

Information Gathering Methods

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 - Observation
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 - JAD session, existing documentation
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Reading material:

Edition 6 of book: Chapter 2, pg. 46 – 58

Describing Requirements

Requirements





Describing the Requirements

- Make a requirement list
- Three user centered design methods:
 - User stories part of e.g. Scrum
 - Scenarios
 - Use cases part of UML
- Use cases are most formal
 - Scenarios and user stories less formal



Requirement list

A requirement list will often look something like this:

Number		,	Status (approved)
	 	•••	

- Number:
 - an incrementing number which identifies each requirement
- Name/description:
 - short description of the requirement
- Use case number(s):
 - a list of use cases which have to do with this requirement
- Priority:
 - how important this requirement is:
 - A: absolutely essential
 - B: useful, but not mission critical
 - C: nice-to-have
- Status:
 - approved/not approved (not always used)



User stories

- One way of describing what users should be able to do in a system
- Very common way of describing user stories

```
"As a <user group>,
I want <user goal>
so that <reason>."
```

"Sem <Notendahópur> get ég <Markmið notenda>, til að <Ástæða>"



Where are the details?

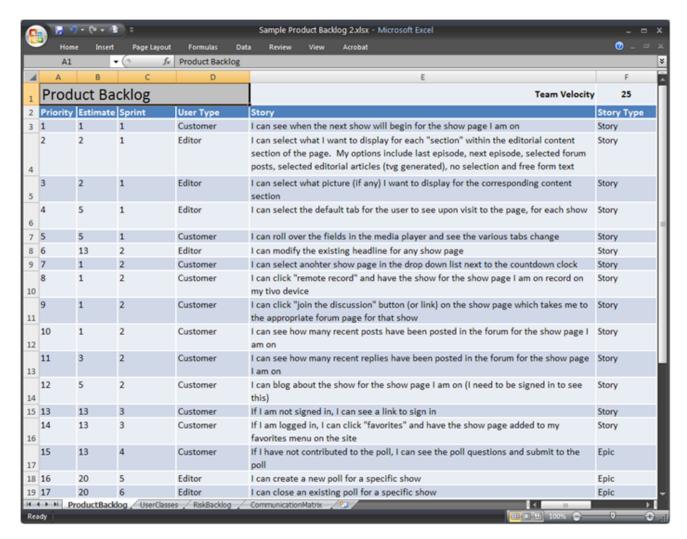
As a user, I can cancel a reservation so that I can get money back.

- Does the user get a full or partial refund?
- Is the refund to her credit card or is it site credit?
- How far ahead must the reservation be cancelled?
- Is that the same for all hotels?
- For all site visitors? Can frequent travelers cancel later?
- Is a confirmation provided to the user?
 - How?



- A description is needed
 - Use case, scenario, prototype, written text,.....

Product Backlog – List of User Stories





Requirement List vs. Product Backlog

- Both describe the requirements for the whole system
 - The requirements are prioritized in both cases
 - There are references to more detailed descriptions either use cases, scenarios, prototypes, etc.
- User stories mention the user group, but users are not necessarily included in requirements



As a user I want to be able to buy a ticket

Use Case structure:

- 1. Pick a performance you want to go to
- 2. State what date you would like
- 3. Find a button to buy a ticket
- 4. State how many tickets you need
- 5. Select the tickets you like
- 6. Insert information for payment
- 7. Insert information on the delivery

Scenario description:

Marta wants to see the theater piece Njála in Borgarleikhúsið, because there has been a lot in the news about this piece. She finds a web site for Borgarleikhúsið and selects the show. She would like to go on a Sunday, because during the weekend she enjoys better going to the theater, so she selects February, 7th. She is going with her husband, so she wants two tickets. When she has done that the system shows her the tickets and she pays them and will pick them up 15 min before the show at the teather.

Information Gathering with Interviews





Information gathering

- Four steps:
 - 1. Preparation
 - 2. Gather the data
 - 3. Analyse the data
 - Describe the data

Example: Telephone interview

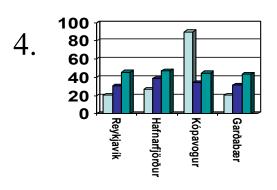
- 1. Prepare the survey
- 2. Conduct a survey
- 3. Calculate the results
- 4. Report the results





3.







