

Sample
Usability Test
Report and Findings

Sample Usability Test Report

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Executive Summary

The usability testing indicated that users liked the new look and feel of the site as well as the improved search functionality and search results pages. They also liked the concept of the calendar, however those that used it were frustrated with the calendar interface. The test uncovered both severe and moderate usability issues.

The moderate issues included:

- Lack of visual feedback providing site orientation cues.
- Confusion on the definition of content sections or categories.
- Ambiguous, missing or inappropriate content descriptions.
- The lack of wildcard options and keyboard control in the search.
- Inappropriate colors and small font sizes.
- User confusion on portlet views.
- Unfamiliarity with breadcrumb analogy.
- Calendar location and organization.

The severe issues included:

- Lack of a text home link or the expected standard of the logo linking to the home page.
- The unexpected and deficient behavior of the browser Back button and unfamiliarity of the breadcrumb analogy for navigation.
- Confusion on the use of and lack of visual feedback on the Favorites functionality.
- “Important” portlets, such as New Items, not prominently displayed on the page.
- Difficulty distinguishing between the ING SmartWorks tab and the Go to ING SmartWorks graphic.
- Navigation and functionality issues with the Calendar.
- “Broken” links to current portlets.

During the testing, no training or guidance was provided unless the user specifically asked for assistance. Many of these issues could be mitigated with training, for example when the users asked for and were given help on adding a Favorite, they found the feature easy to understand and use. However most did not know how to use it until they had been trained. Understanding the site organization, the Browse and Search portlets were also easier for the users after some guidance. Other issues may require more substantial changes to the site.

Testing Overview

The usability test focused on the iPort/Broker-Dealer Center web site. The goals of the test were:

- Determine if users could successfully locate specific content using the search tools or site navigation.
- Determine if users could successfully use BDC center specific tools such as Favorites and Calendar

The testers were given eight tasks to complete, each followed by a brief survey:

1. Explore the Broker-Dealer Center
2. Locate a blank account information form
3. Determine the date of an event or meeting
4. Add an item to your favorites
5. View new items
6. Locate a Click 'n Play
7. View the Advisory Quarterly Reporting
8. Go to ING SmartWorks

The testers were given no training or prompts during the test unless requested and the sessions were video taped and observed by both a facilitator and an observer. It was conducted in the ING Advisors Network, El Segundo offices with six registered representatives from Financial Network and ING Financial Partners. No Multi-Financial Securities representatives could attend due to travel constraints. Each testing session was conducted for 90 minutes. At the end of the test and overall satisfaction survey was administered to the users.

Tester characteristics

A demographic survey was given prior to the testing session. The results are listed below.

Note: Answers with a null response are omitted.

What is your position?	Rep	OSJ
	3	3

What age bracket do you belong to?	26 -38	39 – 50	51 – 63
	1	3	2

How frequently do you use the VFC/RepWorks?	Once a week	2-3 times/week	Everyday
	2	1	3

How frequently do you use websites, besides the VFC/RepWorks, for your business?	Everyday
	6

How much time do you spend on the Internet each week? Do NOT include time you spend working with email?	5-10 hours	10 hours or more
	3	3

When you have problems with your computer equipment at home, not the office, what are you most likely to do to fix the problem? Please read all the choices then choose one answer that is what you are most likely to do.	Get someone you know to fix it for you	Use the Web to try and figure out how to fix it yourself.	Try to fix the computer equipment without any help
	2	2	2

In summary, the testers indicated a high degree of Internet usage yet were split between heavy and moderate/light use of the current VFC/RepWorks site. Older testers, age 51 – 63, were specifically included in the sample because of the frequency of age related accessibility issues such vision impairment and diminished fine motor skills. The technical confidence level of the testers was also split with a majority expressing confidence in their ability to solve computer related problems themselves.

Findings

The following summarizes the findings of this usability test. Red color indicates severe usability issues, yellow indicates moderate severity. *Note: (G) = Global issues, (BD) = IAN specific issues.*

Colors, Links and Design Elements

Most users commented positively on the more “open” and “modern” design of the site. They liked the layout and found it visually appealing; however they had some serious issues with color choices and site functionality.

Users expressed frustration when having to click on the tab only to learn that what they were looking for was not located in that section. They wished the navigation “tabs” had pop descriptions or dropdowns that would display or describe the content of that tab. One user was asked why she kept clicking the down arrow on the tab and she replied that she thought it would show her a list of content categories in that section.

Another user commented on the choice of color, or lack of choice, saying the site “needs more color” and was “boring”. One assumed the gray sub-tabs indicated that they were not selectable because that is a common GUI convention when “ghosting” non-selectable fields or buttons in a software application. Users felt the tabs should change colors to provide visual cues of their location within the site. Another felt the gray tabs didn’t “stand-out” enough and preferred ING SmartWorks color schemes.

Some vision impaired users also complained about the font size and difficulty reading content.

Usability Issue	Severity
Section descriptors (G)	
Visual orientation cues (G)	
Colors and font sizes (G)	

Navigation

The inconsistent behavior of the browser *Back* button is a potential source of frustration to users. Breadcrumbs are an unfamiliar navigation tool for most users who are accustomed to navigating the web using browser buttons. All users attempted to use the Back button, in particular the “non-technical” users. Sometimes it would respond by showing the page they came from, sometimes it would display an error and other times the portlets would repaint unexpectedly. All users eventually discovered the breadcrumb navigation, but even after learning about it, some continued to click the back button.

