

November 29, 2016

To: Janine Solberg  
From: Liz Nickerson  
Re: Usability testing

## Objectives

This exercise served to usability test *Word for Antique Dealers*, using the manual's target audience (antique dealers) as subjects. The following were the objectives of the test:

- Uncover errors or confusing passages in the manual
- Identify visuals to add, remove, or replace
- Determine how the organization of the manual influences usability

## Test design

Subjects	<p><i>Word for Antique Dealers</i> was tested on the following two subjects:</p> <ul style="list-style-type: none"><li>• Ann Nickerson, age 56, antique dealer</li><li>• Mike MacLean, age 21, college student</li></ul> <p>Ann already possessed the subject knowledge typical of the manual's target audience. Prior to taking the test, Mike was briefed on the manual's target audience. During the test, Mike was supplied with relevant subject matter knowledge only if it was necessary to complete the task.</p>
Tasks	<p>The subjects were presented with <i>Word for Antique Dealers</i> as well as a test handout that listed the tasks and test objectives. To complete task 1, the subjects were provided with a sample inventory (either a paper copy or an Excel file).</p> <p>The following are the tasks verbatim from the testing handout:</p> <ol style="list-style-type: none"><li>1. Move all or part of your current inventory into a Word document.</li><li>2. A customer bought a cherry pie safe from you, asked for delivery, and left you his address: 100 Great Road, Eastham MA, 02642. Record the customer's address alongside the item that he purchased.</li><li>3. Resize the margins in a document.</li></ol>
Script	<p>To introduce the test, I read from a script. First, I asked subjects to flip through the manual and respond to the table of contents. Next, I explained the purpose of the test and what the subjects should do; to see how antique dealers use <i>Word for Antique Dealers</i>, subjects were required to complete each task by finding the most relevant part of the manual and following the steps. I then presented the subjects with the testing handout and explained how to "think aloud." Finally, I asked the subjects to read the handout silently and afterwards gave them time to ask questions before beginning the test.</p> <p>During the test, I read each task and then asked the subjects to complete it. After the subjects completed the tasks, I asked them to respond to the look-and-feel of the manual.</p>

## Test results

Task/Module	Result	Proposed change
1 (Import a table from Excel to Word)	One subject went from the TOC to the Chapter 3 landing page to try to find the correct module: “I know it’s going to be somewhere in the chapter about inventory management, but I can’t tell from the TOC which module is correct.” The subject read the landing page, but didn’t equate the “steps” with chapter modules.	On the chapter landing pages, replace the “steps” with module numbers, titles and page numbers. (For example: 3.1 Insert a table (17)).
	Both subjects struggled to find the drop-down in module step 3. After finding the drop-down, one subject couldn’t find the correct drop-down entry because there were several entries that seemed similar.	Provide an image of the entire Save As window with the drop-down expanded and a circle around the correct CSV entry. Include the location of the drop-down in step 3.
	Both subjects were able to navigate the Excel saving prompts without them being covered in the documentation.	(None)
	One subject didn’t close Excel before opening Word. The subject got an error message from Word and had to close Excel.	Write a step in the procedure for closing Excel.
	Neither subject read step 7; for both subjects, it was the default.	Rewrite step 7 as a tip.
	Both subjects struggled with step 11a. One subject read the tip and was able to complete the step successfully while the other didn’t read the tip and could not complete the task.	Move the info from the tip into the step.
2 (Record requests using comments)	One subject took several tries to find the right module. The subject opened to several possible modules and read the Why? section to determine whether they were in the right place.	Revise module title: Record customer requests.
	The subject had trouble reconciling the module title with the task: “I’m confused by what ‘comments’ means.”	
	While one subject found the Why? sections helpful, the other subject did not: “I don’t know why I read this. It wasn’t useful to me.”	Keep the Why? sections. Users can decide whether or not they read them.

Task/Module	Result	Proposed change
2 (Record requests using comments)	Both subjects struggled with step 3 because they had trouble finding the item in the inventory table. One subject worked around this problem by using the search feature in Word.	Write a tip for using search.
	One subject said this about the tip by step 4: “I don’t even have one comment yet, so I can’t use this tip now.”	Move this tip to the end of the procedure.
3 (Insert Margins)	One subject struggled to find the correct module: “All the modules in Chapter 2 sound like they could be for the same thing.”	Revise the titles for all Chapter 2 modules.
	Both subjects struggled with step 3. One subject proactively attempted to enter invalid numbers: “I didn’t know there were limits. I feel like the instructions should’ve told me the min and the max values that I can enter.” The other subject accidentally entered invalid numbers (.075 instead of 0.75).	Rewrite this step to include information about the minimum and maximum values that are accepted.
	In both cases the subject couldn’t figure out what the problem was, because the error message from Word wasn’t clear.	

### Miscellaneous feedback

Result	Proposed change
One subject was confused by module 3.2. “This title makes it seem like I’m using Excel, not Word.”	Change module 3.2 title to Import a table to Word from Excel
One subject suggested including the part number (8471) for preferred Avery business card stock on the landing page for Chapter 2.	Include the part number on the Chapter 2 landing page.
One subject said that they would like bigger font: “Most users for this manual are upwards of fifty years old.	Increase font size.