Information gathering methods

- The main methods are:
 - Interviews with users
 - Observation
 - Surveys using Questionnaires
 - Evaluation of Prototypes
 - Workshops/focus groups
 - Review existing reports, forms, web sites,



Interviewing Users – Viðtöl við notendur

- When you interview, you talk to a person and ask questions
 - It easy and friendly
- Needs good planning
 - Whom do we want to interview?
 - What questions do we want?
 - How long is the interview?
- Two types of interviews
 - Structured interviews
 - Questions decided in advance
 - No space for discussion
 - 2. Semi structured interviews
 - Has decided goals
 - The interviewer goes deeper into some issues in the interview





Semi structured interviews

- Are very good for requirements analysis and design
- Good to get users opinion on particular ideas
- More informal that structured interview
- But we need to have some structure for the discussion
 - Either written down or ideas
- There has to be some trust between the people involved
 - Some people find it hard to be negative
 - Try to make a friendly atmosphere
- Flexible interviews are harder for the interviewer
 - Training gives you good support
 - Good to pilot test the interview with one person
 - You should always record the interview (sound or video)



Themes in the interview

- What are the business operations and processes?
 - Questions to users: What do you do?
 - Think about: What are the real tasks?
- How should those operations be performed?
 - Questions to users: How do you do it? What steps do you follow?
- What information is needed to perform those operations?
 - Questions to users: What information do you use? What forms or reports do you use?



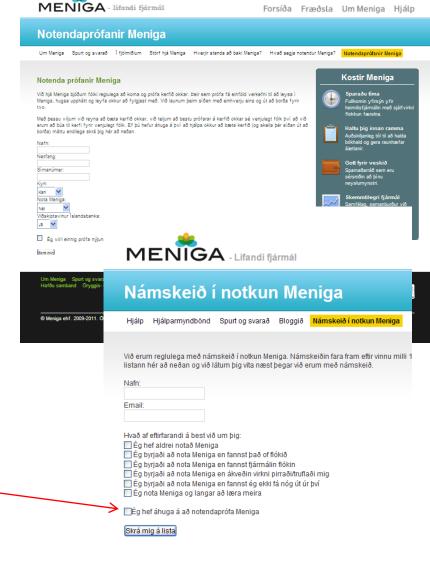
We should interview 3 -4 in each group

Notendahópur	Bakgrunnur	Notkun kerfisins	Umhverfi	Helstu markmið
Námsmenn hérlendis Mikilvægi: Mikilvægasti hópurinn ásamt námsmönnum erlendis	Aldur: yfir tvítugt Kyn: bæði kynin Menntun: framhaldsskólapróf Hæfni/vanhæfni: ekkert sérstakt Tölvufærni: mjög góð yfirleitt	Notkun: Kerfið mest notað á haustin. Lítið notað þess á milli nema út af sérstökum fyrirspurnum. Þjálfun: Engin þjálfun á kerfinu eða reynsla frá vinnu. Viðhorf: Notendur eru almennt jákvæðir fyrir kerfinu þar sem það veitir þeim þjónustu sem þeir þurfa á að halda. Fjöldi notenda: ca. 4.000	Tæknilegt umhverfi: Mjög mismunandi hvernig umhverfið er þar sem notendur koma úr öllum áttum, nettenging og ytri aðstæður mismunandi. Raunverulegt umhverfi: Ættu að vera oftast í skólaumhverfi eða heima, en gætu verið hvar sem er. Annað umhverfi: ekkert sérstakt	-Sækja um lán eða styrki og nálgast upplýsingar
Námsmenn erlendis Mikilvægi: Mikilvægasti hópurinn ásamt námsmönnum hérlendis	Aldur: yfir tvítugt Kyn: bæði kynin Menntun: framhaldsskólapróf Hæfni/vanhæfni: ekkert sérstakt Tölvufærni: mjög góð yfirleitt	Notkun: Kerfið mest notað á haustin. Lítið notað þess á milli nema út af sérstökum fyrirspurnum. Þjálfun: Engin þjálfun á kerfinu eða reynsla frá vinnu. Viðhorf: Notendur eru almennt jákvæðir fyrir kerfinu þar sem það veitir þeim þjónustu sem þeir þurfa á að halda. Fjöldi notenda: ca. 2.000	Tæknilegt umhverfi: Mjög mismunandi hvernig umhverfið er þar sem notendur koma úr öllum áttum, nettenging og ytri gæti verið mjög erfiðar aðstæður sums staðar. Gætu verið með umboðsmann. Raunverulegt umhverfi: Ættu að vera oftast í skólaumhverfi eða heima, en gætu verið hvar sem er. Annað umhverfi: ekkert sérstakt	-Sækja um lán eða styrki og nálgast upplýsingar
Námsmenn, sem lokið hafa námi Mikilvægi: Næst mikilvægastur á eftir námsmönnum hérlendis og erlendis	Aldur: 20 - 99 Kyn: bæði kynin Menntun: háskólapróf Hæfni/vanhæfni: ekkert sérstakt Tölvufærni: misjöfn, fer töluvert eftir aldri	Notkun: Kerfið notað tvisvar á ári til að greiða afborganir. Þjálfun: Engin þjálfun á kerfinu eða reynsla frá vinnu. Viðhorf: Notendur eru almennt jákvæðir fyrir kerfinu þar sem það veitir þeim þjónustu sem þeir þurfa á að halda. Fjöldi notenda: ca. 30.000	Tæknilegt umhverfi: Mjög mismunandi hvernig umhverfið er þar sem notendur koma úr öllum áttum, nettenging og ytri aðstæður mismunandi. Raunverulegt umhverfi: Ættu að vera oftast heima eða í vinnu. Annað umhverfi: ekkert sérstakt	-Skoða upplýsingar um lán - Greiða afborganir



