Taking The Kids Out To The Factory: An Exercise in Scenario Design and Prototyping

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A full set of images on the process and the prototype herein described can be found online at http://www.flickr.com/photos/19873741@N00/sets/72157611037144912/

Version 4.0: Final Draft

This version includes a scenario, a list of role-oriented needs, an abstract process model, a paper prototype, and a usability test.

This document does not include page views for <u>every</u> role identified, and the prototype ignores advanced bookkeeping, participant tracking and messaging features.

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Abstract

In this paper I propose a solution to a problematic information management scenario that arises at every school: the process of getting kids out of the classroom for a company visit, as a way to complement their learning goals.

Preceding these excursions is a series of requirements that are time-consuming and sometimes paper-intensive. Event forms must be completed, authorizations sought, funding requested and transportation arranged, along with the indispensable parental release form that must be retained by the school.

As an exercise in building information systems, herein, I identify functional needs of a system to manage school events thru a combination of scenarios and interviews. I then apply task-centered design techniques to build a paper prototype and conduct usability studies.

Keywords

Scenario, user-centered design, task-centered design, paper prototype, event management system

Introduction: Motivations

Wendy Wurzey¹, an elementary school principal (K-6) in a large community in the Northwest, wants to increase the number of excursions that her school's fourth, fifth and sixth graders take to visit local businesses, as a way for them to complement the lessons learned in the classroom.

The problem is that the process is generally paper-based—typically managed by teachers and school assistants; and, she does not have enough information to formulate a strategic plan to ensure each of her students is getting opportunities to learn outside of the classroom.

There is no easy way to determine how many such events have been held at the school, the variety of learning opportunities that they have targeted, how many have required school funds, which events are most popular or which could be restructured to provide more learning opportunities, among other issues.

Wendy anticipates this kind of information could help her make the case to her superiors on the value of such excursions in order to promote their benefit and obtain increased funding.

Wendy used to work as field operations manager at a large educational software company before becoming a

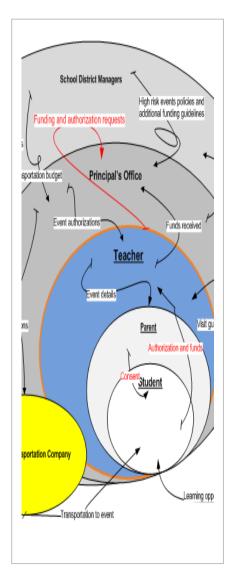
¹ The people and places in this scenario are fictitious characters, based on interviews with school administrators. Any coincidence with a real person or place is unintended.

school principal, and she believes strongly in the value that good relations with local businesses can provide the educational system. She views these interactions not just as learning opportunities for her students, but also as opportunities for raising awareness of the school's vision that could lead to increased community resources working for the benefit of her students.

Taking the children out of the classroom to see their lessons applied to solve problems in the real world is not trivial, however, given the logistics that have to be managed by the teachers. And, administering this process as a strategic opportunity would be difficult for Wendy without a centralized information system.

Based on her prior experience in the software industry, Wendy begins to realize the <u>benefits</u> of implementing an information system to manage these events: The coordination of events could be simplified, funds used could be more easily tracked, and reporting on student participation trends could influence district plans to support more of these events.

Since all the schools in the area deal with this issue, Wendy anticipates wide support to make the case to the school district administrators to fund this information system, particularly because it could be used to track all manner of school events, beyond company visits, such as trips to the zoo or the museum, track meets, teacher conferences, and more. Wendy even envisions a scalable system that could one day allow reliable industry partners to create their own events online to which teachers could subscribe to.



Process Analysis: The Scenario

After relating her vision to me over the phone, Wendy asks if I can come in and manage the process to scope a solution to present to the district managers. I then proceeded to visit the school and interviewed the school assistant and a few of the teachers, along with Wendy, to establish the scope of the existing process.

