

# End User Training Usability Testing

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## Usability Testing Purpose

The general purpose of Learning Solutions pilot usability testing is to evaluate a proposed training strategy with real users, interacting with real content in order to determine problems related to ease of use. During Pilot usability testing sessions our specific purpose is to determine the following:

	<b>Purpose</b>
Determine	<p>If the training is easy to use?</p> <p>If the overall design/presentation is satisfactory?</p> <p>If the user was able to do what they wanted to do?</p> <p>If the user was able to navigate without confusion?</p> <p>If the information provided was adequate?</p> <p>If the feedback provided was appropriate?</p> <p>If the information was well organized?</p> <p>If the user feels better able to do their job?</p>

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## Usability Testing Plan

**Plan** The usability testing will take place in two phases. The first phase is referred to as “Informal Usability Testing” and the second phase is referred to as the “Formal Usability Testing” phase. Each testing phase will address Project, Process, and Job training.

<b>Phase I Informal Usability Testing</b>	<p><b>Description</b></p> <p>Phase I will occur as an internal project test. This test will be conducted among Learning Solutions team members and Process team members. This test will look at functional (accurate links, etc.) and usability issues.</p>
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<b>Sampling</b>	<p>The proposed sample for phase one would include at least 4 individuals for each training level(project, process, job). Ideally, two individuals from each process area will be included in the testing. The individuals would include:</p> <ul style="list-style-type: none"> <li>• 2 process individuals</li> <li>• 2 Learning Solutions team members</li> </ul>
<b>Data Gathering</b>	<p>The <b>process experts</b> will be focused on evaluation of the usability of the training and the content relevance to the end-user. This test will be conducted on an individual or pairs basis using a simple questionnaire followed by a task-based interview. As possible, someone on the design team will observe the testing.</p> <p>The <b>Learning Solutions team members</b> will be focused on functionality and general usability. These testers will need to be individuals who have not been a part of the design team.</p> <ul style="list-style-type: none"> <li>• The functionality portion of the test will include a checklist to verify that all navigation is functioning properly (not observed). ( See Appendix A &amp; B).</li> <li>• The usability portion will be an observed session to see if the Usability Purpose questions are answered in the affirmative. For example the observer will watch to see if the tester navigates without confusion. (See Appendix C &amp; D)</li> </ul>

<b>Phase II Formal</b>	<b>Description</b> Phase II will occur primarily as an external test, conducted among a sampling of end users. This test will look solely at the usability of the training product. This phase will target groups that represent the end-user population. Ideally, this would include individuals from V&C, Supply Chain, and HR.
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<b>Sampling</b>	<p>The proposed sample for phase two would include 3-6 end-users per process in <b>job and process level training</b>. Testing will be done with individuals using material from their process area as is possible. An example sample might include the following:</p> <ul style="list-style-type: none"> <li>• Six end-users total. Three from two different locations (i.e. Tippe, Greenfield) in the V&amp;C process area will test a job and a process course.</li> </ul> <p><b>Project level training</b> will be tested with a minimum sample of 5 end-users at a single location. Potentially this could be a larger group (i.e. an Academy class already tasked with taking these courses.) For Example: Tools I.</p>
<b>Data Gathering</b>	<p>The <b>end users</b> will be focused on evaluation of the usability of the training including value of the content to their job. This test will be conducted on an individual or pairs basis using a simple questionnaire followed by a task-based interview. As possible the testing will be observed by someone on the design team to see if the Usability Purpose questions are answered in the affirmative. For example the observer will watch to see if the tester navigates without confusion. (See Appendix C &amp; D)</p>

# Timeline of Usability Testing

## Timeline Strategy

The objective relative to the timing of the usability test is to have informal testing completed by [shaded box]. Formal usability testing will occur as part of the formal pilot approximately three weeks following the completion of the pilot development.

