

uPortal UX Walkthrough Working Group

uPortal Walkthroughs

The uPortal team's focus is the evaluation of the uPortal product. We will be engaging in a process similar to that pursued by the other teams, but at the same time acknowledging the unique aspects of the service a portal offers to its users. Our objective will be to have something concrete to report at the Fluid Summit at the end of September. It will therefore be necessary to carefully scope our activities, selecting chunks of functionality we can investigate and report on. The goal is for the subgroups for Sakai, Moodle and uPortal to come together with our first phase evaluations in Toronto to look across the work to identify pain points that may be improved through the creation of components.

Project Plan & Timelines

Activity	Time Estimate	Due Date
Complete a short list of personas		8/22/07 ✓
Create a short list of scenarios		9/10/07 ✓
Select target implementations of uPortal and acquire courtesy (guest?) accounts		9/13/07 ✓
Review and freeze heuristic principles and walkthrough objectives		9/30/07 (summit)
Finalize Report Template		9/30/07 (summit)
Determine accessibility measures and tools (screenreader?)		9/30/07 (summit)
Assign evaluation activities (usability, accessibility, walkthrough)		9/13/07 ✓
Evaluation (usability, accessibility, walkthroughs, create raw individual reports)		9/30/07 (summit)
Screen Reader Evaluation (including report)		?
Write Summary Report (synthesize individuals)		?

uPortal Personas

Personas give us the ability to emulate *representative* users of the service. While a persona may not have exactly the same characteristics as any actual user, it provides us with a benchmark of goals, desires, needs, intentions, and behaviour of a population we want to serve. All persona descriptions should be backed up by research data derived from observations of real populations. They should not be simply imagined stereotypes.

A set of [example personas](#) can be found in the uPortal pages of the JA-SIG wiki. The [Sakai Personas](#) created for the Sakai walkthroughs may also be useful in the uPortal investigations.

We chose to focus on personas with intermediate experience/skills in Sakai for the Sakai walkthroughs, as that is the stage we hypothesized most users would be in. In the portal environment, it may make sense to focus on newer users. In the spirit of reuse and commonality we will attempt to use the Sakai Personas for the uPortal walkthroughs.

uPortal Content Management Scenarios

[User scenarios](#) are descriptions of user activities, performed within a defined context, in pursuit of a particular objective. In our walkthroughs, we will focus more on the task, and how the user goes about it, than the achievement of the objective. Our purpose is to capture details of the experience of the task and find commonalities. See also the [Sakai team's Content Management Scenarios page](#).

- [uPortal Content Management Scenarios](#)

Target Instance of uPortal for Evaluation

Evaluations will be performed on existing uPortal implementations selected by the team. In most cases it will be necessary to obtain courtesy accounts for the target services; in some cases demo accounts may suffice. Please add suggestions to the following list.

- [myUBC](#) - has recently been upgraded to uPortal release 2.5.3, along with a complete renovation of appearance and navigation.
- [BCWebCentral](#)
- [my UW Madison](#) (see "[View My UW Demo](#)")

- UC Irvine's [SNAP](#) (see "demo") - good example of a staff-only portal
- [YaleInfo](#) - use <https://portal.yale.edu/Login?userName=demo&password=demo> to log in as the demo user
- [MyRutgers](#)
- [DukePass](#)
- [Unicon uPortal 2.6.0 out-of-the-box](#)

uPortal Reporting Template

We will use the same [Report Template](#) as is used in the Sakai walk-throughs. There may be minor extensions to the template to cover the needs of each product.

uPortal Evaluation Plan

1. Heuristic Overview of the portal and selected channels/portlets
 - Use MyUBC (<https://my.ubc.ca/> , contact [Paul Zabolosky](#) for login), Unicon 2.6 instance of uPortal set up by [Gary Thompson](#) (<http://12.164.148.172/uPortal/>), or even another test uPortal instance you have access to if it contains channels /portlets we want to evaluate. See [#Target Instance of uPortal for Evaluation](#) for suggestions.
 - Begin with a general heuristic overview of the portal. Some of the things to explore include modes, behaviors and content explosions, portlet modes and window states, personalization and customization, and how all of these things affect novice, occasional, and expert users, as discussed in the [Content Management - uPortal Usability and Accessibility](#) document.
 - Suggested Channels/Portlets for Heuristic Overview: Announcements, News, [please add more typical channels/portlets here]
 - done individually by each team member
 - "traditional" heuristic-style
 - Use [UX Walkthrough Heuristics](#)
2. Cognitive walkthroughs
 - Scenario Walkthroughs: use <https://my.ubc.ca/> (contact Paul Zabolosky for login) or Unicon 2.6 instance of uPortal set up by Gary Thompson (URL not yet available), or even another test uPortal instance you have access to if it contains channels /portlets we want to evaluate. See [#Target Instance of uPortal for Evaluation](#) for suggestions.
 - Pick a scenario or scenarios from uPortal Content Management Scenarios page and check it off there as complete which you finish it. This page may be updated with information on which uPortal instance to use; if not, you may need to try to select the best uPortal instance for your scenario. If you are unsure, start with MyUBC and then move on to the Unicon 2.6 instance.
 - Some of the goals are buried inside the portlet applications, and may be inaccessible. Also some of the clickpoints take you right out of the portal. If you are unable to complete a scenario due to not having access to an outside system, just concentrate what happened to get you that far. Paul interactions which cause you to leave the portal are key points for portal usability/accessibility.
 - Can be done individually, but preferably should be done in groups -- 2+
 - Walkthrough specific "likely" (identified) activities as the user -- uses [personas](#)
 - Walkthrough each [scenario](#) again based on description of how disabled person would complete this task differently
 - Keyboard only
 - Screen reader
3. Technical evaluation
 - individually or in a group -- need specific skill set?
 - review code ["under the covers"](#) of the portal and selected channels/portlets against guidelines

uPortal UX Walkthrough Results

Results from the uPortal UX Walkthroughs completed prior to the summit can be found on the [uPortal I Pre-Summit UX Walkthrough Results](#) page, and results from those completed after the summit can be found on the [uPortal Post-Summit UX Walkthrough Results](#) page.

Meetings

The [uPortal UX Walkthrough Working Group](#) meets as needed.

[\[view\]](#) [\[edit\]](#)

Next Meeting: TBD

Meeting Place: [Breeze Videoconference](#)

Teleconference if Breeze doesn't work:

Phone: 416-406-5118

ID: 5220834

Agenda:

TBD

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Related Links

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Attached Documents

File

Modified 

No files shared here yet.