[Presentation: Norene Kelly and Jack Polifka](#h.ae0t9xb4693h)

[Overview Week 3 HCI Presentation - January 29th, 2016](#h.fv99nx2fo9rj)

[Questions](#h.h8vghjvjgek8)

[My Questions for Norene Kelly](#h.ghammjrzk496)

[My Questions for Jack Polifka](#h.43lrf73hmyid)

[Questions Answered in Class](#h.vzdboul0b1oc)

[Jack Polifka Presentation Notes - Primer: Iterative Process](#h.xcgqh03q3liw)

[What is an iteration?](#h.ag68piynf3a2)

[Benefits of Iteration](#h.nygpdfaep98)

[Method Used in Chemistry Project Case Study](#h.jw52opb5nup6)

[Examples of lessons learned:](#h.su3t1u1lph4e)

[GMAP Electronic Form Case Study](#h.ils65wkj55xd)

[Week 4 - Presentation Reflection](#h.cdbclxumv27n)

[About Assignment](#h.71l51stufkog)

[Workiva Discussion](#h.ylw0ywhwe0ho)

[Questions for discussion](#h.teh00foh4qyl)

[Reviewing Workiva's Website](#h.u3z90f5psm2)

[Other Topics for Discussion](#h.2sc1vtomiruh)

[References](#h.y5iwj3vpzjp)

# Presentation: Norene Kelly and Jack Polifka

## Overview Week 3 HCI Presentation - January 29th, 2016

All students (on-campus and online) must post at least 1 topic that the student would be interested to research and then write a short proposal. Submit at least one topic for proposal. Students can propose a project or a set of activities that are part of their current research, project for a different class, or project student is interested to implement/try in near future on campus or at work. All topics must be relevant to HCI. Later all students will read each other's topics and form teams (2 - 4 people) based on common interests. Each group will later write and submit one 2-page proposal that will describe the need and value of the proposed topic.

|  |  |  |
| --- | --- | --- |
| Norene Kelly | ISU IT | HCI doctoral students Norene Kelly and Kelly Kelvelage have been working as UX leads in ITS since last summer. They will talk about their experience of being the first UX team members in IT, and the agile/scrum development methodologies that are being implemented. Students will be emailed a Qualtrics survey earlier in the week to participate in some user testing on the new IT website under development, and those results will be reported and discussed. Please complete the following survey by Thursday, noon: https://iastate.qualtrics.com/SE/?SID=SV\_6Mzn7V1KF3Z677n |
| Jack Polifka | ISU Graduate College | Iteration is a powerful technique for both usability testing and software development. The benefits each discipline gains from incremental improvement is different. In this presentation, Jack Polifka will illustrate these differences by using examples from his HCI Master’s research and from his work as a software engineer for the Graduate College. |

## Questions

### My Questions for **Norene Kelly**

1. What certifications or training do you have specific to UX/Agile/Scrum?
2. What approach or methodology do you like to use for approaching a new UX program/project?
3. What kind of analytic software or user testing approach(s) have been most beneficial to you?
4. Why did your team choose Agile/Scrum over other project management approaches?
5. Are you leading/advocating for this approach or was it brought up by management/project management?
6. How has it benefited your team?
7. What metrics did your team decide to use to evaluate/determine if these approaches are beneficial and should be maintained?

### My Questions for **Jack Polifka**

1. The iterative approach can still be used within Waterfall (just on a smaller scale) or Agile. How do you determine when to use Waterfall, Agile, Lean, or Scrum approaches to your projects?
2. As a part of a team, what evaluation techniques does your team use to defend their choice of approach?
3. What key factors are important to planning, in a high level approach to iterative usability testing?
4. Do you use a pure approach or cross methodology?

