

SuSanA

www.susana.org and www.forum.susana.org
UX Study Moderator's Guide



BENTLEY
UNIVERSITY

User Experience Center

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Explanation of the Moderator's Guide

Purpose of the document: This is an internal document for the Bentley team to use to guide the sessions. It has the information that Bentley session moderators will use to make sure we cover all the tasks and questions and pay attention to key areas of interest. The only parts participants will see or hear are the scenarios and also the specific questions that we will be asking them (such as background questions).

Session duration is exactly one hour. Bentley recruited the participants telling them that it's an hour. We are taking some extra time for setup calls to make sure we can connect to the participants and explain to them how the session will work, but the main session is 60 minutes. So when we are figuring out how much time to allocate to each scenario – we need to have estimates in minutes to make sure that we have enough time to cover everything.

Two groups of tasks. We have decided to have two groups so that we could cover more tasks. The first 6 participants will go through tasks for Group A and the second set of 6 participants will go through tasks for Group B. Participants will be assigned to groups randomly, except participants from India who will all be in Group A.

Assisting participants: when participants get stuck, we may sometimes provide an assist, but not always. For example, if a participant cannot figure out how to find a particular thread within the forum, we will assist them in getting there, because we want to get their feedback on how things work after they get there - within threads (if we don't assist them, we won't be able to get that feedback).

For example, if participants don't review 4 links in scenario 4A. We will just note that they won't and move on without assisting them, because our goal is to see what information people are inclined to review on their own.

Session Breakdown

Here is the suggested breakdown of session flow and approximate duration of each activity. Please, note that we are using short version of the scenario descriptions in this table. Full descriptions can be found later in this document.

The yellow highlighting indicates the most important activities; the ones not highlighted could be dropped if time is too short.

Group A (mainly mother site)		Group B (mainly Forum)	
Activity	Time	Activity	Time
Background Questions	5 min	Background Questions	5 min
Scenario 1A: Mother - home	10 min	Scenario 1B. Forum discussion a. Navigate to forum from outside b. Find Thematic category > subcategory > particular thread c. Find first post d. Respond to last post	13 min
Scenario 2A. Library a) Search by using filters b) Select most recent publication c) Email publication to friend	10 min	Scenario 2B. Forum - home	5 min
Scenario 3A. Project database	5 min	Scenario 3B Find recent post overview	2 min
Scenario 4A. Local chapter	5 min	Scenario 4B Find posts by profile name	5 min
Scenario 5A. Working groups	5 min	Scenario 5B a Update profile b Use help	10 min
Scenario 6A. Post to Forum	5 min	Scenario 6B. Relationship with mother site	5 min
Scenario 7A: In-depth navigation review	10 min	Scenario 7B: In-depth navigation review	10 min
Feedback on experience overall	5 min	Feedback on experience overall	5 min
<i>Total Time</i>	<i>60 min</i>	<i>Total Time</i>	<i>60 min</i>

Participant Briefing (we'll paraphrase)

Welcome

Thank you for participating in today's session. My name is [facilitator's name]. I work at the User Experience Center at Bentley University in Boston, USA and have been contracted by Stockholm Environment Institute for the Sustainable Sanitation Alliance to carry out this independent usability study. I will be facilitating today's session.

Session Details

There are three parts to our session:

- First, I'll ask you a few background questions.
- Second, I'll ask you to perform several scenarios using the website and share your feedback.
- At the end of the session, I'll ask you about your overall impressions of using the website.

The session will last about an hour, so we will be done at [end time]. Is that OK?

Thinking Aloud

I'm going to give you scenarios to work on with the website. While you are working, I'd like you to think aloud. In other words, I'd like you to tell me what you are thinking, describe the steps that you are taking, what you are expecting to see, why you are doing what you're doing, and so on.

Your comments are very important to us. So, we ask that you to give us your open opinions (both good and bad) of what you see. Don't be shy – feel free to give us honest feedback. Because we are not responsible for the design of this website, we won't take any of your feedback personally, either positive or negative. Feedback from you and other participants will help us evaluate the design of the website. One important point I'd like to highlight is that we are evaluating this website, but not testing you in any way. Difficulties you may run into reflect the design of the website, not your skills or abilities.

