HEURISTIC EVALUATION PLAN

STUDY OBJECTIVES

1	Identify usability problems and make recommendations for how to fix those problems.
2	Identify and incorporate the Catastrophic and Major issues into formal usability testing.

RESEARCH QUESTIONS

1	What are the Catastrophic and Major issues related to the UI design?
2	Which one from the evaluated parts of the website requires major improvement?

TO DO

ID	Date	Task
1	15/11/2020	Select evaluators.
2	15/11/2020	Establish an appropriate list of heuristics (Norman + own heuristics). (Put it into Evaluation Checklist)
3	15/11/2020	Write brief for the evaluators (they need to know what to do)
4	15/11/2020	Decide on the elements to be evaluated.
5	15/11/2020	Run evaluation and look for problems. Record all the issues in detail. Use Evaluation Checklist
6	15/11/2020	Run debriefing session - all evaluators collaborate to establish complete list of problems.
7	15/11/2020	Use scorecard to prioritise issues.
8	15/11/2020	Suggest potential solutions for these problems on the basis of the heuristics. (mark them on the web screenshots)
9	15/11/2020	Put together evaluation summary. (associate with recommendations)

EVALUATORS

ID	Name
E1	Agnieszka
E2	Jill
E3	-
E4	-

ELEMENTS TO BE EVALUATED - Relevant system areas, modules and elements that are being evaluated

	Importance 1, 3, 5 or 8 (Fibonacci's scale)	Name
1	5	**Main Menu**
2	5	**Counter Program Screen**
3	8	**Counter: Enter Transaction**
4	5	**Account Lookup**
5	5	**Transaction Types**
6	8	**Counter: Enter Transaction - External Cheques**
7	8	**Counter: Enter Transaction - Cheques Received**
8	8	**Counter: Enter Transaction - Loan Details**
9	8	**Counter: Reverse Transaction**
10	8	**General UI Design**
11	8	**Help and Onboarding**
12	8	**Accessibility**

GOALS OF THE SYSTEM

ID	Importance 1, 3, 5 or 8 (Fibonacci's scale)	Goal
1	8	User should be able to find Account by Number
2	8	User should be able to preview Account Details, Balance details, loan details,
3	8	User should be able to choose transaction type
4	8	User should be able to add amount 500 to the chosen account
5	8	User should be able to withdraw amount 100 tfrom the chosen account
6	8	User should be able to issue a loan
7	8	User should be able to Lodge a cheque / cheques
8	8	User should be able to do credit transfer
9	8	User should be able to choose payee that is set up within the Credit Union
10	8	Usr should be able to reverse transaction
11	5	User should be able to find Account Lookup tool and find account by: - Shortname - Staff No. - Date Born, - Surname - ...
12	5	User should be able to refine search.

SEVERITY RANKING

Rating	
0	Violates a heuristic but doesn't seem to be a usability problem.
1	Superficial usability problem: may be easily overcome by user or occurs extremely infrequently. Does not need to be fixed for next release unless extra time is available.
2	Minor usability problem: may occur more frequently or be more difficult to overcome. Fixing this should be given low priority for next release.
3	Major usability problem: occurs frequently and persistently or users may be unable or unaware of how to fix the problem. Important to fix, so should be given high priority.
4	Usability catastrophe: Seriously impairs use of product and cannot be overcome by users. Imperative to fix this before product can be released.

EASE OF FIXING RANKING

Rating	
0	Problem would be extremely easy to fix. Could be completed by one team member before next release.
1	Problem would be easy to fix. Involves specific interface elements and solution is clear.
2	Problem would require some effort to fix. Involves multiple aspects of the interface or would require team of developers to implement changes before next release or solution is not clear.
3	Usability problem would be difficult to fix. Requires concentrated development effort to finish before next release, involves multiple aspects of interface. Solution may not be immediately obvious or may be disputed.

HEURISTICS SOURCES

1	ANDY BUDD	Andy Budd's 9 Heuristics for Modern Web Application Development http://www.andybudd.com/archives/2007/01/heuristics_for_modern_web_application_development/
2	ONBOARDING	5 Heuristics of User Onboarding https://medium.com/@romanzadyrako/5-heuristics-of-user-onboarding-8c5a91c85139
3	PFEDA	A Practical Framework for Evaluating Designs for Accessibility https://accessibility.deque.com/live-webinar-accessibility-heuristics
4	USERFOCUS	Userfocus - 247 web usability guidelines https://www.userfocus.co.uk/resources/guidelines.html#
6		
7		
8		

HEURISTIC EVALUATION RESULTS

RATING: -1 - doesn't comply with the guideline, 0 - kind of complies, 1 - complies