### Questions Answered in Class

1. **First UX researchers at Iowa State, what challenges are you facing discussing UX benefits and advocating the challenges and opportunities.** There are a lot of misconceptions about UX just being pillow fluffing after a site is built. Discussing user testing is hard because people don’t like change or want applications to be almost done prior to testing. If you mostly code, people don’t always want to utilize UX capabilities. People may not say that they don’t think a coder is an expert but can act like it. UX can be considered extra work and sometimes there is a tendency to just want one or two people to test it and move on. Finally though, IT hired UX staff and there is support so it’s a slow move forward.
2. **Jack after graduating from HCI, what is the most important application of your HCI degree?** Administration side of forms and prelims - I have a solid understanding as a student. From the degree side, understanding the data driven side of UX. Data and proof often wins over managers.
3. **The POS / Access Plus has not gone through UX testing, why?** Jack- it’s not part of my job.
4. **Looking at UX do you see it being more of a trend or necessity in the market?** It’s something that requires training, but is a necessity. If the designer doesn’t have training, then that is where misconceptions about what UX staff do come into play. Jack doesn’t think in the real world based on his experience that UX has been considered a necessity like QA/ UX. (***I disagree with this and have extensive experience in multiple companies***) They said in Des Moines UX is behind, but again I disagree with this as well.
5. **Have you seen a change in the culture since UX has come into ISU IT?** Initially they were considered a resource that is only used sometimes, but they had to have management say that they are team members that are required at every step. It’s not an overnight change. This is a question for two years from now, in the staff’s opinion.
6. **Since you have used Agile and Scrum, do you think it is as sophisticated for big projects software development life cycle? Do you think it’s as good as the software development life cycle?** They don’t keep up with buzz words. Said it’s to make sure things don’t be removed from the road map.
   1. **My response:** I don’t think the presenters answered this question very well and it’s a little disconcerting that they don’t seem to know the difference in pretty basic and well know project management methodologies. Here is a link to the term software development life cycle (it’s not a new term) <https://en.wikipedia.org/wiki/Systems_development_life_cycle> or - They are both fairly ‘sophisticated’ but the intention of using Agile/Scrum vs. say waterfall may be different. I’ve worked on multiple extremely large projects that have used one, both, or a mixture of these methodologies. If the student who asked this question would like to learn more, I recommend checking out books online 24x7 as a free resource or doing some PMP/Agile training. Many designers are often overlooked for lead roles because of lack of training in risk management and program management. If, we as designers would like to advocate more for our roles, taking the lead in the project or program management fronts is a great way to do this. It adds credibility to the role and means the a UX designer will have to be in all IT meetings for a project.
7. **From being a student to know, what is one thing from your experience in UX, that you wish you were exposed to as a student before joining the job market?** Working in a business environment or as teams. Assistantships are a good way to get started. Class projects let you do what you want, but if in the real world someone says no you can’t whine and say you still want to use your way. You have to answer to other colleagues and clients.
8. **How would you measure UX? What metrics do you use? What kinds of methods and techniques do you use or recommend?** Depends on what goals you are trying to address. One of my examples was tracking clicks. We also tracked time and accessed the usability scale, we group tasks, card sorting - how do analyze that? We don’t always use metrics, sometimes we do stuff just to get something done. Sometimes just talking to people is way overlooked. You can learn a lot from this, in a way that assumptions can not replace. When you develop something you develop too much background knowledge to be objective. So, you need fresh eyes.
9. **Working in an IT environment what are your top tools as a UX designer?** We use Axure for prototyping. They use illustrator or PDF for comments. How do you communicate their website design, comment, and make changes quickly? That is the tool you should used based on speed.
   1. **My response:** Axure can be a waste of time, if you know how to code this is an easy step to skip from wireframes to prototyping. It’s also expensive.
10. **Where do you find your users?** Classes we are invited to and email lists. They are currently trying to build a database for this.
    1. **My response:** It might be better to expand to places with more professionals in a field, there are free online tools or turk. You should also use analytics and actual users who are stakeholders. They could also build in feedback forms.
11. **If someone is starting their first UX study, what would you recommend to them?** Know what you want to get out of it and be very specific. Know about methods and books. Jacob Neison’s book and research book method (**this would be good if the instructor could add these specific books somewhere**).

## Jack Polifka Presentation Notes - Primer: Iterative Process

Jack has a masters in HCI and has been working at Iowa State University for 8 months, before this experience he worked in Chicago.

### What is an iteration?

Iteration is repeating process of feedback with continuous stages and customer feedback/evaluation. Feedback allows customers to understand the project better, improve the project early, and get feedback ongoing.

### Benefits of Iteration

* More efficient use of users.
* Five users can find 85% of usability issues for a given application or interface, this speeds up development time and feedback.
* Iterate until one section is perfected and move on.
* Goal to deliver pieces of large project and give valuables as soon as possible.
* Iteration is especially helpful when the end goal is not clear.
* Iteration breaks a large project down into small bits and makes a large project easier to comprehend/test.

