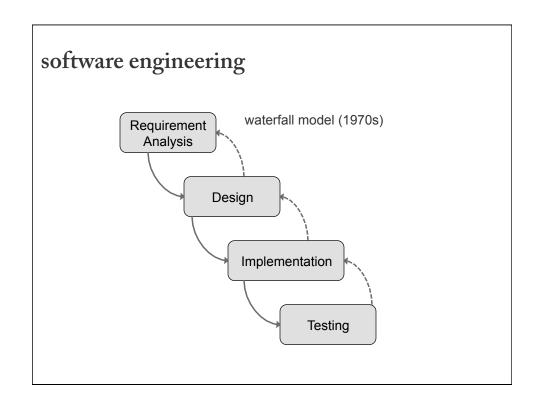
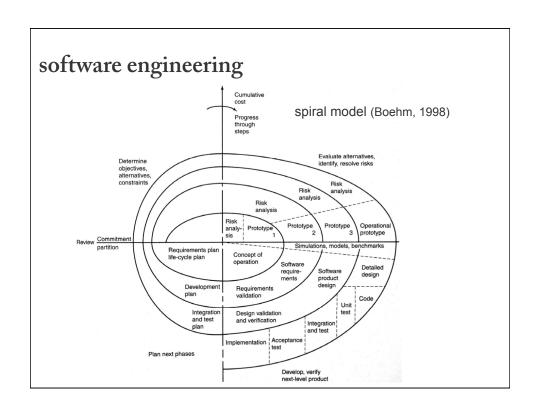
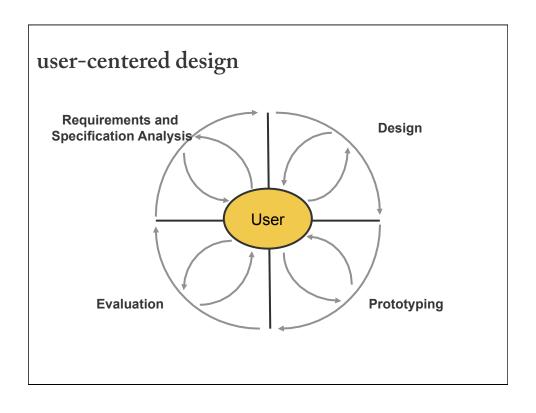
## **Design Cycle of IS**

Anastasia.Bezerianos@lri.fr







## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification

# User

#### Design

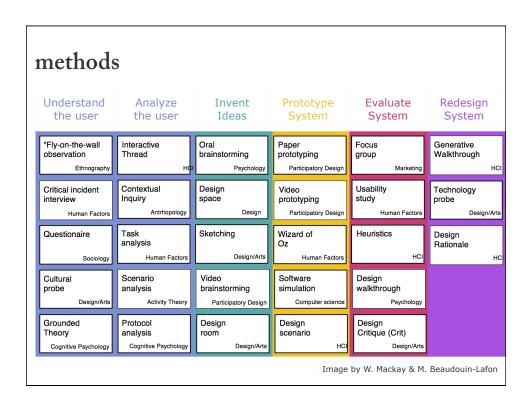
brainstorming
participatory design
conceptual models
metaphors
interaction styles
scenarios
storyboards
interaction models

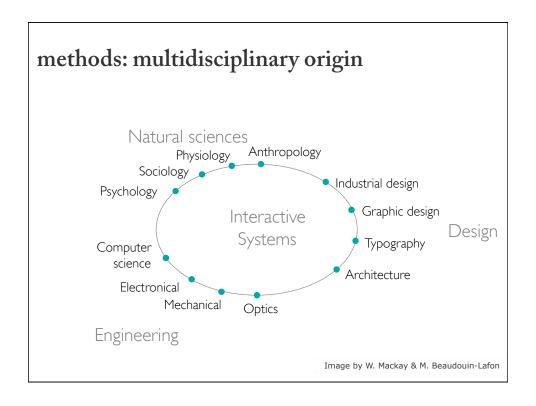
#### **Evaluation**

usability tests
heuristic evaluation
focus groups
lab experiments
observational studies

