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Writing Studies 4196:
Internship in Scientific and Technical Communication
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Final Report

Technology Training and Usability Services: Intake Project

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Introduction

This is a status report for the Intake Forms Project for Training and Usability Services. This report will detail the project management plan and process including descriptions of the planning, drafting, and outcomes of this process. The products of the project are two forms that gather information from potential clients for these two services.

The scope of this project is a department-level form for each of the two branches of Usability and Training Services for the Information Technology department of the University of Minnesota. The first form is for group training requests for groups of University staff and faculty for technology training sessions. The second form is for design teams to request usability services. The two forms are for two separate sections of Usability and Training Services, designed independently with different functionality. The forms have an audience of staff and faculty from the University and they have the same document type as Qualtrics Survey documents which are used as online forms. The duration of the project is from September 22, 2014 to December 12, 2014.

This report will include as description of my work environment; the purpose of the forms; descriptions of planning, research and drafting stages; technical communication skills I used for this project; review and revisions of the forms; and overall project takeaways on an academic, professional, and interpersonal level.

The information included in this report is limited to the first draft of the Usability Services Request Form and the first Qualtrics draft of the Group Technology Training Request form. The content for the forms is limited to the content I received from David Rosen for usability services and Margaret Miller for group training. The question formatting for the forms is limited to Qualtrics' affordances as a platform. Finally, revisions of the forms are limited to opportunities to meet and collaborate with project teams members.

Intake Project

Usability and Training Services

In order to understand this project, you should understand the department, its culture, and my role within the department. The Information Technology department (IT) at the University of Minnesota offers information technology services for students, faculty and staff, researchers and guests (IT@UMN.com). IT offers many business services with various service offerings. Training & Usability is one service and Technology Training and Usability Services are two service offerings. Kathryn Breitenbach is the service director for Training & Usability, and she approved this project as my task to develop my role as a Usability Lab Assistant to become a Usability Services Intern.

My role as a Lab Assistant

Under Kathy Brietenbach, Usability Services is run by Nick Rosencrans and David Rosen. Nick hired me, and I work with him for scheduling and general procedural inquiries. Although Nick seems more involved as my supervisor, there is no formal distinction in David and Nick's professional job titles. They are both User Experience

Analysts, who market their services to consult design teams on a project-by-project basis. The analyst's role is to remain "neutral facilitators," as stated on their website, IT@UMN, while the design team members (the client) serve as the active members in the observation role. The analysts encourage the team (the client) to observe the evaluators (participants lab assistants recruit) and to identify any flaws or strengths in their tool's design. The analysts guide the team to categorize issues observed during the evaluations as aspects of terminology, navigation, user Expectations, task flow, and accessibility, as stated in a description of Usability Services on their website.

As a lab assistant, my job duties include recruiting, reception and lab support for usability evaluations.

Recruiting tasks include:

- emailing and recruiting participants
- collaborating with analysts and lab assistants
- using mass email marketing tools such as Lyris
- managing details for projects and participants
- creating and curating Google forms, documents, and spreadsheets
- approving and supporting web training for technology training services

Reception tasks include:

- setting up the reception room
- checking in and supporting for participants
- organizing paperwork (bill of rights, consent forms, and honorarium receipts) and updating the schedule as participants (evaluators and backups) arrive and depart
- preparing for upcoming projects (recruiting tasks)

Lab Support:

- setting up the usability laboratory
- maintaining the lab environment for observers and analysts
- operating the AMX, eye-tracking, DVD, and USB recording equipment

I work with several other lab assistants, one of whom I still have not met. Her name is Jessica, and she was hired before me along with Jessi, Sabrina, and Alex. I was hired with another assistant, Jacob, and this week I met the newest hire, Michael. We all have very different personalities, but Nick says he hired each of us for one trait we all have in common: attention to detail. Nick and David are both very busy maintaining several projects simultaneously, so our job is to manage the details and help evaluations run smoothly, just as the analysts would maintain them if they had more time. This means we don't make difficult decisions, because the analysts have direct processes for us to carry out, and we always sign their names on email correspondence.

The projects are organized in word documents, we call Project Documents, a template the analysts fill-in based on the specifics of each project. They pass the completed project document to the lab assistants so we can create various Google Document templates necessary to plan the evaluation and recruit the participants. We help compose and distribute recruiting emails, and then collect responses and schedule participants. Each project is different, so it is common to reference the official Project Document every day.

Our process to organize of each project follow an ordered operating procedure, but no two projects have all the same plans. All lab assistants keep note-taking and recruiting methods uniform, and we customize recruiting emails and schedules to fit each project. It is important for us to maintain uniformity in these processes so we can pick up where the last assistant left off. The analyst conducts the evaluation and creates all the deliverables; the lab assistants' only technical, written deliverables are the emails we send to communicate with recipients, respondents, participants, backups, and evaluators.

Instructor-led technology training is only a small portion of the lab assistant position; I was a student assistant for a basic HTML training class. I spent 4 hours assisting a technology training consultant (in my case, Sean Savage), answering basic questions pertaining to the lesson and helping with general computer questions such as minimizing windows, using basic desktop applications, and how to follow the instructor's directions. It was a great experience in technical communication, learning how users can interpret instructions differently and what types of descriptions work best for beginning, middle, and advanced computer users.

The lab assistants occasionally work with Susan McKinnell, Senior Training Consultant, to approve training for these technology seminars and classes. We access a secure queue online to look up general information about the requestor, then we note this information in the request notes, and finally we approve or deny the training request before we send it to the training specialists.

My role as an intern

I told Nick I was interested in adding an intern role to my current job position as a lab assistant. David was concerned my normal duties were not enough for a substantial internship experience. Nick and David decided to ask their service director, Kathy Breitenbach, if she had a project for me to complete in addition to my regular duties. Kathy offered me a role to help streamline intake processes for service requests for the department; and I accepted.