Neutral Observer

My role here is as a neutral observer. I will be taking notes, but will be mostly silent while you are working. I will attempt to answer any questions you may have at the end of the session.

Consent Form

Did you have any questions about the consent form that you signed?

Reiterate: We will be recording the session to get an accurate record of your feedback. We may also have some colleagues observing the session remotely. The recordings will only be used for this project. The data from this study will not be used for any other purpose. Your full name will not be associated with the recordings or any other data collected during the session.

Background Questions [5 min]

1. How often do you visit the SuSanA platform?
2. What do you typically do on the platform?
3. Which parts of the platform do you visit the most?
 - Note if participant differentiates between Mother website and Forum
 - Note all the specific areas participant mentions on the Mother website or the Forum
4. What does usually prompt you to visit the platform?

Note if participant mentions any of the following:

- forum posts
- email notifications of new posts
- email digests
- one wants to look something up

GROUP A (mainly mother site)

SCENARIO 1A: MOTHER HOME [10 MIN]

Imagine that you haven't used the SuSanA website for a while and want to see what's new. Please, use the website to find out.

Start on www.Susana.org home

Navigation: Scroll down the home page

Record start time: _____

Observations and Usability Issues

- Is it clear to participant to scroll below the fold on the home page?
- Does the participant review any of the following:
 - Social Media
 - Upcoming Events
 - Forum
 - Jobs
 - Publications
- Is it clear to participants that green text is clickable?
- If Participant doesn't scroll, direct them to scroll.
- Have you ever reviewed this information on this page before? Why or why not?

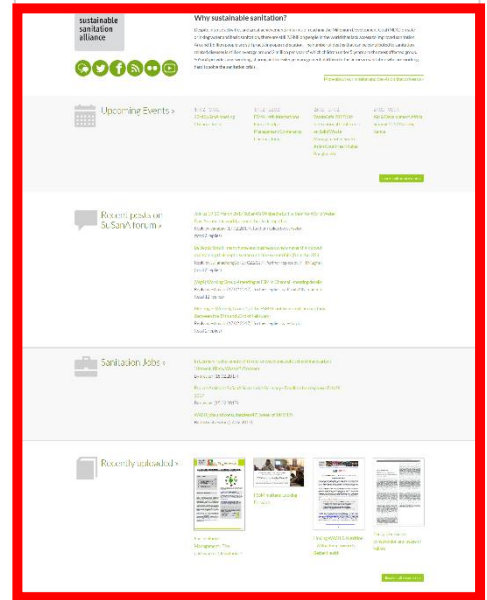
Social Media Icons



- What would you do if you wanted to access SuSanA social media channels from here?
- Is it clear to the participant that icons are clickable?
- Let's take a look at these icons here: without clicking on anything, please tell me where do you expect each icon to take you?
 - Is it clear that the chat one is Forum?
 - Is the Twitter one clear?
 - Is the Facebook clear?
 - Is the Forum RSS feed one clear?
 - Is Flickr clear?
 - Is YouTube clear?

Success point

Participant reviews Social Media options and scrolls down below the fold on the home page to review Upcoming Events, Forum, Jobs, and Publications sections.



SCENARIO 2A: LIBRARY [10 MIN]

a. Please find a SuSanA publication about fecal sludge management developed for practitioners working in the field in Kenya.

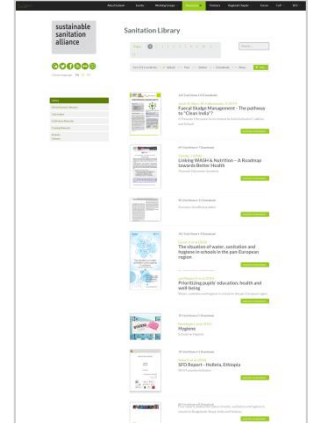
Start on Susana.org home

Navigation: Home page: Resources > Library > Filter

Record start time: _____

Observations and Usability Issues

- Does the participant use the Search field inside of the library OR use the filter function inside of the library?
- Note what the participant is naturally inclined to use. If they only use the search field, ask them to also try out the filter (the task cannot be solved fully without using the filter).