#	Review Checklist	Evaluator 1 - Aga		Evaluator 2 - Jill		Evaluator 3		Rating
		Rating	Comments	Rating	Comments	Rating	Comments	
1	**DESIGN FOR USER EXPECTATIONS**							
1.1	Is system built with conventional UI patterns (menu, search, …) ?	1		1				
1.2	Are repeated navigation patterns consistently presented?	1		1				
1.3	Are features that will help users achieve their goals clearly visible?	1		1				
1.4	Are recurrent functionalities consistently identified?	1		1				
1.5	Do system processes work in a similar way to their offline equivalents?							
1.6	Are changes clearly announced before they take place?	1		1				
1.7	Are changes of context not unexpectedly triggered?	1						
1.8	Are labels or button misleading?	1		1				
1.9	Does system correctly anticipates and prompts for the user's probable next activity?	1	Yes, we have button to reverse the transaction, notifications have relevant CTAs, go back to the queue button after transaction is completed.					
1.10	Are inactive menu items greyed out or omitted?	1	For example Confirm Lodgement is disabled when there is no data in the fields and total is 0.00					
2	**CLARITY**							
2.1	Is language clear and easy to understand?	1		1				
2.2	Are labels clear and meaningful?	1		1				
2.3	Are icons meaningful?	1		1				
2.4	Do interactive elements have clear and visible focus states?	1		1				
2.5	Does organisation of navigational elements facilitate way-finding?	1	Breadcrumbs, side menu	1				
2.6	Are means provided to jump straight to the main content?	1		1				
2.7	Is information presented in a simple, natural and logical order?	1		1				
2.8	Are find/search results clear, useful and ranked by relevance?			1				
3	**MINIMIZE UNNECESSARY COMPLEXITY AND COGNITIVE LOAD**							
3.1	Is unnecessary functionality, process steps and visual clutter removed?	1		1				
3.2	Is progressive disclosure used to hide advanced features?	1		1				
3.3	Are complicated processes broken down into multiple steps?	1		1				
3.4	Are UI elements prioritised using size, shape, colour, alignment and proximity?	1		1				
3.5	Has the number of screens required per task been minimised?	1		1				
3.6	Are the most frequently used features and functions close to the centre of the screen not in the far left or right margins?	1		1				
3.7	Is the navigation system broad and shallow (many items on a menu) rather than deep (many menu levels)?	1		1				
3.8	The screen density is appropriate for the target users and their tasks?	1		1				
3.9	Does the layout help focus attention on what to do next?	1		1				
3.10	Is Fitts' Law followed (the distance between controls and the size of the controls is appropriate, with size proportional to distance)?	1		1				
3.11	Does the system provide an example input for format-specific or complex information?	1		1				
4	**EFFICIENCY AND TASK COMPLETION**							
4.1	Do users have access to quick links to common features/functions?	1		1				
4.2	Are there advanced features like the ability to delete multiple records?	1		1				
4.3	Are common options, like transaction type pre-checked?	1		1				
4.4	Can users change, cancel or override defaults?	1		1				
4.5	Are unnecessary steps removed?	1		1				
4.6	Can users complete common tasks quickly?	1		1				
4.7	Does the system make user's work easier and quicker than without the system?	1		1				
4.8	Does user not need to enter the same information more than once?	1		1				
4.9	Is the path for any given task a reasonable length (2-5 clicks)?	1		1				
4.10	Can a typical first-time user do the most common tasks without assistance?	1		1				
4.11	When they return to the system, will users remember how to carry out the key tasks?	1		1				
4.12	When system presents a lot of information, can the user sort and filter the information?	1		1				
4.13	Does system support novice and expert users by providing different levels of explanation (e.g. in help and error messages)?	1		1				
4.14	Does the system ensure that work is not lost (either by the user or site error)?	1		1				
4.15	Is it easy to "undo" (or "cancel") and "redo" actions?	1	Eg. Reverse transaction	1				
5	**PROVIDE USERS WITH CONTEXT**							
5.1	Do screens have clear name and purpose?	1		1				
5.2	Is the current section in the navigation highlighted?	1		1				
5.3	Does system provide a breadcrumb trail?	1		1				
5.4	Are there appropriate feedback messages?	1		1				
5.5	Is number of steps in a process shown?	1	Quque columns - waiting, current, served	1				
5.6	Is perception of latency reduced, by providing visual cues (e.g. progress indicator) or by allowing users to complete other tasks while waiting?							
6	**CONSISTENCY AND STANDARDS**							
6.1	Is system using common naming conventions such as "search"?	1		1				
6.2	Are items placed in standard locations like search boxes at the top right of the screen?	1		1				
6.3	Are the right interface element or form widget used for the job?	1		1				
6.4	Is the system behaving is a predictable way?	1		1				
6.5	Is system using standard processes and web patterns?	1		1				
7	**PREVENT ERRORS**							
7.1	Are irrelevant options disabled?	1		1				
7.2	Are both local and international dialling codes accepted?							
7.3	Are examples and contextual help provided?	1		1				
7.4	Does system check if record already exist before adding it (payee)?							
7.5	Are mandatory form controls clearly identified as required?	1		1				
7.6	Are instructions provided to help prevent errors?	1		1				
7.7	Have form inputs persistent and meaningful labels?	1		1				
8	**HELP USERS NOTICE, UNDERSTAND AND RECOVER FROM ERRORS**							
8.1	Are errors visually highlighted?	1		1				
8.2	Is feedback provided close to where the error occurred?	1		1				
8.3	Are messages clear and there is no technical jargon?	1		1				
8.4	Are inline error messages providing suggestions to fix errors?							
9	**PROMOTE A PLEASURABLE AND POSITIVE USER EXPERIENCE**							
9.1	Is system UI pleasurable and attractive visually?	1		1				
9.2	Are user goals easily attainable?	1		1				
9.3	Does each screen of the system share a consistent layout design?	1		1				
9.4	Are fonts used consistently?	1		1				
9.5	Is there a good balance between information density and use of white space?	1		1				
9.6	Do the colours work well together and complicated backgrounds are avoided?	1		1				
10	**HELP & ONBOARDING**							
10.1	Value Match. Does user onboarding experience match their expectation of value?	1		1				
10.2	Direction. Is onboarding experience designed to provide direction for new users?	1		1				
10.3	No Distractions. Are distractions that may cause friction or disconnect removed?	1		1				
10.4	Learning through Use. Can users achieve their goal while learning the motions of your product?	1		1				
10.5	Pertinent Assistance. Does system provide relevant, timely help to answer frequent questions about your product's functions, explain terms and abbreviations, show examples.							
10.6	Does the user not need to consult user manuals or other external information to use the system?	1		1				
10.7	Is user confirmation required before carrying out potentially 'dangerous' actions (e.g. deleting something)?	1		1				
10.8	Are prompts brief and unambiguous?			1				
10.9	Do error messages contain clear instructions on what to do next?	1	There are relevant CTA buttons					
10.10	When the user needs to choose between different options (such as in a dialog box), are the options obvious?	1		1				
10.11	Does system provide immediate feedback on user input or actions ?	1		1				
10.12	Does the system provide feedback (e.g. "Did you know?") that helps the user learn how to use the system?							
10.13	Does the system provide context sensitive help?	1	tooltips					
10.14	Does the system provide clear feedback when a task has been completed successfully?			1				
11	**ACCESSIBILITY**							
11.1	Are hierarchical headings used to organise content?							
11.2	Are form controls assigned meaningful text labels?	1		1				
11.3	Is tabular data structured using tables with header cells?							
11.4	Has text sufficient contrast against background?	1		1				
11.5	Has buttons/links text sufficient contrast against surrounding text?							
11.6	Is colour not used as the only way to convey information?	1						
11.7	Are labels and headings worded to be meaningful?	1		1				
11.8	Does sufficient padding and leading makes text easier to read?	1						
11.9	Are interactions not designed to be mouse-specific?	1						
11.10	Are functionalities built to be keyboard compatible?	1						
11.11	Are call to actions labelled for voice recognition navigation?	1						
11.12	Does content not flash more than three times per second?	1						