Phase 1	<p>Usability testing for Phase I needs to be completed prior to February 16, so that data can be gathered and reports can be generated by February 18. The target dates for informal testing are February 9-11, 14-15.</p> <p>Testing of Project Level training should take place on February 8 as part of Tools I class of the Academy.</p>
Phase 2	<p>Usability testing for Phase II will be conducted based on feedback and changes required from Phase I. Target dates for Formal testing of the first process area will be the second week of March.</p>

- [light gray box] Target for Informal Testing (Phase I)
- [dark gray box] Target for Phase I Project Level Testing
- [medium gray box] Target for Formal Testing (Phase II)

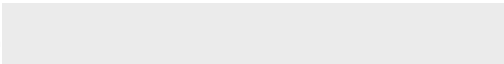
FEBRUARY						
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29				
MARCH						
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	



# Testing Resources for Usability Testing

**Resource** Resources refer to the population of users that will actually view the pilot for usability testing.

<p>Pilot Testers</p>	<p>Learning Solutions personnel will be used for functionality testing and general usability testing in Phase I. MSOs will identify individuals from the process areas for usability testing. Identified individuals follow:</p> <p>Learning Solutions Resources</p> <ul style="list-style-type: none"> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> </ul> <p>Process Areas</p> <p><b>V&amp;C</b></p> <ul style="list-style-type: none"> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> </ul> <p><b>SC</b></p> <ul style="list-style-type: none"> <li>• [Redacted]</li> <li>• [Redacted]</li> <li>• [Redacted]</li> </ul> <p><b>HR</b></p> <ul style="list-style-type: none"> <li>• [Redacted]</li> <li>• [Redacted]</li> </ul> <p>End-User (Phase II)</p> <ul style="list-style-type: none"> <li>• [Redacted]</li> </ul>
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## Usability Testing Goals and Questions

### Goals for testing the pilot

During Pilot usability testing sessions, we will be looking to see how well the following usability goals are being met:

Goal	Sample questions
<b>Conceptual Organization &amp; Presentation</b>	<ul style="list-style-type: none"> <li>• Does the training hierarchy (Project/Process/Job) make sense?</li> <li>• Do the lesson topics make sense?</li> <li>• Is the interface intuitive (understandable)?</li> <li>• Do you know where you are throughout the lesson?</li> <li>• Is the right information presented within each topic?</li> </ul>
<b>Simplicity</b>	<ul style="list-style-type: none"> <li>• Is the training easy to use?</li> <li>• Is the training easy to navigate?</li> <li>• Is it easy to find and recognize attached files? (Power Point and Word)</li> <li>• Do users feel like they can get what they want when you want it?</li> </ul>
<b>Navigation</b>	<ul style="list-style-type: none"> <li>• Can you tell where you are at all times?</li> <li>• Can you go where you want to in the training without difficulty?</li> <li>• Can you navigate between different topics easily? (items on left side of screen)</li> <li>• Do you recognize that you can go anywhere in the training at any time?</li> </ul>
<b>Terminology and Content</b>	<ul style="list-style-type: none"> <li>• Do the labels and headers/captions make sense?</li> <li>• Is the feedback clear and understandable?</li> <li>• Does the feedback provide what you expect?</li> <li>• Is the content clear and understandable</li> </ul>

# Functionality Testing

**Purpose of Functionality Testing**

Functionality testing is conducted to evaluate all functional elements of the training software. Tests are conducted to determine if all links and navigational elements are working properly. This is an internal test to be conducted by Learning Solutions personnel. The primary testers will be those who have not worked as part of the Strategy and Design Team.

A Functionality Report (Appendix A) is included to track completion of functional testing. A Functionality Discrepancy Report (Appendix B) will be used to log identified problems.

	Elements to be Tested
Navigation	<ul style="list-style-type: none"> <li>• Forward &amp; Back Buttons</li> <li>• Topic Navigation from Topic Menu</li> <li>• Navigation of sub-pages from Topic Menu</li> <li>• Internal Page Navigation</li> <li>• Links to external documents, (i.e. Word, Power Point, etc)</li> <li>• Test Functionality               <ul style="list-style-type: none"> <li>• Imbedded Questions</li> <li>• Learning Check</li> </ul> </li> </ul>
Look & Feel Including Consistency in Use	<ul style="list-style-type: none"> <li>• Use of graphic elements</li> <li>• Text formatting               <ul style="list-style-type: none"> <li>• Font</li> <li>• Font sizes</li> <li>• Colors</li> </ul> </li> <li>• Layout               <ul style="list-style-type: none"> <li>• Paragraphs</li> <li>• Order and format of page elements</li> </ul> </li> </ul>
Content	<ul style="list-style-type: none"> <li>• Course &amp; Lesson Titles</li> <li>• Captions/Headers</li> <li>• Content used</li> <li>• Correct flow charts used</li> <li>• Spelling/Grammar</li> </ul>