To find interviewees

- How can we find users?
 - From our customers
 - From our marketing department
 - From our user support
 - Get managers agreement
 - Get connections from users representatives
 - Get a list from the customer
 - Advertise



INNSKRÁNING NÝSKRÁNING



This should be checked in an interview

- Background
 - Age, gender, education, abilities/disabilities, general computer knowledge
- The use of the system
 - How much is it used (how often and how much each time), the skills of using this system, the attitude, the number of users
- The context of use
 - The real environment, the technical environment
- The main users' tasks
 - What do users want to do
 - How do they do this today
- The importance of the user group
 - Estimated from all these things

In what environment?

- Very good to interview in the environment where the system will be used
- If used in different environments
 - Office environment
 - At home
 - In school

	Viðskiptavinur	Umsjónarmaður	Leiðsögumaður	
Skrifstofuumhverfi	2	2		4
Heima	2	1	2	5
Úti á landi			2	2
	4	3	4	

- Different geographical areas
- Take 2 3 in each environment
 - 2 users in each environment
 - If the environment is homogeneous take different groups



Take into consideration for an interview

- The travelling time
- The attitude of the user
- Trust and security
- How much time the interview will take in total
- Explain how the interview is planned
- Plan for analysis of the data
- Plan for that some interviewees will drop out



Analysing and Describing Results of Interviews

- Summarise the background of your interviews
 - We had 10 interviewees, 6 males and 4 females. Their age range was from 34 – 67. They had been working for the company from 6 months to 16 years.
- Summarise the results
 - If you have asked the same questions to all
 - Summarise what the interviewees said for each question in your own words
 - Often good to take examples. Like on of the interviewees stated: "I only use this system, when nothing else works".
 - If you have asked particularly about some issues
 - Summarise what the interviewee said



Analysing Interviews is Challenging

Other Information Gathering Methods





1. Observation

Athugun

e. observation

Bein athugun

e. Direct observation

Óbein athugun

e. Indirect observation

Vettvangskannanir

e. Field studies

Stýrðar kannanir

e. Controlled studies



Direct observation – Bein athugun

- One person observes the user
- Writes notes
 - Does not want to disturb the user
- The user uses the system and solves some tasks
- Very good to understand how the system is used
- Takes a lot of time but gives extensive data





Direct observation

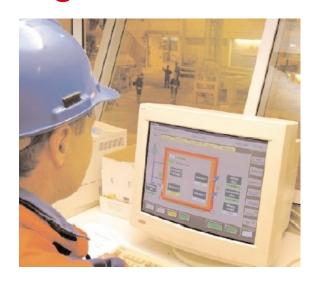
- Divided into
 - Field studies (Vettvangskannanir)
 - Controlled studies (Stýrðar kannanir)
- Field studies
 - The user does his daily tasks in his own environment
 - Work place or at home
 - The observer notes important issues
- Controlled studies
 - The user is observed solving predefined tasks
 - Often in a usability lab
 - Sometimes one conductor and one observer
 - Often precise data gathering, time, mouse clicks, etc.
 - Often called: user testing



