USABILITY TEST REPORT

RoboHelp Instructions

Usability Expert
Cassandra Matchinski
INTRODUCTION

ABOUT THE INSTRUCTIONS

Adobe RoboHelp is a web help generator used by the Center for Technology and Training (CTT) to put help documents created in Microsoft Word into an online manual. Technical writers at the CTT are responsible for updating the online manual, including keeping existing documents up to date in the manual and adding new documents as they are created. Because RoboHelp is a powerful and complex tool, it takes time to train new technical writers in using the program, as most are unfamiliar with it. To solve this issue, instructions were written for creating a new project, and adding and updating documents to that project. The ultimate goal of the instructions was to introduce RoboHelp to new users, and allow them to become familiar with the interface while performing the basic tasks they may be required to perform.

USABILITY TEST GOALS

The primary goal of testing these instructions for usability was to determine whether they would be clear and useful for a novice RoboHelp user. Some of the primary concerns with the instructions were whether they contained sufficient visuals, whether the language used was clear and consistent, and whether any steps were omitted or unclear. Testing the instructions with these concerns in mind, users were asked specific questions that would determine whether content needed to be added or changed.

USABILITY TEST OVERVIEW

Users were recruited from the CTT student interns, as they were all novice RoboHelp users and would have access to the program in the office. The test was conducted in the CTT office during work hours on a specific Windows machine with RoboHelp installed. Each user was asked to create a new project, and then to add subfolders and link test documents which were created for the purpose of this testing. The process was meant to test the instructions’ ability to familiarize a new user with RoboHelp, and to test the clarity of the instructions in creating folders and linking documents to them. Each user was given the same set of instructions and the same test folders and documents, and their projects were deleted after testing was complete.
USABILITY TEST PLAN

TEST SCENARIO: CREATE AND POPULATE A PROJECT

In this scenario, users will be given a set of documents and asked to create a new project in Adobe RoboHelp using the instructions I have written. This scenario will imitate the process of setting up a new project for an online help manual, as well as provide practice in adding new topics to an existing manual. A set of folders with mock topic documents will be created prior to testing and will be provided to all of the users. The primary goals of testing this scenario are:

1. TESTING THE EFFECTIVENESS OF THE INSTRUCTIONS

These instructions have been written for the novice user, and are intended for assisting new employees of the Michigan Tech Center for Training and Technology (CTT). The instructions are meant to guide the user through the basic tasks without requiring the help of other CTT employees. This usability test will find whether or not the instructions accomplish that goal, and provide suggestions for improvement.

2. TESTING THE CLARITY OF LANGUAGE USED IN THE INSTRUCTIONS

Because these instructions are intended to be used as stand-alone training materials, the language must be clear and concise to avoid confusion. The testing should identify any unclear wording choices, particularly through comments made by the users or errors in carrying out the instructions as written.

3. TESTING THE CLARITY OF CONVENTIONS USED IN THE INSTRUCTIONS

As is standard at CTT, the document conventions of bolding actions, italicizing window or pod names, and numbering of bulleted lists where appropriate were used throughout the instructions. A goal of this testing is to find whether those conventions make the task of following the instructions easier.

4. TESTING THE HELPFULNESS OF VISUALS

I elected to use a very limited number of visuals in these instructions, although I initially considered including the RoboHelp main screen to point out and explain its sections. After much consideration, I decided that such an explanation would only take up space unnecessarily. One goal of this test is to find whether users would prefer to have more visuals to help them through the instructions.
SCENARIO DESCRIPTION

Moderator’s Script:

The purpose of this usability testing is to test the effectiveness of the instructions for creating a new project in RoboHelp. Your help is essential in improving these instructions for future users, and your feedback will be used to make final recommendations for updating the instructions. While we walk through the test scenario, I will ask you to think aloud so that we can record your thoughts and any areas of confusion. As you’ve seen on your consent form, you have the option to stop the testing at any time. Are we ready to begin?

You will be creating a new RoboHelp project called “Usability Testing Project.”

For the purpose of this testing, a file system has been organized to form a mock manual, which you will be setting up in RoboHelp. The folder titled “Usability Testing Project,” which is located on the Desktop, contains all files you will need to complete this testing. The RoboHelp project should reflect the organization currently found in the “Usability Testing Project” folder.
# Measurement List

1. **Time Needed to Perform a Task**

The overall time needed to perform each task will be recorded, as well as how long individual steps take, such as selecting the correct button. Our goal here is to identify specifically which parts of each task are the most difficult for users to complete so that we can offer a more informed report to our developers.

2. **Time Spent Searching for Information**

While we have provided step-by-step instructions and an icon guide for our novice users, our ultimate goal with the app was to create something simple and friendly to the most unfamiliar user. If users must reference the help documentation repeatedly, we will make suggestions on making those steps more clear to avoid adding the extra step of searching for information.

3. **Number of Errors**

We will record any errors in our bug report, and compare them across all users to prioritize them from most to least critical.

