

Document status: Final

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[Document status: Final](#)

[Recruitment plan](#)

[Screening Questionnaire](#)

[Supplies](#)

[Research Study for SUMO Paper Prototypes](#)

[This Document](#)

[Purpose of the study](#)

[Location for the study](#)

[Schedule](#)

[Schedule discussion](#)

[Recruiter](#)

[Target participants](#)

[Incentives](#)

[Goals, tasks and scenarios discussion](#)

[Pre-task questions for all users](#)

[\[Answer on Q/A sheets\]](#)

[\[find out if they know what that is\]](#)

[\[Find out if they know what that is. If not, say “besides Firefox, what do you use to access the internet?”\]](#)

[A. NTK: Can people recognize the entry points for the \(OS\) picker?](#)

[Your sister wants to change items in her Firefox toolbar. You searched on the web for “Firefox toolbars” and landed on this page.](#)

[You need to find instructions you can give to your sister so she can fix her toolbar. She uses a Mac. Where is the information she needs?](#)

[B. NTK: Which kind of picker works best for language?](#)

[C. NTK: Search results:](#)

[Your boss is having a problem with a website. The stock trend animation on Bloomberg.com won't play. You're supposed to figure out what's wrong and fix it. You went to Firefox Help, searched for “website error” and got this search results page.](#)

[D. NTK: Ask a Question flow](#)

[E. NTK: Landing pages – info density](#)

[F. NTK: Mobile, how much info per screen on landing pages? How much scrolling.](#)

[G. NTK: Which navigation labels are \(not\) self-explanatory?](#)

[End of session questions:](#)

[NTK: Which kind of picker works best for OS?](#)

[NTK: Which kind of picker works best for product?](#)

[\[Moved consent to new doc for printing\]](#)

[Consent to participate](#)

[Instructions](#)

[THINK ALOUD INSTRUCTIONS](#)

Research Study for SUMO Paper Prototypes

Recruiting Guide

https://docs.google.com/document/d/1TAIdg8lTd2R4OqbfddrC5U1BLhzPEjd_3cjp4fqfEJ8/edit

This Document

This document outlines the plans for a usability study to be conducted in May 2012 in Portland Oregon by Mozilla UX staff, Bram Pitoyo and Crystal Beasley, and Susan Farrell, Senior UX Specialist, of Nielsen Norman Group. The study is a prototype exploration with paper prototypes and Firefox users for support.mozilla.com (SUMO).

This document is a record of our planning process. The linked documents are probably of more use to other researchers.

Contact: bram@mozilla.com or crystal@mozilla.com

Purpose of the study

A prototype usability study done with people who use Firefox.

To refine website prototypes with the help of typical users.

Determine the most usable interaction designs and labels for navigation of various kinds:

- SUMO main navigation labels
- Utility navigation labels
- Landing page / facet terms
- Picker interaction design and labels
 - language picker
 - OS picker
 - Product picker
- Landing page complexity

Location for the study

Portland OR, Collective Agency

<http://collectiveagency.co/>

Map link: <http://g.co/maps/cv4fn>

22 NW Sixth Ave (between Everett and Flanders), Suite 200, Portland Oregon 97209.
This building is across the street from the Everett Street Lofts galleries.

Entry: Buzz "200" when you arrive. (This is written on the keypad as well.) The phone will ring once or twice, then you'll be buzzed up. Come on in; we're on the second floor. There are stairs and an elevator. The research room is one of the first closed offices you'll see. It's in the corner of the building. We'll have a sign on the door also. If the door is closed, please knock.

Researcher contact: (for recruits and recruiters) Susan Farrell: [phone] - Call on arrival.

Venue contact (for Mozilla) (503) 517-6900, email Alex or Fitz at
Council@CollectiveAgency.com or tweet @CollectiveAgenC for general info.
24/7 access for meetings by non-members, and members.

Schedule

May 12: Dry run and pilot session in Indonesia (one ESL participant)

Monday, May 21: Setup, dry run and pilot in Portland

11:00 setup and dry run

3:00 pilot

Wednesday May 23

Friday May 25

Tuesday May 29

Schedule discussion

Prior to the study dates, we need to practice the process. Dry run (aka "trial run") is by ourselves. Pilot is with a participant. It will take at least 5 hours for both, but with planning and adjustments, it's best to plan for 7 and pack a lunch.