Library Page

Path by Filters

- Does the user select the following filters:
 - Select Countries: Kenya
 - Filter by working group: Fecal sludge management
 - Filter by materials for: Practitioners

Imagine that you want to look at the information across countries, not just Kenya. What would you do to see publication about fecal sludge management developed for practitioners across countries?

- Is it clear to participant how to remove Kenya as one of the filters?



Success point

Participant navigates to Resources: Library and uses the search field AND selects appropriate Country, Working Group and Materials for filters OR only the appropriate filters.

Results

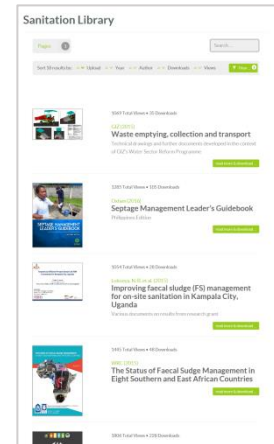
b. Please take a look at the most recent publication on the list.

Sort

- Do users select the Sort function?

Success point

Participant uses Year sort function.



Publication Details

c. Please, email the link to this publication or the publication itself to a friend.

- Is it clear to the user that one can:
 - Copy and paste the URL
 - Download a PDF and email it as attachment

Success point

Participant copies the URL and says that they need to open email client to copy and paste the URL OR download and send as email attachment.

End of task: ask user to return to the home page.

- Is it clear to the user how to get back?

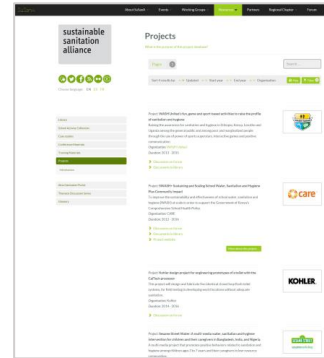
SCENARIO 3A: PROJECT DATABASE [5 MIN]

Find all the projects conducted in Southern Africa.

Start where previous task left off

Navigation: Resources > Projects

Record start time: _____

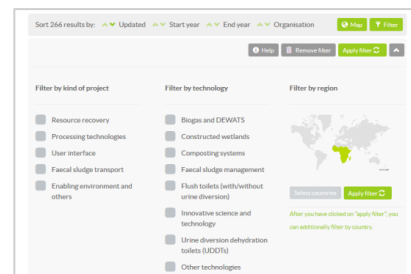


Observations and Usability Issues

- Is it clear to participant to navigate to Projects?

Map Filter

- Is it clear to participant to go to Filter > Filter by Region?



Map



- Is participant inclined to use the Map function?
- If participant doesn't use the Map function, say: "Please, show me what you would do if you wanted to see all the projects in Southern Africa shown on a map?"

Success point

Participant navigates to Projects and uses the filter by Region option and the map function.

SCENARIO 4A: LOCAL CHAPTER [5 MIN]

For all participants except those from India

You are considering setting up a local SuSanA chapter for your country. Take a look at the Indian chapter and let me know if you would you find it helpful to have a similar page for your country.

For participants from India.

Take a look at the Indian chapter of SuSanA and share your impressions.

Start where previous task left off

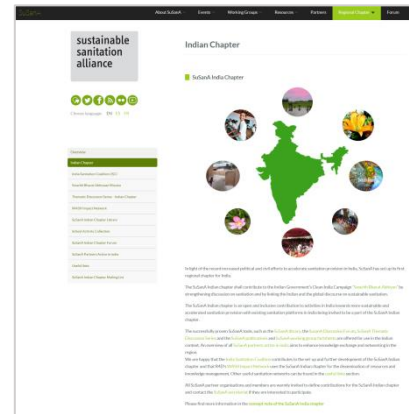
Navigation: Regional Chapter > Indian Chapter

Record start time: _____

Observations and Usability Issues

Indian Chapter page

- Does the participant review four of the following (note which ones are reviewed):
 - Indian Sanitation Coalition (ISC)
 - Swachh Bharat Abhiyaan Mission
 - Thematic Discussion Series – Indian Chapter
 - WASH Impact Network
 - SuSanA Indian Chapter Library
 - School Activity Collection
 - SuSanA Indian Chapter Forum
 - SuSanA Partners Active in India
 - Useful Links
 - SuSanA Indian Chapter mailing lists
- Does participant review submenu on the left or text on the right or both?
- Does participant make any comments about same links appearing in submenu and page body?
- After participant is done reviewing the page, ask: “Would you change this page in any way for your country’s chapter?” (if participant is from India, ask “Would you change this page in any way if you could?”)