After Kathy approved my intake project as an intern, Nick planned a meeting with Kathy and the rest of the project team. After the first meeting, Kathy asked me to capture the meeting in a short recap, which is shown in Appendix A. This was my first deliverable for this project. It was a helpful assignment to solidify my understanding of the scope and purpose of this project. It was also helpful to use this document as a guide for my agenda as the leader for the next meeting (Appendix B). After that first full-team meeting we had one more meeting, but the group was too large and the conversation kept getting pulled in different directions.

Kathy approved my request for separate meetings for Usability Services and Technology Training to allow more focused discussions. I worked with Margaret Miller for technology training and David Rosen for usability services. Nick and Kathy have not been involved in the drafting and revision processes since that first month of the internship.

The final deliverables I produced are the two forms intended for faculty and staff use. The forms are accessible from the IT@UMN website as Qualtrics forms. The forms are intended to get the primary information necessary before a conversation about the services takes place. The forms gets basic information about the request for service before the scheduler involves the service director to discuss how to schedule this request and what information they need from the requestor to proceed. After meeting with the service director, the scheduler gets back to the client to discuss any follow-up information. The form needs to be flexible enough to accommodate a wide

variety of training and usability services, but rigid enough to capture the service requests concisely and thoroughly enough to discuss with the service director.

Planning the intake forms

For planning stages, I had two very different processes. There was no content available for usability intake. The form was made from the bottom-up with David as my subject-matter expert. Group Technology Training had an existing google form (Appendix C), which I used to build the Group Training from the top-down.

Content Strategy: Group Training

Margaret Miller, Kathy and the department were content with the previous intake process and form. My task was to adjust the form to make it more relevant, and to capture the missing details the department needs: information about space to conduct the training, and to enhance embedded education within the document to prevent back-and-forth emails for whoever processes the request. It was also part of the task to transfer the form to the platform Qualtrics. Margaret provided me with the link to access the form and its response page (see Figure 1). I used the response page to see what types of answers requestors provide, and to see trends and patterns for answer types and ways to possibly improve the form.

Timestamp	Username	College/Administra Unit	Department Name	Contact Name	Contact Phone Number	Contact Email	OIT Technology Training Course Title	Will this training be in support of a strategic initiative in your department or college?
9/5/2012 12:14:23		Medical School	Clinical Neuroscience Administrative Center	Melissa Hopper	612-625-6111	amo0178@umn.edu	Excel 2010: Managing and Analyzing Data	Yes
9/7/2012 11:10:22		SPH - Health Policy & Mgmt	Research Data Assistance Center	Faith Asper	612-625-5479	asper001@umn.edu	UM Connect	Yes
10/1/2012 13:22:19		CONTR Controller's Office	EFS Module Support Team	Jamie Sargent	612-624-0352	sarge016@umn.edu	Google Apps and Google+	Yes

Figure 1. View of response sheet, requestor's answers for which OIT Training Course are shown.

I gathered trends and background information from the text responses to existing questions. I observed several repeated technologies requested (Google +, UM Connect, Moodle 2.0) and I decided drop-down menus could be helpful. I also noticed responses to the question "When would you like to have this training?" varied from,

"Summer" to "11/2/13 through 11/8/13 Wednesdays AM only." See Figure 2 for some examples of the varying answers to this question. I did not see advantage to a drop down menu, because users need a flexible way to answer this question. Since Margaret wanted to maintain the working process, I decided to keep the same format as the google form.

I made a preliminary draft in Qualtrics for Group Training. This new form had a complex structure for several questions to force the user to choose from all available technologies, and it prevented users from requesting training below the minimum participant requirement. That form was not used but is included in Appendix D. See the Creating and Revising Qualtrics Forms section to learn more about why this version was not used.

When we planned the forms during our first meeting (Shown on Appendix A, Meeting Recap), we discussed embedded information to better inform users of training services available. My choice to use vocabulary from the website and including a list of available courses was providing information within the design of the form, but we discovered the vocabulary was technical jargon, and not effective for educating the requestors. Also, the fill-in format for choosing a course allowed requestors to provide additional details about their request.

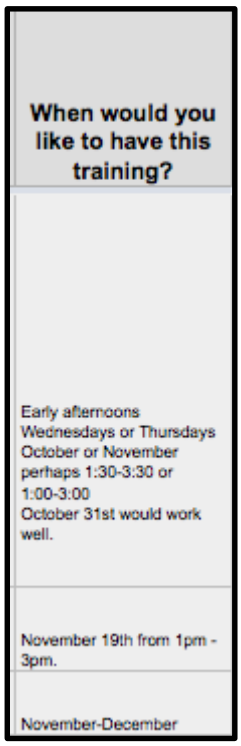


Figure 2. Requestor answers for when they would like to have training.

Content Strategy for Usability

My goal for the usability form is based on Nick's expressed need to establish a centralized intake process to prevent one-on-one requests to analysts' private email mailboxes. This procedure was not working for the department.

To plan the Usability Intake Form, I used Ginny Redish's *Letting Go of the Words* as a reference for content management. I started my project for usability with a version of Redish's persona analysis. I created a flow-chart (Appendix E) to begin the architecture for the form. I met with the analysts to discuss my research about the user, but they believed the form would be too complex with three different paths and embedded information such as an FAQ section or a taxonomy of development, which I designed to help requestors tell the analysts their project's stage of development.

Anticipating Conversations with Site Visitors

To gather information about the usability form's users, I asked the analysts who typically makes usability requests. The analysts told me web teams from all over the university use the lab. Sometimes web teams represent an entire department or college and sometimes they are a project team from different sectors of the University. Another consideration for form design is that sometimes the same requestor schedules services again and again, so

those clients prefer to send a short email request for their intake process. The analysts said a short form would work best for these returning users. I used that information to create three scenarios for different uses of the form.

