Passing Guide

# Usability Test Plan

**Version 1.0**

Cie Digital Labs

## Document Overview

This document describes a test plan for conducting a usability test during the development of passingguide.com website. The goals of usability testing include establishing a baseline of user performance, establishing and validating user performance measures, and identifying potential design concerns to be addressed in order to improve the efficiency, productivity, and end-user satisfaction.

The usability test objectives are:

* To determine design inconsistencies and usability problem areas within the user interface and content areas. Potential sources of error may include:
  + Navigation errors – failure to locate functions, excessive keystrokes to complete a function, failure to follow recommended screen flow.
  + Presentation errors – failure to locate and properly act upon desired information in screens, selection errors due to labeling ambiguities.
  + Control usage problems – improper toolbar or entry field usage.
* Exercise the design (prototype) under controlled test conditions with representative users. Data will be used to access whether usability goals regarding an effective, efficient, and well-received user interface have been achieved.
* Establish baseline user performance and user-satisfaction levels of the user interface for future usability evaluations.

## When

Testing will be conducted from 10/6 to 10/20.

## Where

Testing will occur at Cie Digital Labs in an available conference room.

## Who

The passingguide.com website will be launched to those planning their own death (self-planners) as well as those planning the death of a loved one (helpers). Our usability test will include participants representing both self-planners and helpers. For each round of testing, three self-planners and three helpers will participate. There will be two rounds of testing for desktop web, and two rounds for mobile, with a total of 24 participants consisting of 12 self-planners and 12 helpers.

Participants will be selected by the Validately. The sole criteria will be gender, age, and income. Participants will not be selected based upon their familiarity of Passing Guide.

## How

A test facilitator and participant will both be physically present in the testing room. The test will be performed on a MacBook Pro belonging to Cie Digital Labs. The browser will be an up to date version of Google Chrome pointed to the InVision prototype. Final assessment of the usability test will be made from information gathered during the recorded session, and the facilitator’s notes and observations during and immediately after the test.

The participants' will attempt to complete a set of representative task scenarios presented to them in as efficient and timely a manner as possible. The participants will be directed to provide honest opinions regarding the usability of the application, and to participate in post-session subjective questionnaires and debriefing.

## Procedure

The participant’s interaction with the prototype will be monitored by the facilitator seated in the same office. Note takers will monitor the sessions in an observation room, connected by video camera feed. The test sessions will be recorded.

The facilitator will brief the participants on the web site and instruct the participant that they are evaluating the site, not the participant. Participants will sign an informed consent that acknowledges: the participation is voluntary, that participation can cease at any time, and that the session will be recorded but their privacy of identification will be safeguarded. The facilitator will ask the participant if they have any questions.

Participants will complete a pretest demographic and background information questionnaire. At the start of each task, the participant will read aloud the task description from the printed copy and begin the task.

The facilitator will instruct the participant to ‘think aloud’ so that a verbal record exists of their interaction with the web site. The facilitator will observe and enter user behavior, user comments, and system actions in the data logging application.

After each task, the participant will complete the post-task questionnaire and elaborate on the task session with the facilitator. After all task scenarios are attempted, the participant will complete the post-test satisfaction questionnaire.

## Ethics

All persons involved with the usability test are required to adhere to the following ethical guidelines:

* The performance of any test participant must not be individually attributable. Individual participant's name should not be used in reference outside the testing session.
* A description of the participant's performance should not be reported to his or her manager.

## Usability Tasks

The usability tasks were derived from the main flows of the passingguide.com website. Tasks have been carefully selected to reflect the most common real-world scenarios, given the short amount of time for each usability test and the limitations of the prototype. Tasks are identical for all participants in the study.

The prototype was built with InVision using screenshots and. Because of this, the prototype cannot accurately reflect the real web site. Many pages do not exist such as the about page. In addition, there is only one upload form (Will). Loading times may be slower than normal because each screen is a large image.

The task descriptions below are required to be reviewed by the application owner, business-process owner, development owner, and/or deployment manager to ensure that the content, format, and presentation are representative of real use and substantially evaluate the total application. Their acceptance is to be documented prior to usability test.

The scenarios the participant will be asked to partake in are as follows:

### Prerequisites

* The participant will be briefed that they are to act as a self-planner or helper and will be given information pertinent to each scenario as they occur.
* This information will not be overwhelming and will be enough to solve each task.

## Usability Tasks

**Task 1: Initial homepage feedback**

**Success Criteria:**

No specific success criteria.

**Goals**

The goal of this scenario is to allow the user to communicate any thoughts upon first arriving at the home page, as well as uncover any immediate concerns or questions the user might have.