RESULTS SUMMARY

#	Review Checklist	Raw score				# Questions	# Answers				Score				Average Score
		E1	E2	E3	E4		E1	E2	E3	E4	E1	E2	E3	E4	
1	Design for User Expectations	9	6	0	0	10	9	6	0	0	100%	100%			100%
2	Clarity	7	8	0	0	8	7	8	0	0	100%	100%			100%
3	Simplicity and low Cognitive Load	11	11	0	0	11	11	11	0	0	100%	100%			100%
4	Efficiancy and Task Completion	15	15	0	0	15	15	15	0	0	100%	100%			100%
5	Providing Users with Context	5	5	0	0	6	5	5	0	0	100%	100%			100%
6	Consistency and Standards	5	5	0	0	5	5	5	0	0	100%	100%			100%
7	Error Prevention	5	5	0	0	7	5	5	0	0	100%	100%			100%
8	Recovering from Errors	3	3	0	0	4	3	3	0	0	100%	100%			100%
9	Pleasurable and Positive User Experience	6	6	0	0	6	6	6	0	0	100%	100%			100%
10	Help and Onboarding	12	10	0	0	14	12	10	0	0	100%	100%			100%
11	Accessibility	9	3	0	0	12	12	3	0	0	88%	100%			94%
						98	90	77	0	0	99%	100%			

Average Score vs Review Checklist