Success point

Participant clicks on 4 things that are clickable and reviews the info.

SCENARIO 5A: WORKING GROUPS [5 MIN]

You are interested in the topic of sanitation in cities and heard that SuSanA has a working group on this topic. Find out what this working group has to offer and how you could get involved.

Start where previous task left off

Navigation: Working Groups: Cities

Record start time: _____

Observations and Usability Issues

Working Group page

- Does the participant review the following:
 - Wiki area (allow participants to log in with their SuSanA login, if they'd like, but ensure this doesn't take up too much time)
 - Join the working group
 - Forum
 - Further Reading
 - Top reads

After participant is done reviewing information on the page, ask:

- What are all the different ways you can get involved in this group or find information about this group?



Success point

Participant navigates to the Working Group and reviews Wiki area, Join the working group area, Forum, and Further Reading sections.

SCENARIO 6A: FORUM [5 MIN]

You have a question about behavior change methods that you would like to ask other SuSanA members. Please use the SuSanA platform to ask your question.

Start where previous task left off

Navigation: Forum in top navigation or Left side speech bubble icon > Enter Forum > Login > Post a new topic

Record start time: _____

Observations and Usability Issues

- Is it clear to participant to go to Forum?
- If Participant doesn't navigate to Forum, point to Forum link and ask: Where do you expect this link to take you?
- How do you usually get to the Forum?

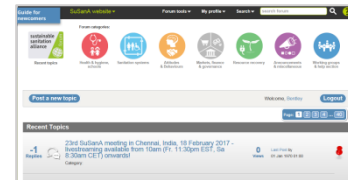
Forum Home

- Is it clear to the user to click "Enter Forum" link to get to the recent topics page?
- Note: if they used the speech bubble to get there, then they will land directly on the recent topics page



Forum discussion page

- Is it clear to user to click Post a new topic button?
- If they are not yet logged in they will be asked to login
- If participant doesn't want to use personal login info or forgot their login info, ask them to use the following:
 - Login: Bentley
 - Password: Usability17



- Is it clear to participant to use the "choose a category" drop-down list?

Success point

Participant navigates to the forum website, logs in if needed, clicks Post a new topic, selects a sub-category where they would post to and completes the Post.

SCENARIO 7A: IN-DEPTH NAVIGATION REVIEW [10 MIN] – LOW PRIORITY

Let's take a closer look at the site's navigation. Without clicking on anything, please, tell me what you would expect to see under each top navigation option.