#### **Prototyping**

paper prototypes low/high fidelity prototyping physical models alpha/beta releases





## importance of user-centered design

## **Development Cost**

Cost of user interfaces: ~50% of total cost

#### Maintenance Cost

20%: « bugs »

80%: unexpected user needs

#### Problem correction Cost

= \$1 during design

= \$10 during development

= \$100 after delivery

1: understand and analyze the user

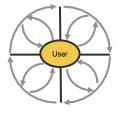
## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification

#### **Evaluation**

usability tests
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#### Design

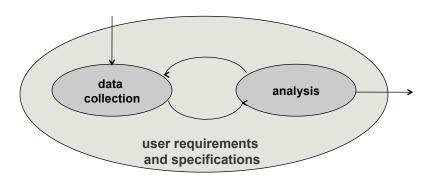
brainstorming
participatory design
conceptual models
metaphors
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scenarios
storyboards
interaction models

#### **Prototyping**

paper prototypes low/high fidelity prototyping physical models alpha/beta releases

### process

- 1. Data collection
- 2. Analysis: interpretation, modeling and requirement specification



## identify your users

Who are the users?

e.g. children, older population, students, specific professionals, artists

What are their problems, needs, preferences and experiences?

What are their capacities (perception, cognition, motor), their knowledge and expertise?

Experts, novices, special needs, etc.

#### Cultural differences

Languages, symbols, communication

#### **Economic Context**

How much can they pay for the new product?

## example: « one laptop per child »

What are the particular requirements and constraints for the development of such a product?



## research methods

Qualitative or quantitative

#### Can be subjective:

We cannot completely remove the observation bias

#### Techniques:

Documentation, research of previous studies

Observation

Interviews

Questionnaires

Focus groups

## direct observation

Observe users using the current system

In the field:

Each observer is biased Observation effect on the observed subject Ethical questions: what can we log/document

Artists use sketchbooks to document all the time



## direct observation: logging/document

Field notebook
Few details, subjective, incomplete

#### Audio

Not always useful without video, hard to analyze



Darwin's field notebooks

#### Video

Detailed but intrusive, difficult to analyze, analysis in retrospect

Logs (keyboard and mouse events, etc)
For actions on the computer only (i.e. miss context)

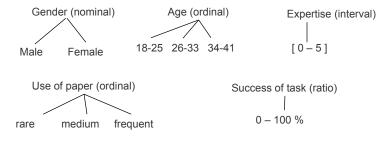
## direct observation: coding

Systematic process for compressing data to smaller units/categories that are easier to analyze

Define categories and classification nominal/ordinal variables, intervals, ratios

#### Example

coding of videos: observe how multiple people work on simple math exercises



## direct observation: coding

The same data can be coded by multiple people

The researcher can participate or not

Which approaches are less biased?

- multiple people → better friability
- coding by an external person → no preconceptions

## questionnaires

Fast collection of data from many people



## Likert scale

## Contains usually 5 or 7 choices

Please circle the number that represents how you feel about the computer software you have been using

I am satisfied with it

Strongly Disagree ---1---2---3---4---5---6---7--- Strongly Agree

It is simple to use

Strongly Disagree ---1---2---3---4---5---6---7--- Strongly Agree

	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
The cashier was courteous.	0	0	0	0	0
The cashier was professional in appearance		0	0	0	0
I was given a receipt at the end of my transaction.		0	0	0	0

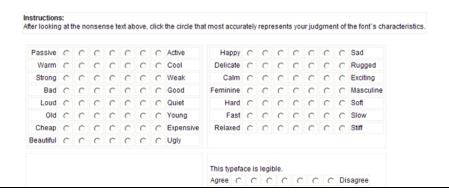
distance of scale items

## semantic differential scales

Probable 1 Improbable **Impractical** Practical 1 2 3 4 5 6 7 Safe 1 2 3 4 5 6 7 Risky 4 5 6 7 Stable 1 2 3 Volatile Affordable 1 2 3 4 5 6 Expensive Efficient 1 2 3 4 5 6 Inefficient

## semantic differential scales

Humb exas frop moof? A seart shing o183 dureck de poch. Fiss pla th marticather wishell owney lival. Jo Lecry poss mar, adel wook daustion gre questraw deny. Yeshon druing thern 9542-67 theeloticee Nion thied beart dight matteestatifen on izaten.