Direct observation – Bein athugun

- Very extensive results
- Easy to perform
- Has its limitations
 - We meet the user only once
 - We affect the user
 - The data is biased towards what the observers thinks is important
 - Sometime we videotape the test session
 - Sound, video or recorded in the computer
- Good to use when describing the requirements





Indirect observation – Óbein athugun

- The use is recorded
 - Video or logged in the computer
 - Nobody is observing
- Huge amount of data
 - That we need to analyse
- The observer does not affect the user
- Have to plan it very well in advance
 - What is your goal, what data do you need



2. Survey using questionnaires

- Könnun með spurningalistum
- We are doing a survey
 - Questionnaire is the tool
- Questionnaires are answered privately
- More structure than in interviews
- A questionnaire has a particular goal
 - Questions for gather data on particular knowledge
- Both on paper and web
- Pros:
 - Very easy to access many people
- Cons:
 - Sometime not that good response rate

Forkonnun.

Vinsamlegast lesið eftirfarandi:

Þakka þér kærlega fyrir að taka þátt í þessum notendaprófunum.

Þessi könnun er framkvæmd af starfsmönnun Háskólans í Reykjavík og Háskóla Islands. Hún er liður í samstarfi háskólanna og Skýrr um nýjar leiðir við úrvinnslu niðurstaða úr notendaprófunum. Einn þáttur í því verkefni er að safna upplýsingum um hvernig ný útgáfa af kerfinu **Vinnustund** nýtist notendum við vinnu sína. Mundu að það er **kerfið** <u>sem</u> verið er að meta **ekki þín kunnátta.**

Nafnleynd hvílir á öllum þeim upplýsingum er þú lætur í té.

Persónuupplýsingar

1. Hvert er þitt stöðuheiti:

2.	2. Hversu lengi hefur þú gengt þeirri stöðu?					
	□ 0-1 ár	□ 2-3 ár	□ 4-6 ár	□ 7-10 ár	□ 11-14 ár	□ 15+
3.	Hve lengi hefu	r þú starfað hjá	Skýrr?			
	□ 0-1 ár	□ 2-3 ár	□ 4-6 ár	□ 7-10 ár	□ 11-14 ár	□ 15+
4.	Aldur:					
	□ 0-19	□ 20-39	□ 40-59	□ 60+		
5.	Kyn:					
	☐ Kvenkyns	☐ Karlkyns				
T	ölvukunnátt	a				
6.	Hve lengi hefu	r þú notað tölvu	ır (PCs, Mac,	o.sv.frv.)?		
	□ 0-1 ár	🗓 2-3 ár	□ 4-6 ár	□ 7-10 år	□ 11-14 ár	□ 15+
7.	7. Hversu mikið á dag að meðaltali, notar þútölvur?					
	🗆 0- 59 mín.	□ 1-2 klst.	☐ 3-4 klst	□ 5-6 klst	□ 6-7 klst	□ 8+
8. Telur þú þig vera: (miðað við tölvukunnáttu)						
	□ Byrjanda □ Meðal notanda □ Sérfræðing					
9. Hvar notar þútölvuna? (merktu allt sem á við)						
	□ Heima	□ĺvinnu [3 Annað			
10. Hversu lengi hefur þú notað Vinnustund?						
□ Min na en mán uð □1 mán. til 1 ár □1 – 2 ár □2 – 3 ár □ meira en 3 ár						
11. Hvaða kerfi notar þú reglulega í vinnunni?						

Two types of questions

- Closed questions
 - Choices
 - Yes/No questions
 - Particular choices
 - Always don't know/
 - Does not apply
 - Sometime we use scale
 - Often 5 or 7 possibilities
 - Have to be opposites
 - Sometime likert scale
 - You respond to a statement
 - The respondent tells you if he agrees or disagrees
- Open questions