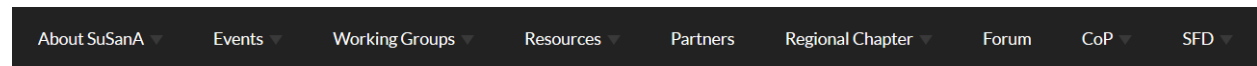
Start on Susana.org home

Record start time: _____

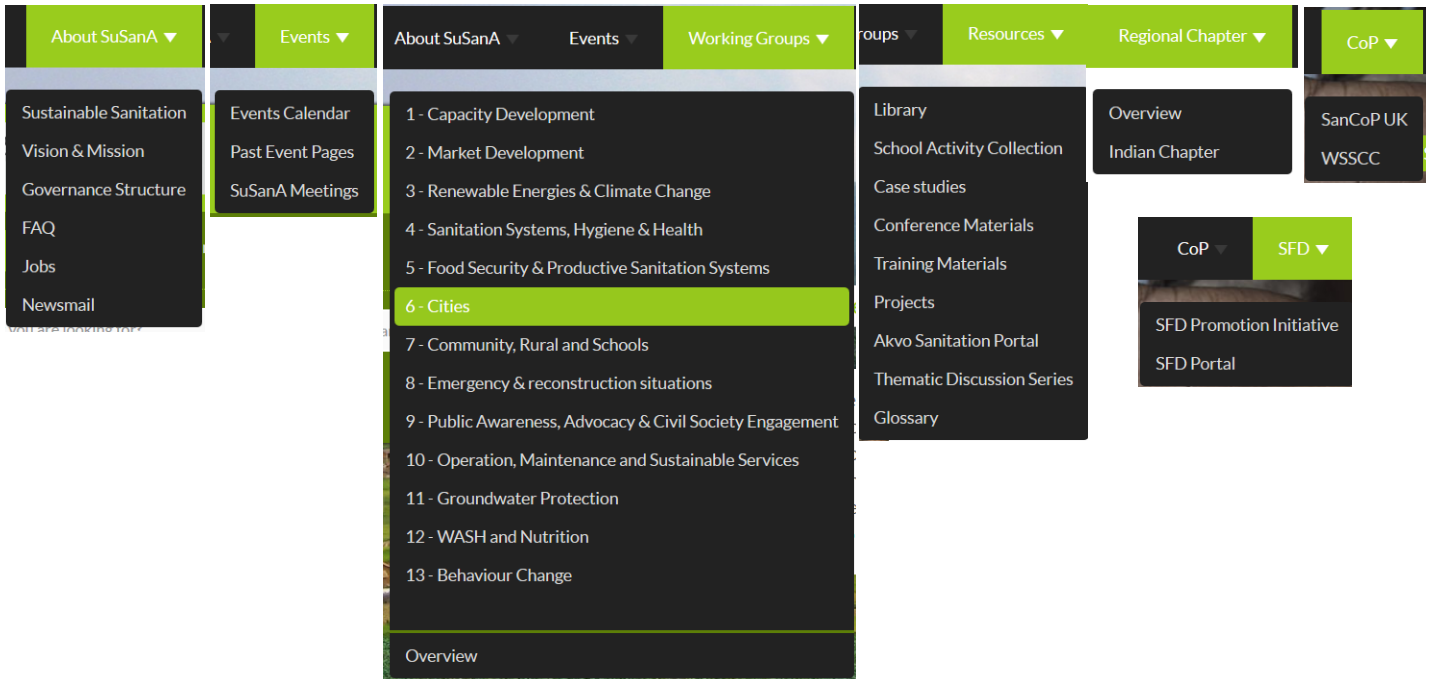
- About Susana
- Events
- Working Groups
- Resources
- Partners
- Regional Chapter
- Forum
- CoP
- SFD

Follow up questions:

- How frequently do you use each navigation option when you are on the website? (e.g. whenever I go to the SuSanA website, I usually go straight to xxx)



- Are there any options that you see when you click the main menu that you would prefer to see in the main menu (instead of as a submenu)?



- If you could choose which navigation options appeared in this navigation bar – which ones would you like to see and why?

GROUP B

SCENARIO 1B: FORUM DISCUSSIONS [13 MIN]

a. Please navigate to the forum website the way you normally would.

Start where participant usually starts (for example, google.com, or the e-mail digest or from the mother website)

Record start time: _____

b. Please take a look at what different people had to say about the following post started in 2013: “Sanitation NoW - Unit Operations Approach for Rapid Disinfection of Human Waste (University of Toronto, Canada)”

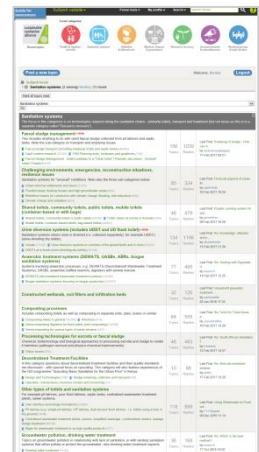
Navigation: Forum: (provide assists if participants can’t figure out how to navigate)

- Category: Sanitation Systems
 - Subcategory: Processing technologies for excreta or fecal sludge
 - Page two of the subcategory

Observations and Usability Issues

Discussion Page

- Is it clear to participant how to select Sanitation Systems category on top?