Daily schedule:

Overview: 90 min for study time, downtime between appts, 3 max per day, 9 recruited participants over 3 days, but 20% no-show is common. We started at 11am and had afternoon sessions around 3 and 5:30.

Examples

A: Early and possibly longer	
9-10:00	Setup
10-11:30	Participant
11:30-1:30	Lunch and revisions
1:30-3:00	Participant
3:00-4 or 4:30	Revisions
4:30 or later, as needed for participant (could probably do 4pm if needed)	Participant
1 hour after last participant	Revisions/recap
B: Later start, hits lunch and after work	**
10-11	Setup
11-12:30	Participant
12:30-2:30	Lunch/revisions
2:30-4	Participant
4-5 or 5:30	Revisions
5:30-7 (could probably do 5pm if needed)	Participant
1 hour after last participant	revisions/recap

Start times available:

** 11, 2:30, 5 or 5:30 or after (preferred, to get lunch and after work times) Will be flexible somewhat to accommodate actual schedules of qualified people.

Overview:

Review what happened and any changes needed after each participant - 60 minutes or so.

Recap after each day: What did we learn? What should we test next? Change the ordering or tasks? Send video to Bram via Dropbox.

Have lunch delivered or bring it with, and remember to grab easy dinner on the way home.

We may also need to rev the prototypes with Bram between test days.

Recruiter

Riley Research Associates
503.222.4179 (main)
Crystal Bolyard is our project manager
Mike Riley is the owner

Crystal Bolyard <cbolyard@rileyresearch.com>
Susan Farrell <farrell@nngroup.com>
Mike Riley <mriley@rileyresearch.com>

We have a not-to-exceed budget of \$1400 with them and it covers 9 users confirmed by 5/21 and some amount of replacing users who cancel early enough. We hope to end up with 7 or 8 people, given the holiday weekend and normal 10-20% no-show rate, but if we get 9 we'll run 9.

NOTE FOR THE FUTURE: the not-to-exceed agreement saved us up to \$2000.

Target participants

<https://docs.google.com/spreadsheet/ccc?key=0AgscVQdNHuGudGoyMHVsVzRqYUxKbkNyVkRZbFJQNFE#gid=0>

Indonesia:

1 pilot user who speaks English or some other language as a second language, test to be done in Indonesian language. (exercise the language picker)

Portland:

1 pilot user
1-2 ESL users in the mix

Incentives

We budgeted \$1400 for incentives. 9 users and 2 pilots, that's \$125 each. Pilots \$100 each.

Susan will pay the users in cash and get signed consent documents for receipts. Bram will pay his pilot and expense it, getting a signed consent document as a receipt.

Goals, tasks and scenarios discussion

Goals/NTK: what we need to know

Tasks: what we need people to do in order to find out

Scenarios: what we will say to them in order to get them to do the tasks

[Script](#)

[Scenarios](#)

Pre-task questions for all users

[Answer on Q/A sheets]

- Which computer operating system do you use?

[find out if they know what that is]

- Which browsers have you used in the last 6 months?

[Find out if they know what that is. If not, say “besides Firefox, what do you use to access the internet?”]

- How long have you used Firefox?
- Have you ever looked up how to do something with Firefox?
[If so,] how did you do that, and did you find the answer?

[Note for the future: This is an ambiguous question that needed more explanation.]

Did you have any problems getting the help you needed?

[If so] **What happened?**

Which problems have you had with Firefox that you still don't know how to solve? [Any answers to this can potentially be a self-crafted task if time allows, or fodder for the next study.]

A. NTK: Can people recognize the entry points for the (OS) picker?

Can be tricky, given how prominent the task-based navigation will be in the navigation. However, we can test the entry point in the Firefox product landing page in addition to the top page, because the pickers could be located at the sidebar.

Scenario idea:

- a. ~~Find information about the features of the latest version of Thunderbird that's available on the market. (Dependency: design Thunderbird product landing page)~~

Task: Recognize OS that was autoselected and switch to another one, then find the information entry point on a landing page.

Prototype support: KB page for How do I customize the toolbars, with OS picker on it and Windows screen shots. Also the same for the Mac. There are 2 alternative designs for OS picker we should alternate between participants. Need mockup of the real page with real screenshots using the mockup font for both OSs.