### Method Used in Chemistry Project Case Study

Formative Method - Ajax action tracking

Summative Method - Interviews, System Usability Guide/Scale (0-100 scale of opinions)

#### **Examples of lessons learned:**

* Learned almost no one used zoom so scrapped that
* Moved items into a parallel line to take up less space, thanks to trial interview feedback
* Navigation on left added contrast - because of lack of interface used
* Discovered inconsistencies in line up, image, and answer choice

### GMAP Electronic Form Case Study

Built the initial front-end form, it was fairly straight forward and was quickly approved. After the form was built, the client evaluated submissions and wanted an effective way to search through submission entries. The client also wanted the ability to edit and view submissions.

The edit screen was initially extremely long so the development team moved this data to a new page to narrow it down to one simple screen.

## Norene Kelly, Jingyu Liu and Kelly Kalvelage Presentation Notes - UX in IT

They work in the University IT Department as the first UX IT staff. Recently the department has been moving towards an Agile methodology.

**Misconception: Design is only visual and something that happens at the end of a project.**

### What is Good Design?

* Broad accessibility
* Simplicity
* Problem solving
* Decoration

### Cogs of UX

* Project Management Methodology: Agile + Sprints
* User Research
* Interaction Design
* Information Architecture
* Content Strategy
* User Interface
* Usability
* Visual Design

### Case Study: Survey for IT Website

* Open Card Sort (for labels)
  + Labels and categories are extensive but some are repeated
  + Evaluating the card sort one by one and comparing could be onerous
  + Some people responded that the site is difficult - they compared other universities but didn’t find a good way to organize it
* Responses to questions about icons where almost more useful that the straight survey
* Evaluated difficulty of use on prototype but probably should have also timed how long it took to do actions
* Pros and Cons reactions
* Associate one word to an image

## Week 4 Assignment - Presentation Reflection of Week 3

### About Assignment

After watching the video of seminar with guest speakers from January 29th, write a short reflection (75 - 100 words). You reflection should answer one or more questions below.

* According to the speakers what are some challenges/opportunities involved with UX?
* What new information did you learn from the speakers?
* Is UX a "must" or "cool" tool?
* How could you apply one of the techniques/methods discussed by the speakers into your research/work?
* How do you see academia benefiting from UX? Do you perceive any changes in near future? Why?
* How UX can be measured/evaluated?
* What factors researchers must consider when planning a UX study?
* Do you have any experience trying the same methods? If yes, describe a situation when you used a similar method and what were the results/outcome?

### According to the speakers what are some challenges/opportunities involved with UX?

According to the speakers, they ran into a lot of departmental problems because UX is new to ISU. Luckily they have managerial advocates and some leeway to move forward, however they also mentioned issues being considered a vital part of the team that needs integrated early. I would recommend to them that they should sit down with program managers and other key leadership staff to create a process flow for departmental projects. If they can define what key methods and processes they would like to use on all projects, project managers can integrate these into proposals and early planning stages. They could also create a team overview of capabilities, this is key for team members and managers who are still trying to understand the value of the team and what skills they are capable of.

### What new information did you learn from the speakers?

I liked the ISU tool for surveys, I signed up for my own Quantcast account since it is free for ISU students. I also learned that Qualtrics sponsors a very large conference related to UX and surveys that I wish I could afford to go to. Granted this is not direct information from the speakers though.

### Is UX a "must" or "cool" tool?

UX is a vital part of the software development process. The speakers had mixed reviews to the question of whether or not UX is a trend or a necessity. The key take away, I got was from the speaker who said it’s vital that UX staff are well trained and I would like to add that it is vital they are good advocates for their field. A solid leader with extensive background in UX, UI, UX management, product/program management, and software development is vital for a department to thrive and move forward.

### How could you apply one of the techniques/methods discussed by the speakers into your research/work?

I liked the speaker’s use of Qualtrics. I’ve used many of the methods discussed in this speech extensive and fully intend to utilize these skills in the future. I however disagreed with many of the points made in their speeches, based on experience, and as a corporate employee am often required to write vision documents, software specifications, and have defensible metrics. Even card sorting, with a simple end goal can have metrics. After seeing the survey, I would recommend researchers seek out qualified users with a vested interest and stakeholders. It can be useful to have random testers, but future users of a site are going to be more likely to care about the end goal. Also, if you find users who are experts in the UX/UI fields there will be a lot more attention to detail in comments so programs are less likely to go into production with simple errors or known standards issues.

### How do you see academia benefiting from UX? Do you perceive any changes in near future? Why?

Many academic websites are extremely cumbersome, with lean budgets for design, and a high ratio of users. It is important that users are able to efficiently find and use applications for educational purposes, registration, activities (sports, clubs, band, career fairs), and to further promote the institution as a leader in their field.