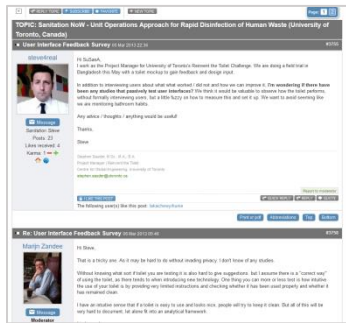
Sanitation systems discussion page

Topic Name	Topics	Replies	Last Post
Processing technologies for excreta or faecal sludge Chemical, biotechnology and biological approaches to processing excreta and sludge to render it harmless (pathogen removal and physico-chemical improvements).	46	483	Last Post: Re: South African Sanitation T ... by fcharlesc 12 Feb 2017 14:27
Odour issues (6/32)			

- Is it clear to participant to select Processing technologies for excreta or fecal sludge subtopic?

Processing technologies sub-category page

- Is it clear to participant how to navigate to the thread on page 2?



Main post page

- Is it clear to participant to scroll down to review posts?
- Does participant look at different pages?

Success point

Participant navigates to the Main post page and reviews a few posts.

c. Who started this thread and when.

Success point

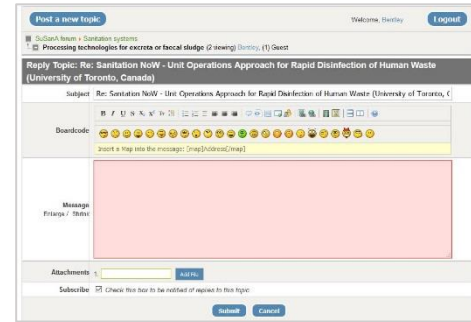
Participant clicks Page 1 and gives us the name and date of the first post.

d. Please respond to the last post.

- Is it clear to participant to click page 2 to get to the last post?
Note: the user can customize the forum in this respect: if someone has changed their setting then they will find the most recent post on top and have to go to page 2 to see the first post of the thread.
- Is it clear to participant to click “Reply”?
- If participant doesn’t want to use personal login info or forgot their login info, ask them to use the following:
 - Login: Bentley
 - Password: Usability17
- When was the last post made?

Success point

Participant clicks Page 2 and sends a response to the last post.



SCENARIO 2B: FORUM HOME [5 MIN]

Please take a look at the Forum front page and share your impressions.

Start where previous task left off

Navigation: Guide for newcomers > Scroll down the home page

Record start time: _____

Observations and Usability Issues

- Is it clear to participant to
 - Click Guide for newcomers?
 - Scroll below the fold?
- Does the participant review any of the following:
 - Recent topics by category
 - Most active topics
 - Tweets mentioning SuSanA
 - Top Contributors
 - Tutorial videos (at the top)
 - Rules, key documents, abbreviations (blue rectangles at the top)
- Have you ever reviewed this information on this page before? Why or why not?
- If Participant doesn't scroll, direct them to scroll.



Forum Categories

- Does participant review the information that appears when hovering over the icons?
- Ask: in your own words how would you describe what category each icon represents?
- Do they icons make sense to you or not?

Mobile site | Statistics | E-mail alerts | FAQ | About | Contact | Imprint

Black links at the bottom

- Does the participant review links at the bottom?
- If participant doesn't review bottom links, say: I'd like to draw your attention to these links.
- Did you notice these links as you were reviewing this page?
- Have you ever used these links before?

Success point

Participant scrolls down below the fold and reviews Recent topics by category, Most active topics, Tweets mentioning SuSanA, and Top Contributors sections as well as the parts at the upper part of the page, i.e. tutorial videos, blue rectangles.

SCENARIO 3B: RECENT POSTS [2 MIN]

Find out what some of the recent forum discussions were about.

Start on end of previous task

Navigation: "Enter Forum"> (Top black) Forum Tools: Recent Topics OR grey box top left

Record start time: _____



Observations and Usability Issues

- Is it clear to participant to navigate to (Top black) Forum Tools: Recent Topics OR grey box top left

Success point

Participant navigates to (Top black) Forum Tools: Recent Topics OR grey box top left.

SCENARIO 4B: POSTS BY USER NAME [5 MIN] – LOW PRIORITY

A user named “Canaday” posted on the Forum some time ago. You want to find his post, but don’t remember the name of the post. Find all posts by “Canaday.”

