

Chaperone Usability Test Protocol

1. Overview

Usability testing will be conducted on the Chaperone web platform to evaluate how efficiently different user roles (Admin, Teacher, Parent, and Student) can complete key tasks. Key elements that the test will focus on includes ease of use, efficiency, and clarity in interface design.

Key objectives:

- Measure task completion rate.
- Assess user satisfaction.
- Identify usability issues.
- Uncover growth opportunities
- Discover new user needs and that translate into new key features

Goals:

- Identify any user pain-points
- Understand how users current navigate you through the platform to complete tasks
- Assess the efficacy and usability of current features
- Identify areas of improvement – both UX and UI

2. Research Questions

1. How *intuitive and efficient* is the Chaperone platform for different user roles (Admin, Teacher, Parent, and Student) in completing essential tasks?
2. Are users able to *clearly understand and access key information* on the Chaperone platform (such as trip details, emergency contact forms, and payment options)?
3. What *challenges do users face* when interacting with the platform, and how can these be addressed to enhance the user experience?
4. What *improvements can be made* to the Chaperone platform's design and functionality to enhance user satisfaction and streamline task completion for each role?

3. Methodology

Overview: This study uses a **task-based usability testing** approach with **think-aloud** and **post-task interviews** to evaluate the platform's user experience. Participants will perform assigned tasks in the roles of Admin, Teacher, Parent, and Student, each designed to test specific functionalities relevant to that role.

Type of Test: Remote, moderated

Testing Method: Think out loud, 5-Second Test, task analysis

Participants: Current Chapperone users, new users

Tasks: Users will be asked to complete a series of tasks at different permission levels: admin, teacher, parent, and student (tasks are outlined in detail below)

4. Test Setting and Environment

Overview: The testing session will be conducted virtually via Zoom. Each session is expected to last approximately 30-60 minutes, which will include task completion and follow-up SUS survey.

Setup: Tests will be conducted virtually via desktop as we are testing the web platform

Technical Requirements: Zoom

Recording: Each session will be recorded – both audio and video

5. Script

Hi [name], thank you for joining us today and for helping us improve Chapperone! My name is [name], and I'll be guiding you through this session. The goal of this study is to evaluate how users interact with the platform across different roles. Your feedback will help us identify areas for improvement to make the platform more intuitive, efficient, and user-friendly.

During the test, we'll be using something called the 'think-aloud' protocol. This means that I'd like you to verbalize your thoughts as you go through each task. For example, if you're not sure what to do next or if something doesn't make sense, please let me know. Even if what you're doing seems obvious, please try to speak every action outloud – this will really help me understand your thought process. If you have any questions at all during the test, please feel free to ask it.

Please be assured that all data collected during this session will be kept confidential and used solely for the purpose of improving the Chapperone platform. Your identity and personal information will not be shared in any reports or presentations.

Additionally, as you go through the tasks, I want you to keep mind that we're testing the product, not you! There are no "right" or "wrong" answers, and any difficulties you encounter are things we want to know about. Feel free to let us know if anything is confusing, or if you'd like any support or clarification.

Please perform each task in the role provided (Admin, Teacher, Parent, or Student) and follow the steps as naturally as possible. We are researchers studying this platform, not the developers who created it, so please feel free to provide honest feedback without any hesitation. No hard feelings.

Finally, we'll be recording this session with audio and video, which will allow us to go back and review your feedback in detail. This information will be kept confidential. Do we have your permission to record today's session?

Thanks, let's get started!

6. Test Procedures

For Group 1:

Admin Task: Create a 3-day school trip with one teacher and 5 students.

- **Task Guidance:** On the Chapperone platform, create a new trip. Set the trip duration to 3 days, select a teacher from the provided list, and assign 5 students from the given list. Ensure all participant details and create the trip using the itinerary details we have provided to you.

Think-Aloud Prompts:

- Describe your thought process as create your trip.
- How would you describe the experience of creating a trip with Chapperone?

(yinuo) Teacher (Instructor) Task: Please show me how you would arrange a 1-day museum visit for 10 students, **add tasks and participants**, and modify the date after you created the event.

- **Task Guidance:** Create a new 1-day trip to a local museum, selecting 10 students from the provided list. Enter all necessary student information.
- **Think-Aloud Prompts:**
 - Explain your approach in choosing and entering student information.
 - Are there any steps that felt unclear or required extra effort?

(mier) Parent Task:

Register your child for a school trip, view trip details and navigate through the platform.

- **Task Guidance:**
 - Create an account using the “shared trip link” to register for the child.
 - Enter the information for the child.
 - Invite your child to the trip
 - View the trip details and all the necessary info.
 - View the participants.
 - Able to know how to navigate to the home page and enter different trips.
- **Think-Aloud Prompts:**
 - During registration:

What are your initial impressions of the “shared trip link” process for creating an account?