A common web convention is the use of the corporate logo in the upper left corner of the page with the function of linking back to the home page. This functionality does not exist in

Sample Usability Test Report

the Broker-Dealer Center and users were constantly confused about how to return to the homepage, one user discovered the link to the *Site Map* and used it consistently at the start of many tasks as a means of returning to the “home” page.

Users also were confused on why they couldn't click the tabs once they were in a section to return to that portlet's home page. Their solution was often to click another portlet, then click back to the previous portlet. Even when navigating in this inefficient manner, some expressed confusion when returning to the portlet after conducting a search to see it had not changed back to its original “Browse” display, but retained the search results view of the portlet.

Many times the users wanted to get back to the Browse portlet after completing a task unsuccessfully and found it difficult because the section or sub-section link is not active when one is within a category.

Usability Issue	Severity
Back button (G)	High
Home link/logo (BD)	High
Unlinked sections (G)	High
Portlet view state (G)	Medium
Breadcrumbs(G)	Medium

Favorites

The *Favorites* task was the single most difficult and time-consuming task for the users.¹ Most users required some level of training to complete this task. Many wished for a “global” favorite's portlet on the BDC home page or My Profile and didn't see the value in having a “per-portlet” favorites section. The behavior of the favorite's functionality was also perplexing to users because there is not a visual indication that one has successfully added a favorite. When adding a favorite the screen refreshes but shows the same page. Some users questioned whether they had been successful in completing the task and either navigated to the portlet home page itself or were instructed to in order to see the results of adding a favorite.

Some users expected to see the Favorites under the My Business left-hand navigation as it is on the VFC today.

Usability Issue	Severity
Favorites core functionality (G)	High
Lack of visual feedback (G)	High

¹ See the *Task Charts* at the end of this report.

Content Organization

As expected, users were unfamiliar with the site and therefore had a difficult time locating some items in the tasks. In general, most users found the *Forms* and *Research* sections easy to find because of their prominence and commented positively on the search tool and the layout of the search results. Content is not always tagged in ways that will make it easy for the users to find items and some users expressed a desire for more robust form descriptions and tools for packaging forms together.

Users had a difficult time locating the *New Items* portlet in the *Research* section of the site. They often overlooked the *New Items* portlet initially or completely because of its location at the bottom of the page. Most expected the *New Items* portlet to be displayed near the top of the page to call attention to it.

The *Click 'n Play Library* was also difficult for some users to locate. Some of the expected locations were, ING SmartWorks, My Business and Timesaving Tools & Resources.

Locating the link taking the user back to *ING SmartWorks* was often assumed to be the *ING SmartWorks* tab. Most users overlooked the *Go to ING SmartWorks* logo on the home page.

Most users took less time to locate the *Advisory* content than on earlier tasks either relying on the navigation or using the search tools. Because this task was later in the testing, familiarity with the site likely improved their success rate.

Usability Issue	Severity
Portlet location (G)	Red
INGSW tab and link (BD)	Red
Content/portlet page location (G)	Yellow
Content tags and descriptions (BD)	Yellow

Search

The search tools were generally well received. The distinction between *Browse* and *Search* was not always clear to the users with some referring to *Browse* as the “home page” for the portlet. Some functional issues were identified by the users, specifically the search button not responding to the *Enter* key and the lack of a *wildcard* option. Users generally liked the search results pages and commented positively on its content and layout. As mentioned earlier page and form descriptions could be improved to make it easier for users to find appropriate content.

Usability Issue	Severity
Search Functionality (G)	Yellow

Calendar

When users were asked to locate a Calendar event, most correctly located the News & Events portlet. Because of the calendar portlet's location on the page, it was often initially overlooked and users focused on items in the content portlets to locate the event. Once the calendar was found, they commented positively on its familiar appearance and had no difficulty viewing the event details.

There were numerous usability issues with the functionality of the calendar itself. Users found it frustrating to navigate from month to month and when performing this action expressed frustration that the screen would refresh entirely and require them to scroll back to the calendar. They expressed a desire to be able to skip directly to a specific month either through a dropdown option or a visual representation of the months or quarters of the year. The categorization of events was not immediately apparent to most users and as with the content organization in general, when discovered it wasn't apparent how the categories were defined.

Users also noted the absence of a My Events favorites portlet and expressed a desire to include one.

Usability Issue	Severity
Calendar interface (G)	High
Calendar categories (G)	Medium
Calendar portlet location (G)	Medium

Post Task Survey Responses

The following survey was administered following each task (Excluding the *Explore* task):

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident
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2. How satisfied are you with your experience in using this website to complete this task?

Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied
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3. Compared to the way you do this task now, this tool is ...?

Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy
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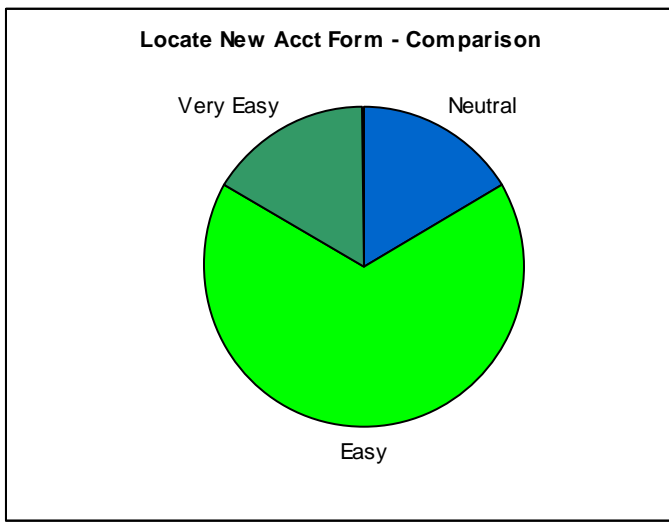
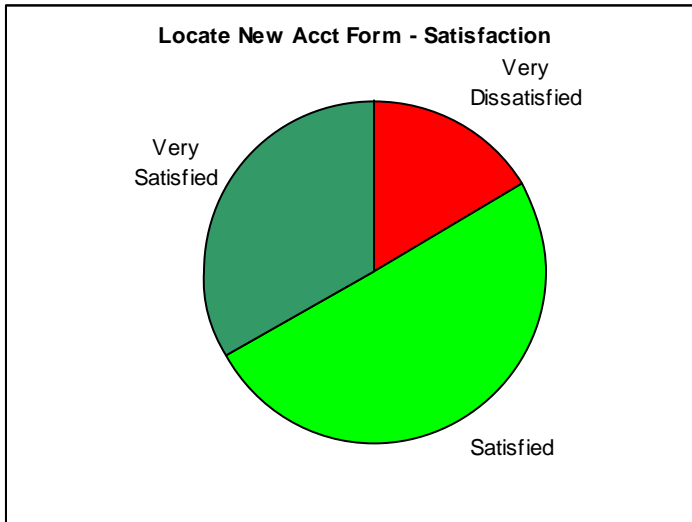
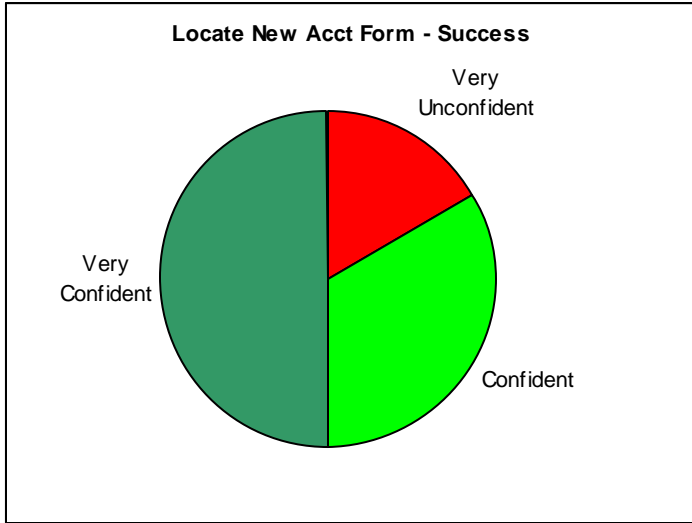
4. What do you LIKE most about what you just did?

5. What do you DISLIKE most about what you just did?

Pie charts illustrating the responses are on the subsequent pages. Answer choices that received no responses are omitted from the results. Verbatim user comments are also included.

Note: Research has shown that responses on satisfaction surveys tend to trend toward the positive because of a psychological desire to “please the facilitator” and the test subject’s avoidance of appearing overly negative. A common mitigation technique is to adjust responses toward the negative one point in the scale. This mitigation technique has not been used in the analysis of these responses. They are displayed, unadjusted, as answered by the participants.

Locate a new account form



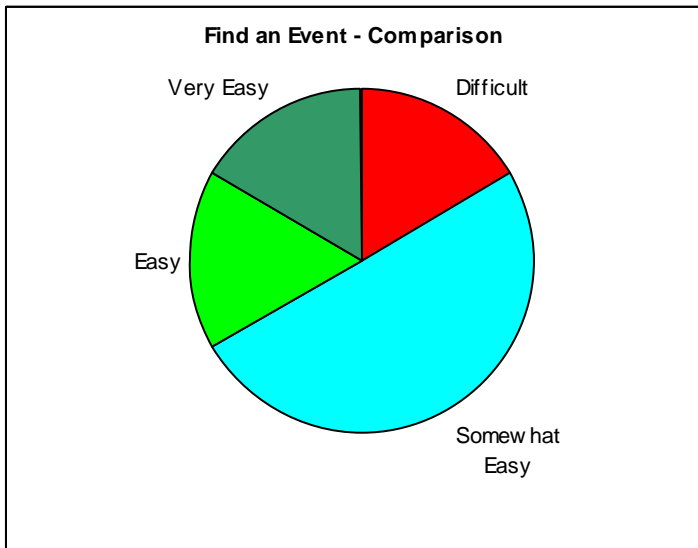
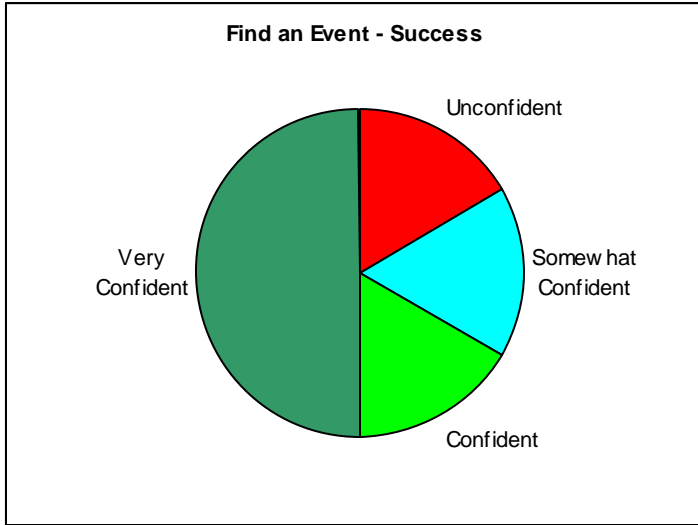
Likes:

