

User Profiling and Testing Toolkit

Australian Government Information Management Office (AGIMO)

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Introduction to the Toolkit

Overview

Introduction

This section contains:

- an overview of the stages in user research, and
 - information on customising the tools and templates.
-

In this section

This document contains the following topics.

Topic	See Page
Stages in User-Centred Research	2
User Research Methods – Strengths and Weaknesses	3
Customising and Using the Tools	4

Stages in User-Centred Research

Introduction

User research and design is an iterative or cyclical process.

Research can begin at any stage, provided clear objectives and requirements are established before undertaking any activity.

User research process

The following table identifies the main stages involved in user research process.

Stage	Description
1.	<ul style="list-style-type: none">Identify project objectives, the goals and user research requirements.Choose key user groups, analysis techniques. Examples: Analysis techniques include: behavioural observations, interviews with user, and focus groups.
2.	Understand the user requirements through user profiling.
3.	Develop specific user scenarios based on profiling data for testing.
4.	Perform usability testing with appropriate users from each user group. Examples: Techniques include: scenario-based testing, observation, logging metrics, participant debrief and feedback.
5.	Iterative site restructuring or redesign and testing of sites. Examples: Techniques include: paper prototypes, partial prototypes, high fidelity, functional prototypes.

In this toolkit

This toolkit contains templates and guidelines to support this user research process.

User Research Methods – Strengths and Weaknesses

Research methods

The table below lists the user research methods and provides details of their strengths, weakness and resource requirements.

Method	Strengths	Weaknesses	Quality of results	Resources required
Usability test - metrics, qualitative feedback	<ul style="list-style-type: none"> • pinpoints users' misconceptions • comfortable for users • finds user preferences 	<ul style="list-style-type: none"> • does not show technical problems 	<ul style="list-style-type: none"> • medium quality human response feedback • medium quality technical feedback 	<ul style="list-style-type: none"> • 8 -15 users per group • 2+ facilitators/observers
Questionnaires and surveys	<ul style="list-style-type: none"> • finds subjective user preferences • provide countable data 	<ul style="list-style-type: none"> • indirect method: low validity • needs good recall to be significant 	<ul style="list-style-type: none"> • high quality human response feedback • low quality technical feedback 	<ul style="list-style-type: none"> • no conclusive data on numbers • 2+ facilitators and observers
Interviews and focus groups	<ul style="list-style-type: none"> • finds subjective user preferences • spontaneous reactions • group dynamics 	<ul style="list-style-type: none"> • hard to analyse subjective data • appointments can be hard to set up and participants fail to turn up • group dynamics 	<ul style="list-style-type: none"> • high quality human response feedback • low quality technical feedback 	<ul style="list-style-type: none"> • 6-12 per focus group / 30+ interviewees • 2+ facilitators and observers
User website feedback	<ul style="list-style-type: none"> • finds subjective user preferences • spontaneous reactions 	<ul style="list-style-type: none"> • not a good representation of the user population • hard to analyse subjective data 	<ul style="list-style-type: none"> • medium quality human response feedback • low quality technical feedback 	2+ analysts

Customising and Using the Tools

Overview

This toolkit contains generic tools and templates. The templates will need to be customised for use with each project.

Process for customising

The following table outlines the general process required to customise the tools and templates.

Stage	Description
1.	<ul style="list-style-type: none">Choose user groups and analysis techniques.Identify all required research parameters such as, number of participants, dates, resources required.
2.	Review strengths and weakness of each method or technique.
3.	Choose appropriate tools or templates.
4.	Update selected templates with relevant and accurate information.
5.	Add, remove or restructure questions in each template to align with project objectives.
6.	Review for completeness and consistency.

Checklist of items to be customised

Items that will need to be altered have been indicated in the template in square brackets, [].

The following items will need to be added or updated in the appropriate places to reflect the *specific details of the project*:

- department or agency name,
- portal name and URL,
- user group names,
- instructions and instruction lists,
- contents and topic lists,
- roles and responsibilities,
- clients or clientele,
- specific issues lists, and
- portal-specific sections or questions.

Important: This is **not** an exhaustive list. The research team will need to review each document carefully for errors and inconsistencies.

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Customising and Using the Tools, Continued

Items to be deleted

The following items will need to be deleted from the templates before use:

Item	Notation in Templates
Generic labels, instructions	[] , square brackets
Notes to portal managers and facilitators	Notes to facilitator:
Sample instructions for participants	sample

User Profiling

Overview

Introduction This section contains information on user profiling techniques and analysis.

In this section This section contains the following topics.

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User Profiling – Concepts

Introduction This topic describes the general purpose of profiling, and explains the information and attributes captured during profiling and data capture techniques.

Purpose of profiling The purpose of user profiling is to capture the needs, goals, values, expectations and habits of users into well-defined user groups.

Profiling categories and attributes Characterisation of the portal’s user groups provides information about the users that is useful in making design decisions. These user groups represent a large cross-section of people with similar attributes.

The following table lists important categories of information and recommended attributes that need to be captured during profiling.

Category	Attributes to be captured
Demographics	<ul style="list-style-type: none">• age,• gender,• occupation, and• education.
Web behaviour	<ul style="list-style-type: none">• online usage habits,• experience, and• ability.
User needs analysis	<ul style="list-style-type: none">• issues,• concerns, and• information requirements.
User goals and expectations	how they currently satisfy these needs and accomplish their stated goals
Barriers or problems	perceived and real problems in accomplishing their goals
Diversity	special needs that affect users

User needs analysis The user needs analysis involves understanding:

- the users’ issues and concerns,
- their typical tasks,
- information requirements,
- how frequently they perform common tasks, and
- their specific constraints.

It is important to investigate the information needs of the target audience to help tailor the general portal for specific user groups.

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User Profiling – Concepts, Continued

Barriers and problems

The barriers or problems faced by users provides an insight into the:

- difficulties they experience when using the portals, and
- types of information that they cannot locate on-line.

"Negative" profiling data is very difficult to obtain by any other means, such as log-file analysis.

User goals and expectations

Discovering the user's goal and motivations for performing a task and using a site are critical elements of user profiling.

The following table outlines the different types of user goals and expectations.

Important: The Experience goal is important, as this is almost always an unstated but essential user requirement.

User Goals	Description
Experience	How do they want to feel when using the site Examples: Confident, excited, not stupid, happy, expert, having fun.
Outcome	Benefits they achieved after using the site Examples: Saved time or money, efficiency, higher quality of work, solved a problem, avoided problems.
Practical	Specific practical result of having used the site Examples: Found a specific answer, satisfied a customer, calculated an answer, paid a bill.

General tips for profiling

Keep the following in mind when undertaking any profiling activities:

- Avoid preconceptions or assumption about the users and their goals.
- Be prepared to make the most of available resources.
- Be flexible.

It is common to find that users' expectations do not match your plan.

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User Profiling – Concepts, Continued

Administering the questionnaire

The information in a user profile is usually obtained through a questionnaire given to the users. There are several options for administering the user profile questionnaire. The questionnaire may:

- contain open-ended and/or closed questions, and
 - be fielded anonymously or conducted face-to-face.
-

Data capture techniques

Data for profiling can be captured by:

- written methods, and/or
- observational or interactive methods.

Examples: Interviews, behavioural observation, focus groups.

A combination of methods will provide a richer data set of both qualitative and quantitative results.

See: User Research Methods – Strengths and Weaknesses for a comparison of these methods on page 3.

Diversity in user requirements (Individual variations)

Some of the main categories of variations that are of interest to designers are:

- user experience level,
Examples: Subject matter, computing skills, internet skills.
- user preferences,
Examples: Users tastes and habits.
- market segment, and
Examples: Age, gender, education, occupation.
- variation in physical or cognitive ability.
Examples: Near-sightedness, colour blindness.

The variations in user requirements can only be addressed if the design team is aware of the issues.

Using the profiling data

User profiling data provides the basis for usability scenario development.

See: Usability Scenario Development on page 32.