The flow-chart in Figure 3 shows the product of my audience analysis. The three types of users represent types of requestors and what types of conversations can be expected from incoming requests. There were several problems with this model. First, the analysts wanted something simpler with one path for all users. Second, Qualtrics does not have the capability to remember details about users, for example, the very top scenario: an Old Pro entering an email to "store" personal details is not an option, given the affordances of Qualtrics as a platform. Third, the analysts and Kathy did not like the idea of a taxonomy. The word taxonomy meant a grid that was too complex for this form. They did not want to give unnecessary amounts of information, and a taxonomy could not work for projects' status because the current state of a project in development is a soft definition rather than hard definition that can fit into a taxonomy classification.

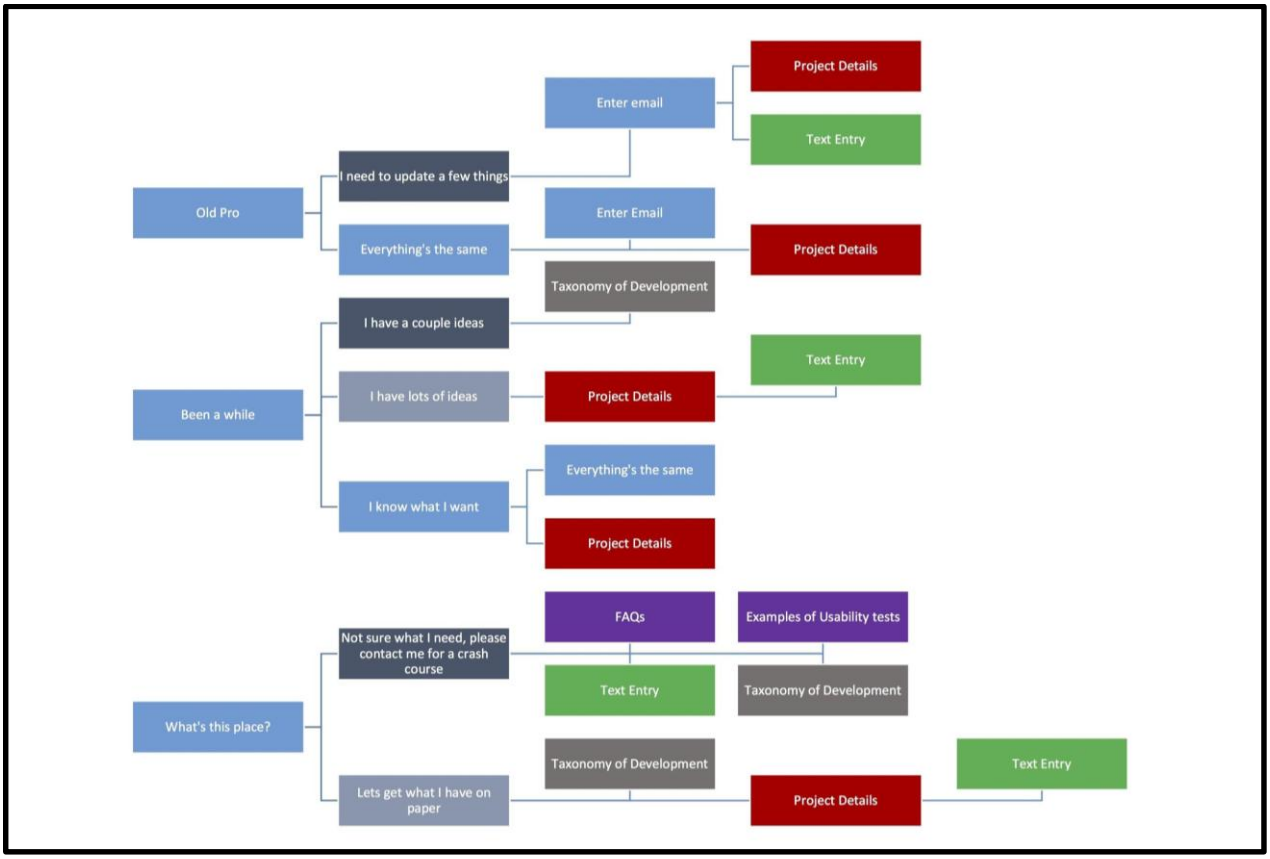


Figure 3. Flow Chart for Users requesting Usability Services on the new form.

Creating and Revising Qualtrics Forms

To create the intake forms, I needed familiarity with Qualtrics. Creating a practice form for Training was great practice to explore different question types and customizing survey settings and the look and feel. I used

tutorials on Lynda.com as well as the Qualtric's embedded help feature. I created drafts for both forms and worked with David and Margaret to revise them.

Drafting: Group Training

I did not use my practice form for group training (Appendix D) because it was too complicated and Margaret Miller said the current process works well. My practice form used jargon and complexity that mirrored the internal workflow for training services. At that time, the website divided services into three sections: courses, instructor-led seminars, and online tutorials. I used the information from the website to create a question that forced requestors to categorize their request into one category and then I created a form for each response, including a list of 17 training course titles. Figure 4 shows the building the technology question in Qualtrics. Users would see a multiple choice question similar to Appendix D, but this is what the back-end of the survey looks like in Qualtrics.

