

## Procedures for Formal Usability Testing

### I. Learn

Do some reading to uncover methods and tips to the process (see accompanying bibliography)

### II. Prepare

A. Check to see if your institution has human subjects policies – if so, comply with those policies and procedures. Don't wait until the last minute to check this out.

B. Create a timetable

Ground your timetable in reality. If you have many other responsibilities, give yourself plenty of time for the entire process. The timeline will help keep you on track. If you need to have a short timetable, the timeline will help ensure that things do not slip through the cracks.

C. Begin Preparing Materials

1. Check List: Prepare a list of activities that must be done, beginning eight weeks before the test, then six weeks before the test, three weeks before the test, one day before the test and the day of the test.
2. Decide who will do what.
3. Develop a purpose statement that describes at a high level the reason for performing the test at this time.
4. Develop problem statements that describe the activities to test and give focus to the assessment.
5. Create a tasklist that is the actual test. These are tasks that the user will perform during the test to give you answers to your problem statements.
6. Create a data collection form. This will include space to record whether or not the task was performed successfully, the time it took to perform the task, whether or not there were any false starts, what steps were taken in accomplishing the task, and any comments that were made by the test participant during the task. (See sample data collection form.)
7. Test the test to make sure the questions/tasks are understandable. Use student volunteers, not library folks so that the pre-test truly identifies vocabulary problems, etc. Make changes to tasks that did not seem to be clear. This also ensures that the questions yield predictable results – in a dynamic environment things can change quickly and you don't want surprises.

D. Recruit and select participants

1. Develop a recruitment plan – flyers, ads in student newspaper, announcement on the Web site.
2. Provide incentives - cash or check, copy cards, gift certificates.
3. Develop a screening questionnaire - include year in school, age, gender, and library/computer experience.

E. Schedule tests

1. Communicate test time and place to participants.
2. Reserve rooms and staff.

F. Continue to prepare materials

1. Draft a script to read to each test participant so they all get the same instructions and context.
2. Make a sign to post in the test area indicating that it is the system that is being tested, not the person.
3. Prepare copies of consent forms to be signed by test participants.
4. Develop a summary/exit questionnaire or debriefing form to close the test session. (See example)
5. Develop data summary forms.
6. Arrange for equipment such as a tape recorder or video camera and a clock.

**III. Perform and administer tests**

- A. The day before the test, check the equipment, make sure necessary forms are ready, post any signs you want, and check the task list to make sure it is current.
- B. Decide who does what:
- Meets participants
  - Reads introductory script
  - Handles tape recorder
  - Reviews consent form and payment procedure
  - Administers exit questionnaire/debriefing

C. Conduct the test:

- Meet participant in an easy to find agreed upon location
- Read the introductory script
- Give the test
- Collect data as tasks are performed
- Tape record participant comments

D. After the test:

- Debrief the participant
- Make arrangements for payment
- Debrief observers immediately – share results and perceptions
- Make any needed changes to data collected based on observer debriefing
- Review audio/video tapes if necessary

#### IV. Analyze results of tests

Compile and Analyze Results

Successful/not successful

False starts

Time taken to complete each question

Steps taken

Comments

Exit questionnaire

#### V. Identify and Implement Solutions

- A. Identify problems including tasks not completed, tasks that took a long time to complete, tasks with convoluted solutions
- B. What can be done in-house to overcome the problems? Who does what regarding in-house solutions? What has to go to the vendor and who communicates those things?
- C. Implement Solutions:
- Develop implementation plan that includes timeline and target dates.
  - Share with colleagues what changes are being proposed and why.
  - Make the changes.

#### VI. Retest

Start the cycle over again to see if the changes made to overcome the problems are successful.