# Usability Testing

## Usability Testing

Usability testing will be done utilizing three methods. These methods will be used in conjunction with one another in order to get the most thorough data possible from the test participants.

<b>Observation Form</b>	The Observation Form (Appendix C) is a tool intended to help Learning Solutions identify usability problems while observing the initial training activity. While the tester(s) is working through the training material the observer will be watching for specific things. This form will help them to notice usability issues. The form also contains a base script that the evaluator will want to share with each tester so that every tester has the same frame of reference and is comfortable with the test being conducted.
<b>Usability Questionnaire</b>	The Usability Questionnaire (Appendix D) is a tool used to gather data regarding individual's feelings with regard to use of the given training tool. This brief questionnaire will be given to the tester following the training in order to gather base line information on the user's feelings about the training.
<b>Usability Tasks</b>	The Usability Tasks (Appendix E) are a set of tasks that the tester will be asked to perform as part of the test to target specific usability questions about the training. These tasks are planned following the tester having completed the training. This will allow the tester to have seen the material and then recall and demonstrate specific elements of the training.



## Appendix A: FUNCTIONALITY REPORT

Name of Lesson Tested \_\_\_\_\_

Name of Tester \_\_\_\_\_

Date Tested \_\_\_\_\_ Signature of Tester \_\_\_\_\_

Level of Lesson Tested
Project Process Job

Function	Check Point	Complete Date
Navigation	Forward & Back Buttons	
	Topic Navigation from Topic Menu	
	Navigation of sub-pages from Topic Menu	
	Internal Page Navigation	
	Links to external documents, (i.e. Word, Power Point, etc)	
	Test Functionality	
	Imbedded Questions	
	Learning Check	
Look & Feel	Use of graphic elements	
	Text formatting	
	Font	
	Font sizes	
	Colors	
	Layout	
	Paragraphs	
	Order and format of page elements	
Content	Course & Lesson Titles	
	Captions/Headers	
	Content used	
	Correct flow charts used	
	Spelling/Grammar	

## Appendix B: FUNCTIONALITY DISCREPANCY REPORT FORM

**Instructions:** Upon identifying a discrepancy in the training material it must be logged on this form and attached to the associated Functionality Report.

- Give each new discrepancy a number.
- Check the appropriate function area (Content, Look & Feel, or Navigation) that the discrepancy falls under. This will help us in tracking completion of functionality testing in each of the areas.
- Describe the discrepancy and location so corrections can be made. (Use as many lines as necessary.)
- Once a fix is made to a discrepancy this form needs updated to verify that the change has been made in the training material. Do this by dating and initialing the last column.

Discrepancy #	Navigation	Look & Feel	Content	Description and Location of Discrepancy	Fix Made Date And initial
1					





## Appendix C: OBSERVATION FORM

Name of Lesson \_\_\_\_\_

Name of Observer \_\_\_\_\_

Name of Tester \_\_\_\_\_ Position \_\_\_\_\_

Date Tested \_\_\_\_\_ Signature of Observer \_\_\_\_\_

Level of Lesson		
Project	Process	Job
Circle one		

### Beginning the Test Session

Communicate the following to each tester prior to their working on the lesson.