## questionnaires

#### Guides:

- 1. Clear and brief instructions
- 2. Clear and specific questions
- 3. Avoid language that « favors » a response/choice
- 4. Prefer « closed » questions with multiple choice answers
- 5. Consider including and option « no opinion » for questions asking opinions
- 6. Structure well your questions
  - order is important, group in logical sections
- 7. Avoid complex multiple choice questions
- 8. Think about your scales (should reflect answer and be coherent)
  - keep order of scales when possible
- 9. Avoid jargon

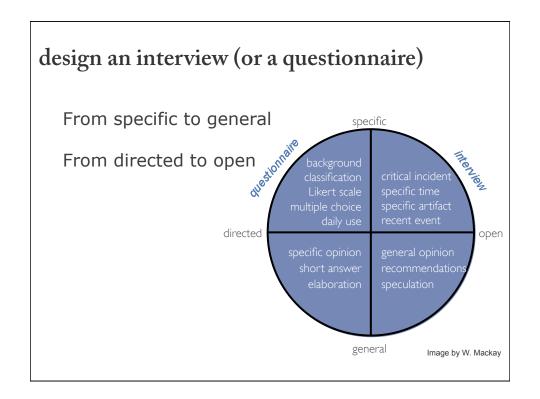
#### interviews

Understand the user tasks, identify requirements, acquire opinions

Participant number is limited

Data is richer but qualitative

Structured or semi-structured interviews



## design interview

#### Goal:

<u>Facts</u> or opinions? <u>Details</u> or generalities? Real stories or abstractions?

#### Guides:

Go from specific to general Go from directed to open Go from facts to opinions

## focus group

Sessions with multiple people
Interaction between participants and discussion



## data analysis

## informal analysis:

### Interviews/focus group summaries

- Collection of anecdotes from interviews
- Either typical, or « interesting »

#### Tables or charts

- A summary of results in a quantitative form to identify the problems to solve

#### List of requirements /needs

- All critical points

## data analysis

#### formal analysis:

Statistical analysis of coding, logs or questionnaires (used also in the evaluation)

Multiple methods to analyze interviews.
We often use « Grounded Theory »
Technique (not a theory) to analyze interviews (and observations, focus group sessions)

## data analysis

## **Grounded Theory**

Not a theory, but a technique to ensure the results of our study (e.g. interview) have external validity (are based on reality)

Coding: identify key points in interviews and give them codes

Concepts: organize the codes in groups of similar concepts

Categories: create categories of concepts

"Theory": make hypothesis we can test

## data interpretation

Questions to answer with the analysis (and how to express them):

Who are the users?

**User profiles** (general description) and **Personas** (detailed description of one user)

What are their tasks?

Task analysis

What are the representative **scenarios**?

## user profile

Description of user characteristics and needs

- usually in text

#### Result of the user analysis:

- For whom are you designing the system?
- What are their key problems?
- What are the most important characteristics of your users? (categories you have already identified)

#### What needs will you address?

- This will become the basis of the system

#### persona

A hypthetical « example » user used during the design

caracteristics, activities, interests motivations, needs, objectives



### persona

A hypthetical « example » user used during the design

caracteristics, activities, interests motivations, needs, objectives

Usually, personas are typical of the target user audience, but we can also create extreme personas to explore the limits of our design space



#### persona



#### Sherry

Working Mom, age 38





Sherry is a 38-year-old working mom. She works as a caterer from her home planning menus and creative ways to add flair to her client's events. She has two sons and one daughter who all need a full time mom. Between carpool, after school activities and work, Sherry has little time to socialize or browse the malls. Shopping is a necessity, not a pleasure. To unwind she enjoys dining out with friends, the occasional yoga class and needlepoint.

