Heuristic Evaluation Checklist

How to Conduct an Effective Heuristic Evaluation?

- Define the scope of your evaluation
- Know your end-user
- Choose your set of heuristics.
- Set up an evaluation system and identify issues
- Analyze and summarize findings

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1 Visibility of system status

The system should always keep users informed about what is going on, through appropriate feedback within reasonable time.

#	Checklist	Yes	No	N/A	Comments
1.1	Is the terminology of the menu items user-friendly?				
1.2	If the system processes a request for more than 3 seconds, is the loader displayed & is there a hint of how much time the processing will take?				
1.3	Does every screen start with a title that describes the page content?				
1.4	If a user can select multiple options, does the system show which options are already chosen?				
1.5	Is it clear which page a user is on?				
1.6	Do the icons indicate the status of the page?				
1.7	If the user selects or changes the order of objects, does the system reflect the changes?				
1.8	Are clickable elements highlighted in the hover state?				
1.9	If the system is loading for more than two seconds, is the loader shown?				

2 Match between system and the real world

The system should speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order.

#	Checklist	Yes	No	N/A	Comments
2.1	Is the system designed with users' habits in mind?				
2.2	Is navigation located in the familiar for users place: at the top or sidebar?				
2.3	Does the system speak users' language with familiar words, phrases, and concepts rather than system-oriented terms?				
2.4	Are all questions, if they refer to users, concise and unambiguous?				
2.5	Do metaphors unambiguously reveal their meaning?				
2.6	Do icons clearly represent their meaning (e.g. is search icon represented by a magnifying glass?)?				
2.7	Do hints help users perform an action?				
2.8	Are all abbreviations and acronyms explained (e.x. 4AD*)?				
2.9	Does the system do some part of work for users: offers ready currency signs, country mobile codes, division of numbers into threes (9,999,999)?				

3 User control and freedom

Users often choose system functions by mistake and will need a clearly marked "emergency exit" to leave the unwanted state without having to go through an extended dialogue. Support undo and redo.

#	Checklist	Yes	No	N/A	Comments
3.1	When users complete an action, does the system skip unnecessary steps like 'submit' or 'apply'?				
3.2	Can users delete their account?				
3.3	Is there a cancellation feature if it's needed?				
3.4	It is possible to cancel the process?				
3.5	Can users edit their personal information?				
3.6	Does the page have breadcrumbs to provide navigation for multilevel processes?				
3.7	Can users overcome any system issues?				
3.8	Can users make a backup of a current version?				

4 Consistency and standards

Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform conventions.

#	Checklist	Yes	No	N/A	Comments
4.1	For complex fields (password, username), does validation take place in real-time?				
4.2	Can users see the limit of characters that can be entered into the field?				
4.3	Are the fields case-sensitive (when applicable)?				
4.4	Do the fields contain default values (when applicable)?				
4.5	In the forms with 2+ fields, do the button remain inactive until users fill in all of the fields?				
4.6	Is the validity of the field checked upon completion of the entry? (not at the time of filling and not by pressing a button)				
4.7	Is the name of the field always visible (in the filled state as well)?				
4.8	Are users able to preview changes if reverting them takes a long time?				
4.9	Do error message indicate the corresponding error field?				
4.10	Is the input of incorrect data type in the field blocked (e.g. typing numbers in the name input field)?				

5 Error prevention

Even better than good error messages is a careful design which prevents a problem from occurring in the first place. Either eliminate error-prone conditions or check for them and present users with a confirmation option before they commit to the action.

#	Checklist	Yes	No	N/A	Comments
5.1	Is the page navigation similar to the navigation on other pages?				
5.2	Are the main navigation items always available and not hidden behind the menu button?				
5.3	Is all information users need at a particular point visually? (users don't need to memorize)				
5.4	Is the logo in the header displayed on every page and leads to the main page?				
5.5	Does the menu contain sub-items that are visually clear?				
5.6	Is the field title always available?				
5.7	Are the icons intuitive? (e.g. the search icon looks like a magnifying glass)				
5.8	Are the menu items non-generic? (don't include common titles, e.g. 'catalogue' or 'goods')				
5.9	Do icons have captions?				
5.10	Are the links recognizable?				

6 Recognition rather than recall

Minimize the user's memory load by making objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate.

#	Checklist	Yes	No	N/A	Comments
6.1	Do you have industry or company formatting standards that are followed consistently everywhere?				
6.2	Do the system or a product never confuse the users by using different words, actions, design, or situations to derive the same meaning?				
6.3	Does the component placement (home icon, cart icon, search bar etc.) follow the users' mental model & patterns familiar to the users?				
6.4	Is the size & color of components consistent (buttons for example) throughout the product?				

7 Flexibility and efficiency of use

Accelerators — unseen by the novice user — may often speed up the interaction for the expert user such that the system can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

#	Checklist	Yes	No	N/A	Comments
7.1	Does the system allow experts to use shortcuts or customize them?				
7.2	Does the system allow power-users to chain together multiple actions that can be automatically triggered?				
7.3	Does the system allow users to approach tasks in multiple ways to suit their working style?				
7.4	Can experienced users take advantage of accelerators and other secondary features designed to speed up commonly performed actions?				

8 Aesthetic and minimalist design

Dialogues should not contain information which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

#	Checklist	Yes	No	N/A	Comments
8.1	Is the information, essential to decision making, displayed on the screen?				
8.2	Is the “signal” maximized and the “noise” limited?				
8.3	Are universal visual patterns that carry positive connotations used throughout the page?				

9 Help users recognize, diagnose, and recover from errors

Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution.

#	Checklist	Yes	No	N/A	Comments
9.1	When an error is found, is the required field highlighted and the cursor is placed there?				
9.2	Do the tips stay away from user criticism?				
9.3	When the button is not active, is there a hint why?				
9.4	Do the error pages 404 and 503 tell the user what to do next?				
9.5	Are all errors written in the same style and tone of voice?				
9.6	Does the text of the error communicate the possible cause and the following actions? (if the user cannot correct the error, e.g.: "We are updating the server. Try in 2 hours"				

10 Help and documentation

Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation. Any such information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large.

#	Checklist	Yes	No	N/A	Comments
10.1	Can users skip or start onboarding from the beginning?				
10.2	Is there a live chat on every page of the site or application?				
10.3	Is the FAQ page user-friendly, i.e. divided into categories and searchable?				
10.4	Can users resume work where they have left off after receiving help? (e.g. the help page opens in a new tab)				
10.5	Do important explanations remain displayed on the screen as long as the user needs them? The user shouldn't write down explanations anywhere.				
10.6	In case users can't find the answer to their question, is there an option to ask a new question? (or else there should be hotline contacts, email, etc.)				
10.7	Before performing potentially dangerous actions (e.x. deleting files), does the system ask for user's confirmation and explains the consequences of deletion (for non-recoverable data)?				

Out of space?

Use the next page for additional checklists

#	Checklist	Yes	No	N/A	Comments

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Source: Usability Inspection Methods. By Jakob Nielsen and Robert Mack