Teachers who wish to take their students on an excursion start by sending a notification to the principal's office, with details of the event being planned, in order to obtain preliminary authorization. Once authorized, teachers obtain consent forms from the main office and distribute them to students to get written parental authorization, along with any request for funds to cover expenses. In most cases the teacher will need to endeavor to secure funding, either from external sources--parents, fund raisers or donations²-- or from the school's budget.

As the teacher tracks the consent forms and student fees received, the school assistant labors to arrange transportation to and from the event. The assistant also handles the task of applying school funds for an event, when necessary–for example, in order to cover expenses for economically disadvantaged students; and, she has to process the event funds collected by the teacher. Meanwhile, the teacher identifies volunteers that can help chaperone the students while off campus.

On event day, teachers verify that they've received parental consent forms for all students, or get parents or caretakers to provide consent over the phone—without consent, students cannot leave the school grounds. They then organize students for transport and confirm emergency procedures with the school's main office, before departing.

My conversations with administrative assistants at the main office yielded that, as long as there was no overrun on budgeted funds or serious liability issues, the principal's assistant charged with managing events could provide preliminary approval. The principal needed merely to be made aware of the event, to play a support role in preparing the students for the excursion; but, only preoccupy with administrative details if the event deviated in any wayfrom standard policy. The superintendant's office was only engaged when events involving high risk for the students or needing exceptional funding required it.

While I was at the school, I also collected copies of the forms that teachers use to obtain parental consent and track event participation (appendix C.)

Wendy and I met again to go over my notes, and we agreed then that we would focus on the design of a concept interface to address the needs of the teacher and the main office. District level integration concerns and advanced bookkeeping features would be left out of the first version of the proposal—noted along with other recommendations, in appendix F. I proposed to Wendy that we could start off with a paper prototype to first build support from other school administrators. With her agreement and that goal in mind, I set out to encapsulate the process and formulate requirements.

² The PTA, for example, is pledged to organize and fund some annual events at the school.

First Brainstorm: Deconstructing Roles

Using the forms obtained and the information I gained about the process, I built an abstract process model (Holtzblatt, p.98) to help me isolate the entities and activities at play in organizing a school excursion.

Detailed descriptions of the entities involved, as construed from the interviews, are offered in appendix A; and, the contextual and abstract models are represented in appendices B and D, respectively.

The models I produced revealed three main roles interacting in the process of organizing a school excursion: an Event Promoter (typically, the Teacher), a School Administrator (the Principal or a bookkeeping delegate at the main office), and the Student (or rather his Caretaker). The representations also revealed that forms, particularly parental consent forms, played a significant role. This conceptualization of the process got me started on formulating how the tasks might be handled in a new information system.

Changes: Needs Analysis

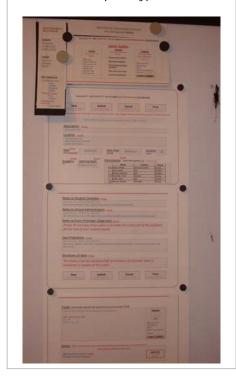
Wendy would like a future scenario to first focus on making it easier for teachers at her school to coordinate student excursions with the main office. She envisions a system that allows the teacher to fill an intranet form that triggers the process of seeking authorization and funding for an event, of any kind. Her second area of concern is on how the information system will allow her or a main office delegate to review the authorization requests. Lastly, she wants me to consider event tracking and reporting issues.

Before proceeding, Wendy warned me that not all students have email or cell phones or a computer at home; so, the implementation in this stage cannot be paperless.