Navigation: (Top black) Search: Find User

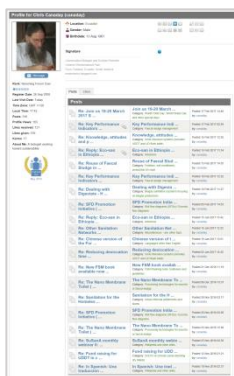
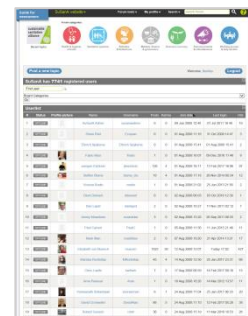
Record start time: _____

Observations and Usability Issues

- Is it clear to participant to navigate to Search: Find User?
- If Participant doesn’t know where to go, direct them.

Find User page

- Is it clear to the user where to search for a profile?
- If participant doesn’t want to use personal login info or forgot their login info, ask them to use the following:
 - Login: Bentley
 - Password: Usability17



User Profile page

- Is it clear to the user where Recent posts are?
- Please share your impressions of this page and information available here?

Success point

Participant navigates to Search: Find users, enters Canaday as search terms, clicks Canaday name, and finds posts in the profile information as well as other profile information.

SCENARIO 5B: UPDATE PROFILE [10 MIN] - LOW PRIORITY

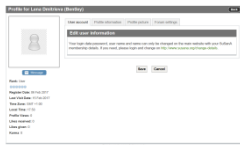
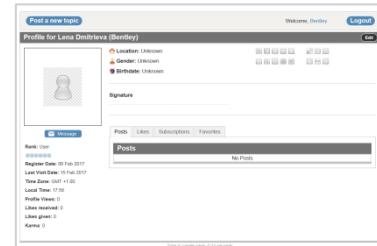
a. Please add a picture to your forum profile.

Navigation: (Top Black) My Profile: Edit Profile Overview

Record start time: _____

Profile Screen

- If participant doesn't want to use personal login info or forgot their login info, ask them to use the following:
 - Login: Bentley
 - Password: Usability17
- Is it clear to the user to click Edit button in upper right?
- If not: go to b (Help)



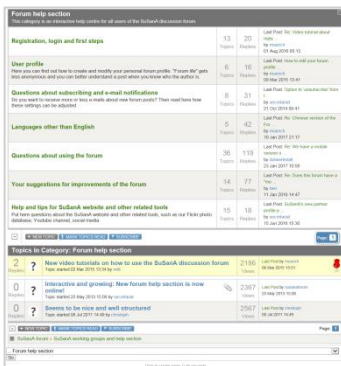
Edit screen

- This is as far as we need to go for this task.

Success point

Participant navigates to My Profile: Edit Profile Overview: Edit.

b. Please use the help section to find out about changing your user profile.



Help page

Navigation: (Top Black) Upper right Question mark icon



- Is it clear to the user to go to the question icon?
- Can the user find the sub-category on "Edit profile"?
- This is as far as we need to go for this task.

Success point

Participant clicks Help Icon and finds "User profile" thread.

SCENARIO 6B: RELATIONSHIP WITH MOTHER SITE [5 MIN]

Take a look at SuSanA's 13 working groups to learn about how SuSanA members contribute to SuSanA.

Start where previous task left off

Navigation: SuSanA website: Working Groups (or they assess the drop-down menu (below "SuSanA website" directly from the Forum page)

Record start time: _____



Observations and Usability Issues

- Is it clear to participant that they now need to go to the mother website
- If Participant doesn't navigate to the mother website, point to SuSanA website link and ask: Where do you expect this link to take you?

Success point

Participant navigates to the mother website

SCENARIO 7B: IN-DEPTH NAVIGATION REVIEW [10 MIN]

Let's take a closer look at the site's navigation. Without clicking on anything, please, tell me what you would expect to see under each top navigation option.