- It took only a few clicks to find the form.
- One less click of mouse to get to Forms Central
- The look of the site and the navigation to the different sections
- New format/layout/software newness
- Straightforward/easy

Dislikes:

- It may have been harder to find if I didn't know from experience what I needed.
- No option to display the content of each section without clicking on it.
- The search results should give information on the usage of the different forms and to be able to use wildcard or option to narrow search.
- Add a hyperlink to form number

Find an event



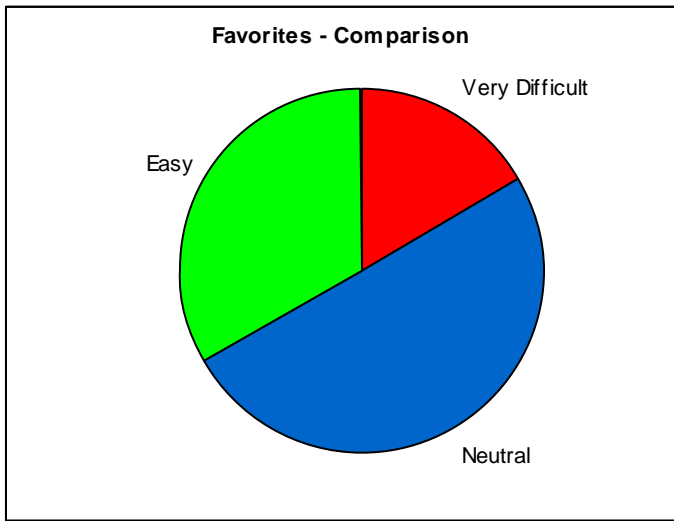
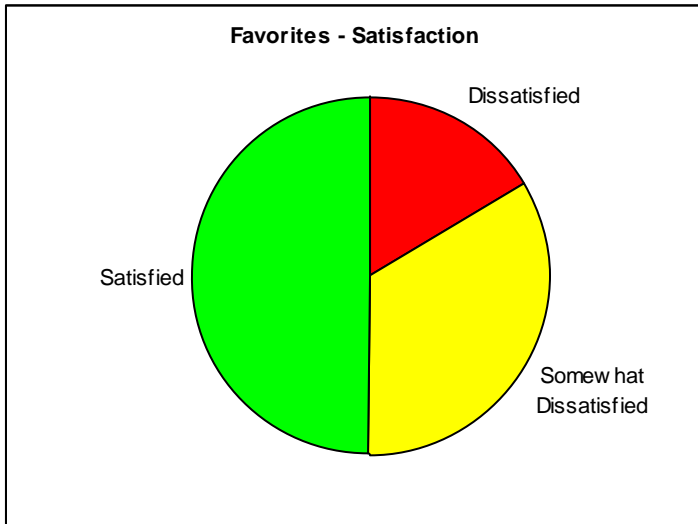
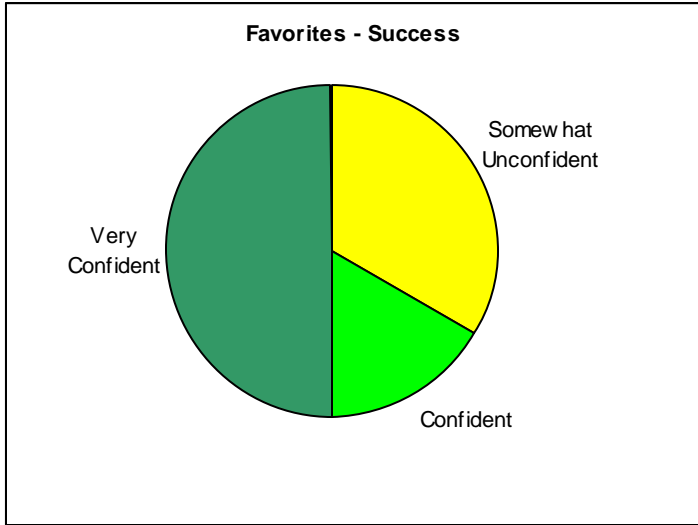
Likes:

- I like the calendar feature
- I liked the calendar
- The information displayed at the beginning is summarizing the tasks I want to accomplish and then I can select the place that I want to navigate further.
- Fairly easy, but that's because I knew to scroll down to find the "secret" calendar

Dislikes:

- I went through the list to find it – it would have been easier to see it on the calendar
- Would like to see "my events" tab with instructions non how to access.
- To be able to view the calendar in multiple months or select directly the month without scrolling
- New system learning curve, didn't find it quickly
- Calendar is in a bad spot. Mostly hidden. Perhaps have a mini-calendar with just dates that link to the master calendar.