After reviewing my notes from the interviews, going over the models with Wendy and considering the constraints expressed, Wendy and I decided on the following functional and process requirements for prototyping a new web-based school event management system:

- Event Promoter (Teacher, etc.) will use the PC in the classroom to fill out a web based form that creates a record of the excursion event in the system to include: a description, site location and datetime details, list of participants, projected costs, notes on unfunded needs, along with notes for parents and administrators
- Promoter can manage their events list and track participation responses from students
- School Administrator (principal, agent or superintendent's office) can manage new events that need to be reviewed for authorization and funding
- School Administrator can edit events, authorize (or reject) them, allocate funds—and track fund sources, add transportation details, include messages for event participants and print parental consent forms
- Participant Look-ups: Student, Faculty, and Volunteer Directory is part of the event management tools available to all users, which can be used to prepopulate event participant lists
- Event Status: Events can be categorized by the Administrator by status whether Pending, Pre-Approved, Under Review, Approved or Rejected, Under Way or Completed
- Notifications: All system users can add messages for parents or administrators of an event

The prototype.



These requirements were expressed as needs during a second brainstorming session that focused on conceptualizing the prototype components—see appendix G.

Second Brainstorm: The Prototype

In order to realize the components of the first version of the web-based event management system prototype, it was necessary to identify the common set of activities corresponding to the Event Promoter and School Administrator Roles. The abstract representation of the process pointed to the following baseline activities that established the foundation into which increased system functionality could later be integrated: Create and manage an event; authorize and fund an event; and, track student participation (thru the parental consent forms that are returned to the school).

I decided to focus first on the task needs of the Event Promoter role into which role-based Administrator page tools could later be incorporated, since the Administrator was expected to carry out all the tasks afforded to the Event Promoter, with the distinct ability to modify event status and track funds. Using a magnetic white board, I sketched out variations of a user interface, took pictures and continued to mark up the digital images further—images of this process are included in appendix G. I started out conceptualizing the user gateway, or event summary list view where a user would typically start working in the system. Then I focused on how a user would create an event in the system and subsequently manage it. Two main system views quickly came into perspective: an Event Details page to collect information on a particular excursion,

and an <u>Events Summary</u> page or list of organized events.

The composition or content of these web pages was envisioned to be controlled by role-based permissions, such that an Administrator's view of each Event Details page should somehow incorporate or layer a distinct set of tools that allowed the Administrator to authorize or fund that event. One way in which these permissions would control the information presented to the user was in the distinction that an Administrator's view of the events summary list was required to show event funding data columns, whereas an Event Promoter's view would ignored this information need. This idea of a portable administrative toolkit that could be layered on standard page templates led to the inclusion in the prototype of an Administrator's Toolbar that would appear at the top of Event Details views.

Once satisfied that the user activities were addressed thru the components sketched, I proceeded to create wireframes of the Event Details, Events Summary and Administrator Toolbar web parts using Powerpoint and Excel, then built thick paper stock cut outs that could survive manipulation during usability tests.

The final paper representations of the interface components, organized on a portable magnetic board to simulate web pages, provided a low cost prototype to evaluate the effectiveness of our solution. Photos of the finished prototype are included in appendix H, below.

Usability: Testing the Prototype

The time had come to validate how well our concept of the solution, the prototype, managed to satisfy the requirements established.

Preparing to conduct a field usability test of the prototype with real users was the most time-consuming single aspect of this exercise, yet perhaps the most critical. Gaining access to test subjects was challenging given educators' sporadic and uncertain availability during school hours; so, having a well-structured test to quickly gather usability data while educators had free time was paramount. Once you had a participant's attention, you had a very finite opportunity to effectively encapsulate for them the goals for both the prototype and the usability test. That's why, after going thru a dry run of the interface views, I formulated a usability test strategy (Hendry, 2008).

Once I was satisfied with the prototype components I had produced, I took pictures of the system views to



create a visual map that I and anyone providing assistance during the tests could refer to.

I ordered test task

units for the two types of subjects (teachers and administrators) in a spreadsheet to stay on target and easily gather data on particular components of the interface. (The spreadsheet can be downloaded from

http://students.washington.edu/bohemio/class/prototy pe_usability_test_tasks.xls.) Each of these tasks required system components which I indexed using the test task list and which I ordered in bound, clear plastic document holders.