How did you feel about entering your child's information? Was it intuitive?

- Inviting child:

Did you successfully invite your child? Was anything about the invitation process surprising or different from your expectations?

- Viewing trip details & participants:

How easy was it to find all the necessary trip details?

How easy and clear was it to view the participants/invitation status/ their roles?

Did you find all the information sufficient or helpful?

- Navigation:

When you tried to return to the homepage or navigate between trips, was the process clear?

Was there any moment when you felt unsure about where to click or go next?

- **Observation Points:**

- **Time Spent per Task:** Note if certain steps take longer, which could indicate complexity.
- **Frustration Points:** Look for signs of frustration, such as repetitive clicking, returning to the same page, or hesitating on next steps.
- **Guidance and Labels:** Are participants able to accomplish tasks without seeking clarification, or do they often refer to labels and prompts?

For Group 2:

Admin Task: Review and Approve a Trip Request

- **Task Guidance:** Locate the trip request submitted by a teacher on the Chapperone platform. Review the details, then approve or modify some information, such as adjusting the number of students, required documents, or changing the date of the trip.
- **Think-Aloud Prompts:**
 - Describe your approach in finding and reviewing the trip request.
 - Are there any parts of the approval or modification process that feel unclear?

Teacher (Instructor) Task: Viewing and Modifying Created Trips

- **Task Guidance:** Locate the trip you created earlier and change the meeting time from 8:00 AM to 9:00 AM. Ensure that the updated information is saved correctly.
- **Think-Aloud Prompts:**
 - Explain your thought process while locating and modifying the trip details.
 - Were there any parts of the editing and saving process that seemed confusing?

Parent Task: Check Trip Notification and Cost Details

- **Task Guidance:** View the details of your child's upcoming school trip on the Chapperone platform. Confirm the cost details, and read through and confirm all safety instructions and notes for parents.
- **Think-Aloud Prompts:**

- Describe your experience locating and reading the cost and safety details.
- Was the information clear, and did anything seem difficult to understand?

For Both Groups:

Post-Test Interview

- 1. Overall Usability:**
 - a. How would you rate the overall ease of using the Chapperone platform?
 - b. Were there any specific features you found particularly helpful or frustrating?
- 2. Suggestions for Improvement:**
 - a. Based on your experience, what changes or additions would improve the platform?
 - b. Were there any moments when you felt unsure of what to do next? If so, please describe.
- 3. Overall Rating:**
 - a. Rate your experience from 1-5, 5 as really satisfied.
- 4. Additional Comments:**
 - a. Do you have any additional feedback or insights you would like to share about the platform?

Post-Test SUS Evaluation

Using a 5-point Likert scale (1 = Strongly Disagree, 5 = Strongly Agree), the user will analyze the following statements post usability test:

1. I think that I would like to use this system frequently.
2. I found the system unnecessarily complex.
3. I thought the system was easy to use.
4. I think that I would need the support of a technical person to be able to use this system.
5. I found the various functions in this system were well integrated.
6. I thought there was too much inconsistency in this system.
7. I would imagine that most people would learn to use this system very quickly.
8. I found the system very cumbersome to use.
9. I felt very confident using the system.
10. I needed to learn a lot of things before I could get going with this system.

7. Metrics for Evaluation

- 1. Quantitative Metrics:**
 - Task success rate
 - Time on task
 - Error rate
- 2. Qualitative Metrics**

- User satisfaction ratings – post evaluation SUS questionnaire
- Post-Test Interview
- Observed behaviors and reactions

8. Data Collection

- Observational data will be collected by taking notes and recording sessions (with participant consent) to capture non-verbal cues and any challenges participants encounter in real-time.
- Quantitative data will be taken on task completion time, number of errors, and completion rates for each task in order to measure the efficiency and success rate for each role.

9. Data Analysis

Overview: *Post testing, the team will provide Chapperone with both qualitative and quantitative data via a written document (google doc) and a spreadsheet (google sheet)*

1. Thematic analysis will be used to identify common themes and patterns from user feedback.
2. Comparative role-based analysis will be used to compare usability findings across different user roles.

10. Deliverables

1. **Summary of Findings:** Overview of key insights, patterns, and behaviors
2. **Detailed Findings:** Analysis of each task, and user behavior
3. **Recommendations:** Recommendations and improvements for UX and UI elements derived from testing results
4. **Data:** Appendix with links to recorded sessions, and any additional data

Presentation Format:

- A slide deck summarizing main findings and recommendations.
- Annotated Video Clips (Optional): Short clips showing key usability issues and user insights.