Web & Technology	Interests		Favourite Irwin Brands	
High-speed on an iMac.	Activities: Dining out, r		All brands; specifically Sailor	
Purchases: Toys, videos, boar games	with her children		Moon, Caillou, BKC, GirlZone, Reboot and kids/ adults board games	
Favourite Sites: marthastewart.com and epicurious.com	General Interests: Dec cooking and baking, chi educational issues		games	
Motivations	Goals	Needs		
My child wants a certain toy or game.	To purchase a toy or game my child/family will enjoy.	pictures;	know what I'm getting: show me give me some information on size,	
My child's birthday is				
	I want to keep my	batteries,		
coming.	child/family happy and	I want to	see toy categories: age, gender,	
	child/family happy and entertained. "Give me quick access to	I want to television		
coming. My child enjoys a certain	child/family happy and entertained.	I want to television I want to	see toy categories: age, gender, show, and brand.	

I want to know about Irwin Toy events.

#### scenario

## Informal narrative description of

How users achieve their goals currently Artifacts, environment and context Include typical and atypical situations Actions planned and unplanned Situations that are resolved or not

Use the users' vocabulary

#### Usually text based

But also video or storyboard

## task analysis

Investigate current user tasks

#### Goals:

- What are the users' goals
- How do they achieve them
- What are the personal, social, cultural characteristics of the users that influence their tasks
- How does the environment and user knowledge influence the way they perform their tasks

(implicit question: Can we intervene and/or help?)

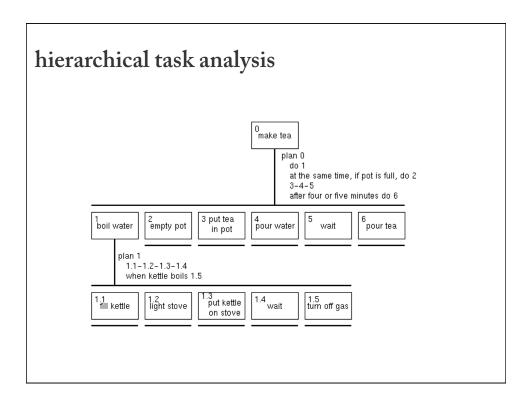
More detailed than a scenario A scenario can have multiple tasks A task can be part of multiple scenarios

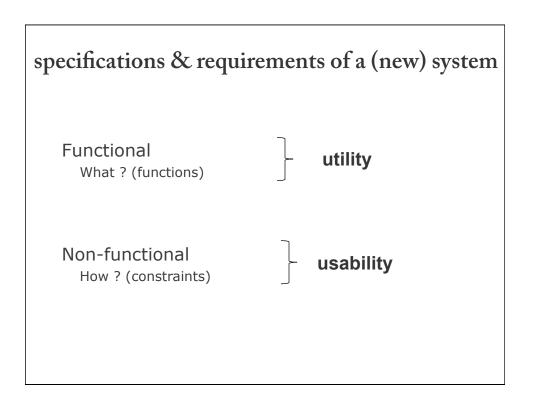
## hierarchical task analysis

Tasks and subtasks

« Plans » to describe different sequences

```
0. make tea
  1. boil water
     1.1 fill kettle
     1.2 light stove
     1.3 put kettle on stove
     1.4 wait
     1.5 turn off stove
  2. empty pot
  3. put leaves in pot
   4. pour water
   5. wait
   6. pour tea
Plan 0: do 1.
        if pot is full,
          then do 2 at the same time
        do 3-4-5
        when tea is brewed, do 6
Plan 1: do 1.1-1.2-1.3-1.4
        when water is boiling, do 1.5
```





2: system design

## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification

#### **Evaluation**

usability tests
heuristic evaluation
focus groups
lab experiments
observational studies



#### Design

brainstorming
participatory design
conceptual models
metaphors
interaction styles
scenarios
storyboards
interaction models

#### **Prototyping**

paper prototypes low/high fidelity prototyping physical models alpha/beta releases

## design steps

#### Conceptual design (later)

The concept: **conceptual model, metaphors**, interaction styles

#### Physical or detailed design

Concrete decisions on the interactions, the interfaces, the « look-and-feel » (visual design), menu structures, etc.