The motivation for such extensive preparation was determined mainly by the need to delegate some of my functions during the tests to a person who could play the role of interface computer. Anticipating that I was likely to miss details while playing both the Moderator and Observer roles, I even created a participant consent form so that I could be allowed to record video of the tests; and, to be sure their identity would remain confidential, they were identified on the release form only by a code, such as TP1, for 'teacher participant number 1'.

A copy of my strategy for test sessions along with the participant consent form can be downloaded from http://students.washington.edu/bohemio/class/prototy pe_usability_test_session.doc.



Notes: Findings and Reflections

Usability data on the prototype's effectiveness is limited because thus far I have only been able to collect feedback from a school parent who helped me prepare for tests and from a school teacher who took part in one. Yet, as Krug (p. 142) so well proposed, one real user tested was better than none!

The prototype was well received by those who observed it, and I was able to prove through that singular test session that both the prototype and the usability test process I formulated represented a viable mechanism for gathering usability information that could feed into a future implementation effort.

Among the issues found with the interface, navigation and the use of page controls, in particular, recurred most prominently.

It wasn't immediately evident to users that changes made to event text fields could all be stored at once by pressing the SAVE or SUBMIT buttons after all changes to the event were made. This pointed to a potential violation of the learnability principle of interaction design (Tognazzini, 2008), and it was worth exploring how to improve visibility of the page use guidelines posted at the top of the form.

Both testers also expressed uncertainty about what buttons or page controls they could 'push' in the two-dimensional prototype. It was during the usability test that a question on what to push next was brought up by the participant and I realized that I had failed to disclose during the orientation that controls on the paper page views had been deliberately outlined in red. Ensuring that this information was provided to the

testers before starting the task unit tests was sure to ease their initial assessment of the prototype components and prevent any need to the protype.

I regret that I do not have more granular usability data to report on, and I would hesitate to make broad assessments based on a single test. I should note that everyone who heard about the goals of this exercise or experienced the prototype first-hand expressed great interest in actualizing a system that would simplify the excursion process, particularly where it would eliminate the need to keep track of physical event documents and could potentially liberate teachers from having to remind unconfirmed participants. Provided more time, I am confident that finding willing testers should not be a problem.

Paper prototyping may be low-fi, but there is still a need to organize the process, to develop a strategy. I consumed a lot of time early on by not setting deadlines as suggested by Rettig (p. 23). I spent too much time worrying about whether the components in the prototype addressed the user requirements, rather than getting the prototype in front of users to gather feedback throughout. On the other hand, taking the time to plan the usability tests paid off in that I was better prepared to set expectations with test participants and had several means to capture data.

The greatest lesson for me arising from this experience is that I should have collaborated with someone, rather than work individually. Collaboration would not have just allowed me to distribute the significant workload; but, more importantly, would've provided a more timely means for qualified feedback on design and process decisions on which I spent effort trying to be objective.

Conclusion

This exercise has produced a simple to use, low-cost paper prototype kit of an event management system that Wendy can use on her own to recruit other school administrators and build support to make the case for funding from administrators to implement this system throughout the school district. The prototype components produced and the documentation created during the process will serve as a good starting point to estimate actual system integration requirements.

Moreover, this process has allowed me to gain valuable experience on managing the design process while creating new information systems. The importance of making time to conduct a proper task analysis (Greenberg, p. 4) that focuses scarce resources on the most critical user needs, and the preparation required to easily recruit test users and be able to convey the goals for the project and prototype, are both lessons I will want to recall in design efforts of the future.

Acknowledgements

I want to thank Chris Kunzelman at Nealy O'Brien Elementary in Kent, Washington, for her invaluable input on the excursions process.

Citations

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Appendix A: Actors, Activities and Artifacts

Here are the descriptions of the roles (actors), responsibilities (activities of relevance), and forms (artifacts) that I have recognized as playing a part in coordinating excursions—from the interviews I held with faculty at the school.

