishing factor of usability testing, compared to other usability inspection methods, is the inclusion of representative end users attempting realistic tasks with the system or a representation of the system.

Usability testing is commonly described as either formative or summative in style. A summative usability test is performed at a late stage when attention turns toward usability and performance metrics. It is typically conducted in field environments where the application or system is intended to be used.

Summative usability tests generally focus more on quantitative measures, such as task success, time on task, use errors, and user satisfaction scores, although qualitative data is often collected during the debrief interview following completion of the tasks.

Outcomes

Enter the $\boldsymbol{Outcomes}$ here. If there are no details, insert N/A or TBD.

 A summary of measures for efficiency, effectiveness, and satisfaction. Examples include time spent completing tasks, rates of successful task completion, and the results of a satisfaction questionnaire. $\label{lem:commented} \begin{tabular}{ll} \textbf{Commented [MG1]:} Link to Usability Test - Formative \\ method page \end{tabular}$

 A report that identifies use errors and calls for assistance along with attributed causes for each.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

 To validate the design and assess the system's fitness for the existing operational environment.

Commented [DG2]: Phase = Evaluate

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

- The system or application is all but complete at this point; discovering a significant usability problem will likely result in higher cost and delay.
- All user types must be represented in the testing; it may be difficult to recruit sufficient sample of each user type.
- Usability in a laboratory does not guarantee usability in more realistic conditions.
- Can be time and resource intensive to do well.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

- Training in experimental design and research methods is highly recommended.
- Testing sessions should be conducted by an experienced facilitator/moderator.

Commented [DG3]: Required Expertise = Hire a Pro

Commented [DG4]: Required Expertise = Training and Practice Required

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

Usability, Validation, Efficiency, Effectiveness, Satisfaction

Sources

Enter the REFERENCES here. If there are no details, insert N/A or TBD.

• N/A

ReferencesEnter the **REFERENCES** here. If there are no details, insert N/A or TBD.

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	A summative usability test is a form of validation that is performed late in the design process, when the system or application is significantly developed.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [] [Specify] [] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# User Experience Assessment

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

User-Experience Assessment

Description

Enter the **Description** here (REQUIRED).

An integrated approach that includes user-research activities and user-testing activities. User-experience assessments (also known as user-experience evaluations) are conducted to determine how well the user needs identified in research are addressed in the product or service.

In a user-experience assessment, users are recruited to fit the expected user types for a planned system, and a user-research method such as contextual inquiry or focus group is completed with them.

As part of the summarization phase, participants are asked to help develop testable tasks and scenarios that best describe their activities, individual motivations, and the context of their work.

The results of this user-research activity should drive requirements and system design, but they can also be used to inform formative and summative user tests. The same participants that participated in the user-research activity can be used in the evaluation, a new group of participants can be used, or a combination of each can be recruited.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

- Detailed descriptions of users, their needs, desires, and the context of their activities.
- Testable user scenarios and tasks.
- Gap analysis describing the difference between the desired user experience and the product or service.
- A list of usability problems categorized by importance with recommendations for redesign.

Commented [DG1]: aka User Experience Evaluation

Commented [MG2]: Link to Focus Group method page

 $\begin{tabular}{ll} \textbf{Commented [MG3]:} Link to Usability Test - Formative \\ method page \end{tabular}$

 $\begin{tabular}{ll} \textbf{Commented [MG4]:} Link to Usability Test - Summative method page \end{tabular}$

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

- To identify user needs, understand the context of use including the workflow and the task environment — and specify system requirements (accomplished through user research).
- To measure the capability of the product or service to meet the user needs identified in the earlier phases (accomplished through user testing).

Commented [DG5]: Phase attribute = Plan AND Understand AND Specify

Commented [DG6]: Phase attribute = Produce AND Evaluate

Limitations

Enter the **Limitations** here. If there are no details, insert N/A or TBD.

 Success of the user-experience assessment depends on a solid, agreed-upon test plan, which includes a timeline, dependencies, research objectives, target-user identification, and key tasks.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

- User-research methods vary in experience level required to execute. Training is required for all methods, and expert level plan and materials review is required prior to the start.
- User-testing methods are best accomplished with professional support or some accumulated practice.

 $\textbf{Commented [DG7]:} \ \textbf{Expertise attribute = Hire a Pro} \\$

Commented [DG8]: Expertise attribute = Training and Practice

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the Glossary Terms here. If there are none, insert "None."

User Research, User Testing, Use Scenario

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

N/A

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

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Enter the Related Content Section Header here... Needs two sections since this encompasses two areas

User Research

Details for each section should be formatted as they are intended to be viewed (text formatting, list formatting, hyperlinks, etc.)

- Persona Development
- Contextual Inquiry
- Ethnographic study
- Structured Interviews
- Focus Group
- Survey

Enter the Related Content Section Header here...

User Testing

Details for each section should be formatted as they are intended to be viewed (text formatting, list formatting, hyperlinks, etc.)