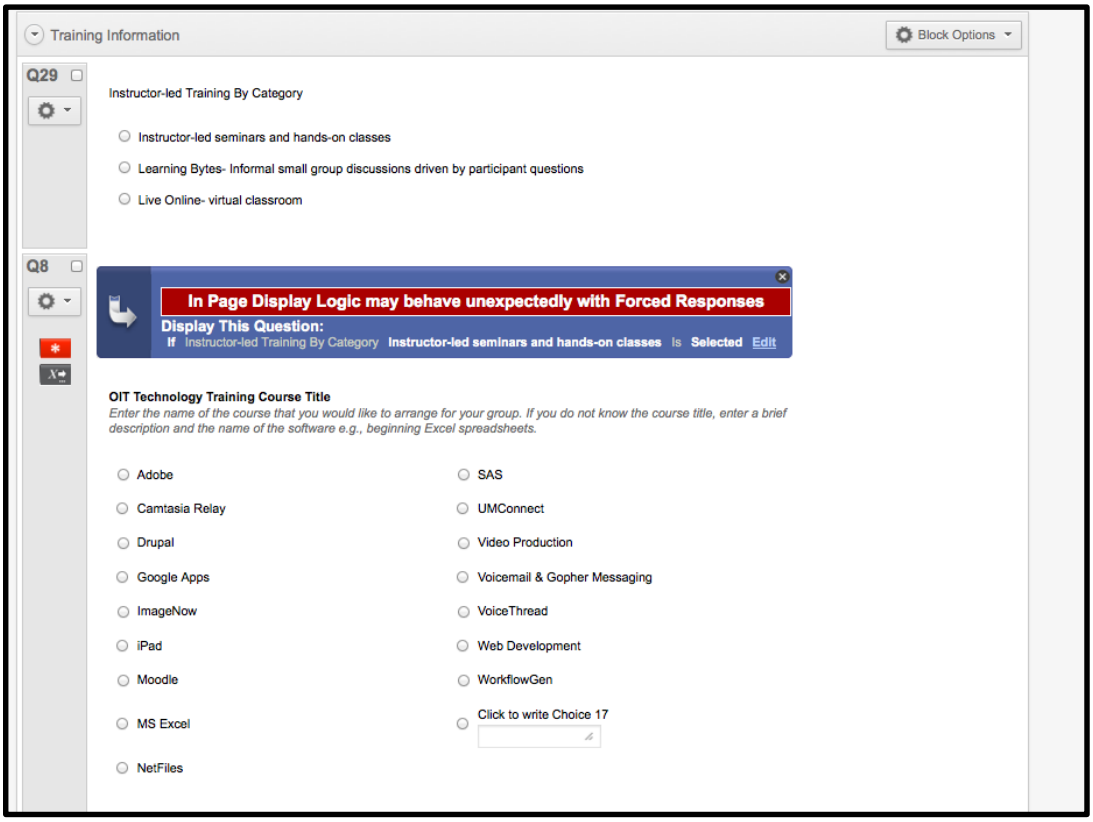


Figure 4. Using vocabulary and content from IT@UMN to create a practice form with embedded information from the website. (View from the back-end.)

In the drafting stage, we decided to skip embedded education enhancements. I copied Group Training's current google form into a new survey in Qualtrics, and I set my first draft with the service-offering focus aside. One major change in the new form was the order for questions in the Training Information section. Kathy recommended moving the goals section to the front. As shown in Figure 5, we emphasized the "goals for this training" by putting

that question first. I also extended the size of the answer box for "Course Title" to invite longer answers that provide helpful details.

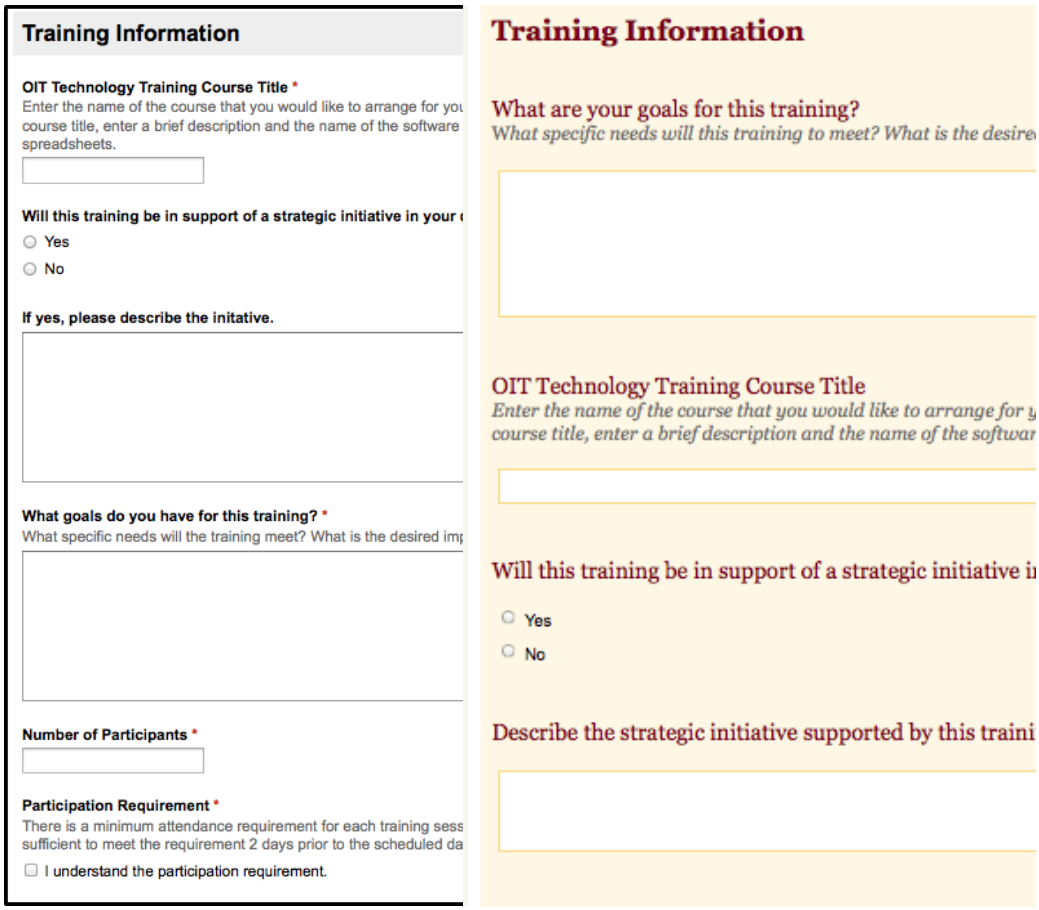


Figure 5. Shows first draft (left) and final draft (right) revision to change the order for questions on this section.

Margaret also wanted me to update the final question about the location for training. The original Google Form (not shown), had an option for Walter Library. This room in Walter Library is now unavailable and should to be removed from the form. Margaret said it is most helpful to hold group training in a space the requestor provides, so I added a field for the user to provide a space to hold the training. I anticipate Margaret and Kathy are likely to revise this question on the form that in the near future because we were not certain how this addition will be received by users.