Teacher. Coordinates the event; seeks authorization; orders notices/forms for parents from main office; tracks confirmed participants; and, sometimes responsible for managing class fund raising to cover expenses.

School Assistant. Handles creation of parental consent forms; applies school funds to event—covering fees of economically disadvantaged students; and, coordinates transportation for events.

Principal (or Delegate). Reviews excursion details, provides funding (as needed), clears liability issues with district office, and authorizes (or rejects) teacher requests.

Student (and Parent). Returns parent consent form to teacher along with payment, if applicable.

Sponsors. Sponsors, commercial or otherwise, such as the Parent Teacher Association (PTA) which pays and

organizes some annual events; and, other volunteers such as those acting as event chaperones.

School District Managers. (Executive Director or Superintendent.) Authorizes (or rejects) high risk events, and provides funding and logistics support.

Transportation Company. Provides charter bus service to and from the event, at a cost that must be covered by raised funds—cannot come from district budget—which usually the PTA budget covers.

Parental Consent Forms. For parents to sign and return to provide consent for the child's participation in an event; a blanket annual consent form is also available—see prototype 0 forms 001 image in appendix C.

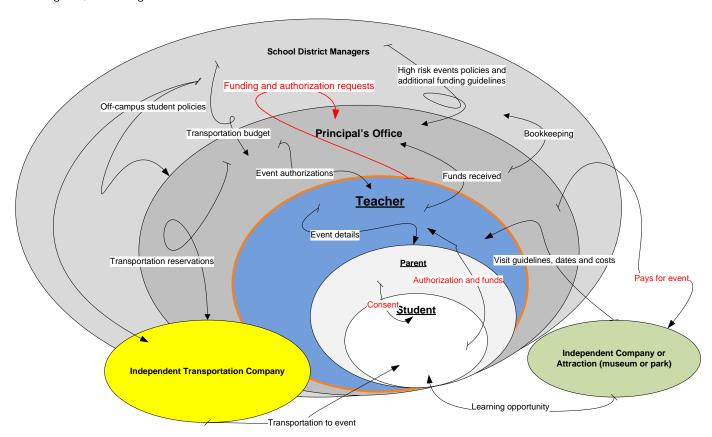
Payment Stub. Additional record used to track fund sources, returned to school with remittance.

Event Participation Sheet. Used by teacher to track responses and funds received—see prototype 0 forms 003 image in appendix C.

District Permit Forms. Sent by teacher to administrators to request extraordinary authorization and funding, as necessary.

Appendix B: Contextual Model

The diagram below represents the actors and the interactions at work in a school excursion planning scenario. The teacher is the main coordinator of the event and the student it's main beneficiary. Their participation in any excursion is mainly constrained by school district policies and funding levels. The principal's office is at the center of the diagram, reflecting its role as the command center for all excursions.



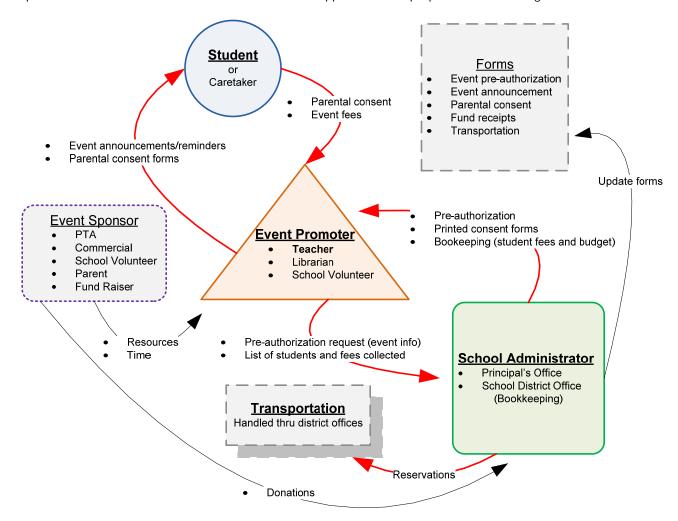
Appendix C: Examples of Related Forms

I used the parental consent form and the teacher's fund tracking sheet below to determine the record-keeping components of the prototype.