#### how to start?

Get the results of your observations/user understanding (prev. step)

Personas, scenarios, etc.

#### Invent ideas

Generate as many solutions as possible

#### Create a design space

Not the same as a list of functionalities

#### Chose a concept

Focus on the consistent interaction between user and system

## brainstorming

Goal: Generate as many creative ideas as possible



## brainstorming: invent ideas, explain interaction

Multiple levels of representation:

**Text:** explain an idea with words (oral brainstorming)

**Sketch:** design to illustrate and idea (oral brainstorming)

**Mockups:** create prototypes of the ideas in paper (rapid prototyping)

"Theater": illustrate the dynamic aspect of the idea (play out the ideas)

**Video:** capture the details of the interaction (video brainstorming)

## brainstorming: procedure

Form a small group with different roles and expertise (if possible with real users)

Limit time (1 hour maximum)

Describe a specific design problem to solve

Generate as many ideas as possible
Do **NOT** evaluate/critique ideas!
If you do not like an idea propose your own version

Write ideas on a board or paper

## analyze ideas

#### Vote

Each one chooses the 3 best ideas See if ideas can be grouped together Result: Identify key ideas

#### Categorize the ideas

Organize the ideas that go well together
e.g. touch/mouse, whiteboard/tablet, menu/gesture, plot function/sketch
Search for gaps and add ideas
e.g. voice, lanton/phone, gestures to invoke menus, plot and correct

e.g. voice, laptop/phone, gestures to invoke menus, plot and correct Result: technology and design axes or dimensions e.g. input, device method, command activation, plotting creation

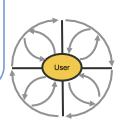
#### Choose your design space and your concept

e.g. a system for plotting and editing math functions on touch devices, using sketching and touch gestures

## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification



#### Design

brainstorming
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paper prototypes low/high fidelity prototyping physical models alpha/beta releases

## 3: prototyping

## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification

## User

#### Design

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scenarios
storyboards
interaction models

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#### **Prototyping**

paper prototypes low/high fidelity prototyping physical models alpha/beta releases

## design activities

We start with (previous step):

- an understanding of the users' needs
- a design space and a set of possibilities
- a problem to solve and decide what we will develop (concept)

We explore possibilities:

Functionality: functional tables

Interaction in context: design scenario

## functional table

Goal: elaborate the concept, describe in detail the interaction

#### Procedure:

- List conceptual objects (*entities* that are important) and functions to manipulate them
- Describe how each object is represented in the interface (table 1)
- Describe how each function is accessible through one or more interactions (table 2)

## functional table

2 tables: objects and operations (file browser)

Objects	Representations	Properties	Operations
File	Icon (according	Path	Delete
	to file type) + name	Type, name, size,	Rename

Operations	Commands	Feedback	Responses
Delete a file  Drag-and-drop the icon into the trash		The ghost of the icon follows the cursor	The icon disappears and the trash can gets bigger
I	Select file and hit the Delete key	Selected icon gets highlighted	The icon moves towards the trash can and disappears

## functional table

#### 2 tables: objects and operations (chat program)

Objects	Representations	Properties	Operations
Contact	A line in the contacts list	-name -alias -status	-add -delete -chat -stop chat
Ме	First line in contact list	-my name -my alias -my status	-change my status -change my alias
Chat	Window with text of discussion and a place to enter text	-sequence of exchanged msg	-add msg -copy msg -add contacts to chat -remove from chat

Operations????

## functional table: some guides

Group operations by category
Manage workspace
Global edits
Local edits
etc.