*The [redacted] Learning Solutions team is conducting this test in order to evaluate the usability of the training and what might be done to improve it. We are not evaluating your personal performance, or knowledge of the subject. We are looking specifically at the tool in efforts to make it the most valuable tool possible.*

*We will do this by observing you as you navigate through the lesson as well as asking you to provide some written feedback following the lesson. We will also ask you to do a few specific tasks so we can evaluate the tools usability in a few critical areas.*

*At any time during the lesson, we want you to feel free to ask questions or provide verbal feedback you may have. For example, if something seems confusing to you or out of sequence, we would like for you to let us know so we can identify the problem. Before we provide directions on any navigational questions, we will ask you to first do what seems most obvious so we can identify navigational problems.*

*We will stop for a short break at about one hour before completing the evaluation. We will need a complete two hours to finish the evaluation. During the first hour we will look at a process level course, followed by a job level course in the second hour. Are you ready to begin?*

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Continue ...

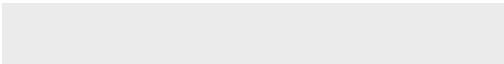


... Continue

**Instructions:** Place a check in the small box that you have observed this item and note in the box below each item where and what observations you had. Note any specific observations that need reviewed. Use another page when necessary.

**OBSERVE**

<input type="checkbox"/>	Is the user was able to do what they want to do?
<input type="checkbox"/>	Does the user know where they are and how to get where they are going?
<input type="checkbox"/>	Did the user understand the use of the forward and back navigation buttons?
<input type="checkbox"/>	Did the user understand how to use the Topics menu and do so effectively?
<input type="checkbox"/>	Does the user use the scroll bar when it is available? (Is content missed because of a scroll?)
<input type="checkbox"/>	Does the user access the external elements (i.e. Word Documents and PowerPoint) without any difficulty?
<input type="checkbox"/>	Does the user notice and access navigational elements within pages (pop-ups, links)?



## Appendix D: Usability Questionnaire

Name of Lesson \_\_\_\_\_

Level of Lesson

Name of Tester \_\_\_\_\_

Project Process Job

Position of Tester \_\_\_\_\_ Date \_\_\_\_\_

<b>SCALE</b>
<b>1 = Definitely</b>
<b>5 = Not at All</b>

<b>Conceptual Organization &amp; Presentation</b>	• Does the training hierarchy (Project/Process/Job) make sense?	1	2	3	4	5
	• Do the lesson topics make sense?	1	2	3	4	5
	• Is the interface intuitive (understandable)?	1	2	3	4	5
	• Do you know where you are throughout the lesson?	1	2	3	4	5
	• Is the right information presented within each topic?	1	2	3	4	5
<b>Simplicity</b>	• Is the training easy to use?	1	2	3	4	5
	• Is the training easy to navigate?	1	2	3	4	5
	• Is it easy to find and recognize attached files? (Power Point and Word)	1	2	3	4	5
	• Do you feel like you can get what they want when you want it?	1	2	3	4	5
<b>Navigation</b>	• Can you tell where you are at all times?	1	2	3	4	5
	• Can you go where you want to in the training without difficulty?	1	2	3	4	5
	• Can you navigate between different topics easily? (items on left side of screen)	1	2	3	4	5
	• Do you recognize that you can go anywhere in the training at any time?	1	2	3	4	5
<b>Terminology and Content</b>	• Do the labels and headers/captions make sense?	1	2	3	4	5
	• Is the feedback clear and understandable?	1	2	3	4	5
	• Does the feedback provide what you expect?	1	2	3	4	5
	• Is the content clear and understandable	1	2	3	4	5

- What would you change to improve this training?
- What did you like best about this training?
- What did you like least about this training?
- Would you recommend this training to others?
- Would this training help you do your job better?

• Overall Reactions *(circle a rating for each item)*

Comments

Clear	1	2	3	4	5	Confusing
Too Slow	1	2	3	4	5	Too Fast
Satisfying	1	2	3	4	5	Frustrating
Enjoyable	1	2	3	4	5	Tedious
Exciting	1	2	3	4	5	Boring
Valuable	1	2	3	4	5	Worthless
Useful	1	2	3	4	5	Waste of Time
Intuitive	1	2	3	4	5	Overwhelming
Simple	1	2	3	4	5	Complicated

## Appendix E: TASKS

- In [redacted] go to:  
[redacted]

- Logon: [redacted]

- Password: [redacted]

- Select course

- Select Lesson

- Maximize screen

- Have fun!