Identifying User Groups

Introduction

The process of identifying the broad categories of users of the site is an essential step in user research. This will help site owners and other stakeholders understand generally who their users are. The different user groups identified will then need to be refined in to distinct user profiles to provide a clear picture of the target user base.

Techniques and activities

Different techniques and activities can be used to identify potential users and user groups, including:

- reviewing available information and documents,
- interviewing stakeholders, and other internal staff,
- holding workshops or focus groups to brainstorm ideas, or
- developing user personas.

These activities do not need to be formal sessions but should be documented. It is important to have a designated scribe or note-taker.

Existing internal resources

The following are useful **internal** resources for identifying potential user groups.

The agency's:

- core customer base as defined by the portfolio,
 - website's business case or design documents,
 - website feedback forms,
 - prior user or market research results,
Examples: Prior usability tests, or survey results.
 - web development team,
 - business development team, and
 - customer service or helpdesk personnel.
-

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Identifying User Groups, Continued

Questions for brainstorming sessions

The following questions could be used to brainstorm information about the potential users of the website:

- What is the subject matter of the website?
 - Who do we think are the primary users of the website?
 - What are our assumptions about the users?
 - What do we already know about them?
Examples: Age, gender, profession, computer literacy, computer access and platform, education.
 - How does the user currently get this information?
 - What does the website aim to do for the user?
Examples: Purpose or functionality of the website.
 - Do we currently have access to users for profiling? Who are they?
Note: These may be from an existing list or database of users who have agreed to participate in surveys, focus groups or interviews.
-

Developing user personas

Development of personas is a technique used to turn amalgamated data into illustrations of 'real users', and to help the design team to focus on users.

The first step is to gather preliminary information from different sources and collate it into user groups. Then the data is refined into unique and individual user personas.

The following details could be included in a persona:

- a name and picture,
Important: Pictures should be taken from stock artwork. Do **not** use photos of real users or persons.
- general description,
Examples: Age, gender, occupation.
- description of relevant technology used, and
- overview of the goals and concerns.

See also: "Perfecting Your Personas" by Kim Goodwin

http://www.cooper.com/newsletters/2001_07/perfecting_your_personas.htm for additional information on developing personas.

Recruiting Participants

Introduction

The selection of participants whose background and abilities are representative of the portals' intended end user is a crucial element of the profiling process. Participants should be recruited from the site's main users groups.

Valid results will be obtained only if the participants recruited for profiling are typical end users of the portal, or are matched as closely to the categories and attributes as possible. Identify the main attributes of each user group to be tested and screen responses based on these attributes.

See: User Profiling – Concepts on page 7 for further information about categories and attributes.

Before you recruit participants

The following table lists a few important factors that you may need to consider before recruiting participants for profiling.

Factors to consider include...	Comments
how many participants you wish to profile.	Unless targeting a narrowly defined group, a small sample will not cover the range of users. While any amount of profiling will help, too small a sample may not provide reliable feedback.
the geographical distribution you wish to obtain information from.	Will you limit your testing to your physical location, or will you target remote users?
broad versus narrow categories of participants.	A broad category of users, such as 'Australian residents' will be easy to source, but the results will be difficult to analyse.
specific problem(s) you are trying to address.	You may wish to find out why a particular user group is not accessing the portal, so you may want to conduct research on this particular profile.

Sources of participants

Participants can be sourced from a number of areas depending on your profiling goals.

Sources of participants may include:

- the business community,
 - the general public,
 - specific community groups, or
 - your personal network.
-

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Recruiting Participants, Continued

Methods to attract

Attracting participants can be the most difficult part of user profiling. The following table shows some of the methods used to attract participants.

Note: In all cases you will need to be very specific about the type of participant you are trying to attract. You will need to identify any relevant information, such as age, gender, occupation, or education.

Method	Advantages	Disadvantages
Using a third party Examples: Charitable organisation, council, Business Enterprise Centre, school.	<ul style="list-style-type: none"> • Third party organisations have good networks of contacts. • They can arrange and screen participants as well as organise venues. • You can liaise directly with one person, saving you time. • Can be of assistance with either large or small numbers of participants. 	<ul style="list-style-type: none"> • They may only be able to source participants in their local area. This can be a problem if you are trying to arrange participants in multiple locations. • They will require a fee for their services.
Market research firms	<ul style="list-style-type: none"> • Market research firms have good networks of contacts. • They can arrange and screen participants as well as organise venues. • Some organisations can perform the profiling for you. • They can often recruit participants from across the country. • You can liaise directly with one person, saving you time. 	<ul style="list-style-type: none"> • They will require a fee for their services. • They will only be of assistance where large numbers (over 100) of participants are involved.
Advertising on your web site	<ul style="list-style-type: none"> • Easy to administer. • Cost effective. • Can reach large numbers of people in many locations at the one time. 	You will only attract users who are familiar with your site and are knowledgeable of the internet.

Continued on next page

Recruiting Participants, Continued

Methods to attract (continued)

Method	Advantages	Disadvantages
Advertising in the newspaper	<ul style="list-style-type: none"> • Easy to administer. • Inexpensive to place the advertisement. • Can potentially reach large numbers of people at one time. 	<ul style="list-style-type: none"> • Response rates are variable. • Can be time consuming to screen a large number of responses for suitability.
Unsolicited letters to organisations or participants	<ul style="list-style-type: none"> • Easy to administer. • Cost effective. • Can reach large numbers of people in many locations at the one time. 	<ul style="list-style-type: none"> • Response rates may be low. • You may need to send many letters to attract a reasonable response. • Can be time consuming.
Cold call followed by letter	<ul style="list-style-type: none"> • Suitable for sourcing small numbers of participants. • Can screen participants while talking to them. • Can be easy if a specific group is being targeted. Example: Doctors, dentists, or people that can be identified in the yellow pages. 	<ul style="list-style-type: none"> • Labour intensive and time consuming. • You may need to make many calls to attract a reasonable number of participants.
Using staff and their families	<ul style="list-style-type: none"> • Suitable for sourcing small numbers of participants. • Can screen participants while talking to them. 	May introduce a bias since staff may be familiar with the services, information, and the "vocabulary" of the agency.

Continued on next page

Recruiting Participants, Continued

Screening participants

It is always a good idea to screen participants for their suitability before arranging an interview/focus group. The profiling categories and attributes you have identified will assist you to screen the participants you wish to use for profiling.

See: User Profiling – Concepts on page 7 for further information about categories and attributes.

Offering incentives

It is common practice to offer incentives to thank participants for taking the time out of their schedules to be part of the profiling/testing process. You should check with your organisation about what would be considered appropriate.

Note: Cash payments to participants may have tax implications. You should **always** seek advice before offering a cash payment.

User Profiling Techniques – Focus Groups

What is a focus group A focus group is a structured discussion with an 'expert' group of users.

Purpose The purpose of a focus group is to bring together the attitudes, beliefs, perceptions, preferences and experiences of different customers.

Advantages A focus group is an effective method to use group dynamics to:

- obtain a large amount of material in a short period, and
 - evaluate different concepts and explore new ideas.
-

Disadvantages Focus groups:

- need careful unbiased facilitation,
 - generate purely qualitative data based on user perceptions and expectations,
 - need significant preparation and coordination efforts, and
 - can be expensive and resource intensive, especially if participants are geographically dispersed.
-

Example of focus group session **See:** Focus Group Discussion Guide on page 58 for an example.

User Profiling Techniques – User Interviews

Description User interviews are generally conducted one-on-one, with a single customer or user and a representative of the design team.

Interviewing is a popular way of gaining user insights.

Purpose Interviews can be used to:

- elicit user requirements and expectations,
 - establish responses to the current site, and
 - understand user preferences for competitive offerings.
-

Advantages Interviews support in-depth understanding of user requirements.

A structured interview enables the interviewer to focus on issues of particular relevance to the proposed profiling objectives.

Interviews are easy to conduct and provide insight into user needs relatively quickly with comparatively low levels of expertise.

Disadvantages Interviews can be expensive and time-consuming.