Moderated user testing

- Formative Scenario Based
- Preference study

Unmoderated user testing

- Card Sort/Tree Study
- Computer driven scenario testing

Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	User-experience assessments (also known as user-experience evaluations) are conducted to determine how well the user needs identified in research are addressed in the product or service.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [X] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [X] [Plan] [X] [Understand] [X] [Specify] [X] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# User Survey - Questionnaire

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

User Survey - Questionnaire

Description

Enter the **Description** here (REQUIRED).

Structured lists of questions designed to collect data from a range of individuals in a way that limits bias and ensures that the collected data can be compared across respondents.

User surveys are often used to collect background information but can be useful in quantifying subjective experiences, especially when the goal is aggregating or comparing those experiences across many responses.

Generally, surveys are completed by filling out forms. They can be used to collect quantitative data (e.g., ratings on a scale) and qualitative data (free responses to openended questions). Online survey tools allow these forms to be distributed easily and usually the responses are stored within the tool. The responses are then compiled and analyzed by an expert.

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

 A report describing the population invite, the participants and their backgrounds, and the results and discussion of quantitative and qualitative analyses — including lists of themes extracted from open-ended questions.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

 To gather requirements, feedback during design phases, and as part of field testing though user surveys can be conducted at any phase of development.

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

 Because responses are often very subjective, care must be taken when designing the survey and analyzing the results.

- Surveys can be used to gather a general sense of what is or is not working, but they
 usually cannot pinpoint specific points of failure.
- More weight is often placed on quantitative results. However, even if meaningful, these results are not always statistically significant. Surveys should be used in combination with other methods to fully evaluate an application.

Required Skills and Expertise

Enter the **Required Skills and Expertise** here. If there are no details, insert N/A or TBD.

• The results of a survey are only as good as the questions asked. It is important that the survey is designed well by trained experts.

Commented [DG1]: Expertise attribute = Hire a Pro

Techniques

On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

Qualitative, Quantitative

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

 Usability.gov (2013). Online Surveys. Usability.gov. Retrieved April 29, 2020 from http://www.usability.gov/how-to-and-tools/methods/online-surveys.html

References

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	User surveys are structured lists of questions designed to collect data from a range of individuals in a way that limits bias and ensures that the collected data can be compared across respondents.
Required Expertise	Select a Required Expertise: [X] [Hire a Pro] [] [Training and Practice Required] [] [DIY]
Project Phase	Select a Required Expertise: [X] [Plan] [X] [Understand] [X] [Specify] [X] [Produce] [X] [Evaluate] [X] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]

Page ID: #.# Visual Modeling

Primary Content

Title

Enter the Title of the Method here (REQUIRED).

Visual Modeling

Description

Enter the **Description** here (REQUIRED).

A range of methods to represent a proposed user interface (UI) visually. Visual modeling is done so that design elements and information can be seen and compared, particularly when there are multiple solutions or designs possible.

Visual models can range in fidelity from a storyboard to a structured wireframe to a high-fidelity UI design. Some visual models can be interactive and can allow for usability testing. These visualizations can bridge the gap between development teams and business owners (or user workgroups).

Outcomes

Enter the **Outcomes** here. If there are no details, insert N/A or TBD.

• A visual representation of a design or concept that can be used to guide development.

Recommended Uses

Enter the **Recommended Use** here. If there are no details, insert N/A or TBD.

Visualization can be useful throughout the design cycle, with utilities that include:

- To aid in consideration of interaction requirements.
- To compare the advantages and disadvantages and potential design solutions.

Limitations

Enter the Limitations here. If there are no details, insert N/A or TBD.

• The visualization may not match the underlying technical or design constraints.

Required Skills and Expertise

Enter the Required Skills and Expertise here. If there are no details, insert N/A or TBD.

Commented [DG1]: Phase attribute = Specify AND Evaluate

Required skills varies. A visualization can be drafted with pen and paper, but experience with software tools may be required to create the most informative visualizations.

Commented [DG2]: Required expertise = DIY AND Training and Practice

Techniques On Hold

DO NOT ENTER

Glossary Terms

Enter the **Glossary Terms** here. If there are none, insert "None."

User Interface, Wireframe,

Sources

Enter the **REFERENCES** here. If there are no details, insert N/A or TBD.

• N/A

References

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• N/A

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Categories	[CATEGORIES USAGE (AND ACTUAL CATEGORIES) TBD]
Excerpt	Visual modeling is a range of methods to represent a proposed user interface (UI) visually
Required Expertise	Select a Required Expertise: [] [Hire a Pro] [X] [Training and Practice Required] [X] [DIY]
Project Phase	Select a Required Expertise: [] [Plan] [] [Understand] [X] [Specify] [] [Produce] [X] [Evaluate] [] [Measure]
Property Name	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
State of Current Design	Select a Required Expertise: [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] [CHECKBOX] [VALUE] []
Tags	[TAGS USAGE (AND ACTUAL TAGS) TBD]
[OTHER PROPERTIES?]	[OTHER PROPERTIES NOT YET DISCOVERED FROM RAW CONTENT SOURCES?]