Scenario:

Your sister wants to change items in her Firefox toolbar. You searched on the web for “Firefox toolbars” and landed on this page.

You need to find instructions you can give to your sister so she can fix her toolbar. She uses a Mac. Where is the information she needs?

[Show a page called “Navigation toolbar items” - we have 2 of these:

Odd-numbered participants: Show the one with “Switch Operating System” beside “Firefox for Windows” (p.12), then show OS picker after the user clicks on “Switch operating system”

Even numbered participants: “Firefox for Windows | Mac OS X | Linux” (p.14)

After the task, show the other Navigation toolbar page.]

Tricky: We have 2 versions of OS picker. Show one OS picker to each user, alternating which one they see first for each user. If a user can't figure out how to switch OS, show that user the alternative picker. At the end of the session, show both and ask.

Questions for after the task:

What do you think about this page?

1. **How can we make switching from X to Y easier to do?**
2. **Where would you expect to see the information about which system you are using?**
3. **What would be most helpful for you to see in order to decide which OS you are using, if you were not sure?** (I'm not sure this will be a helpful question, but let's ask.)
4. **Get feedback on the alternatives for the OS picker (show both and compare) A, B or something else? A combo?.**

B. NTK: Which kind of picker works best for language?

Task: Find and use the language picker. We'll show one in a foreign language (Indonesian) to American participants and one in English to the Indonesian pilot. It will satisfy the task when users choose the picker and their language on it.

Scenario:

You're on a trip! While you are in Indonesia, you stop at a cyber cafe and check your email. Now you want to make sure Firefox didn't save any of your personal information. You searched and landed here. Change it so you can read it in your native language.

[Show Indonesian SUMO home (p.5)]

[We have two possible language picker interactions for this page.

- Odd-numbered participants see first an in-page menu that will expand on click (p.6)
- Even-numbered participants see first the language selector in another page entirely (p.7)

After the task, show them the other one.]

“Here's the other way we could do this. What do you think about that?”

Prototype support: Firefox or SUMO landing page in English and any other language.

C. NTK: Search results:

Task ideas:

- a. ~~You want to view all discussions about a subject called “uninstalling toolbar”. How do you do this?~~
- b. ~~“Website error” works better. Pretend you searched for ... here’s the results. We want them to go to discussions facet. Pretend this is not what you want. Now what? (Must click discussions facet and then they see AAQ.) Go to AAQ flow. (Dependency: design a discussions-faceted SRP with “Do you want to ask a question?” lightbox put on top)~~

Scenario:

Your boss is having a problem with a website. The stock trend animation on Bloomberg.com won’t play. You’re supposed to figure out what’s wrong and fix it. You went to Firefox Help, searched for “website error” and got this search results page.

[Show SRP with managed answer at top.]

What would you do next to solve your boss’s problem?

[See if they find and choose the discussion/AAQ entry point.
If they do, go to AAQ (next scenario).

If they don’t, then say:]

Please explain what you see here and what it’s for.

Prototype support: The person could ignore the facets and use the navigation, so we need to let them browse around on the prototype pages, substituting Under Construction for pages we don’t have.

Make a stack next to you of pages they’ve seen as they browse, so that the person can go Back Back Back if they want to.

If they go to the home or product page and click a discussions link, that satisfies the task but doesn’t exercise the part of the prototype we need to see (search facets).

So let them do that if they want, and show them the SRP again if they say they would search for something. If they don't use the search facets at all, do the next scenario. If they click any AAQ link or Discussion link, go to AAQ flow without reading the next scenario.

We can look again at the search page at the end of the session and discuss it then.

D. NTK: Ask a Question flow

- a. a continuation of the search facet task, registration, pretend get email, show after-mail page. Task ends on a forum thread after they post. Gather evidence about form usability, flow, info per page.

Scenario

[Only for people who did not AAQ in the search facet task - show SRP again.]

Now what would you do, since search isn't giving you what you need? Your boss needs that animation to play, so you have to find out how to make it happen.

[If they search, show them: AAQ version of search, get some short feedback on the SRP if they volunteer it.

If they don't choose to Ask a Question, ask them to, then go through AAQ flow.]

Show me how you would ask your question.