Interviewees may distort information through:

- reflecting any bias of the interviewer, if the interviewer is not careful and skilled,
- recall error,
- selective perceptions, and
- a desire to please the interviewer.

Interviews can generate a large volume of information and may be difficult to transcribe and reduce data.

User Profiling Techniques– Surveys

Definition: “A "survey" is used most often to describe a method of gathering information from a sample of individuals. This "sample" is usually just a fraction of the population being studied.”
survey Source: <http://www.stat.ncsu.edu/info/srms/survwhat.html> (12/09/03)

Purpose A user survey can be used to ask both specific and factual, or subjective questions from users. It is the most appropriate means of gathering information about the profile and experiences of users located in geographically dispersed areas.

Advantages Surveys:

- are relatively cheap and easy to administer,
- allow for anonymity of responses,
- are useful for accessing large sample size,
- allow easy comparison of answers, and
- allow flexibility – many questions may be asked on a given topic.

Disadvantages Surveys have certain disadvantages, such as:

- a potentially low response rate,
- a risk of responses not mapping to the representative user group if fielded randomly,
- they are based totally on the user’s recollection of facts and information.

Conducting a Focus Group

Introduction This topic provides general guidelines for conducting a focus group.

Process for conducting a focus group The following table outlines the general stages in preparing for and conducting a focus group.

Stage	Description
1. Establish objectives	It is critical that the objectives of the focus group are clear and explicit. Note: The clearer the objectives, the easier it will be to design the rest of the session.
2. Plan and prepare	Identify requirements and resources for the sessions, including: <ul style="list-style-type: none"> • an agenda, • a script, • additional materials, • guidelines for third-party recruiters (if applicable), • participant invitations, • question list, • site location and attributes, and • session dates.
3. Recruit participants	<ul style="list-style-type: none"> • A good session requires a small, but representative sample of 'expert' participants to discuss a topic. • These 'experts' may be potential or current customers. • There should be between 6 and 12 people involved. • Screen the participants for suitability, if necessary.
4. Organise the venue & equipment	<ul style="list-style-type: none"> • The room must be comfortable. • Typical materials include notepads, pencils, flipchart, markers, sticky tape, blu-tac™, Post-it™ notes, name tags, refreshments and a clock. • Additional materials include copies of questionnaire or surveys and incentive or reward packages for participants. • Recording equipment if required, including tape or video.
5. Facilitate	<ul style="list-style-type: none"> • The session should not be longer than 3 hours and it is likely that in a 2 hour session a break will be required. • Questions should be open and enable discussion. • A script will ensure the session runs smoothly and should include an indication of where and how the facilitator should probe further. <p>It is important to create a good atmosphere, prevent any disruptive behaviour and encourage participation. The facilitator needs to be impartial.</p>

Continued on next page

Conducting a Focus Group, Continued

Process for conducting a focus group (continued)

Stage	Description
6. Evaluate results	<ul style="list-style-type: none">• Review the notes and summaries of the focus group.• Group items and refer to the objectives when drawing conclusions.• Compare the findings to other research, user observations or interviews.

Conducting an Interview

Introduction

This topic provides general guidelines for conducting an interview.

General approach

Interviews are best conducted face-to-face. A user interview should last no more than 2 hours, preferably less than 1 hour. The participant is often giving up valuable time, so detailed preparation is required to make the most of the opportunity.

Interview questions

Some general rules for interview questions:

- Ask open questions.
- Avoid closed questions, leading or biased questions.
- Don't combine questions.
- Avoid focussing the interview around 'feature checking'.
Example: Asking participants if they like a particular feature on a screen, or what features they would like to see.

Use a question guide but do not limit interesting discussions.

Question themes

Interview questions should focus around:

- users needs,
 - complaints, problems and weaknesses,
 - expectations and perceptions,
Example: What do you expect?
 - experiences, and
Note: Ask about both negative and positive experiences.
 - current approach to finding information.
-

Continued on next page

Conducting an Interview, Continued

Portal review session

If the interview includes the portal review session then ask the following types of questions:

- What features are important,
Examples: which would you use, which aspects, what requirements are met, what do you like best
- How could it be improved?
- What else could you use instead?
- What would encourage you to use it?

Important: Do not prompt users to carry out tasks differently, or in an order other than the one they use normally.

Interviewing tips

Common tips for interviewing:

- Try to minimise disruption.
 - Listen and watch attentively.
 - Ensure that you do not give negative signals to the users, either verbally or by your body language.
-

Fielding a Survey

Introduction This topic provides general guidelines for fielding a survey.

Conducting a survey The following table outlines the main stages in conducting a survey.

Stage	Description
1. Establish objectives	Identify the objectives of the survey.
2. Plan and prepare	<ul style="list-style-type: none">• Determine the key dates for the survey.• Decide the user group to target.• Adapt survey questions for the target group based on objectives.• Draft a cover letter to accompany the survey.• Determine the method for fielding the survey. Example: Telephone, e-mail, web-based.• Run a pilot test.
3. Conduct the survey	Print, mail or e-mail surveys and present them to the respondents. Note: A web-based survey may be used, but requires extra work to design.
4. Collect raw data	<ul style="list-style-type: none">• Retrieve returned surveys from the mail, disk, e-mail, web.• Enter data into a spreadsheet or program.
5. Analyse data	<ul style="list-style-type: none">• Analyse the raw data for pattern and trends.• Collate data into a report or document.

General tips Consider changing the categories or options included in the sample survey to tailor requirements for your portal.

Some useful tips for re-developing survey-based questionnaires are:

- Keep the survey brief.
 - Use simple language and common concepts.
 - Keep questions manageable.
 - Structure questions to reduce confusion.
 - Run a pilot test of the survey.
-

Keep the survey brief Distinguish what is "nice to know" from what you "need to know". Stick with the "need to know" for the survey.

Continued on next page

Fielding a Survey, Continued

Use simple language and common concepts

It is important to use simple language in the survey. This reduces any ambiguity.

Use the following guidelines:

- use common words rather than any catchy phrases or jargon,
 - phrase short questions,
 - avoid asking two questions in one,
 - avoid double negatives, and
 - qualify or explain options and choices.
-

Keep questions manageable

Ensure that the questions are manageable for the respondent.

This can be achieved by the following:

- ask personal fact questions,
Note: Respondents can answer questions of personal fact easier than questions of opinions and attitudes.
 - avoid any recall of the past, and
 - avoid hypothetical questions.
-

Question structure

General rules to structure individual questions are:

- use simple questions rather than general ones,
 - use close-ended and open-ended items for appropriate inquiries,
 - offer a "no opinion" option,
 - watch wording choices,
 - use open-ended follow-ups to close-ended questions, and
 - ask multiple questions on an important topic.
-

Run a pilot test

Test the survey to ensure that respondents:

- understand the meaning of the questions,
- can respond to the questions (the questions aren't too complicated), and
- maintain interest and attention.

The pilot can be done with the interviewer in the room with the respondent to discuss the respondent's reaction to the survey.

Profiling Analysis

Introduction

The focus of user profiling is to capture and analyse qualitative and quantitative data. The qualitative data is important in identifying and extracting trends or themes.

Analyse interview and focus group data

The following is a list of things to extract and create groups of related data.

Some examples of useful groups are:

- issues,
 - user language and terminology,
 - user preferences for information sources,
 - problems,
 - methods for finding information,
 - popularity of issues, topics, features, and
 - likes and dislikes.
-

Analyse survey data

The following steps will help in analysing survey data

Step	Action
1.	Enter all numerical data into a spreadsheet, word processing program or analysis tool of your choice. Note: It is possible to automate the data capture by using a web-based survey.
2.	Produce frequencies for responses to all quantitative or numerical questions.
3.	Examine whether there are differences in responses between common categories. Examples: men and women, younger and older users. Examining these differences will provide important insights into key issues of your target audience.