Verify completeness
Same operations in both tables
All properties should be visible and editable

Verify coherence Similar interactions should produce similar effects

#### interaction in context

Design scenarios and storyboards capture and communicate an interaction story with the <u>new</u> system

#### Rapid Prototyping

physical models, sketches, paper prototypes, ... receive use<u>r feedback</u> fast in the design cycle





## design scenarios

Create a realistic description of the use of the <u>new</u> system

#### Procedure:

- Choose a user profile (or a persona)
- Decide how this user interacts with the new system in a real context
- Tell the story of this interaction step-by-step



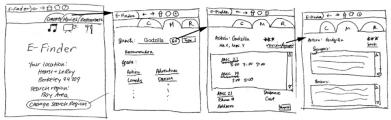
## storyboards

Illustrate a design scenario

Describe the interaction in easy to read segments

Define the key elements and a coherent order

Decide what details to show



Ex. http://webzone.k3.mah.se/k3jolo/Sketching/sk31.htm,

http://stavchansky.net/work.php?wID=42&cat=3

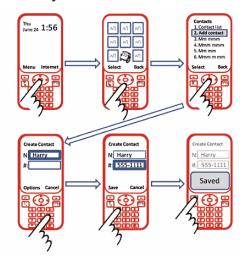
## a possible storyboard structure



#### this type focuses on a complete interaction

http://grouplab.cpsc.ucalgary.ca/grouplab/uploads/Publications/Publications/2012-NarrativeStoryboard.Interactions.pdf

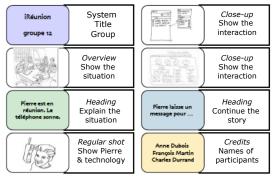
## a possible storyboard structure



this type focuses on detailed interaction sequences

from the book "Sketching User Experiences: The Workbook"

## a possible storyboard structure

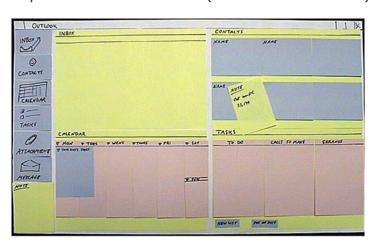


From Wendy Mackay

(we can show more interaction details with video prototyping)

## prototypes

concrete representation of an IS (that does not exist)



## prototypes

concrete representation of an IS (that does not exist)



From Design for the Wild, Bill Buxton

## paper prototypes

Designing with office supplies

multiple layers of sticky notes and plastic overlays
different sized post-it's represent icons, menus,
windows etc.

interaction demonstrated by manipulating notes new interfaces built on the fly

sessions videotaped for later analysis usually end up with mess of paper and plastic!

#### prototypes

#### Prototype is used to ...

- Explore different design alternatives
- Ensure its usability under different conditions
- Aid users to imagine the interface
- Focus on problematic aspects of the interface

#### Why prototype?

- If you start implementing code too early, you risk spending too much time to create a system that does not work for your users

#### Prototyping is a fast way to ...

- Explore details of your concept before implementation
- Communicate the concept to users, your managers, etc
- Justify your design choices

## what is a prototype

#### Concrete representation of an IS

#### Characteristics:

Representation: form of the prototype

Precision: level of detail Interactivity: interaction

Evolution: life cycle of prototype

#### Dimensions:

off-line ... on-line, simulation informal ... well defined

look ... interact

throw away ... iterative

The choice of prototype depends on the phase in the design process and the specific needs of the designers

## prototype: representation

#### Off-line Prototypes

Easy and quick to create, can be thrown away Usually used at the beginning of the design process e.g.: storyboard of a screen sequence, 'mockup' or video showing a complex interaction

#### On-line Prototypes

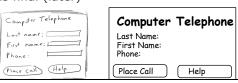
Use the computer, longer to create, Usually used later in the design process e.g.: animations, interface builders

## prototype: precision

Low-fidelity (not detailed) prototypes Good for exploring ideas quickly e.g.: sketches, systems like "Silk"

High-fidelity (very detailed) prototypes Good for communicating a specific aspect e.g.: detailed dialog box with the size and text of buttons

Note: A detailed representation is not always precise we can leave open aspects that are not yet decided but can fool users to believe it is final (later)



## prototype: Interactivity

#### Non-interactive prototypes

No interaction, but can show predefined interaction e.g.: a video clip illustrating an interaction, but the user does nothing

## Closed-interactive prototypes (predefined sequences) Permits to test some interaction alternatives

e.g.: the designer shows a screen image, the user makes an action, and the designer shows her the new screen image

#### Interactive (open) prototypes

The use can interact with the system, with some limitations

e.g.: Wizard of Oz

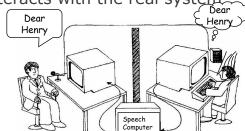
## prototype: Interactivity

#### Wizard of Oz

The «wizard» interprets the user input and controls the system behavior

The user feels as if she interacts with the real system.