**Task 2: Create an account**

**Success Criteria:**

The participant clicks on the “Register” button and completes all steps required to create a new account.

**Goals**

The goal of this scenario is to assess the discoverability of the “Register” button as well as the usability of the registration form.

Add additional scenarios as needed.

## Usability Metrics

Usability metrics refers to user performance measured against specific performance goals necessary to satisfy usability requirements. Scenario completion success rates, adherence to dialog scripts, error rates, and subjective evaluations will be used.

### Scenario Completion

Each scenario will require, or request, that the participant obtains or inputs specific data that would be used in the course of a typical task. The scenario is completed when the participant indicates the scenario's goal has been obtained (whether successfully or unsuccessfully). Additionally, the facilitator may assist with or end a task prematurely if the participant fails to complete a task.

### Critical Errors

Independent completion of the scenario is a universal goal. In general, critical errors are unresolved errors during the process of completing the task or errors that produce an incorrect outcome. For example, help obtained from the facilitator is cause to score the scenario a critical error. Critical errors can also be assigned when the participant initiates (or attempts to initiate) an action that will result in the goal state becoming unobtainable.

Example: the user is tasked to report when a BOGO deal expires and either fails to find and report the date or reports the wrong date.

### Non-critical Errors

Non-critical errors are errors that are recovered from by the participant or, if not detected, do not result in processing problems or unexpected results. Although non-critical errors can be undetected by the participant, when they are detected they are generally frustrating to the participant.

These errors may be procedural, in which the participant does not complete a scenario in the most optimal means (e.g., excessive steps and keystrokes). These errors may also be errors of confusion (ex., initially selecting the wrong function, using a user-interface control incorrectly such as attempting to edit an un-editable field).

Noncritical errors can always be recovered from during the process of completing the scenario. Exploratory behavior, such as opening the wrong menu while searching for a function, will be coded as a non-critical error.

### Subjective Evaluations

Subjective evaluations regarding ease of use and satisfaction will be collected via questionnaires, and during debriefing at the conclusion of the session. The questionnaires will utilize free-form responses and rating scales.

## Usability Goals

The next section describes the usability goals for passingguide.com website.

### Completion Rate

Completion rate is the percentage of test participants who successfully complete the task without critical errors (i.e. have an "output" that is correct).

### Error-free rate

Error-free rate is the percentage of test participants who complete the task without any critical or non-critical errors.

### Subjective Measures

Subjective opinions about specific tasks, features, and functionality will be surveyed. At the end of the test, participants will rate their satisfaction with the overall system. Combined with the interview/debriefing session, these data are used to assess attitudes of the participants.

## Problem Severity

To prioritize recommendations, a method of problem severity classification will be used in the analysis of the data collected during evaluation activities. The approach treats problem severity as a combination of two factors - the impact of the problem and the frequency of users experiencing the problem during the evaluation.



### Impact

Impact is the ranking of the consequences of the problem by defining the level of impact that the problem has on successful task completion. There are three levels of impact:

* High - prevents the user from completing the task (critical error)
* Moderate - causes user difficulty but the task can be completed (non-critical error)
* Low - minor problems that do not significantly affect the task completion (non-critical error)

### Frequency

Frequency is the percentage of participants who experience the problem when working on a task. In a session of 6 participants

* High: 67% (4) or more participants experience the problem
* Moderate: 33% - 83% (2-3) participants experience the problem
* Low: 16% (1) or fewer of the participants experience the problem

### Problem Severity Classification

The identified severity for each problem implies a general reward for resolving it, and a general risk for not addressing it, in the current release.

**Severity 1** - High impact problems that often prevent a user from correctly completing a task. They occur in varying frequency and are characteristic of calls to the Help Desk. Reward for resolution is typically exhibited in fewer Help Desk calls and reduced redevelopment costs.

**Severity 2** - Moderate to high frequency problems with moderate to low impact are typical of erroneous actions that the participant recognizes needs to be undone. Reward for resolution is typically exhibited in reduced time on task and decreased training costs.

**Severity 3** - Either moderate problems with low frequency or low problems with moderate frequency; these are minor annoyance problems faced by a number of participants. Reward for resolution is typically exhibited in reduced time on task and increased data integrity.

**Severity 4** - Low impact problems faced by few participants; there is low risk to not resolving these problems. Reward for resolution is typically exhibited in increased user satisfaction.

## Reporting Results

The Usability Test Report will be provided at the conclusion of the usability test. It will consist of a report and/or a presentation of the results; evaluate the usability metrics against the pre-approved goals, subjective evaluations, and specific usability problems and recommendations for resolution. The recommendations will be categorically sized by development to aid in implementation strategy.