[What do they not understand? What would they put in the forms? Make sure they keep talking their way through filling it out.]

[print one of these for each participant and let them write on it]

(Diagram of Ask a Question flow:

<https://www.lucidchart.com/documents/view/#4a11-a8ec-4f9ab412-a436-27900a5b1e83?branch=66f13ca8-9449-40e5-8ed9-49ac250c98f9>)

(Diagram of proposed Ask a Question flow — it is now a mostly 1-page process)

<http://people.mozilla.com/~bpitoyo/sumo/ask-a-question-proposal.pdf>

(old)

E. NTK: Landing pages – info density

Task ideas:

- a. Forum/discussion/community landing page mockup (Dependency) - could just ask people to look at this and explain it, and/or we could ask them to register or something. Decision: save this for the next test.

Scenario for next test: You are helping a friend get Firefox, set it up and learn how it works. You just installed it on their computer. Find some helpful resources for them on this website so you can go home and leave them to it. [printout of Firefox download thanks page? SUMO home? Firefox product page?] (Do we need bookmarks or will Getting Started do? Maybe we can get them to find Getting Started landing page and have them explain it to us?)

- b. (Have Get Started mocked up already)(Have Firefox product mocked up already) Decision: Customize landing page and get feedback on info density and labels.

Tricky: This exists already on a website that is not SUMO, using SUMO links.]

- c. Find out how to view information about a subject that is located on the bottom of a landing page (for example, Bookmarks) on Customize landing page. Get feedback about chunking, info density, navigation and label comprehension.

Scenario: You need to find out how to make Firefox your default browser. Show me how you would find those instructions.

[Show Top page]

[This will give us a chance to exercise the OS picker and get feedback]

[Desired destination: *Customize controls, options, preferences, add-ons* landing page.

It is accessible via three ways: by clicking on the product first > task later, by clicking on the task first > product picker, or by clicking on “Mozilla Software Help” > product picker > task”]

Please explain the things on this page.

[This will help us explain the difference between what things people think are controlled by the browser, vs. what are controlled third-party add-ons]

[There will be 5 subtopic landing pages on the landing page above. We expect user to browse, click and hit back in trying to find the topic. Let them click around and get feedback about it.]

[Desired destination: the first link on the landing page above, called *Change Firefox controls, options, settings & preferences*]

[Desired destination: a link on the bottom of that page, under the heading *Set default programs*, called *“How to make Firefox the default browser”*]

[If the user doesn't open all 5 subtopic landing pages on their journey to find *“How to make Firefox the default browser”*, show them all subtopic landing pages he had not seen before, and get feedback about them].

F. NTK: Mobile, how much info per screen on landing pages? How much scrolling.

Task ideas:

1. Get feedback on two landing pages formatted for mobile, one longer than the other.
Mobile Firefox is a good one. Another?
2. Look for particular info, near the bottom?

Tricky: The main idea is for them to need to read through the view port and get the experience of how many “pages” down they need to go in order to see the info they need at the bottom. We could have a scrollbar on the frame and tell them to touch the up or down arrow if they want to move up or down on the page (ignoring the touch screen possibility and gestures that some people will not be familiar with, allowing us to test this with everyone, not just the smartphone users)

Idea for really long pages: The “computer” can reposition the paper and viewport as needed *on the table so the camera can see it*. If someone stabs the arrow repeatedly, the computer can jump the paper up or down.

Scenario:

You're using Firefox on your phone. Find out if you can use Bing instead of Google for Firefox's search.

Prototype support:

- cut out viewport from 8.5x11ish index card or cardboard
- tape down the mockup or cover it with clear thing - poster tack - artist tape
- add top blank inches to mockup so we can cut off any damage as needed
- bring scissors, box cutter
- Back button on viewport
- Viewport piece covers mockup

- user moves viewport
- computer tapes down the pages as needed, on top of each other as user clicks.

G. NTK: Which navigation labels are (not) self-explanatory?

For this, we will need to have a landing page without a picker (though a link to the picker is fine) or just test the navigation menu itself.

- Where would you go to find help for Mozilla Marketplace?** (This task is particularly good because it also tests the difference between the wording of “software” vs “services”)
- Explain what you see here. What is it, what does it do, what can you do with it, what’s clickable, what do you expect will happen when you click on it. (explain?) what would YOU call it? Test it using a list of terms.