Drafting: Usability

Since there was no content for the usability form, I spent extra time drafting questions and scheduling meetings with David to revise and discuss the content. We had three meetings after the first meeting with the entire team. In our second meeting, David and I wrote five questions to use for the form. David stressed the need for a minimalistic form that only requests the following foundational pieces of information:

1. Who is the client?
2. What is their project?
3. Is this a Request for Proposal (RFP)?
4. When would they like to schedule usability services (evaluations, focus group, etc.)?
5. In what stage of development is their project?

1. Who is the client?

David wanted the form to collect identifying information: name, name of University of Minnesota department, and contact information (phone number and email). These should all be text-entry fields, so I will not need to set up drop down or multiple choice answers.

2. What is the project?

David wanted a name field for the site name. He also wants a description field to describe the project more in depth if necessary. These will also be text entry fields on the form.

3. Is this an RFP?

I researched the term on the U of M website and I learned an RFP is a step in the bidding process to obtain services from a vendor outside the University's Resources. My internship advisor confirmed this definition in our weekly discussion. David said we did not need to include definition details for the RFP question, "If it's part of an RFP, they know it," David explained.

4. When does the client want to test?

David wanted the client to share when they hope to have Usability Services involved with their project. He suggested a question format with a field to select a date range. I will have to try a couple options in Qualtrics because I did not see an example of a calendar format in any of the tutorials. This may need to be a text entry field with helping text to suggest a format for their answer (e.g., 10/27/14 – 11/4/14 or May 2015)

David said this was all he wanted included in the form, but I asked if information about the stage of development was another helpful detail. He said he didn't want to offer too many options, but maybe beginning, middle, and final stages could be used for a question like that. He emailed me a simple format for this question:

Early development: we've got some ideas on paper, and we plan to use the evaluation to design or redesign the resulting product.

Middle development: we have an initial product on a server to test, and we plan to use the evaluation to adjust what we have so far.

Late development: we don't have much time to make substantive adjustments, but we need feedback to guide our training and support efforts.

I created the form using the information provided by David. I met with David to discuss the final draft of the Intake Form. See Appendix F for a marked up version of the form with revisions. David told me to revise the header to remove the default text "Extension," and remove the phone number question because he saw email as the dominant channel for the intake process. He also recommended a range for the time-frame question, but Qualtrics did not have functionality for this aside from fill-in formatting. The highest priorities for David were the needs for a lead-In, section titles and an appropriate header.

Final Deliverables

I delivered the final forms to Kathy in January and sent the final usability intake forms to Nick and David directly. Both forms have the University of Minnesota theme offered by Qualtrics. Appendix G and H show the final forms for Group Training and Usability Services, respectively.

Final Draft: Group Training

Margaret approved the final draft for the intake form on December 8, 2014. She asked if I could customize the header to include the department letterhead. She sent me the image file and I imported it into the header for the form. The final draft did not have the same question/answer format as the usability intake form. I created the final form in one block to prevent a choppy experience for users. Margaret asked me to remove the minimum participation requirement embedded in the form, so when requestors fill a number below the minimum, they can still proceed with the request without receiving an error. The end of survey message is the same as the original google form: "Your request has been sent. Someone will respond within 2 business days," followed by "OIT Technology Training it.umn.edu/technology-training."

See Appendix G for the final Group Training intake form.

Final Draft: Usability

This form is one continuous block (like the Group Training form) to allow uninterrupted completion without many screens. David asked me to combine all the questions to avoid a choppy, drawn-out experience for users. I used the University theme, but I added IT@UMN below the M logo to mirror the header from the department website. I anticipate the look and feel will be revised in the near future, this design choice was not thoroughly discussed.

I added headings for the final document by using questions that do not require an answer. Qualtrics does not have a way to display block names or headings. Every element of text is entered in Qualtrics as a question, with different options for question types to customize the look of the text. I also included a short introduction text as a placeholder for future revisions of the form. David told me to write something that says we will get back to them after they submit the form. I customized the form to show a note after the survey is submitted, "Thank you for requesting a consultation. We will get back to you within one business day." David requested this text and time-frame.

See Appendix H for final Usability Services intake form.

Conclusion

My final forms have the content from my subject matter experts and they are limited to the affordances of Qualtrics as the platform. I learned many lessons in project management, teamwork, and technical communication. There were many positive experiences as well as helpful applications of my coursework from previous courses at the University. My role as an intern was fulfilled within the transition of Training's current Google form into Qualtrics and creating a new form for Usability. The department can use my work to further improve the intake process for

requests for the Training and Usability department.

I learned a lot about how to manage a project. I learned how to use Google Calendar to plan and invite people to meetings. I also learned what to expect from large groups and how to adjust my agenda based on unpredictable conversational tangents. I also learned how to begin a project, given different amounts of existing content. I also learned not to be afraid of critical feedback. Instead of feeling attached to my flow-chart, I simply said, "Thank you, I will get right on that" (Scilance, The Science Writer's Handbook), and I was able to maintain a professional attitude and make necessary revisions.

My most powerful learning experience was how to manage ambiguity. I've learned not to panic when beginning a project that does not have an explicit direction, content, or format. My project taught me that chaos and uncertainty are what separate the development process from tasks of re-production. I learned to work with the information available and to see past the discomfort of not knowing the details to expect in a concrete outcome. In general, I worked to fulfill a purpose rather than to achieve a predetermined outcome.

Another takeaway from this project is how best to incorporate tools I've learned from my coursework in technical communication. Incorporating the text from my Writing with Digital Technologies course, I used Redish's audience analysis tools to develop content for my intake forms. Using Redish's analysis technique helped me see general paths different types of requestors share. It also gave me some context in a vacuum, without any baseline of existing content to use for the usability form.

