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SAMPLE_Study Guide for 'Experience Testing'

Goals
To learn and define what is "good user experience for a good email app."

Length of time: 30 sessions, 75 minutes each
Participants: 1 participant per session, 30 total participants, 3 experienced participants

Ideally:

IOS					
experienced\first-time	Secure Mail	App1	App2	App3	App4
App0			O	O	O
App1	O			O	O
App2	O	O		O	
App3		O	O		O
App4	O	O	O		
Android					
experienced\first-time	Secure Mail	App1	App2	App3	App4
App0		O		O	O
App1	O		O		O
App2	O	O		O	
App3	O		O		O
App4					

When there is a lack of iOS and Android App2/ App3/ App4 users:

IOS					
experienced\first-time	Secure Mail	App1	App2	App3	App4
App0			O	O	O
App1	O			O	O
App2				O	
App3					O
App4					
Android					
experienced\first-time	Secure Mail	App1	App2	App3	App4

App0				O	O	O
App1	O				O	O
App2						O
App3		O				
App4						

Researcher: Amy (Ying-An) Chen

Observer: Designer 1, Designer1, PM, Senior Researcher

Consent form: Vendor will collect consent forms

Gifts & future research: N/A

Observer's notetaking link: https://googlesheet

Prototype Link: N/A

Materials:
1. Cellphone to test (iOS and Android)
2. Cellphone cables and chargers
3. Cellphone to take pictures, send email, and invitations to participants
4. Printed page of tasks
5. Printed page of task materials (graphic)

Setup:
1. Prepare email and invitation that need to be sent, and send them to test phones first
2. Setup to record screen
   - Quicktime to record iPhone
   - Vysor to record Android
   - GTM

Primary Data: Feel/impressions about the apps (what they like and dislike), observation of the tasks

Secondary Data: The work email app's name they use, the personal email app's name they use

Study Protocol

Before entering the building (at the lobby / waiting for elevator)
- Confirm if they brought their own phone and confirm which app they use for work.

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- If not, the study can't continue and they will need to be rescheduled.
- Script:
Hi, [Name]. Thank you for coming in today. My name is Amy and I'm a design researcher at Citrix. Our study will be divided into two parts:
1) We are interested in how you manage work email and calendar on your own phone. Could you let me know which email app you are using for work on your phone?
2) After, we will ask you to test a different email app which you don't currently use for work and we would like to know your opinion about the app.

Introduction, Consent Form, Setup (10 mins)
- Before the test, I will ask you some questions to collect some background information regarding how you use your mobile email app for work. I will then ask you to complete some tasks on your phone.
- We will be recording the screen of your cell phone. This will help me review your workflows later. Please speak out loud about what you are clicking and thinking so we don't have to guess when we are reviewing the recording. If you are ok with this, let's set up your device for recording.
  - o [Device recording setup]
- During the test, you will need to respond to the email and invitation that I am going to send to you now. Could you type down your work email address on this phone?
  - o [Write down email address and double check it's work email account connected to the work email app they use]
  - o [Researcher sends two emails from George, an invitation from Mary, and an unrelated email from Citrix Research for testing the deletion of a participant.]
- It would be great for you to show me and talk me through how you go about all these processes.
- Please keep in mind that we are testing the application's usability and not you. Therefore, if you encounter any problems, please let me know. You cannot do anything incorrectly during the session.
- Do you have any questions?
- Okay, with your permission, I would like to begin recording the session.
  - o [Begin recording]

Experience testing part 1 (30 mins)
Background information (5 mins)
I would like to ask you about how you access your work email on your phone.
[SOME SAMPLE QUESTIONS]

- Please describe briefly what you do for work.
- Can you recall the last time you checked your email for work?
- Could you tell me the reason why you chose it?

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Testing (25 mins)

I am going to ask you to use your work email app on your own phone to complete several tasks. You will have to share the screen with me.

[Test begin]
You are working on a project in a team. Mary is your manager and George is your teammate.

Task 1. [Email] (10 mins)
  1-1. (1 min) **[Compose]** You need to email your manager, Mary (mary@ooo.com), to update her about a project you are working on. Go ahead.
  1-2. (1 min) **[Search/ Cc/ Forward]** Mary needs a meeting recording from last week. George has sent the recording to you. He's not in the office. Please send this recording to Mary and copy George. Make sure that the recording is attached in the email. Go ahead.
  1-3. (1 min) **[Delete]** You want to delete a spam email regarding a summer camp in Russia. Go ahead.

  Task 1 is completed. Now I would like to ask you some general questions:
  • (2 min) Did you encounter any difficulties when you completed these tasks?
  • (2 min) What did you dislike the most about this email app?
  • (1 min) What did you like the most about this email app?
  • (1 min) Do you mark your emails?
  • [if yes] Why do you mark them? Could you walk me through the process?
  • (1 min) Is there anything else you would like to share with me about the email function in this app before we move on?