Any company or organization with an online presence may have that online presence be their first impression to potential backers, future students, other institutions, grant foundations and leading organizations.

If a user has issues signing up for classes or registering because of poor UX, other resources may be wasted trying to help that student locate registration or the student may not believe in the quality of a program. For example, if a web design company promotes their services on a 2-3 page table website that is not responsive and has broken code that only works well on the IE7 browser, how confident would you be in giving them your business? This is an extreme example, but the same can be said for a site that is not user friendly or accessibility friendly. Think of how much more Harvard Review or Carnegie Mellon’s published articles and podcasts are promoted and easy to find than colleges like DMACC or the University of Phoenix. Is this because they are IVY League schools or because the school is also better at promoting important materials, simplifying usability, and optimizing content?

UX, with the right implementation, will give academia a better foot forward for education, branding, partnerships, accessibility, and search engine optimization.

### How UX can be measured/evaluated?

There are many ways the UX can be measured and evaluated. The presenters only mentioned a few tools and did not dive too deeply into their actual implementation, outside of the presented case studies. A few tools shown where card sorting, interviews, surveys, and analytics. The implementation of these tools is the key missing component of this presentation.

### What factors researchers must consider when planning a UX study?

When researchers are planning a UX study they must consider factors like budget, stakeholders, design/development/project management methodology, the timeline, stakeholder feedback, business need, business requirements, user needs, user feedback, availability of users for testing, legislation, restrictions, organizational policies, team members, training skill sets, existing knowledge base (analytics, past studies, known standards, an existing site), and criteria.

### Do you have any experience trying the same methods? If yes, describe a situation when you used a similar method and what were the results/outcome?

Yes, I have experience using many of the methods mentioned in the week 3 presentation. In my work, I’m often required to create pattern libraries, flows, defensible criteria, and have many stakeholders to answer to. While I may use some of the methods differently from the presenters, I think they have a great start to integrating UX into ISU’s IT department.

# Workiva Discussion

I’ve added the details of this document to BlackBoard so that we can continue the discussion and collaborate as a class if anyone is interested.

<https://bb.its.iastate.edu/webapps/discussionboard/do/message?action=list_messages&forum_id=_202297_1&nav=discussion_board_entry&conf_id=_135610_1&course_id=_48122_1&message_id=_1886622_1#msg__1886622_1Id>

## Questions for discussion

These are my questions from the Week 4 Google Docs, in case they are not included in class maybe we can discuss them here?

* How big is your UX/UI team?
* Who do you consider your stakeholders and what kind of evaluation/testing do you do to ensure ongoing feedback?
* Is the iteractive container (computer buttons that expand) part of an open source frame work- is that polymer (https://www.workiva.com/content/wdesk-platform-b)?
* What considerations have your team made for 508 compliance and Accessibility testing? (not including performance, I did see it's SSAE 16 Type II compliant and looked at a couple of the case studies - https://www.workiva.com/customers/case-studies)

#### Reviewing Workiva's Website

* + I noticed that their primary site is missing key components of accessibility compliance and web standards. I scheduled a demo, but doubt I will be able to do it before Friday's class. This may or may not reflect on the Workiva product line, but would be a consideration for me as a corporate client.
  + The site is responsive
  + The site is written on HTML5
  + Uses http://ogp.me/ Open Graph Protocol
  + I'm curious why they choose to use IE=Edge
  + The site appears to use a framework
  + They use Google Analytics on their main site, I wonder what kind of analytics they use for their products and how they integrate results.
  + Built on Drupal
  + Google Tag Manager Integration
  + Using Clicktale

#### Other Topics for Discussion

Since we are on the topic of empathy in relation to UX, I found this article the other day ([Seung Chan Lim, 2014](https://uxmag.com/articles/what-is-empathy)). It's a well written piece that starts off with a story that leads into scientific research and evaluation of empathy.

# References

* Workiva (2016). Case Studies. https://www.workiva.com/customers/case-studies
* Seung Chan Lim (2014, Article No :1338 ). What is Empathy? UX Magazine. Accessed 2016. <https://uxmag.com/articles/what-is-empathy>
* Tutorials Point (2016). Software Development Lifecycle. <http://www.tutorialspoint.com/sdlc/sdlc_overview.htm>
* Wikipedia (2016). Software Development Lifecycle. <https://en.wikipedia.org/wiki/Systems_development_life_cycle>