How do you..., What ways are there...., What do you do to

Harder to analyses those



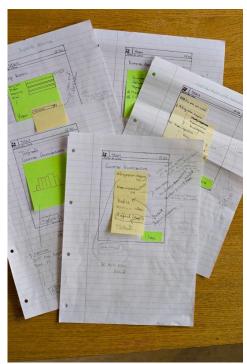
When designing a questionnaire

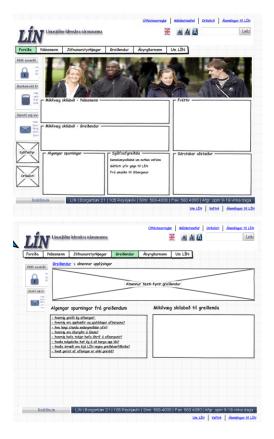
- Have to be well designed
 - A boring questionnaire will not get any response
- The questions have to be simple
 - As few as possible
 - Not more then 2 A4 pages
 - Clear questions and not ambiguous
 - The users can not ask you about the questions
 - The questions should collect data that you need
 - Leave space for comments
 - "Some other comments?"
- Very important to test the questionnaire well



3. Evaluating Prototypes

- Prototype is an initial, working model
 - of a larger more complex entity
 - Often used to gather information on requirements





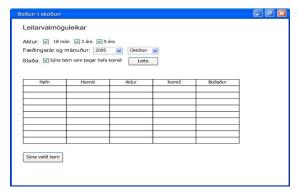




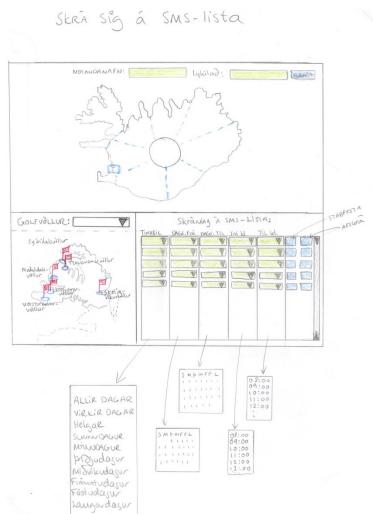


Design prototypes - Millihönnun









Evaluating Prototypes





Informal evaluation

- Informal evaluation session
- The goal is to observe the user using the low-fi prototype
 - One user at a time
- To gather feedback on the UI
 - Does it fit the users needs? Is if the requirement analysis is right?
 - Is the UI well designed and usable?
- The conductor suggests changes to the interface
 - According to the users reaction
 - They change the prototype in collaboration
- Different from interview because we are discussing the prototypes
 - Using the prototypes to guide the discussion



4. Review exististing documentation

- External to the organization
 - Sometimes "best practices" studies
- Within the organization
 - Reports, forms and procedure descriptions
- Some ways to use the documentation:
 - 1. Provide copies of the current documentation to review
 - 2. Use the documents in the interviews as visual aid
 - Good to have forms that have been filled out
 - 3. Aid to define business rules



5. Meetings

- What is it?
 - People gather for a short period of time (often one hour) at the same place
- Why do it?
 - Discuss issues that need to be decided
- When to do it?
 - When you need information from users
- How to do it?
 - It is vital to have the information being discussed visible for all participants, fx. by using a projector
 - You could bring prototypes, or visions, or other material to gather feedback during the meeting



6. Workshops

- What is it?
 - a meeting at which a group of people engage in intensive discussion and activity on a particular subject or project
 - Walking the wall during class was actually a workshop
- Why do it?
 - To gather feedback from users and get them involved in the development of the product
- When to do it?
 - Often in the early phases of design and understanding
- How to do it?
 - It is often a three hour activity with one conductor planning and scheduling the activities and managing the event

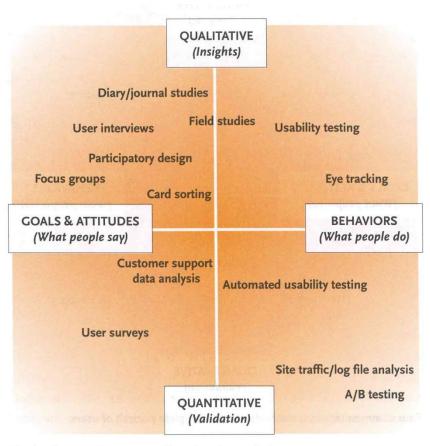


Information gathering methods

- We have covered
 - Interviews
 - Observation
 - Questionnaires
 - Evaluating prototypes
 - Review existing reports, form and procedure descriptions
 - Meetings
 - Workshops
 - Exploring the competition



Select method according the information we need







How do we use this information?