Favorites



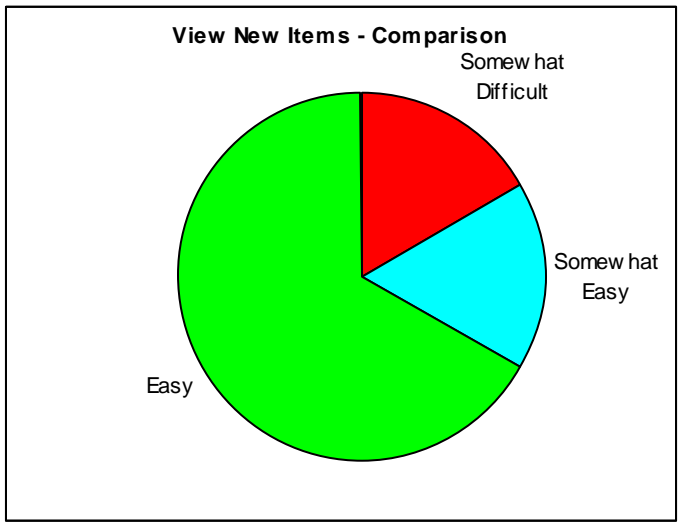
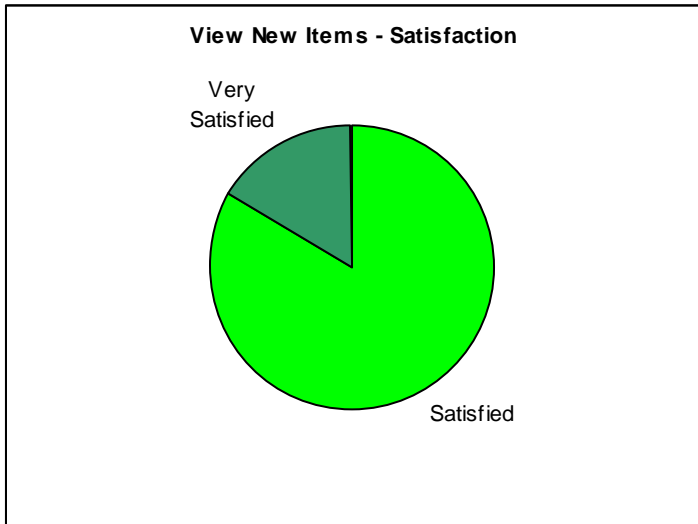
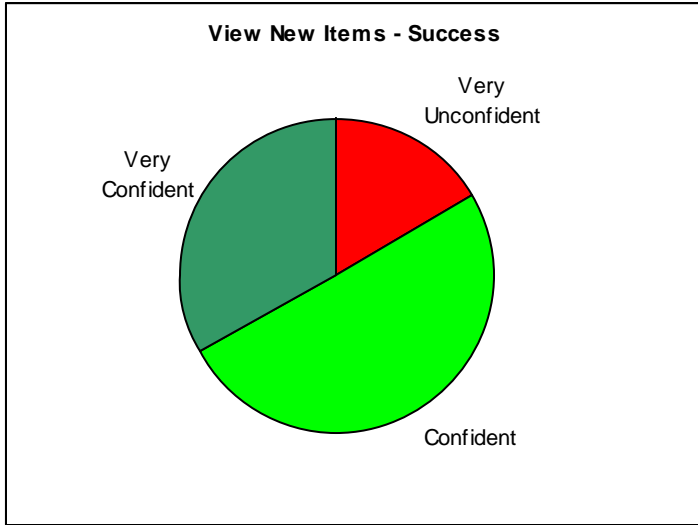
Likes:

- I like the “my compliance” tool so I can save what I want
- Once I figured it out it was easy
- Using the tool to get more organized and save time
- Missions accomplished, had personal assistance from Jeff
- Nothing

Dislikes:

- When searching, it’s hard to find items if you don’t know the exact name. Example: Rep Manual, Rep Guide finally found it under “Registered Guide”
- It wasn’t intuitive to me
- Maybe the lack of a familiar way to get to the tool
- I wouldn’t use it in real time
- Confusing process. Prefer favorites to be on the home page +/- within each section.

View New Items



Likes:

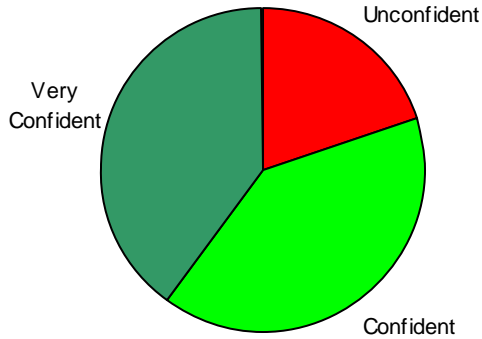
- Jeff helped me. It's easy to find once I remember to look at the entire screen.
- Appears to have more links/info on page
- Reminder at the right corner that I can add the research items to be viewed each time I go to that section
- Easy to find
- Link to Research is on home page and fairly easy to find

Dislikes:

- I think the new items should be located at the top of the screen so I don't have to scroll down to find them. I overlooked it and had to have help.
- Had to scroll down to find new items
- New items are hidden off screen below old items. This should be switched. Also FNIC Research Dept. items should be kept separate and stand out as they do now.

Locate a Click 'n Play

Locate CNP- Success



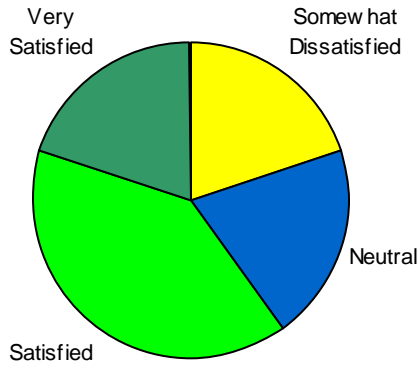
Likes:

- I found it by sorting by the title.
- Easy access to the tool and accomplish the task
- Nothing

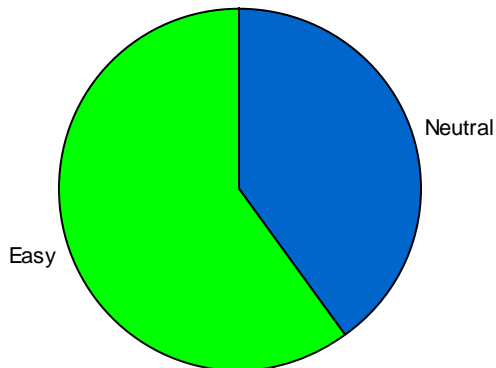
Dislikes:

- I forgot to sort at first and started guessing where it would be by clicking on listed items.
- Extra steps because of new program
- Hard to find. ING SmartWorks heading on the home page is not clear in what it offers. Also under Time-Saving tools. Click 'n Plays are hard to find. Perhaps move out of Professional Development and make them their own section.