TASK: Explain labels, draw lines between things that are alike (connect them) and ? for anything confusing or IDK.

Prototype support: We can do this with a list of navigation labels on printed sheets of paper. We’ll need one set per participant and we might want one for the facilitators to mark up also. Test only the labels with alternatives (e.g., long and short versions, choices we have to make, things we can change). Same font, alphabetical list.

Scenario:

We want to understand what these terms mean to you. Please read the list aloud and explain each one briefly. What does it mean, and what do you expect to find on a web page that is named that?

[We will track misunderstanding and disliked labels as well as ones that work. Mark up your copy of the list as the user marks up hers.]

Tricky: How best to capture this on our note sheets? Should we change mockup labels after Question 2 below? If we change something, do we keep it changed or make a new mockup. Change labels between users as needed by sticking new labels on or writing it in. Change labels as decided between test days in printable mockups. We’ve got 3 versions of the picker, which are alternatives. We need to alternate which ones we use during each session and try to note any comments or problems using them. Each user sees each one. If user makes comments about inconsistency, then ask which they prefer and why.

End of session questions:

Questions for after the session:

[SUMO Home landing page “Mozilla Support”]

- **Where would you go to find help for Mozilla Marketplace?**

[Target paths: Task, then product picker OR picker first, e.g. product navigation link]

- **Where would you go to get Firefox for your phone?**

[get feedback about mobile landing page also]

- **I noticed you said [X] about [Y] when we were talking about the list of terms.**

[Show list again]

- **We need to improve that one. What we hope to communicate is [Explain what it means]. What would you suggest we call that instead so that it would better signal to you what it is?**
- [Show alternative pickers for products and get feedback.]
- Show alternative pages and get feedback
 - Firefox landing pages
 - Getting started landing pages
 - product picker alternatives
 - SRP:

Conditional scenario for people who find Discussions and AAQ somewhere else:

[Search Results page]

Explain what's on this page and how to use it, as if you were teaching someone else how to use it for the first time. Point at the things that are clickable and say what information you expect to see when you click.

Thank you. This has been extremely helpful. Do you have any questions for me?

After user is gone, record discussion of what happened and what to do, if Bram is not on Skype. If he is, then STOP RECORDING NOW.

Remember to number any marked up pages with the participant number!

Drop recording in Dropbox.

Make list of changes and findings on Google Docs.

NTK: Which kind of picker works best for OS?

~~OS and version selection is something that each application ought to be able to handle automatically, so switching should rarely happen.~~

~~Verdi says that SUMO may have an article with a 3.6 section (ppe, sp1), a 4-8 section and a 9+ section, but the next time that article gets updated, they'll probably remove everything but the 9+ section. Furthermore, version is likely to be useful only to contributors, and its uses to users are mostly edge cases. (ESR starts at 10)~~

~~Proposal for extended support:~~

~~<https://wiki.mozilla.org/Enterprise/Firefox/ExtendedSupport%3AProposal>~~

~~Which version is going to be ESR?~~

~~<https://wiki.mozilla.org/File:Esr-release-overview.png>~~

~~OS picker seems like a totally different thing. different OSes call the same thing a different name, and the steps to complete a task are different for different OSes. Of course, the problem is, nobody knows what an operating system, browser or search engine is, so when you ask people what os they use you are likely to get an answer like, "I don't know. Dell?" or even "Google". A "Mac" is a computer and a "Windows" is an OS.~~

~~(A potential solution: "Does your desktop look like this?" "Is your mouse cursor black or white?" "Do you see traffic light colored orbs on the upper left side, or rectangular buttons on the upper right?")~~

~~But autodetection is not enough, we should also have visual indicator of what OS you're using right now.~~

~~This led me to believe that OS picker should be available at every page (product picker, product landing page, KB article) so users can switch with one click no matter where they land. But version picker should only be available on some pages, not on the picker, and may be should only be visible to contributors. [agreed—I thought version picker might live only on the download product picker or that ESR would require two versions of does, but it seems not to be the case. Also, Marketing has versions covered on their download page, which we can just link to from SUMO's download page.]~~