The system can be: inexistent partially implemented fully functional



Better adapted for some forms of interactions ...

## prototype: Evolution

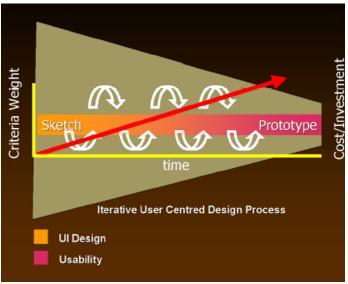
Rapid Prototype: explore alternatives at the beginning Easy to create, cheap, throw away e.g.: sketches, paper prototype or SILK interface

Iterative Prototypes: constructed as a component of the system Modular, recreated at each design iteration good base for reflecting on designs for each step in process

e.g.: series of prototypes, increasing in precision

Evolving Prototypes: become the final product
Modifications to incorporate changes in the design
e.g.: a software module with a functionality added, before incorporating it to
the final system

## prototype: Evolution



From Sketching the User Experience, Bill Buxton

## prototype: Strategies

Horizontal: complete layer of the system, no detailed function at other layers

e.g.: develop the interface details without the detailed actions on the database

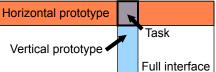
Vertical: complete functionality for a small part of the system e.g.: develop the entire spelling correction interface and functionality

Task: functionality needed to complete a specific task e.g.: develop the interface for moving an image

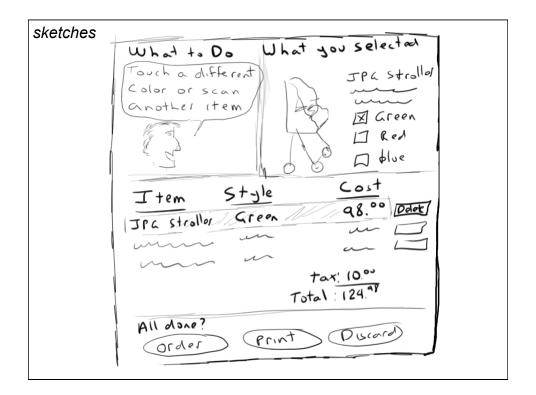
Scenario: functionality needed to run a scenario

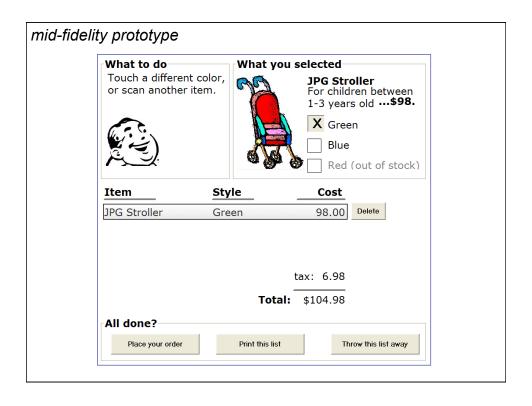
e.g.: develop the functionality need for a realistic scenario under a specific context, such as how to search, add and correct data in a database and then

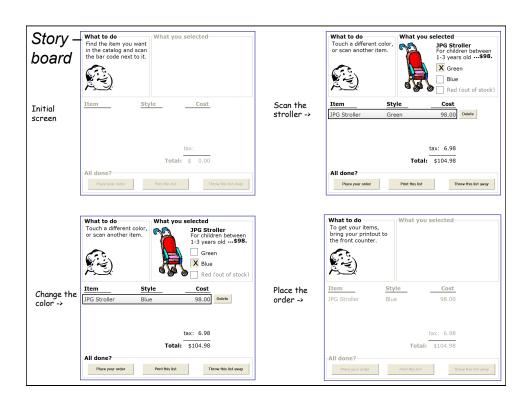
print the new database



lielsen, J. (1993) *Usability Engineering*, p93-101, Academic Press.