Continued on next page

Profiling Analysis, Continued

Correlations and trends

When analysing the data, look for general patterns and differences in patterns within the user group based on the following criteria:

- age,
Example: Sometimes it is found that differences are more pronounced for older age categories.
 - gender,
 - employment,
Examples: occupation, position, experience, full or part-time.
 - non-English speaking background (NESB),
 - computer and internet usage, and
 - factual information.
Examples: user familiarity with the structure of government departments, frequency of use of information.
-

Usability Testing

Overview

Introduction This section contains information on usability testing concepts, the testing process, usability scenario development and analysis.

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Usability Testing – Concepts

**Definition:
usability**

Usability is a measure of whether people manage to do what they wanted to on a site, and whether (consequently) the site achieves its goals.
Source: <http://www.writing.uct.ac.za/user/usability.htm> (14/09/03)

**What does
usability testing
measure?**

Usability testing is designed to measure a combination of factors that affect the users' ability to accomplish tasks at the site.

Some of the common factors are:

- ease of learning,
 - efficiency of use,
 - memorability,
 - error frequency and severity, and
 - user satisfaction.
-

**Usability
metrics**

A usability test can be used to “measure” a number of elements of user interaction, such as the:

- time to complete a task,
 - percent of tasks completed,
 - ratio of successes to failures,
 - time spent in errors,
 - percent or number of errors,
 - percent of favourable/unfavourable user comments,
 - number of repetitions of failed commands,
 - number of times the interface misleads the user,
 - number of good and bad features recalled by users, and
 - number of the users expressing frustration or satisfaction.
-

Continued on next page

Usability Testing – Concepts, Continued

Data collection methods

The table below outlines the common data collection methods used during a usability test.

Note: It is important to use a combination of methods to capture better quality data.

Method	Data collected by...
Observation	observing the user's behaviour throughout the usability testing.
Debrief/Verbal Report	the user's verbal report after completing the usability test.
Thinking-Aloud	using user's thoughts throughout the usability test.
Questionnaire	question items that address the quality of information and user responses.

Usability Testing Process

Introduction This topic contains information on the usability testing process.

Steps in usability testing The following table outlines the main activities involved in developing and conducting a usability test.

Stage	Description
1. Establish test objectives	<ul style="list-style-type: none"> • Determine the usability test goals. • Decide the scope of test user groups, if certain features of the site are being tested, how to measure usability. • Schedule key dates for testing.
2. Plan and prepare	<ul style="list-style-type: none"> • Begin recruiting test participants. • Prepare the following test materials: <ul style="list-style-type: none"> - tasks and scripts, - participant instructions, - data logging sheets, - pre-test and post-test questionnaire, and - consent forms (if required). • Select feedback protocol mechanisms: <ul style="list-style-type: none"> - a written feedback protocol distributed to users who write their own feedback, and/or - an interview feedback protocol with answers recorded by the moderator.
3. Recruit participants	<ul style="list-style-type: none"> • Filter participants based on user group attributes. • Prepare an introduction or cover sheet inviting participants. • Explain the test process to the participants.
4. Organise venue and equipment	<p>Organise a venue with suitable equipment. Example: Computer, internet access, privacy.</p>
5. Conduct tests	<ul style="list-style-type: none"> • Greet users and explain the session structure. • Introduce any observers or facilitators. Important: Managers and designers should also identify themselves as mere observers rather than major stakeholders. • Conduct session with minimum disruptions. • Record observations on logging sheets. • Keep a check on the time. Try not to let the test run overtime.
6. Debrief participants	<ul style="list-style-type: none"> • Ask participants to fill in the feedback questionnaire. Important: Remember to collect this form and check for completion. • Ask the participant to provide general feedback about the Web site and answer observers' questions. • Thank and compensate the participants.

Continued on next page

Usability Testing Process, Continued

Steps in usability testing (continued)

Stage	Description
7. Collect and analyse data	<ul style="list-style-type: none">• Collect logging sheets, feedback material, observers' notes from all sessions.• Group results into usability categories for analysis.
8. Recommendations	<ul style="list-style-type: none">• Document what was observed.• Determine which usability goals were met and which were not met.• Recommend changes to make the site usable.• Distribute findings to all stakeholders.

Usability Scenario Development

What is a scenario?

User scenarios are built around defined user profiles and personas and include descriptions of common user tasks.

Purpose

The purpose of user scenario development is to define and understand the circumstances in which the user would be likely to use the portal.

The goal is to build ideal user experiences that will most likely meet the expectation of the user group and result in the successful accomplishment of users' goals.

Key requirements for scenario

Some key requirements of a scenario for usability testing are that scenarios:

- must be designed from user group issues and requirements,
- are usually high-level goals from the user's perspective,
- must be reasonable and realistic, and
- must **not** include keywords or interface elements.

Example: do not use words in the scenario that are identical to those that appear on the screen.

Continued on next page

Usability Scenario Development, Continued

Developing tasks

The following table outlines the main steps required to develop a task list for usability testing.

Step	Action	Comments
1.	Determine the nature of the test and test goals	Understand the user groups, key metrics and qualitative data to be logged.
2.	Identify the right tasks	<ul style="list-style-type: none"> • The tasks must reflect the user groups' information requirements. • Based on the user group issues list determine information requirements that are: <ul style="list-style-type: none"> – important, – performed frequently, and/or – hard to locate. <p>Note : Try to include at least one task based on an issue important to the user group but not included in the content on the site. The site should ideally direct users to another appropriate portal quickly and easily without the participant spending a long time searching.</p> <p>Example: A parent searching for information on drugs and teens may choose to search on the Families portal. This information may be dealt with comprehensively on the Youth portal. The Families portal should be able to direct the parent to the Youth portal.</p>
3.	Determine all site features that require testing	<p>Make a list of the site features that <i>require</i> testing. This can include:</p> <ul style="list-style-type: none"> • main navigational elements, • transactional features, • new subsites or pages, • new or redesigned features, and • problematic features. <p>Example: Problems identified from site feedback.</p>
4.	Phrase tasks as directed or non-directed scenarios using site features.	<p>Write out complete tasks in a:</p> <ul style="list-style-type: none"> • non-directed scenario, or • directed task-based format.
5.	Determine sequence of tasks	<p>Sequence final task list from</p> <ul style="list-style-type: none"> • easy to hard tasks, or • common to uncommon tasks.
6.	Check wording of tasks	<p>Check that the wording does not:</p> <ul style="list-style-type: none"> • lead them, • mislead them, or • "give away" correct interactions. <p>Example: Be careful of using keywords.</p>

Continued on next page

Usability Scenario Development, Continued

Design tasks for testing site features Users may initially go the Australia.gov.au website for information and find the information they need via a link provided to another website, such as the State or Local Government websites, as well as commercial websites.

In developing scenarios for testing, users should be asked to locate information from a variety of pages throughout the sites and access information that takes them out of the site. This is crucial in testing the navigational usability of the sites.

Sample tasks The following table list some sample tasks for testing site features.

Site Features	Sample Tasks
Multiple Entry Points	
Entering the portal from the Australia.gov.au homepage	Starting at www.australia.gov.au complete the following task.
Entering the site from the portal homepage	Starting at www.[] .gov.au complete the following task.
Entering the portal from a link from another website or from a search engine result	Find www.[] .gov.au using search engine (Google, Yahoo)
Main Features of the Site	
Menus and sub-menus	Go to [] page.
Navigation bars	Navigate to [] page or [] site.
A-Z lists	Use A-Z list to find [].
Search engine	Find [product] using the search engine and go to the product page.
Advanced search	Customise your search to return [] results per page.
Utility Links	
Register	Register as a new user Note: Provide fictitious details for user.
Logon	Login using [username], [password] Note: Provide fictitious details for user.
Feedback	Locate and complete the feedback survey
Contact Us	E-mail the webmaster.
Site Maps	Use the site map to find []
Moving out of the site and navigation back	Close your browser window. Open the [] site. Navigate to [] site. Bookmark the URL of the [] site.

Usability Checklist

Checklist

Use the following checklist to check for common usability issues.

Note: This list is a guide only and is **not** an exhaustive or complete test.