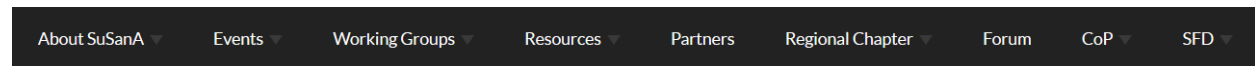
Start on Susana.org home

Record start time: _____

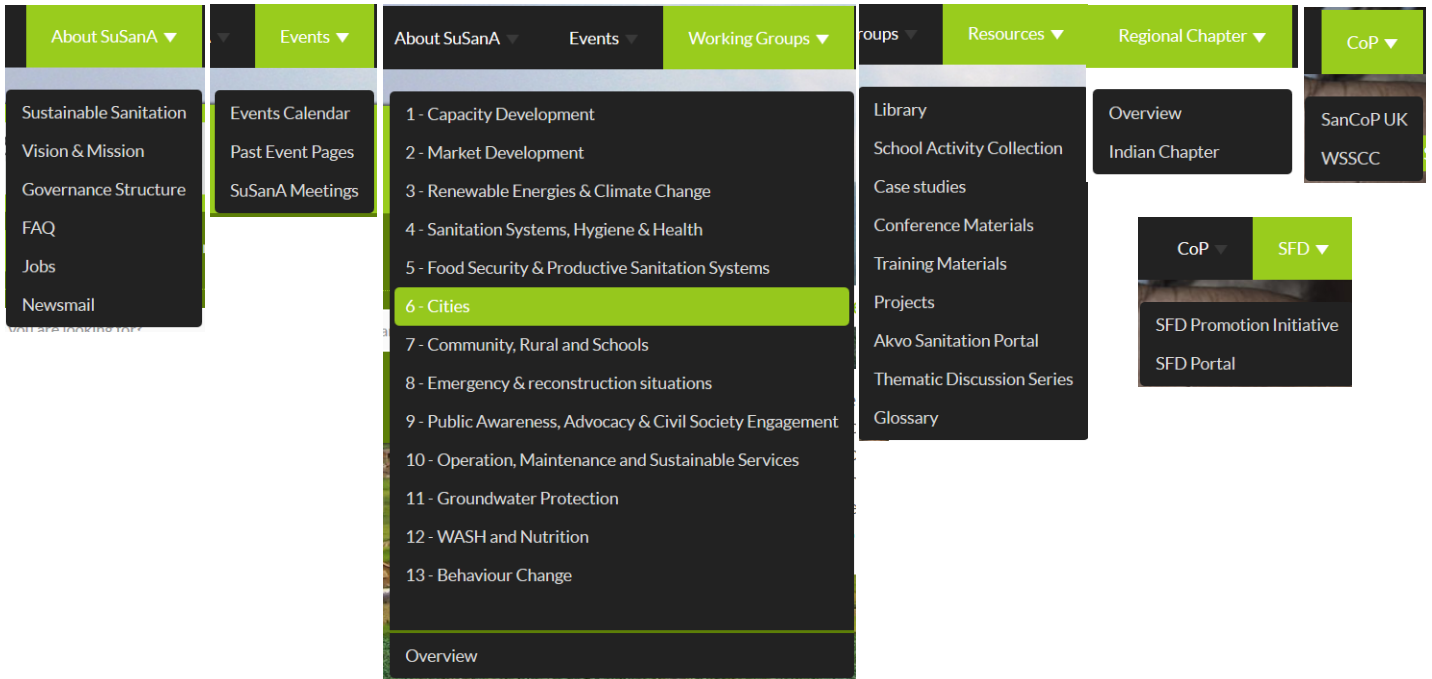
- About Susana
- Events
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Follow up questions:

- How frequently do you use each navigation option when you are on the website? (e.g. whenever I go to the SuSanA website, I usually go straight to xxx)



- Are there any options that you see when you click the main menu that you would prefer to see in the main menu (instead of as a submenu)?



- If you could choose which navigation options appeared in this navigation bar – which ones would you like to see and why?

POST-SESSION INTERVIEW [5 MIN]

- What two things did you like best or the least about using the mother website? The Forum?
- What are your impressions of the colors used throughout the SuSanA website? The Forum?
- What are your impressions of the green text (for hyperlinks) used on the SuSanA website?
 - Grey text used for plain text?
- Do you use or visit other sanitation-related websites apart from SuSanA? Is there something they do better than SuSanA?
- Is there another website that you use often and like the layout of (not necessarily sanitation related)? Why?
- Do you have any final comments or suggestions you'd like to share that we have not had a chance to discuss yet?

Thank you for your participation!