ESCUELAS PUBLICAS DE KENT Distrito Escolar No. 415, Condado King Kent, Washington	KENT SCHOOL DISTRICT #415 RECEIPT RECORD Student Receipt Log Sheet			
Fecha:	TEACHER: DATE:			
	LOG #:			
estimados Padres de Familia:	No.	Đ)		
a clase del salón de su niño/a está planeando un paseo a	Student Signature/Payee Name	Amount	Circle One Item	Paid For Account
, como parte del currículo	1		cash / check	
(Lugar — Dirección — Número de Teléfono)	2		cash / check	
colar. Estaremos saliendo de cerca de la(s) (Hora)	3		cash / check	
(Lugar) (Hora) día y regresaremos a la escuela aproximadamente a la(s)			cash / check	
(Fecha) (Hora)	4			
ansportación (Marque uno): Conductor (Marque uno):	5		cash / check	
Autobus Escolar Del Distrito	6		cash / check	
Automóvil Escolar Padre	7		cash / check	
Automóvil Particular Alumno/a	8		cash / check	
	9		cash / check	
Maestro/a	10		cash / check	
Por favor llene este formulario, corte en la línea de abajo y regréselo a la maestra o al maestro antes del,	11		cash / check	
	12	-	cash / check	
	13		cash / check	
PERMISO PARA PASEO DE LOS PADRES DE FAMILIA	14		cash / check	
Fecha:	15		cash / check	
gestro/g:	16		cash / check	
	17		cash / check	
doy permiso para que asista al paseo a			cash / check	
, el día, con la transportación	18			
dicada a continuación:	19		cash / check	
ansportación (Marque uno): Conductor (Marque uno):	20		cash / check	
Autobus Escolar Del Distrito	21		cash / check	
Automóvil Escolar Padre Automóvil Particular Alumno/a	Total Cash: \$ Total Checks: \$			
Padre de Familia o Apoderado	Grand Total: \$			
	RECEIVED BY:		RECEIPT #:	

Appendix D: Abstract Model

The diagram below represents the entities that interact to organize a school excursion event. This representation helps us to understand the activities that need to be supported in the proposed event management solution.



Appendix E: Brainstorming, Part 1

Early brainstorming notes on components of user views in the Event Management System, in no particular order. Not all of them made it into this version of the prototype.

Teacher ← the event promoter

- Status (new or resubmit) ← or otherwise static "pending", under review, approved, declined)
- Date
- Location
- Company
- Sponsoring teacher
- Number of kids
- Names and ages (perhaps gets fed from the schools database)
- provides a print option for students who don't have email information in the system; so that forms can be printed at main office and delivered.
- Transportation Needs (commuting, local bus, walk, hired)
- Student Learning Targets (what areas are being extended thru this trip?)
- Costs
- Funding Needs? (hired transportation, food, access fees)
- Funding Provided? (donations, funds raised, grants)
- Funding Source (if external) ← provide an Add Another function
- Note to parents
- Notes to school district management
- Company liaison information ← checkbox to show it to parents or not
- Company event page (for now, make this all optional) ← I don't have time to build out a company offerings interface.