Design Component	Question
Architecture and Navigation	<ul style="list-style-type: none"> • Does the structure fit the purpose? • Is the navigation scheme clear? • Where are you? How do you find what you want? • Is it clear where to go next? • Does interaction support informational retrieval tasks? • Are there a reasonable number of nav-bar choices? • Do link names match page names? • Are links clearly marked? • Is there a clearly marked link back to the home page? • Is there an option to search for information? • Is there a site map? • Does every page have standard identification elements? • Does the user have control over navigation?
Layout and design	<ul style="list-style-type: none"> • Is layout consistent on all pages? • Is excessive scrolling required? • Is there a main display area on each page? • Does the layout work visually? • Proper use of alignment and grouping? • Proper use of contrast? • Is it cluttered?
Content	<ul style="list-style-type: none"> • Is the text clear and concise? • Is there excessive use of jargon or acronyms? • Is text organised in small chunks? • Are there spelling or grammar errors?
Forms	<ul style="list-style-type: none"> • Are dialog methods concise and consistent? • Are there clear submit and reset buttons?
Platform and implementation	<ul style="list-style-type: none"> • Is download time fast enough - do pages load in 3-10 seconds? • Do all the links work? • Are there broken images? • Are pages written to be found by search engines? • Does the site work with all supported browsers? • Does the site work on all platforms? • Does the homepage display fully on a screen with 800 x 600 resolution? • Does the site work on resolutions from 640 x 480 to 1024 x 768? • Are non-standard plug-ins used?

Continued on next page

Usability Checklist, Continued

Checklist (continued)

Design Component	Question
Accessibility (priority 1)	<ul style="list-style-type: none">• Provide alternative text for all image type buttons in forms.• Provide text equivalents for every non-text element, including but not limited to images, scripts, animations, audio and video.• Ensure that all information conveyed with colour is also available without colour, for example from context or markup.• If an image conveys important information beyond what is in its alternative text, provide an extended description.• For tables not used as layout, such as spreadsheets, identify headers for the table rows and columns.• If the submit button is used as an image map, use separate buttons for each active region.• If a data table has two or more logical levels of row or column headers, use markup to associate data cells and header cells.• Provide alternative content for each SCRIPT that conveys important information or functionality.

Conducting a Usability Testing Session

Introduction This topic contains information on conducting a usability test session.

General guidelines for conducting a session The following guidelines should be adhered to when conducting usability testing with users:

- Keep the session neutral.
 - Treat each participant as a completely new case.
 - Assist the participants only as a last resort.
 - Help participants to relax.
 - Use the ‘thinking aloud’ technique.
 - Be aware of the effects of your voice and body language.
 - If you make a mistake, keep going on.
-

Keep the session neutral Take the attitude that you have no vested interest in the results of the test one way or the other. Do not indicate through your speech or mannerisms that you strongly approve or disapprove of any actions or comments offered by a particular participant.

Encourage participants to focus on their own experiences and not to be concerned with what other people of similar characteristics might hypothetically think or need.

Treat each participant as a completely new case Treat each participant as a completely new case, regardless of background of the participant and what previous results and sessions have shown.

Try to collect data without undue interpretation.

Assist the participants only as a last resort The tendency to rescue is due to our natural empathy and even embarrassment when watching someone struggle.

Assist the participants only as a last resort. If you assist the participant, you may lose the opportunity to understand what happens when people get lost and how they recover.

Continued on next page

Conducting a Usability Testing Session, Continued

Help participants to relax

Humour can counteract participants' self-consciousness and help them to relax. Indicate to the participants that there is no right or wrong response. If participants are having fun, they are more apt to let their defences down and tell you what is really on their mind.

Use the 'thinking aloud' technique

'Thinking aloud' is a simple technique intended to capture what the participants are thinking while working with interactive software.

To use this technique, have the participants provide a running commentary of their thought process by thinking aloud while performing the tasks of the usability test.

Be aware of the effects of your voice and body language

It is very easy to unintentionally influence someone by the way in which you react to the person's statements, both verbally and through body language.

To prevent any bias effects, make a special effort to be mindful of your voice and body language.

If you make a mistake, keep going on

Do not panic if you inadvertently reveal information or in some other way bias the session of a usability test.

Just continue on as if nothing happened. At best, the participant will not even observe your comment or action.

Usability Test Analysis

Introduction This topic contains general information on collecting and analysing usability test data.

Analysing qualitative and quantitative data During the usability test both quantitative and qualitative data are collected. The information collected includes:

- quantitative data
 - metrics recorded by the moderator
 - metrics recorded by the participant
- qualitative data
 - session notes recorded by the moderator and observer
 - feedback from the participant

It is important to analyse both types of data together to get a complete picture of usability issues and problems. This can be done first by simple categorisation, then quantification of data.

See: Sample issues table and Sample metrics table below.

It is important to understand that the qualitative information will provide a rich context to understand core usability issues. Direct observations record **what** users did during the usability test. This qualitative information should provide more information on **why** users faced problems.

Example: Users might provide a high score against site navigation but direct observation indicates that users consistently faced navigational problems.

Collecting data Extract and cluster observations and user comments into groups of data. Use only one or two grouping schemes.

Some examples of useful groups are:

- task or scenarios,
- site feature,
- usability issues,
- problems, and
- likes and dislikes.

Collect all quantitative data into tables in a word processor or a spreadsheet.

Continued on next page

Usability Test Analysis, Continued

Analysis steps The following table outlines the broad steps required to analyse usability data.

Step	Action
1.	Go through the list of groups and observations.
2.	For each group, find a common issue.
3.	<ul style="list-style-type: none">Describe the issue in terms of the cause or problem.Identify why there was difficulty or what the source of problem might be. Examples: List specific factors such as, confusing labels or placement of navigation features, poor colour contrasts between text and background.
4.	Understand the issue in terms of the impact on users when generating recommendations.

Sample issues table This is a sample table to record observations.
[Record observations and user comments about the following usability features of the [URL and name] portal.]

Feature	Comments
Home Page	
Look and feel	
Navigation	
Labelling	
Content	
General observations	

Continued on next page

Usability Test Analysis, Continued

Sample metrics table [Sample table to record observations]. Record the usability metric in the following table.

The following table shows the participants rating for each statement.

Information Design	1 Strongly agree	2 Agree	3 Neutral	4 Disagree	5 Strongly disagree
The site has a clear and logical structure.					
The meaning of the main menu items is clear.					
The site clearly identified the services and information available.					
Design and Navigation					
The navigation features of the site are clear and easy to use.					
The link labels and link names were clear and directed me to the correct information.					
I prefer to access government services on the web rather than by other methods.					

Appendix A - Profiling Tools

Overview

Introduction This appendix contains the profiling tools and templates.

It is recommended these tools are customised for each individual project.
See: Customising and Using the Tools on page 4

Using the tools The profiling tools are templates and can be used in a number of combinations to get the maximum value out of the profiling activities.

The templates contain questions by profiling category.
See: User Profiling.

The following table provides **suggestions** on how the templates may be used.

Profiling Technique	Recommended Templates
Survey	<ul style="list-style-type: none">• Participant Information Questionnaire• Government Information Resources
Interview	<ul style="list-style-type: none">• Participant Information Questionnaire• Issues• Government Information Resources• Portal Review
Focus Group	<ul style="list-style-type: none">• Participant Information Questionnaire• Focus group Discussion Guidelines
Website Survey	Website Exit Poll

Additional information For additional information on surveys, interviews and focus groups, see:

User Profiling Techniques – Focus Groups on page 16.

User Profiling Techniques – User Interviews on page 17.

User Profiling Techniques– Surveys on page 18.

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Overview, Continued

Contents

This section contains the following topics.

Topic	See Page
Session Introduction – Cover Page	44
Participant Information	46
Government Information Resources	50
Issues	52
Portal Review Session	54
Focus Group Discussion Guide	58
Sample Website ‘Exit Poll’	61

Session Introduction – Cover Page

[Project Title]

Introduction

[Department Name] is conducting a study into user profiling for [portal name and URL] portal.