Locate CNP - Satisfaction

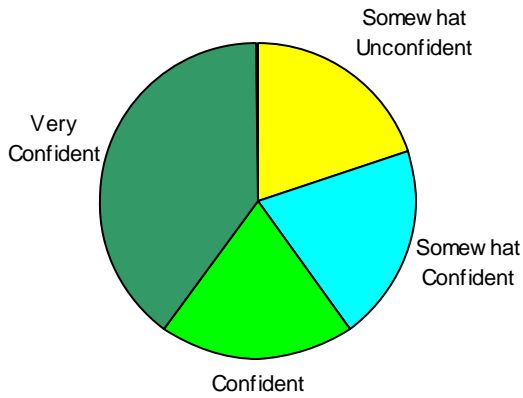


Locate CNP - Comparison



View the Advisory Quarterly Reporting

View Adv Reporting - Success



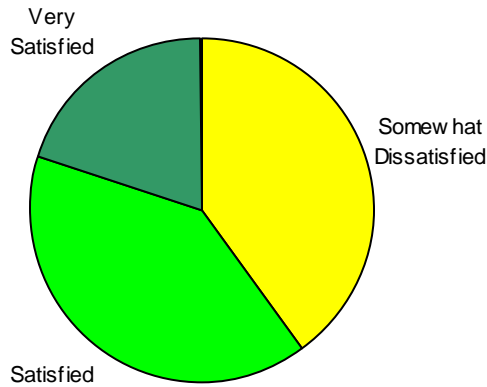
Likes:

- I found it on the list and there was an icon to get to the reports.
- Easy use of search field to find the information I'm looking for
- It was easy
- Nothing

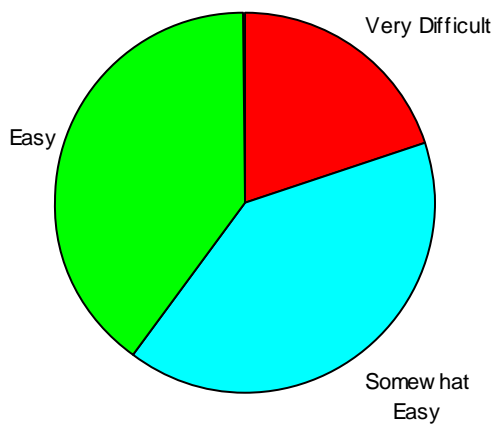
Dislikes:

- Hard to find. My Business – Advisory – Advisory Reports vs. home page of SmartWorks. SW is much easier.

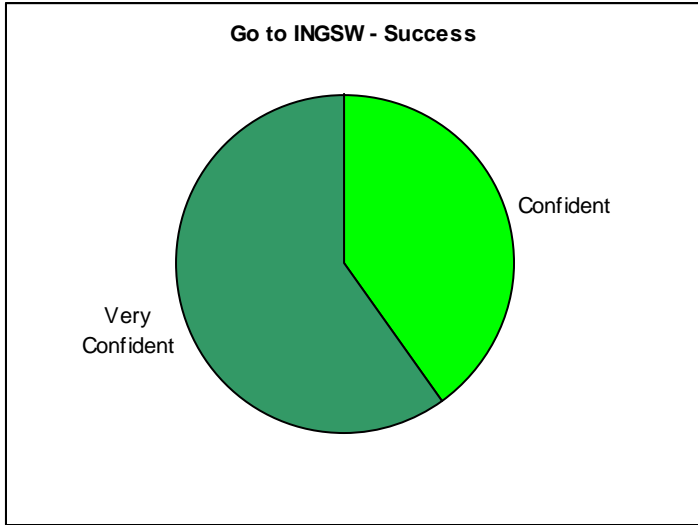
View Adv Reporting - Satisfaction



View Adv Reporting - Comparison



Go to ING SmartWorks

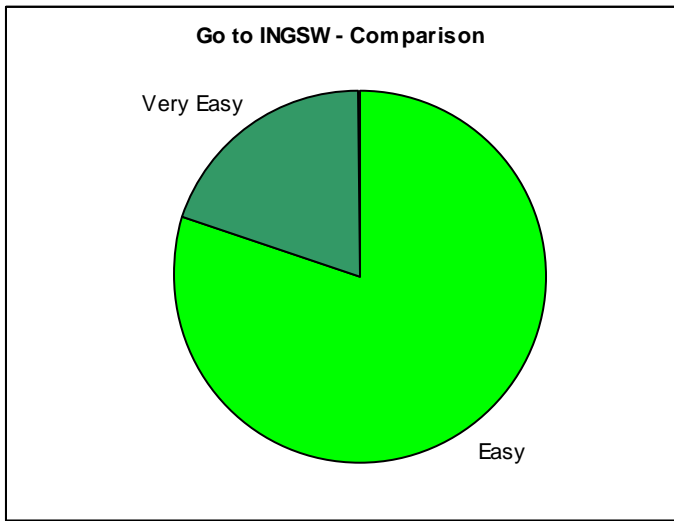
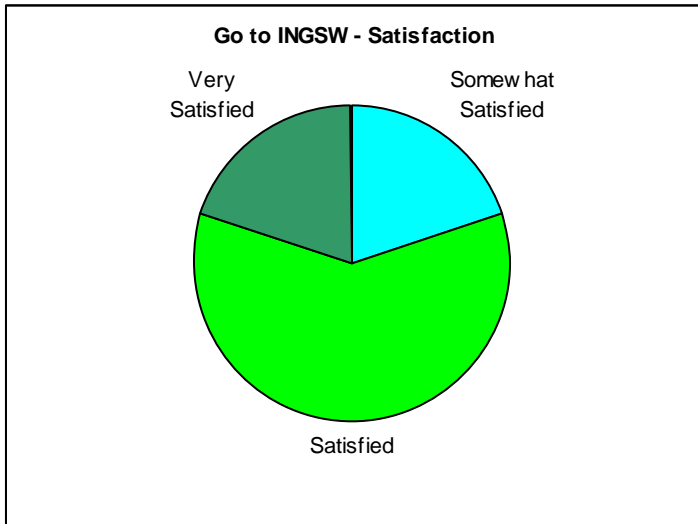