After I presented my audience analysis to the team, I realized audience analysis tools only make sense to the designer. It may not always be useful to share these tools with clients, but rather use them to sort complex ideas, which *can then be explained* to the client. I also learned that, rather than creating a complex design with different paths for different users, it's simpler to eliminate extra steps and find a basic path that can work for across user-types.

One final takeaway was actually gained from the very first meeting, which is the need for self-training when using new software (As I did with Qualtrics.). I had been creating and exploring Google Forms for my lab assistant work with Usability Services, so self-training in this application was easy and fast-paced. Learning to take the time and initiative to understand new software's functionality, organizing structure, and vocabulary was instrumental to completing this project.

In general, this project was insightful, challenging, and foundational to tie together my coursework and my professional development in my student job. I am grateful for the opportunity to learn how to manage ambiguity and balance meetings and deadlines with interactive design to accommodate the unpredictable process of development and discovery.

Appendix

Appendix A: Meeting Recap

Discuss Intake Project and Service Offering Webpages Update
September 22, 2014
Kathy Breitenbach, Margaret Miller, Nick Rosencrans, Ashley O'Brien

Discussed the need for a project to streamline operational intake procedures for Training & Usability Services.

Areas for Improvement:

- Website
  - Accessibility to Request for Services (UX/Training)
- Client Contact
  - Transition from Google to Qualtrics (Training)
  - Update Training Form (Training)
  - Evaluate Level of Detail for Intake Forms (UX/Training)
- Manage Client Expectations
  - Client Education (UX/Training)
  - Solidification of Usability Scheduling (UX)

Goal:

Improve intake process—flexible enough to accommodate wide variety of Training and Usability needs, but rigid enough to keep projects organized and timely.

Considerations:

- Create usable intake process for clients
  - avoid emailed requests
  - embedded education
  - balance giving/collecting information
- For Training- address limited space
- Accommodate repeat clients—avoid repetitive, unnecessary steps for their requests
- Utilize Self-Help guides such as Lynda.com

Appendix B: Meeting Agenda

October 16, 2014

Part 2- Discuss Intake Project and Service Offering Webpages Update

What happened on Monday, September 22?

Goal: Improve intake process—flexible enough to accommodate wide variety of Training and Usability needs, but rigid enough to keep projects organized and timely.

Areas for Improvement:

- Website
  - Accessibility to Request for Services (UX/Training)
- Client Contact
  - Transition from Google to Qualtrics (Training)
  - Update Training Form (Training)
  - Evaluate Level of Detail for Intake Forms (UX/Training)
- Manage Client Expectations
  - Client Education (UX/Training)
  - Solidification of Usability Scheduling (UX)

What happened on Thursday October, 2? (UX)

- Intake Form emphasis over Website Development
  - Centralize service requests, reduce/eliminate one-on-one requests
  - Informative enough and minimal enough to avoid redundancy
- Form = Request, not Sign-up
  - You have been added to the queue, we will get back to you soon
- Usability Evaluation Request
  - Is there too much content on form?
  - Which questions are better to talk about one-on-one?
  - Time frame (picker/drop-down (month & year) question?
  - Generic Questions?
- Taxonomy of Projects- Depth vs. Timeframe
- Umn.Qualtrics.com

What happened on Thursday, Oct 16? (TR)

- Conversion to Qualtrics
- Embedded Course Description information?
  - Issues with updating
  - Education?
- Participant Requirement
  - 7-10?
- Scheduling Preferences Block
  - Time-frame format?
  - Location? No more Walter 210, limited training space availability

Appendix C: Group Training Google Form

Page 1 of 2 (Group Training Google Form)

Group Training Request Form

Training requests should be submitted at least 6-8 weeks in advance. Our ability to fulfill training requests is dependent on resource availability. Requests are handled in the order they are received with priority given to requests that are part of a larger strategic initiative.

* Required

Contact Information

Department Name *

College/Administrative Unit *
Enter the college or administrative unit your department falls under.

Contact Name *

Contact Phone Number *

Contact Email *

Page 2 of 2 (Group Training Google Form)

Training Information

OIT Technology Training Course Title *
Enter the name of the course that you would like to arrange for your group. If you do not know the course title, enter a brief description and the name of the software e.g., beginning Excel spreadsheets.

Will this training be in support of a strategic initiative in your department or college? *

- Yes
- No

If yes, please describe the initative.

What goals do you have for this training? *
What specific needs will the training meet? What is the desired impact of the training?

Number of Participants *

Participation Requirement *
There is a minimum attendance requirement for each training session. If enrollment numbers are not sufficient to meet the requirement 2 days prior to the scheduled date the session will be canceled.

- [ ] I understand the participation requirement.

Appendix D: Practice Form for Group Training

Group Training Request Form - Duplicate from Google Docs - Copy

Q1 Training requests should be at least 6-8 weeks in advance. Our ability to fulfill training requests is dependent on resource availability. Requests are handled in the order they are received with priority given to requests that are part of a larger strategic initiative.