Separately, the teacher will need a view to keep track of her proposed events and where they stand in terms of progress

- Approved, pending events list ← this list is public on an events webpage
- Unapproved events list
- Completed events list
- Event
- Date
- Company
- Students (funded and authorized vs non- ratio) example: (5/19)
- Approved by district? (Y/N/Pending/Under Review)
- Resubmit with changes link
 - ** Teacher gets email confirmation when event is created and when approved/declined or updated

Principal/School Assistant

- Event summary with company contact information
- Total participants (link to Names)
- Funding requirements (total, and link to breakdown pop-up)
- Teacher notes
- Liability authorization and language provisioning for the teachers to print forms for students (principal is responsible for providing language for the forms perhaps the forms are just printed and dropped off by the secretary) ← perhaps this is a set of text input fields that pop up from the events list... or consider using a FORMS LIBRARy that the principal can choose from or add to!!
- Funding authorization
- Cost borne by student
- Cost borne by school
- Cost covered by grants and donations this is for reporting purposes!
- Note to superintendant

Student/Parent

- Email containing link to secure page is sent, when Principal approves and teacher triggers
- Events list (by classroom, or week, or school) ← contextual based on the secure link
- Event info (date, location, company visited, description of trip goals)
- Number of guests expected
- Student Learning Targets (what areas are being extended thru this trip?)
- Teacher note

- Cost per student (payment link for credit card or direct debit use) ← don't go too far beyond here!
- Parental authorization
- Note to teacher

Superintendant

- Gets an email when a new event is approved by Principal that takes him to...
- Pending approvals events list
- Under Review events list (Funding approved or Not approved) ←funding may not be approved—or there may only be partial funding, but that does not take away from the event itself being authorized
- Approved events list, by school by week –show date (link to pop-up details)
 sort by school, by week, by cost, by company, last change made
- Declined events, last change made

- Teacher notes
- Notes to teacher
- Notes to principal

All events include ← they can be changed thru the detail page

- Total participants
- Sponsoring Teacher
- Company
- Total costs
- Status / Approval box (options Under Review—if waiting on info to approve, Pending—if discussing issues with principal or teacher or other, Approved or Declined)
- Email teacher or principal or company contact (link to send email or call on phones—pop-up of the people selected)
- Funding and funding source (donations or grants) or account number for financial reporting
- Liability forms ← FORMS LIBRARy functions

Appendix F: Out of Scope

Functionality that is excluded from this version of the prototype.

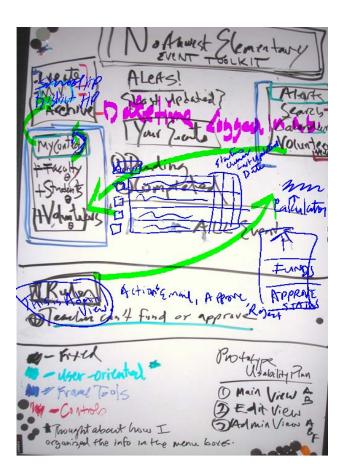
- Student participation response tracking system could include a reminder function to draw attention to anyone who has not returned a response.
- 2. Teacher can enter a parent volunteer into the system.
- 3. Teacher can resubmit a previously rejected event, after re-formulating it.
- Administrator or designate should be able to add or change parental consent and administrative forms.
- 5. Teacher can add others that need to be included in event updates.
- Teacher can make last minute attendance updates to the event via mobile phone, as the event gets underway, so the office has an accurate list of participants to be used in cases of emergency.
- 7. Administrator can print reports on funds distribution and event participation.
- 8. Administrator can apply funds from district accounts pre-loaded into the system.
- 9. System users can manage personal contact lists.
- System is aware of parental messaging preferences, and will send email or text to parents in directory that

- choose this method; otherwise, forms will be printed for those students who do not want or have email or text options.
- 11. Parents who have included email or mobile phone contact information in the main student profiles should have the ability to authorize student's participation thru secure link.
- Parents can choose to pay event student fees by direct debit or credit card, and provide consent thru a secure link.
- District financial records exchange should be supported by this system.
- 14. District managers should have access to a portal that allows to review and approve escalated events; and, otherwise, track events and report on student participation.
- 15. System should provide access to businesses to coordinate learning targets with school and offer events thru a public events list that teachers could subscribe to—as a way to initiate the authorization process.
- Upcoming events page for parents where they can presubscribe their child.