The purpose of the user profiling session is to gain an understanding of the information requirements of the target group. This will provide information that will be used to determine the effectiveness of the current content structure and, if required, provide recommendations for improving the design and structure of the site.

Name	
User Group	
Location	
Date/Time	

How the information will be used

The results from the study will be used to:

- determine the key issues and information requirements, and
 - understand the way users access information.
-

Privacy and Confidentiality

[Department] will compile and analyse all responses received from this session.

[Department] will include **anonymous** survey responses only in any report or document produced as a result of this study.

The personally identifiable information we collect about you is **not**, under any circumstances, shared with any other companies or organisations.

Duration

This session/survey will take approximately [] minutes to complete.

Continued on next page

Session Introduction – Cover Page, Continued

How the session will be conducted [Include instructions for the participants.]
The following is a **sample only**:

This interview consists of three parts: a survey, an interview and the portal review.

1. The participant will fill in the questionnaire as part of the survey.
 2. The interviewer will then ask some detailed questions based on the survey.
 3. The participant will review the portal and provide feedback.
-

Contents [Provide contents list here.]
The following is a **sample only**.

This questionnaire contains the following topics:

Topic	See Page
Participant	46
Government Information Resources	50

Participant Information

Demographics Please answer the following questions about yourself.
Tick the appropriate choice(s) for each category.

	Question	Response
1.	What is your age group?	<input type="checkbox"/> less than 18 <input type="checkbox"/> 18- 20 <input type="checkbox"/> 21- 25 <input type="checkbox"/> 26 –30 <input type="checkbox"/> 31– 39 <input type="checkbox"/> 40 – 49 <input type="checkbox"/> 50 – 59 <input type="checkbox"/> 60 or above
2.	Gender	<input type="checkbox"/> Female <input type="checkbox"/> Male
3.	What is your highest level of education?	<input type="checkbox"/> Year 10/11 <input type="checkbox"/> Year 12 (HSC) <input type="checkbox"/> Vocational Education (TAFE) <input type="checkbox"/> Bachelors <input type="checkbox"/> Masters <input type="checkbox"/> Other (specify)_____
4.	Are you from a Non-English Speaking Background?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.	What is your main occupation?	<input type="checkbox"/> Manager / Administrator <input type="checkbox"/> Professional <input type="checkbox"/> Sales person <input type="checkbox"/> Clerk <input type="checkbox"/> Tradesperson <input type="checkbox"/> Labourer or Related Worker <input type="checkbox"/> Machine Operators, and Drivers <input type="checkbox"/> Public service <input type="checkbox"/> Student <input type="checkbox"/> Volunteer worker <input type="checkbox"/> Other

Continued on next page

Participant Information, Continued

(continued)

	Question	Response
6.	What industry do you work in?	<input type="checkbox"/> Advertising <input type="checkbox"/> Building & Construction <input type="checkbox"/> Engineering <input type="checkbox"/> Education <input type="checkbox"/> Finance <input type="checkbox"/> Government <input type="checkbox"/> Health <input type="checkbox"/> Hospitality <input type="checkbox"/> Legal Services <input type="checkbox"/> Manufacturing <input type="checkbox"/> Management Consulting <input type="checkbox"/> Retail Services <input type="checkbox"/> Telecommunications & IT <input type="checkbox"/> Trades Services <input type="checkbox"/> Vocation Education and Training <input type="checkbox"/> Other (specify) _____
7.	Nature of Occupation. (Tick all that apply)	<input type="checkbox"/> Full time <input type="checkbox"/> Part Time <input type="checkbox"/> Casual <input type="checkbox"/> Self Employed <input type="checkbox"/> Retired <input type="checkbox"/> Unemployed <input type="checkbox"/> Other (specify) _____
8.	What region of your state do you live in?	<input type="checkbox"/> Metropolitan <input type="checkbox"/> Regional <input type="checkbox"/> Rural/Remote

Continued on next page

Participant Information, Continued

Role and Organisation

Please answer the following questions about your [current employment].
Notes to facilitator: These questions apply only in a work related profiling context.

Question	Response
How long have you been with your current organisation?	
How long have you been in your current role/position?	
What is the main service that your organisation provides?	

Computer literacy

Please rate your confidence in using a computer an internet on a scale of 1 (Not Confident) to 5 (Very Confident). Place an **X** in the box that applies.

Question	Response				
	Not Confident	2	3	4	Very Confident
How confident are you with using a computer?					
How confident are you with the internet?					

Internet access

From where do you access the internet? Tick all that apply.

- Home
 - Work
 - Community resource centre/library
 - Other (specify) _____
-

Frequency of internet access

How frequently do you access the internet? Tick the most appropriate choice.

- More than once a day
 - Daily
 - More than once a week
 - Weekly
 - Less than once a month
 - Other (specify) _____
-

Continued on next page

Participant Information, Continued

Internet usage For what reason do you use the internet? Tick all that apply.

- Academic/educational
 - Work
 - Private/Personal
 - Other (specify) _____
-

Browser version Which Web browser do you use most frequently?

- Internet Explorer 5.0 or more
 - Internet Explorer 4.0 or less
 - Netscape 4.0 or more
 - Netscape 3.0 or less
 - Don't know
 - Other (specify) _____
-

Preferred method for finding web sites Which is your preferred method for finding Web sites?

- Guess the URL
 - Search Engines, for example Google, Yahoo.
 - A hotlink
 - Favourites/Bookmarks
 - Other (specify) _____
-

Government Information Resources

Introduction

The questions in this topic relate to your experience with government information sources, specifically government web sites.

If you do not currently use government web sites, please answer questions in relation to government enquiry counters, shop fronts or help desks etc.

1. On what issues do you seek government information? Please list 5-7 issues.

2. From the list above rank the three most important issues.

- 1.
 - 2.
 - 3.
-

3. When looking for information regarding government policies and programs, do you...

1. ring the relevant department?
 2. search the official website?
 3. visit the government department enquiry counter?
 4. ask someone? (specify) _____
 5. other? (specify) _____
-

4. In the table below, please list some government sites that you visit. If you cannot remember the site address, then give a description or name. For each site listed please state the information that you seek.

No.	The site I visit is...	The information I look for is...
1.		
2.		
3.		
4.		
5.		

Continued on next page

Government Information Resources, Continued

5. Why do you visit these government websites? Tick all that apply.

To look for general information

Examples: General government news, programs.

To look for specific information

Examples: Public services, forms.

To do something online

Example: Fill a tax return

To link to another resource

To find a contact or agency information

Other (specify) _____

6. What are the general problems you face in using government websites? Tick all that apply.

It is difficult to find information that is relevant to my situation.

Navigating the sites is difficult due to poor structure.

The information provided is often incomplete.

The information provided is often outdated.

The sites often have dead or broken web links.

7. Are there any **other problems** that you would like to add to the above list?

Issues

Introduction

The questions in this section are to help identify the major issues that concern you and for which you may seek information.

1. Describe your [role] and your main activities related to your [role].
Note: Depending upon the profiling objectives, 'role' refers to the user's main role in either a personal or work related context.

 2. Briefly describe your [clientele].
Notes to facilitator: Depending upon the profiling objectives, the 'clientele' refers to the user's main subject of interest in either a personal or work related context.

 3. What are the major issues related to your [role] and your [clients] that you have a need for information and services?
Notes to facilitator: Depending upon the profiling objectives, use of the terms 'role' and 'clients' refer to the user's main role and their subject of interest in either a personal or work related context. These can be changed to suit the user group you are working with.