- To have better understanding of the use of the new system
- Use it for requirement analysis
 - To state requirements
 - By user Stories
 - Requirement list
 - Get information for Use Cases
- Use it for design
 - Designing the user interface
 - Modeling classes and objects



Exploring the Competition – Evaluating Web Sites





Exploring the Competition

- Many problems have already been solved
 - Good to study what is on the market
- Three positive contributions
 - Often helps users/developers to generate new ideas
 - 2. Good to see excellent and state of the art solution
 - 3. Often cheaper and less risky to buy a solution
- One risk
 - 1. That the bought system does not cover all the requirements



Exploring the Competition

- Learn from other design solutions
- Assess both the positive and negative aspects
- Respect copyrighted material and intellectual property





Preparation for Comparing Web Sites

- 1. Decide what Web Sites to explore
 - Decide core requirements that need to be fullfilled
 - Decide what criteria you want to use
 - Should it be easy to use? Secure? Beautiful?
 - Decide what results you are gathering
- 2. Ask evaluators to evaluate
 - First alone, then meet and gather the results
 - They have to have at least 3 4 hours
 - 1 -2 hours for evaluation in private and two hours for a meeting



Preparation – Evaluating Web Sites

- 3. Decide where to evaluate
 - Do not need a evaluation laboratory, most often informal environment
- 4. Decide how to register the pluses and minuses
 - How are you going to describe your findings?
 - Often good to priortise the findings
 - State 5 good things
 - State 5 bad things



Pluses and Minuses

Pluses

- What supports the users work
- What is easy to use
- What has good user experience
- You can also check:
 - What has a sales potential
 - What supports the organizational mission

Minuses

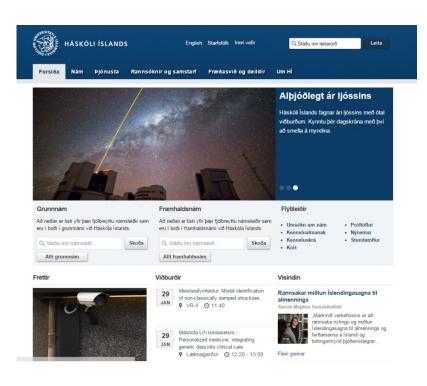
- This design doesn't support the work
- It is hard to understand
- You have problems when using it







Evaluating the Competition



Plusses

 State all the positive things that you discover by browsing through the competitors

Minuses

 State all the negative things that you discover by browsing through the competitors



Exploring the Competition

- What you need to do in assignment 1
 - Decide at least 5 web sites that you are exploring
 - Decide what requirements you want to study
 - Decide what aspects you want to study (usability, UX,)
 - Decide how to register the findings
 - Evaluate first individually
 - You need to document the results and include in the deliverables of assignment one
 - Meet and discuss the findings
 - You also need to document the outcome of that meeting
 - The outcome should be a list of pluses and minuses for each web site that you argee on

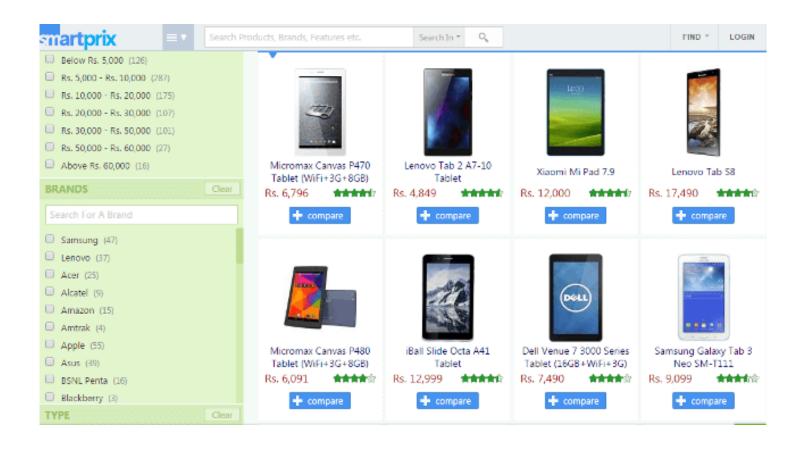


You Could Document the Results as a Table





Many Ideas Out There





Summary

- Requirements, User stories, use cases, scenarios
- Interviews
 - Structured and semi structured
- Observation
 - Direct and indirect observation
- Surveys using questionnaires
 - Many types of questions
- Evaluating Prototypes
 - Discussed in more detail later
- Other methods
 - Existing documentation, meetings, workshops
- Exploring the competition/Comparing Web Sites