Appendix G: Brainstorming, Part 2

Notes on interface components from my second brainstorming session. These are features to be built into the first set of prototype views.



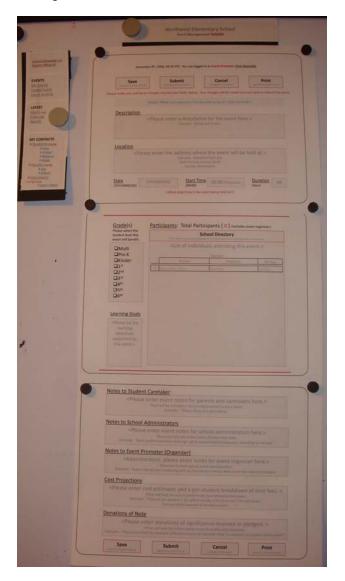


I started out sketching on a whiteboard, then took a picture of it and overlayed additions using OneNote's stylus tool.

Appendix H: Prototype Views

A full set of prototype images can be viewed online at http://www.flickr.com/photos/19873741@N00/sets/72157611037144912/

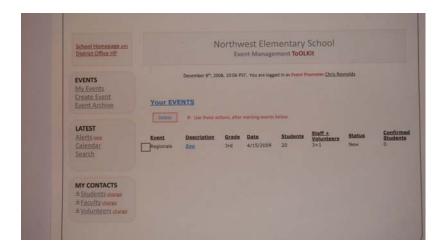
Creating a new event on the Event Details view (below).



The participants list after entries are selected from the Directory—at right (below).



The Event Summary page for an Event Promoter (below).



School Homepage and District Office HP

EVENTS

December 8th, 2008, 09:39 PST. You are logged in as School Administrator Wandy Works

My Events
Create Event

Event Archive

LATEST

Alerts one
Calendar

Search

Description

Late French

Lore French

Lore Constitute

Description

Authorities

Authorities

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Lore Besides

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Late French

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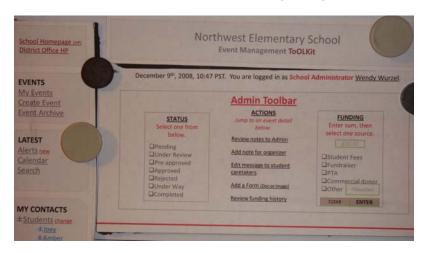
Description

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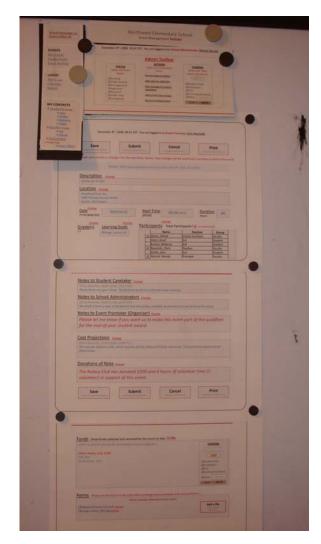
Lore Constit

The Event Summary page for a School Administrator (below).

Administrator Toolbar amplified (below) and at top of Event Details view for School Administrator (image at right).



Event Details view for School Administrator (below).



Appendix I: Usability Test Plan Example

Here are some examples of the task units to be observed during usability tests. Full details of the session strategy and the complete set of task units to be tested thru this prototype can be found at

http://students.washington.edu/bohemio/class/prototype_usability_test_session.doc and http://students.washington.edu/bohemio/class/prototype_usability_test_tasks.xls, respectively.

<u>Example tasks to be observed for Event Promoter</u> (Teacher)

- Create an event
- Add participants
- Add a cost projection statement
- Confirm new event in system
- Add message to administrators

Example tasks to be observed for School Administrator

- Check for new events that need review
- Pre-approve new event
- Allocate funds to an event
- Add message to Event Promoter
- Create a new system alert