Q2 Department Name

Q3 College/Administrative Unit

Q4 Contact Name

Q5 Contact Phone Number

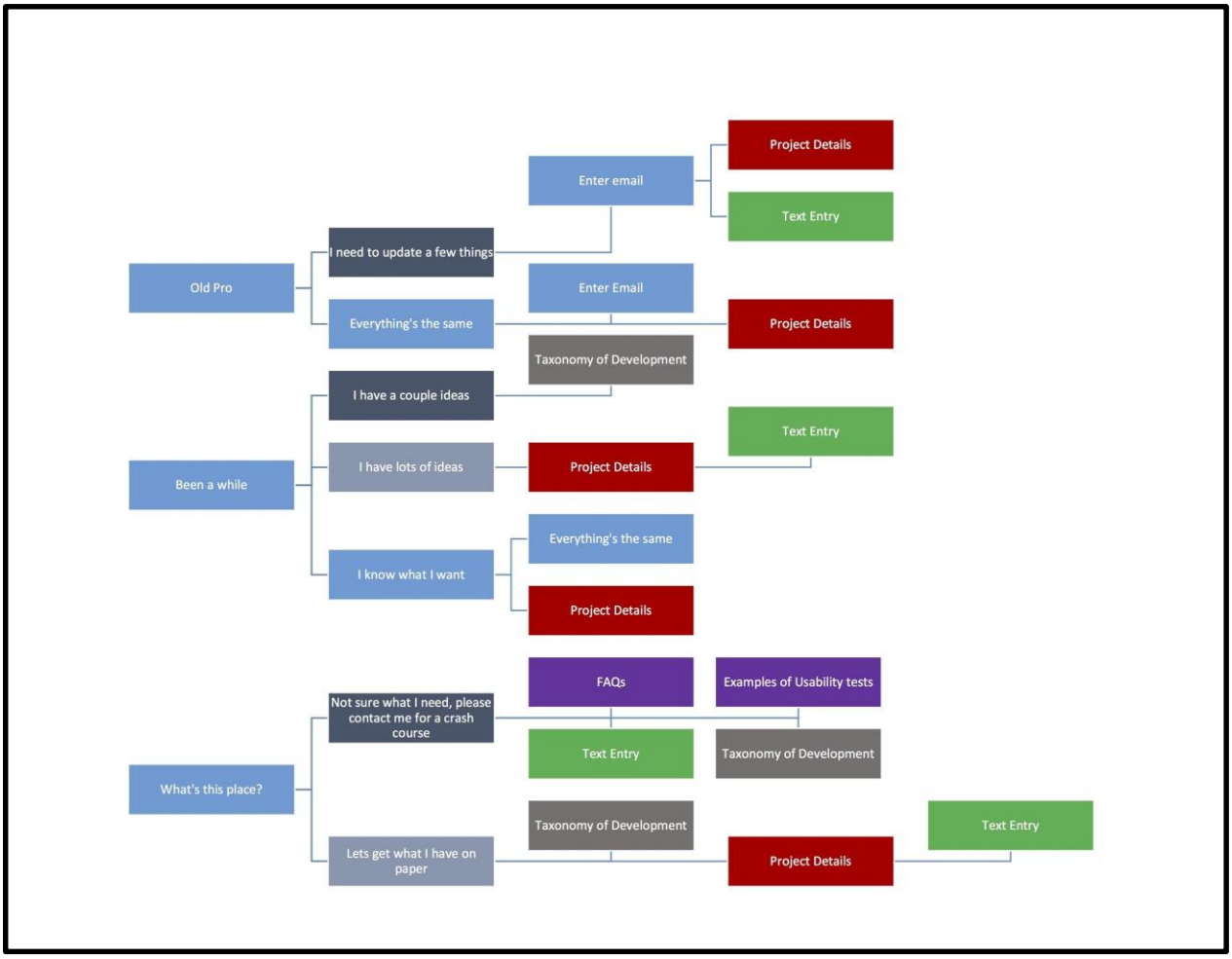
Q6 Contact Email

Q29 Instructor-led Training By Category
- ❍ Instructor-led seminars and hands-on classes (1)
- ❍ Learning Bytes- Informal small group discussions driven by participant questions (2)
- ❍ Live Online- virtual classroom (3)

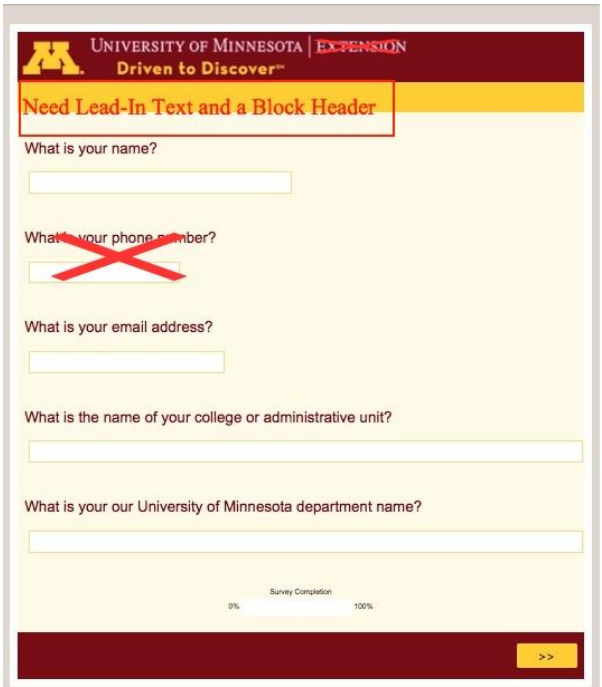
Answer If Instructor-led Training By Category Instructor-led seminars and hands-on classes Is Selected

Q8 OIT Technology Training Course Title Enter the name of the course that you would like to arrange for your group. If you do not know the course title, enter a brief description and the name of the software e.g., beginning Excel spreadsheets.
- ❍ Adobe (1)
- ❍ Camtasia Relay (2)
- ❍ Drupal (3)
- ❍ Google Apps (4)
- ❍ ImageNow (5)
- ❍ iPad (6)
- ❍ Moodle (7)
- ❍ MS Excel (8)
- ❍ NetFiles (9)
- ❍ SAS (10)
- ❍ UMConnect (11)
- ❍ Video Production (12)
- ❍ Voicemail & Gopher Messaging (13)
- ❍ VoiceThread (14)
- ❍ Web Development (15)
- ❍ WorkflowGen (16)
- ❍ Click to write Choice 17 (17) _____