- ~~a. **You have a Windows computer, and you are trying to erase Firefox history on a Mac computer that is not connected to the internet. Find out how to do this.** (Dependency: KB page—Erase History)~~
- ~~b. **You landed on an erase Firefox history page. Everything is perfect, except that this page displays the instruction for a Mac computer, and you are running Windows XP. Find out how to get the instruction for Windows XP.**~~

- ~~c. This we will learn automatically through other tasks such as needing to change from one to another. E.g., language for our ESL users, OS for people trying to support someone else, product for people entering on SUMO home.~~

~~[See previous goal, with a version of this task. a. is a good one too, here, but we would not need the goal page, just the landing page with the entry point for the KB article.]~~

~~NTK: Which kind of picker works best for product?~~

~~Task ideas:~~

- ~~a. Find out how to download Firefox Mobile (For this, make the user land on the top page, not the product landing page) dependency: some other product landing page.~~
- ~~b. This we will learn automatically through other tasks such as needing to change from one to another. E.g., language for our ESL users, OS for people trying to support someone else, product for people entering on SUMO home.~~

~~**Scenario:** You searched for information on Google about [downloading] [Firefox for your Android phone] and ended up on this page [?]. Show me how you're going to get the software you need [product picker][product page][download]~~

[Moved consent to new doc for printing]

Consent to participate

The undersigned hereby acknowledges that he or she has been asked to participate in a usability study conducted by the Nielsen Norman Group, an independent usability consulting firm.

By signing below, you consent to participate in the test session and agree to allow the Nielsen Norman Group representative to observe and record your comments and actions.

This information will be used only to enhance the usability of a website. No names or personal information will be used in the research report, to protect the privacy of all participants.

You have been offered an honorarium for your participation today, and by signing below you also acknowledge receipt of said amount.

Amount received: \$_____

Signature

Printed name

Date and time

Instructions

Thank you so much for helping us out today. Have you ever participated in a usability study before? [beverage, chair, snack?] Well, it's really simple. Today you'll show us how you would use a website by trying out some prototypes. The session will take about 90 minutes, so if you'd like to take a break or need to leave at any time, just let us know.

We're trying to find ways to improve the design of the Mozilla Firefox support website. So today you're our testing partner, and together we're testing ideas for the website. This is not a test of your knowledge or skills, so you can't do anything wrong.

All of your comments and questions will help make the website better. We promise not to be offended no matter what you say, and your participation will be anonymous.

We'll be taking notes and recording both sound and things shown on the table surface here, with

this camera.

Do you have any questions so far?

THINK ALOUD INSTRUCTIONS

We're very interested in your suggestions, so please say anything that springs to mind as you go along. Complain about anything annoying and point out anything that works well. When you're looking for something, say what you're looking for and explain how you're going to find it as you work.

~~If you get to a point where you would usually just give up, please be sure to say so. [leave this in for clickable tests where time on task and task success/failure matters more]~~

When you have questions, please ask them right away. I might not be able to answer them, but it's important for me to know which questions come up, so we can improve the system in that area. At the end of the session we'll try to answer any questions you may still have.

If you notice anything that seems to be missing or incorrect, please point that out.

The system we'll be working with today is in the early design stages, so we'll be looking at drawings and web pages on paper. Crystal will pretend to be the computer today, and you'll click on things with your finger while she changes pages for you. It's a fun way to try out designs, and we can change things as we go.

So there are only three things to remember:

- Think out loud, explaining what you're doing and why. Just comment the entire time as you go along and walk me through whatever you happen to be doing.
- Do things the way you normally would, and
- feel free to ask questions and make suggestions.

Any questions before we begin?

[turn camera on]

Supplies

- office supplies
 - scissors
 - exacto
 - artist tape (repositionable)
 - pens and highlighters, sharpies
 - pencils with erasers
 - sticky notes
 - correction tape
 - painter's lamp for side lighting
 - magic tape
 - stapler / staples
 - extension cord(s)
 - legal pads (2)
 - heavy card stock for making viewport

- Take:
 - prototypes
 - incentives
 - office supplies
 - snacks, drinks
 - digital files
 - contact info f
 - MacBookPro / power cord / passwords / cable lock
 - document camera / power / USB / instructions
 - thumb drive
 - consent forms
 - business cards
 - phone / charger
 - printed schedule / profiles
 - printed Q&A sheets
 - printed scripts