4. **Amount of Time to Recover from an Error**

Recording the amount of time to recover from each error will also help us to prioritize them in our final report.

5. **Percentage of Task Completed**

Whether or not the user completes the task will determine how successful both our app and our help documentation are. If the user is unable to complete the task, we will make recommendations on both the app and the help documentation.

# Potential Observations of Participant

1. **Comments**

The user will be asked to think aloud both at the start of testing and throughout if he or she forgets.

2. **Facial Expressions**

The user’s facial expressions will be noted, particularly if he or she seems confused, upset, or excited with the app. If the user appears to be thinking and not vocalizing, we will ask him or her to think aloud, or ask how he or she is feeling at that moment.

3. **Body Language**

The user’s body language will be noted, particularly if he or she seems tense at any point in the testing. This will further help us to determine if at any time the user is uncomfortable with the testing, or frustrated or confused with the app.
USER INFORMED CONSENT FORM

Test Administrator _____________________________

Participant Name _____________________________

Participant Number _____________________________

The purpose of this study is to test the effectiveness of the instructions to Create a New Project in Adobe RoboHelp. This test has been created for novice users of Adobe RoboHelp who have at least basic computer skills. The goal is to measure the effectiveness of the instructions and take in feedback to improve the final instructions. Your participation will help me to achieve this goal.

In this session you will be asked to complete a single scenario in which you’ll set up a new project for a fictitious help manual. I’ll ask that you think aloud while you complete the tasks so that I can observe any areas of clarity or confusion. I will take notes as you work through the scenario and will also be available if you are stuck or have questions.

All information collected in this session belongs to Michigan Technological University and will be used for internal purposes. I will not record the sessions but I may publish results in our reports. All information in reports will be confidential and will not include your name.

I am testing the instructions. I am not testing you or your abilities. I am solely looking for aspects of the instructions that may be confusing or can simply be improved. You may take breaks or stop your participation at any time during the test.

STATEMENT OF INFORMED CONSENT

I have read through the above material and understand my rights as a participant. I voluntarily agree to participate in this study.

Print Name  _____________________________________________

Signature  _____________________________________________

Date   _____________________________________________
PRE-TEST QUESTIONNAIRE

1. What is your age?

2. How many years of college have you completed?

3. What is your area of study?

4. Have you ever used Adobe Creative Suites?
   Yes           No

5. If so, please list all Adobe programs you are familiar with:

6. What is your primary operating system?
   Windows       Mac OS       Neither
POST SCENARIO INTERVIEW & QUESTIONNAIRE

Mark your satisfaction with this app by circling the number that best reflects your opinion.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Neutral</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The instructions were clear and easy to follow.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>The language used was helpful and easy to understand.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>The instructions for creating a project were clear and helpful.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>The instructions for adding folders to the project were clear and helpful.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>The instructions for linking files to the project were clear and helpful.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>I would recommend these instructions to a brand new RoboHelp user.</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Answer the following questions as accurately/honestly as possible.

**Clarity & Content**

1. Was the language clear and consistent?

2. Were the instructions’ visuals helpful in completing the tasks? Would you prefer more visuals?

3. Were the steps presented in a logical order?

4. Were the document conventions (bolding, italics, etc) helpful in clarifying the instructions?

**Usability & Accuracy**

5. What did you find most useful about the instructions?

6. Were any of the steps confusing to you? Can you tell me what was most confusing?
7. Do you feel that the audience was considered in writing these instructions? How could I better address the audience?

8. What considerations were missing from the instructions?

9. What would you suggest to improve these instructions for future users?
RESULTS

USER DEMOGRAPHICS

Number of Users: 3

Areas of Study: Scientific and Technical Communication, Computer Networking/System Administration, Civil Engineering

Average User Age: 20.7 Years

Average Number of Years of College Completed: 2.5 Years

Number of Users who have used Adobe Programs: 2 of 3

Adobe Programs Users were Familiar With: Illustrator, Photoshop, InDesign, Dreamweaver, Fireworks

Primary Operating Systems of Users: Windows (2 Users) or Windows and Mac OS (1 User)

SCENARIO 1: REPORTING A DEER-VEHICLE COLLISION

POST TASK QUESTIONNAIRE

Scenario 1 Post-task Questionnaire Results
USER OBSERVATIONS AND COMMENTS

<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
<th>Possible Reasons</th>
<th>Possible Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new project</td>
<td>“Do you want any specific name for the project?”</td>
<td>Didn’t specify enough what to name the test project</td>
<td>No solution needed, a project name will be specified by full time technical writer in charge of project</td>
</tr>
<tr>
<td></td>
<td>“What is the ‘First Topic’”</td>
<td>RoboHelp automatically creates a blank ‘first topic’ in a new project</td>
<td>Add explanation on what the ‘first topic’ is, direct user to leave it there when creating project</td>
</tr>
<tr>
<td>Add a folder to the project</td>
<td>All users completed this task quickly and without any questions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Drag and drop folders to correct position</td>
<td>No users completed this task</td>
<td>There wasn’t really a specified need to move folders in the scenario</td>
<td>None</td>
</tr>
<tr>
<td>Link documents to folders</td>
<td>All users completed this task “Do I update or generate all?”</td>
<td>User wasn’t sure what the difference between these was</td>
<td>Clarify what each of these options means, and add that all documents must first be generated when they are linked</td>
</tr>
<tr>
<td>Generate table of contents</td>
<td>Difficulty finding TOC pod, thought it was missing</td>
<td>TOC pod is very small and hard to locate</td>
<td>Add an exploded view of the home screen in the instructions with clear labels of all the pods</td>
</tr>
</tbody>
</table>