 4. Please rank the above issues from most to least important.

 5. What specific information do you seek on these issues?

 6. Where do you obtain this information? Tick all that apply.
 1. Colleagues
 2. Newspapers
 3. Letters/correspondence
 4. Internet (general)
 5. Internet (government sites)
 6. Staff intranet
 7. Newsletters
 8. Internal circulars
 9. Call centres or helpdesks
 10. Other (specify)
-

Continued on next page

Issues, Continued

7. Have you searched on the internet for information on these issues?

8. Are you generally able to find adequate information on the internet?

1. Yes
 2. No
 3. Not sure
 4. Sometimes
-

9. On a scale of 1 (Very Easy) to 5 (Very Difficult), how easy has it been to get the information you sought?

10. What are the major problems you face when trying to obtain information to address your (government-related) issues on the internet?

11. Can you give me an example of an instance when you had to make a decision on one of these issues?

[Follow-up questions]

- What did you do?
- Why/How did you know to do this?
- What information did you rely on?
- Did you achieve a successful outcome?

Notes to facilitator: This set of questions identifies potential scenarios for a portal review or usability testing session. Additionally, they attempt to bring together in a single 'story' or anecdote qualitative information gathered in previous 10 questions.

Portal Review Session

Overview

This topic contains questions about the [URL] portal.

The portal review can be conducted in face-to-face interview sessions. This provides an excellent informal opportunity to gauge the user's impressions of the site and its content.

This is an on-line activity and requires a computer with internet access.

Important: This is **not** a usability test. The overall usability of the portal must be evaluated in separate usability test sessions.

Instructions for interviewer

Do the following:

1. Check the list of important issues identified by the participants
2. Ask them to locate the information through the portal.
3. Against each scenario, note the users' first and second options for links.
4. Ask the user what the link labels suggest to them and make a note of these.

Important: Use only 2 or 3 scenarios. Allow users to explore the site.

Sample scenarios of use

The following table contains **sample** scenarios for community workers.

Note: It is recommended that you use the participant's personal information requirements list as the source of scenarios.

Scenario number	Scenario (examples)	Link(s) Chosen	Keywords	Comments
1	Find funding for computer equipment.			
2	Find a grant for a small bus for your community.			
3				

Qualitative comments

Encourage the user to explore the site and links, and ask the users about their expectations and impressions. Make a note of the qualitative comments. These can be grouped together by category or theme for later analysis.

Continued on next page

Portal Review Session, Continued

User satisfaction

Please answer the following questions related to the government portal [portal name or URL] and the associated portal links.

1 How would you describe your familiarity with the web portal (Tick all that apply).

I

- was not aware of this web portal.
 - was only generally aware, but have not used it.
 - am familiar with this web portal.
 - am familiar with similar government websites.
-

2 How clear is the menu structure of the main page [portal name or URL] ? (Select one option).

- Very clear
 - Mostly clear
 - Neither
 - Mostly unclear
 - Very unclear
-

3 How helpful are the link names in directing you to the correct information location? (Select one option).

- Very helpful
 - Mostly helpful
 - Neither
 - Mostly confusing
 - Very confusing
-

4 Which links did you visit?

Continued on next page

Portal Review Session, Continued

5 What did you like about the portal?

6 Is there anything you dislike about the portal? What?

7 How often would you find a need to access this web site? (Select one option).

- more than once a day
 - daily
 - more than once a week
 - weekly
 - monthly
 - occasionally when a need arises
 - never
-

8 Which of the following best describes your **need** to access the web site? (Select one option).

- I would really use this site because nothing similar exists to meet my information needs.
 - This is a minor improvement to my current information resources.
 - Looks okay but this is similar to the sites I use now.
 - I am not at all interested in using the web site.
-

Continued on next page

Portal Review Session, Continued

9 Would you recommend this site to other people?

Yes

No

10 What would encourage you to use this site more frequently?

Thank you for your participation in the portal review

Focus Group Discussion Guide

Overview This guide contains the moderator’s list of topics and questions for discussion with participants, as part of the user profiling focus group.

What you will need To prepare for the user profiling focus group, the moderator will need:

- flip chart paper,
- blu-tac™, Post-it™ ,
- pens and blank paper for participants,
- white board markers, and
- copies of the Participant Information Questionnaire to distribute to each participant.

Timing The session should take approximately 1.5- 2 hours. Allow 5-7 minutes for the introduction and 20-25 minutes per section for the remaining two sections. Schedule a *very* short break between sections.

Introductory questions Introduce the focus group session by using the following topics.

Topic	Comments
Introduction	<ul style="list-style-type: none">• Moderator introduces self, the client and the project.• Explain how long the session is expected to run.• Ask participants to switch off mobile phones for the duration of the session.
Focus group objectives	<ul style="list-style-type: none">• Explain briefly the objectives of the discussion.• The objectives are to understand:<ul style="list-style-type: none">- the user group’s information requirements,- how they access information and services, and- barriers to information access.
Participant consent	<ul style="list-style-type: none">• Read the confidentiality statement to participants. This statement is located on the front page of the questionnaire.• Explain that participants can ask for clarification at any time.
Introduce Participants	Ask participants to go around the group and introduce themselves.

Continued on next page

Focus Group Discussion Guide, Continued

Issues Ask participants the following questions about their issues and information resources. Record their responses on the flip chart. Allow 20-25 minutes.

Number	Question	Comment
1	Here is a list of issues that have been identified as important [Sample list from parents' interviews] <ul style="list-style-type: none"> - Education - Job/work - Health - Drugs - Drinking - Safety 	List issues on flip chart. Note: The issues list was generated from earlier profiling activities. If a list of issues has not been generated then use this question to quickly brainstorm responses. Important: Keep the issues list visible throughout the session and make additions whenever required.
2	Ask participants if they wish to add any more issues.	Add issues to list on flip chart.
3	Ask participants to group the issues and rank the top 5 issues.	Group Activity: Ask participants to group and rank the issues on the paper provided.
4	What are your specific information needs for each issue?	List on flip chart. Examples: How to find an appropriate course, alcohol education programs
5	Do you use government web sites to search for information or services on the issues?	Count show of hands yes/no against list.
6	Which web sites? Why?	List on flip chart.

Using government sites Ask participants the following questions on using government websites. Record participant responses on the flip chart. Allow 15-20 minutes.

Number	Question	Comment
1	<ul style="list-style-type: none"> • Do you face any problems in using government websites? • What problems do you face? 	Count yes/no by show of hands. Brainstorm responses.
2	What would you like to see/expect when you visit a government site?	Brainstorm responses.
3	Ask them what they like or may dislike about the government sites.	Brainstorm responses. Make two separate lists for positive and negative attributes.

Continued on next page

Focus Group Discussion Guide, Continued

Scenarios Ask participants the following questions about their issues and concerns.
Allow 15-20 minutes.

Number	Question	Comment
1	<ul style="list-style-type: none">• Can you give me an example of an instance when you had to look for information on one of these issues?• Where did you search?	Ask participants in turn to briefly describe a scenario where they had to locate information. Example: Use the issues list.
2	<ul style="list-style-type: none">• Did you achieve a successful outcome?• Why do you think so?	Brainstorm responses. List success and success factors.

Wrap-up Thank participants. Hand out the participant profile questionnaire and ask participants to complete and return it before they leave.
Allow 5-10 minutes.

Sample Website 'Exit Poll'

Overview

This topic contains questions that can be fielded as a quick on-line survey for visitors to the portal.

Notes to facilitator: This survey is a sample only. Questions should be changed, added or removed according to the project's objectives.

Users background

What type of organisation do you work for?

- I don't work
 - Government
 - Academic
 - Research
 - Non-profit Organization
 - Private Sector
 - Other (specify) _____
-

Internet behaviour

How many hours do you spend on the Internet each week?

- 1-5
 - 6-9
 - 10
 - more than 10
 - other (specify) _____
-

Method for locating web sites

Which is your preferred method for finding Web sites?

- Guess the URL
 - Search Engines, for example, Google, Yahoo.
 - A hotlink
 - Favourites/Bookmarks
 - Other (specify) _____
-

Government sites visited

What work-related or government sites do you visit more than once a week?

Continued on next page

Sample Website 'Exit Poll', Continued

Feedback on portal

The following table contains questions to gauge the user's satisfaction.
Notes to facilitator: Use appropriate scales or ratings to collect data.