Likes:

- It's easy to find
- Easy link to go to the items
- It was easy
- Simple

Dislikes:

- There is a tab next to Broker-Dealer Center that appears to be a link to ING SmartWorks.
- Confused between the two SmartWorks links.



Post Usability Test Survey Responses

The following survey was administered at the end of the usability testing session. Average responses are listed after each question. Comments are on the following page.

Q1. Did you have enough time to evaluate and make comments on the site you evaluated? -

Yes

Q2. How difficult was it to learn the user interface for the site? - **Easy**

Q3. How much training is needed? – **Low Training**

Q4. How satisfied were you with the appearance of the user interface? - **Neutral**

Q5. How satisfied were you with the terminology and labels? - **Neutral**

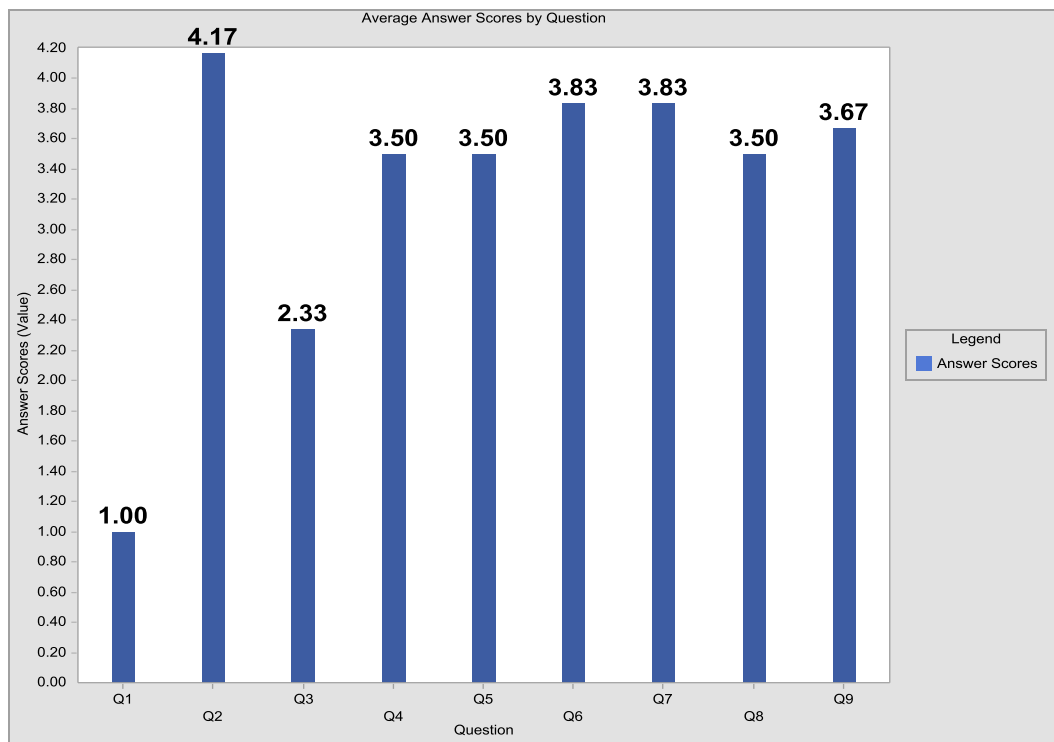
Q6. How satisfied were you with the consistency and integration of the site? - **Neutral**

Q7. How satisfied were you with the overall value provided by the site? - **Neutral**

Q8. Considering all factors (e.g., ease of learning, ease of use, ease of moving between screens, ease of locating information), what is your overall satisfaction with the site? - **Neutral**

Q9. Compared to your current way of doing your job, how easy or difficult was it for this site to handle these tasks? - **Neutral**

The following chart shows the numerical average responses to the survey questions above. All questions are on a 5-point scale, except for #1 (Yes/No) and #3 (4-point scale).



Sample Usability Test Report

Q10. What did you LIKE most about the site you saw today?

- I like the layout - boxes are easy to find. The search function worked well.
- The navigation tabs and search engine
- Appears easier to use than RepWorks
- the arrangement of the data
- Feel like it has taken RepWorks to a more technical level (modern)
- I do not know how to answer this question. I believe the site needs more work. Issue need to be address regarding terms used. There is experience and knowledge existing with the present site so that creates a problem when comparing the two sites with one another.

Q11. What did you DISLIKE most about the site you saw today?