Task 2. [Calendar] (10 mins)
[As an invitee]
  2-1. (2 mins) **[Respond to an invitation]** You received a meeting invite from Mary earlier. But the topic does not seem to be related to you, so you are not certain that you would attend. How would you mark that and how would you ask Mary if you are required to attend? Go ahead.
  2-2. (1min) **[Check location, time, and other invitees]** Your remember you have a meeting with Mary, but you are not sure who else is attending the meeting, and where and when it is. Please tell me who are attending and where and when it is. Go ahead.
[As an organizer]
  2-3. (1 min) **[Edit an event]** You sent an invite to Mary earlier, but Mary found that she has another meeting at the same time. Thus, you need to move the meeting to another time. Go ahead.

2-4. (1 min) **[Cancel an event]** You are suddenly unavailable for the meeting you set up with Mary due to a personal reason. Thus, you need to cancel the meeting. Make sure it's removed from your calendar. Go ahead.

Task 2 is completed. Now I would like to ask you some general questions:
- (2 min) Did you encounter any difficulties or not when you did these tasks?
- (1 min) What do you dislike the most about the calendar in this app?
- (1 min) What do you like the most about the calendar in this app?
- (1 min) Is there anything else you would like to share with me about the calendar function in this app before we move on?

Task 3. [Contact] (3 mins)
- (1 min) Do you use directory in your phone?
- (1 min) [If yes] in what scenarios did you use directory?
- (1 min) Have you ever edited the information of people in your email app? If you have, could you show me what you did?

Overall feedback (2 min)
- The first part of the test is done. Before we move on, is there anything you would like to share with me?

Experience testing part 2 (30 mins)
Background information (5 mins)
[Handover the phone]
- (3mins) This is a different email app called X. Now, please explore the app a little bit. Please share your thoughts as you explore the email app.
- (2mins) Please tell me your first impressions of the app. What do you like or dislike?

Testing (25 mins)
Now, I am going to ask you to use the email app on this phone to complete several tasks. You will have to share the screen with me.

Task 1. [Email] (10 mins)
1-4. (1 min) **[Compose]** You need to email your manager, Mary (mary@ooo.com), to update her about a project you are working on. Go ahead.
1-5. (1 min) **[Search/ Cc/ Forward]** Mary needs a meeting recording from last week. George has sent the recording to you. He's not in the office. Please send this recording to Mary and copy George. Make sure that the recording is attached in the email. Go ahead.
1-6. (1 min) **[Delete]** You want to delete a spam email regarding a summer camp in Russia. Go ahead.

Task 1 is completed. Now I would like to ask you some general questions:
- (2 min) Did you encounter any difficulties when you completed these tasks?
- (2 min) What did you dislike the most about this email app?
- (1 min) What did you like the most about this email app?
- (1 min) Do you mark your emails?
- [if yes] Why do you mark them? Could you walk me through the process?
- (1 min) Is there anything else you would like to share with me about the email function in this app before we move on?

Task 2. [Calendar] (10 mins)
[As an invitee]
2-5. (2 mins) **[Respond to an invitation]** You received a meeting invite from Mary earlier. But the topic does not seem to be related to you, so you are not certain that you would attend. How would you mark that and how would you ask Mary if you are required to attend? Go ahead.
2-6. (1min) **[Check location, time, and other invitees]** Your remember you have a meeting with Mary, but you are not sure who else is attending the meeting, and where and when it is. Please tell me who are attending and where and when it is. Go ahead.

[As an organizer]
2-7. (1 min) **[Edit an event]** You sent an invite to Mary earlier, but Mary found that she has another meeting at the same time. Thus, you need to move the meeting to another time. Go ahead.
2-8. (1 min) **[Cancel an event]** You are suddenly unavailable for the meeting you set up with Mary due to a personal reason. Thus, you need to cancel the meeting. Make sure it's removed from your calendar. Go ahead.

Task 2 is completed. Now I would like to ask you some general questions:
- (2 min) Did you encounter any difficulties or not when you did these tasks?
- (1 min) What do you dislike the most about the calendar in this app?
- (1 min) What do you like the most about the calendar in this app?
- (1 min) Is there anything else you would like to share with me about the calendar function in this app before we move on?

Task 3. [Contact] (3 mins)
- (1 min) Do you use directory in your phone?
- (1 min) [If yes] in what scenarios did you use directory?
- (1 min) Have you ever edited the information of people in your email app? If you have, could you show me what you did?

Overall feedback (2 min)
- The first part of the test is done. Before we move on, is there anything you would like to share with me?

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The session is done. Thank you for participating!

Appendix
Fake accounts for testing

- George (Teammate)
  - george@ooo.com
- Mary (Manager)
  - mary@ooo.com
- Angel (participant, when testing on the lab phone)
  - angel@ooo.com

Backup fake accounts

- George (Teammate)
  - george@xxx.com
- Mary (Manager)
  - mary@xxx.com
- Angel (participant, when testing on the lab phone)
  - angel@xxx.com