No.	Question
1.	Are you familiar with this site?
2.	Was this visit useful?
3.	Does the Home Page keep your attention as it loads?
4.	How long does the Home Page take to load (Please enter number of seconds or minutes)?
5.	Is the purpose of the site clear? Notes to facilitator: [Insert purpose of the portal here]
6.	Do the buttons at the top of the page tell you the site's basic content?
7.	Are the colours, images, and fonts in alignment with the site's purpose?

Navigation

The following table contains questions about the portal's navigational elements.

Notes to facilitator: Use appropriate scales or ratings to collect data.

No.	Question
1.	Do the navigation links show you everything you think belongs to the site?
2.	Can you easily identify the links that will help you find the specific information you are looking for?
3.	Do the subheadings and text make it easy to scan the material?
4.	Is the text easy to read and understand?

General comments

Are there any comments you would like to make about this site?

Thank you for your feedback.

Appendix B – Usability Testing

Overview

Introduction This section contains material for use during usability testing.

Contents This section contains the following topics.

Topic	See Page
Observer’s Introductory Script	64
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Sample Test Script – [User Group] Scenarios and Tasks	66
Participant Debriefing – [URL]	67
Sample Observer’s Sheet – [User Group]	69
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Observer's Introductory Script

Introduction	<p>Thank you for coming here today. I am working with the Australian Government Information Management Office (AGIMO) and other government agencies to develop a user-friendly and effective web access to government information and services.</p>
Tasks	<p>I will be asking you to complete a number of tasks. The tasks are designed to let me see how easy the site is to use. The tasks are testing the site, not you! We expect this session to take up to an hour and half.</p>
Recording activities	<p>I will be writing down the steps you take to complete the tasks. Please 'think aloud' so that I can more accurately understand why you make each choice.</p> <p>These notes are for the purpose of preparing a usability report for AGIMO. You will remain anonymous. In my report, you will be referred to as participant 'x'.</p> <p>I may ask you questions or remind you to 'think aloud' during the session.</p>
Consent	<p>Are you okay with me taking notes? Can I have your permission to use anonymous extracts from your comments in my report to AGIMO?</p>
Comfort	<p>Do you have any questions so far? Are you ready to begin?</p>

Participant Information

About this test [Department name] is reviewing government sites see whether or not they are easy to use.

The purpose of this test is to gain an understanding of the effectiveness of the current internet sites. The results from the review will provide information that may be used to improve the design, structure and content of the sites.

There are no mistakes This is a usability test of the sites. There is nothing you can do wrong – we are testing the sites, not you!

Please be honest Please feel free to be honest about what you like and dislike about the sites and its contents during this session.

Information about you Please complete the following information to help us assess the results of the test.

Do you use the internet?

- No.
- Yes – Daily Weekly Monthly

Why do you use the internet?

Examples: Shopping, banking, email, information.

Do you use the internet to access government information or services?

- No.
- Yes – Daily Weekly Monthly

On a scale of 1 (lack confidence) to 5 (very confident), how confident do you feel using any website?

Sample Test Script – [User Group] Scenarios and Tasks

Instructions

This usability test will start at [URL].

I will give you specific tasks to complete from this site. I will let you know exactly when we start and finish the test.

Please let me know if at any time during a task you would give up looking for information on the site.

Homepage impressions

Please have a look at the homepage [site URL] and tell me your initial impression of this page.

Try to ‘think out loud’ so that I know what you're thinking about.

Please don’t click on anything yet.

Tasks and activities

Starting at the [URL] homepage, please complete the tasks listed below. I will record your answers for you on a separate sheet.

No.	Task Description
1	
2	
3	
4	
5	

Comments

Are there any comments you would like to make about the sites visited?

End of Test

We have now completed the usability test.

Participant Debriefing – [URL]

Directions

Please rate your experience about the [site name and URL] by writing a number next to each statement in the space provided.

Information design

Rate the statements below on a scale of 1 to 5.

- 1 Strongly Agree**
- 2 Agree**
- 3 Neutral**
- 4 Disagree**
- 5 Strongly Disagree**

- [] The site has a clear and logical structure.
 - [] The meaning of the main menu items is clear.
 - [] The site clearly identified the services and information available.
-

Navigation & orientation

Rate the statements below on a scale of 1 to 5.

- 1 Strongly Agree**
- 2 Agree**
- 3 Neutral**
- 4 Disagree**
- 5 Strongly Disagree**

- [] The navigation features of the site are clear and easy to use.
 - [] The link labels and link names were clear and directed me to the correct information.
 - [] Once I was inside the site, I could move around easily.
-

Content

Rate the statements below on a scale of 1 to 5.

- 1 Strongly Agree**
- 2 Agree**
- 3 Neutral**
- 4 Disagree**
- 5 Strongly Disagree**

- [] The language used is plain English and not filled with jargon and acronyms.
 - [] The text is easy to read and understand.
 - [] The information provided is useful.
-

Continued on next page

Participant Debriefing – [URL], Continued

Graphic design & screen presentation

Rate the statement below on a scale of 1 to 5.

- 1 Strongly Agree**
- 2 Agree**
- 3 Neutral**
- 4 Disagree**
- 5 Strongly Disagree**

- [] The graphic design of the site is attractive and appealing.
 - [] The screen design allows you to easily locate specific information quickly.
-

Overall evaluation

Rate the statements below on a scale of 1 to 5.

- 1 Strongly agree**
- 2 Agree**
- 3 Neutral**
- 4 Disagree**
- 5 Strongly Disagree**

- [] I feel comfortable about using the site.
 - [] The site provides access to information efficiently and effectively.
-

Comments

Please provide comments on any features on the [site name and URL] site that you particularly noticed, and why you liked or disliked them.

Sample Observer's Sheet – [User Group]

Test Start

What time was the test:

- started?
- completed?

Total test time:

Homepage impressions

What is the participant's impression of the homepage?

1. Scenario or Task #1

Notes to facilitator: This is a sample template for recording one task only.

Access method:

Comments:

Completed:

- No, gave up
- No, time's up
- Partially right
- Completely right
- Wrong answer

Comfort level:

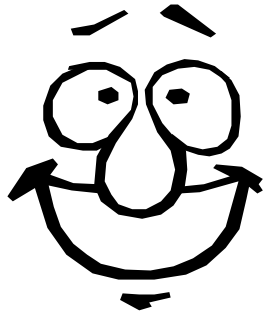
- 1
- 2
- 3
- 4
- 5

Time taken:

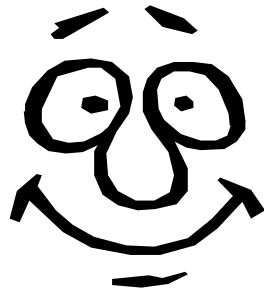
Comfort Level Table

Purpose The purpose of this table is to measure the “comfort level” of participants after each task is completed during an Internet Usability test.

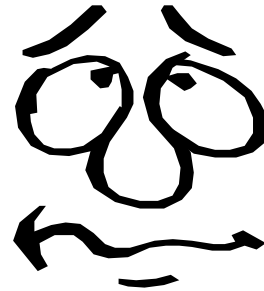
Overview Please select one of the below icons after each task is completed. Choose the icon that best represents the way you felt while trying to complete the task.



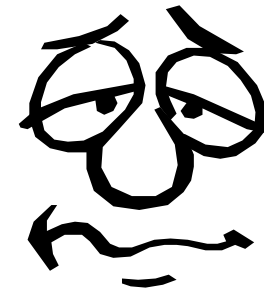
'Really enjoyable'



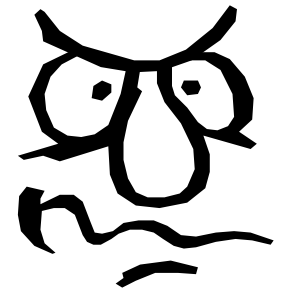
'Kind of fun'



'OK'



'Ouch'



'Absolute agony'

Thank you We would like to thank you for your cooperation and participation.

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