POST-TEST QUESTIONNAIRE

WAS THE LANGUAGE CLEAR AND CONSISTENT?

- Yes, it was very consistent

WERE THE INSTRUCTIONS’ VISUALS HELPFUL IN COMPLETING TASKS?

- Yes, and more detailed visuals would be very helpful
- The icon images were very helpful, especially in finding buttons
- Add a diagram of the main window in the Overview section to show the pods

WERE THE STEPS PRESENTED IN A LOGICAL ORDER?

- Yes, the steps were logical

WERE THE DOCUMENT CONVENTIONS HELPFUL IN CLARIFYING THE INSTRUCTIONS?

- The extra emphasis was appreciated in some areas
- Use a different font setting for the optional settings (for example to view something)

**WHAT WAS MOST USEFUL ABOUT THE INSTRUCTIONS?**

- The icon images were very helpful
- The background section in the beginning was also nice
- The linking instructions were especially useful
- The structure of the instructions and the breakdown into small steps

**WERE ANY STEPS CONFUSING?**

- Finding the table of contents pod was difficult
- The objective of the test was a little confusing at times (more an issue of the test than the instructions)

**WAS THE AUDIENCE CONSIDERED IN WRITING THESE INSTRUCTIONS?**

- The audience was well considered in the instructions
- Only suggestion is more pictures
- Most engineers prefer short and to the point instructions, which could be an area of improvement

**WERE ANY CONSIDERATIONS MISSING FROM THE INSTRUCTIONS?**

- Note which steps may take longer to complete or open
- Some settings were unexplained, like for check boxes

**USER SUGGESTIONS FOR FUTURE IMPROVEMENTS**

- Add more instructions, explain how the table of contents is used
- Add more screenshots
TEST SUMMARY & RECOMMENDATIONS

USABILITY TEST SUMMARY

All three usability tests went relatively smoothly, although there were some significant issues that had to be adapted to as testing was performed. The biggest issue that occurred in all three tests was confusion on the exact structure of the project that the participants were instructed to create. Before testing, a project folder was created with three subfolders and three test documents in each subfolder; users were instructed to create a new project with the same structure and naming system. None of the three users recreated the structure exactly, and additional instruction was needed when users were unsure of what their projects should look like. Additional scenario instructions were provided to the second and third users in an attempt to avoid this issue, but it was not avoided completely in any of the three tests. It was determined, however, that this issue was a result of the usability test plan rather than the instructions, and changes to the instructions are not required to resolve it. A new RoboHelp user will not be given the task of creating a new project without an approved folder structure from a lead technical writer, so this is not an issue that will be addressed in the final recommendations.

FINAL RECOMMENDATIONS

CONTENT

- **Note Task Length** – Some tasks, such as the creation of a new project, or updating several documents in the project, take several seconds or minutes to complete. It would be worthwhile to note the approximate amount of time these tasks take so that users are aware that the wait is standard and not an error on their part.
- **First Topic** – A first topic is automatically created with a new project. It would be worthwhile to explain the first topic and also whether there are other options besides creating the first topic and deleting it later.
- **Define Options/Settings** – Not all checkboxes were explained in the instructions; rather the user is simply instructed to either uncheck or check boxes as the instructions progress. It would be worthwhile to explain each checkbox and the outcome of checking or unchecking it, so that the user understands why they are performing the action.
- **Table of Contents** – While the user is instructed to generate a table of contents, the function of the table of contents is not currently explained in the instructions. Both an explanation of the table of contents and a screenshot of the table of contents output in a current manual would be useful for a new user.

VISUALS

- **Overview** – An exploded view of the RoboHelp main screen would be very useful in helping the user to identify all of the pods and their functions. All users in this usability testing had difficulty finding the Table of Contents pod, and requested more visual explanation in the instructions, so this recommendation should receive top priority.
- **Buttons** – The screenshots of particular buttons was very well-received by all three users, so it would be worthwhile to add more visuals of all the buttons a new user may need to carry out these tasks.
Judging by the usability testing results, these instructions are clear, consistent, and could be useful to a new RoboHelp user. With the implementation of the aforementioned recommendations, the instructions will be even more self-sufficient in explaining the use of RoboHelp and allowing a new user to perform the necessary tasks in the program.