# Getting Started

## Instructions

Write out a test script to help you achieve your research goals. You may add or delete tasks as you see fit.

* Set realistic tasks that participants want and/or need to accomplish.
* Make scenarios and task instructions clear, simple, and straightforward.
* Make tasks actionable.
* Don’t include terms in your scenario or task instructions that are visible on the screen currently being evaluated.
* Phrase questions in a neutral way to avoid influencing participants.

## Scoring definitions

### Usability metrics criteria

* **Time on task:** How long did it take the participant to complete the task?
* **Number of times confused:** Count the number of times that the participant expresses doubt.
* **Number of errors:** Count the number of times that the participant makes an incorrect action, when trying to complete a task.
* **Completion** **score:** Did the participant complete the task?
  + Success: Yes, they did what they needed to do.
  + Fail: No, they couldn’t figure it out.
  + Partial: They did part of the task, but not all of it.

## Participants

Keep track of the participants in an organized chart like the one below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Name** | **Role** | **Scheduled date** |
| 1 | First & Last Name 1 | Accountant | 01/01/22 |
| 2 | First & Last Name 2 | Senior Accountant | 01/02/22 |
| 3 | First & Last Name 3 | Inventory Manager | 01/03/22 |
| 4 | First & Last Name 4 | System Admin | 01/04/22 |
| 5 | First & Last Name 5 | Staff Accountant | 01/05/22 |
| 6 | First & Last Name 6 | Controller | 01/01/22 |
| 7 | First & Last Name 7 | Purchasing Receiver | 01/01/22 |
| 8 | First & Last Name 8 | Manager | 01/04/22 |

# Usability Test Script and Notes

*All text in blue are placeholders or examples, feel free to modify to your needs.*

### Researcher’s name: <Person conducting research>

### Overall objective: <Insert research objective>

## Test Script

### Introduction:

|  |
| --- |
| Hi <participant’s name>, thank you for agreeing to participate in this study. I’m <name> from <Infor department name>. I’ll be walking you through today’s session.  As part of an ongoing effort to improve the usability of <Infor product name>, we’d like to determine if our application is working as intended. Your feedback is extremely valuable.  This session will take about <#> minutes. I’ll start by asking a few questions about how you use <product name> to do your work. Then, I’ll ask you to share your screen and accomplish a few tasks using <product name>.  Please note that this is not a test and there are no wrong answers. We're testing the application, not you as the user.  As you work through the application, feel free to think out loud as much as you can, and describe what you’re trying to accomplish. If you would like to stop the session at any time, please let me know.  This session will be recorded and used for research purposes only. Any information that we share will be anonymized for your privacy. Is it alright if we go ahead and record this session?  Before we start, do you have any questions for me? |

### Warm-up questions:

|  |
| --- |
| Before we get started, I have a few questions for you.   1. What is your current role? 2. How long have you been working as a <role>? 3. How long have you been using <product name>? |

### Introduction to tasks:

Now, I’ll be giving you some scenarios and tasks using <product name>. Could you please share your screen and turn on your camera? Before you share, please make sure you minimize anything that you don’t want to be recorded.

In our chat box, I sent you a link to <product test link>. Can you open the link, please?

### Task 1:

**Objective**: Discover usability problems in filing for sick leave.

Imagine that you were sick yesterday. To ensure that you don’t lose pay, you need to file for sick leave in the employee portal. Indicate the reason for sick leave.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Participant** | **P1** | **P2** | **P3** | **P4** | **P5** | **P6** | **P7** | **P8** | **Average** |
| Time on task | 2:07 | 4:13 |  |  |  |  |  |  |  |
| Number of times confused | 2 | 5 |  |  |  |  |  |  |  |
| Number of errors | 2 | 3 |  |  |  |  |  |  |  |
| Completion score | Success | Fail |  |  |  |  |  |  |  |

**Notes:**

* Add notes from the session. For example, when the user appears stressed or confused.

### Task 2:

**Objective**: Discover how the user handles errors.

Imagine that you have a vacation planned, and your manager verbally approves your time off. You realize you submitted for the wrong vacation days in the system before your manager could approve it. How do you fix this error?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Participant** | **P1** | **P2** | **P3** | **P4** | **P5** | **P6** | **P7** | **P8** | **Average** |
| Time on task | 2:07 | 4:13 |  |  |  |  |  |  |  |
| Number of times confused | 2 | 5 |  |  |  |  |  |  |  |
| Number of errors | 2 | 3 |  |  |  |  |  |  |  |
| Completion score | Success | Fail |  |  |  |  |  |  |  |

**Notes:**

* Add notes from the session. For example, when the user appears stressed or confused.

### Task 3:

**Objective**: Assess findability of performance reviews.

Imagine it’s time for performance reviews, which happens once or twice per year. Where do you go to start this process?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Participant** | **P1** | **P2** | **P3** | **P4** | **P5** | **P6** | **P7** | **P8** | **Average** |
| Time on task | 2:07 | 4:13 |  |  |  |  |  |  |  |
| Number of times confused | 2 | 5 |  |  |  |  |  |  |  |
| Number of errors | 2 | 3 |  |  |  |  |  |  |  |
| Completion score | Success | Fail |  |  |  |  |  |  |  |

**Notes:**

* Add notes from the session. For example, when the user appears stressed or confused.

### Wrap up

|  |
| --- |
| This is the end of our session for today.   * Could you share any thoughts you have about the process we just went through? * Were there any tasks that you found easy and/or difficult? * Do you have any additional comments before we end our session? * Are there other usability issues you’d like us to explore? * Are you open for a follow-up discussion?   Thank you for your time and contribution to our research. We'll be in contact with you to share updates about the progress of the research. |