- It seemed like the boxes I needed most often were at the bottom of the screen requiring scrolling to find.
- To be able to view the content of the section without clicking it.
- Would like to see more dropdown boxes. Home pages should fit the screen.
- Color would make some of the portals more distinct
- Graphic design - no "pop" on tool bar (vs. orange) or SmartWorks favorites not on home page

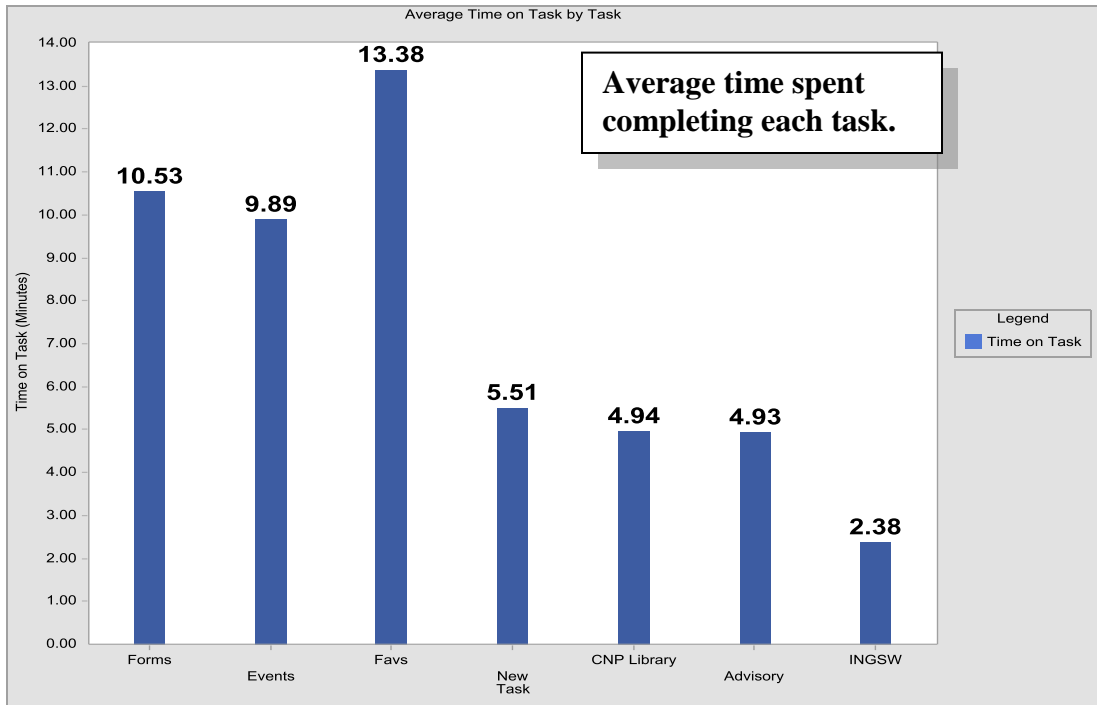
Q12. What additional training or information could we have provided you before starting the evaluation that would have helped you understand how this site functions?

- I can't think of anything.
- None that I could think of

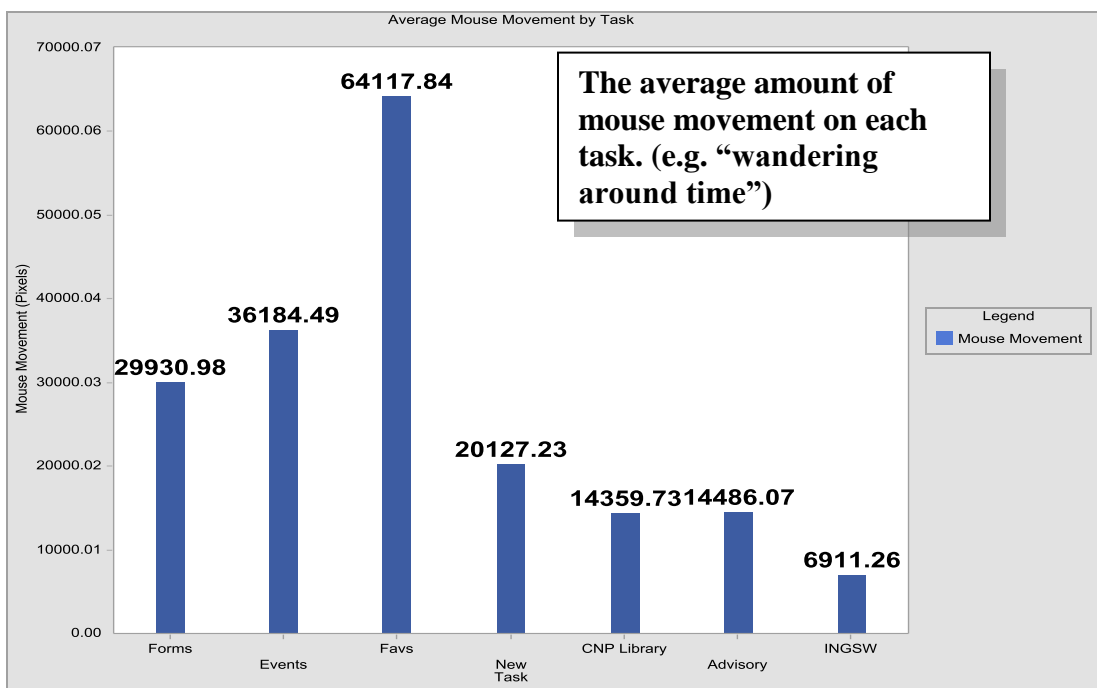
Task Charts

The following task charts graphically illustrate the average time, mouse movement and page changes per task. Individual task values should be viewed relative to other tasks in the study. The Explore task is excluded.

Average Time on Task (Minutes)



Average Mouse Movement by Task (Pixels)



Average Web Page Changes by Task