Appendix E: Flow Chart for Requestors for Usability Services

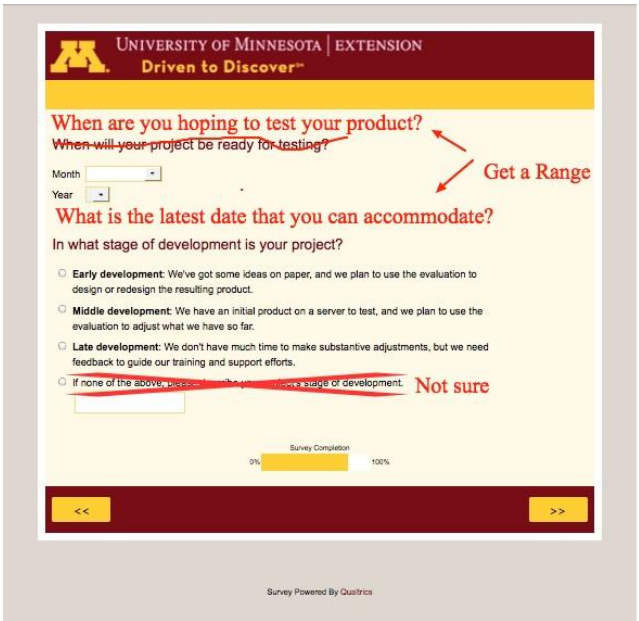


Appendix F: Usability form draft with revisions



Screenshot 1 of 4 (Usability form draft with revisions)

Screenshot 2 of 4 (Usability form draft with revisions)



Screenshot 3 of 4 (Usability form draft with revisions)

Screenshot 4 of 4 (Usability form draft with revisions)

Appendix G: Final Group Training Intake Form

Group Training Request Form

Training requests should be at least 6-8 weeks in advance. Our ability to fulfill training requests is dependent on resource availability. Requests are handled in the order they are received with priority given to requests that are part of a larger strategic initiative.

Your Contact Information

Department Name

College/Administrative Unit

Contact Name

Contact Phone Number

Contact Email

Page 1 of 4 (Final Group Training Intake Form)

Training Information

What are your goals for this training?
What specific needs will this training to meet? What is the desired impact for this training?

OIT Technology Training Course Title
Enter the name of the course that you would like to arrange for your group. If you do not know the course title, enter a brief description and the name of the software e.g., beginning Excel spreadsheets.

Will this training be in support of a strategic initiative in your department or college?

- Yes
- No

Describe the strategic initiative supported by this training

Page 2 of 4 (Final Group Training Intake Form)

Scheduling Preferences

When would you like to have this training?

e.g. approximate dates, days of the week that are good for your group, preferences for mornings or afternoons, any additional information that will help with scheduling

Computer Platform

- Windows
- Macintosh
- Combined Windows and Macintosh
- Seminar - no computers needed

What location would you like the training to be held in?

- OIT computer classroom - Humphrey 50a
- Other

Survey Completion

0% 100%

Submit

Page 3 of 4 (Final Group Training Intake Form)

Participation Requirement

Minimum attendance requirement is 10 participants for each training session. If enrollment numbers are not sufficient to meet the requirement 2 days prior to the scheduled date the session will be canceled.

○ I understand the participation requirement.

Number of Participants

Additional Information

Page 4 of 4 (Final Group Training Intake Form)

Appendix H: Final Usability Intake Form

IT@UMN

Usability Services Request

Please complete this form to request usability services. Your request will be processed upon recepit and you will hear back from us to discuss your project and consider the best usability service to fit your project's needs

What is your name?

What is your phone number?

What is your email address?

What is the name of your college or administrative unit?

What is your our University of Minnesota department name?

Page 1 of 3 (Final Usability Intake Form)

Tell us about your project

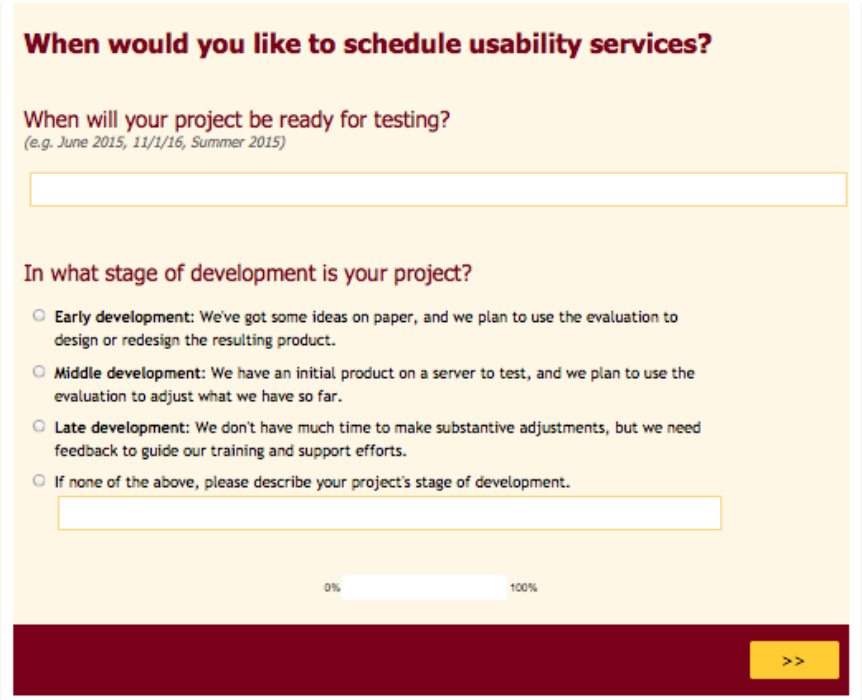
What is the name of your project or Web site?

Describe your project.

Is your project a Request for Proposal (RFP)?

- Yes
- No
- I'm not sure

Page 2 of 3 (Final Usability Intake Form



When would you like to schedule usability services?

When will your project be ready for testing?
(e.g. June 2015, 11/1/16, Summer 2015)

In what stage of development is your project?

- **Early development**: We've got some ideas on paper, and we plan to use the evaluation to design or redesign the resulting product.
- **Middle development**: We have an initial product on a server to test, and we plan to use the evaluation to adjust what we have so far.
- **Late development**: We don't have much time to make substantive adjustments, but we need feedback to guide our training and support efforts.
- If none of the above, please describe your project's stage of development.

0% 100%

>>

Page 3 of 3 (Final Usability Intake Form)