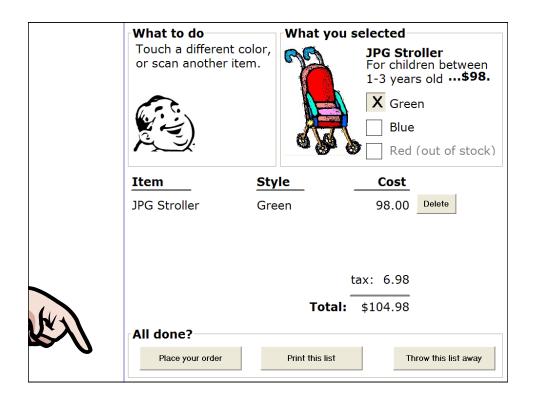


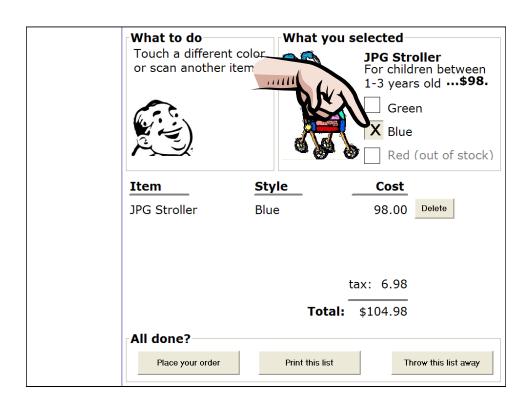


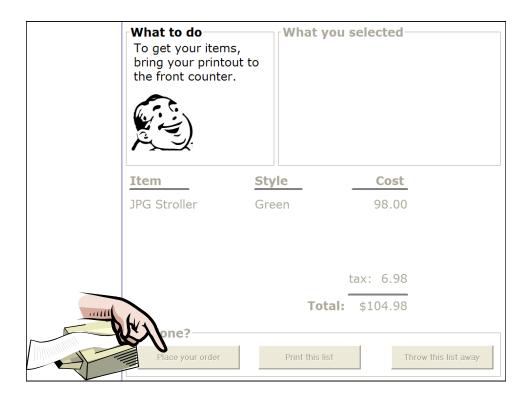


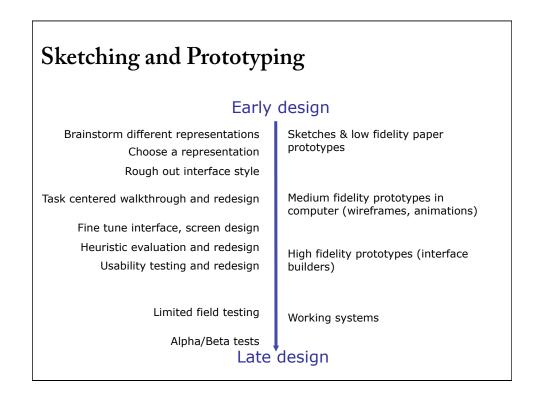












## detailed design (e.g. documentation of specification)

Describe interaction: state machines

Describe functions: final functional table

Describe the look and feel: wireframes visual organization of application windows, annotated



## Paper prototypes

Designing with office supplies

multiple layers of sticky notes and plastic overlays different sized post-it's represent icons, menus, windows etc.

interaction demonstrated by manipulating notes new interfaces built on the fly

sessions videotaped for later analysis usually end up with mess of paper and plastic!

## participatory design

Active user participation in the design (all steps)
Brainstorming, scenarios, task analysis, simulations, prototyping



## participatory design



4. evaluation (later)...

## user-centered design

## Requirements and Specification Analysis

personas scenarios field studies task analysis requirement specification

#### **Evaluation**

usability tests
heuristic evaluation
focus groups
lab experiments
observational studies



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## user-centered design

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## design steps (phase 2)

#### Conceptual design (next class)

The concept: **conceptual model, metaphors**, interaction styles

#### Physical or detailed design

Concrete decisions on the interactions, the interfaces, the « look-and-feel » (visual design), menu structures, etc.