QUALITY ASSURANCE TESTS
RELEASE 1 SUMMARY TEST RESULTS

JUNE 2009

Kathleen Murray

Contents

Round 1 Results

The first round of QA for Release 1 was conducted Monday, April 6 - Thursday, April 9, 2009. In all, 22 internal users from the Information Technology Services department within the University Libraries participated. Individuals' test environments were predominantly Windows XP, Firefox browser, with a LAN connection.

Operating system	Windows XP	Ubuntu	No Response
N=22	19	1	2
Browser	Firefox	Internet Explorer	Opera
N=22	17	4	1
Connection	LAN	DSL	No Response
N=22	20	1	1

Overall, participants reported they successfully completed 84% of the tasks. The test script (Appendix A) included 46 items divided into nine functional areas. The following table reports task completion percentages for each functional area.
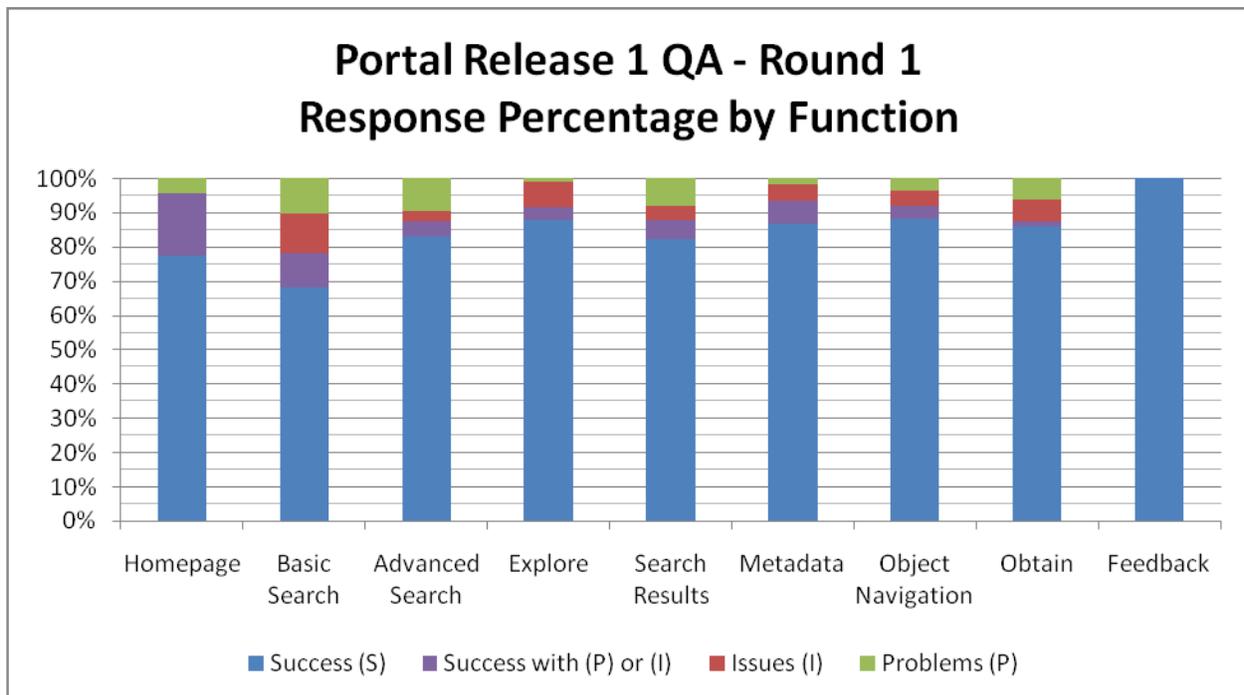
Based on analysis of task completion for each functional area and testers' feedback, assignments for the design and development teams were identified. The beta Portal site was revised accordingly. The

following table is a key to the results testers reported. It is followed by a table ranking all 46 tasks in order of the sum of problems and issues reported.

Response Key

Code	Result	Definition
S	SUCCESS	Completed task successfully
P	PROBLEM	Task failed or presented significant problems that need to be fixed
I	ISSUE	Task might be confusing for some users, but isn't serious enough to be classified as a problem
SP	SUCCESS+PROBLEM	Completed task successfully but task presented significant problems
SI	SUCCESS+ISSUE	Completed task successfully but task might be confusing for some
ND	NOT DONE	Task not done
NR	NO RESPONSE	No result indicated; task may or may not have been completed

Task Ranks
Based on Problems and Issues Reported

Rank	Function	Task	S	SP	SI	P	I	ND	NR	N	Sum SP, SI, P, I	% Sum SP, SI, P, I
1.	Search Results	28	8	0	0	10	3	0	1	21	13	62%
2.	Basic Search	6	11	2	1	6	2	0	0	22	11	50%
3.	Basic Search	8	13	0	2	2	5	0	0	22	9	41%
4.	Basic Search	2	14	0	4	0	4	0	0	22	8	36%
5.	Basic Search	3	14	1	3	2	2	0	0	22	8	36%
6.	Advanced Search	12	14	1	1	6	0	0	0	22	8	36%
7.	Advanced Search	14	14	1	0	6	1	0	0	22	8	36%
8.	Metadata	33	15	0	3	2	2	0	0	22	7	32%
9.	Obtain	43	14	0	1	2	3	0	2	20	6	30%
10.	Advanced Search	13	16	1	0	5	0	0	0	22	6	27%
11.	Explore	21	14	1	1	0	3	0	3	19	5	26%
12.	Homepage	1	17	1	3	1	0	0	0	22	5	23%
13.	Basic Search	4	17	1	0	2	2	0	0	22	5	23%
14.	Basic Search	7	17	0	1	3	1	0	0	22	5	23%
15.	Object Navigation	42	16	0	0	2	3	1	0	22	5	23%
16.	Explore	18	18	0	1	1	2	0	0	22	4	18%
17.	Search Results	22	18	0	3	1	0	0	0	22	4	18%
18.	Search Results	24	18	0	2	1	1	0	0	22	4	18%
19.	Metadata	31	13	0	2	0	2	5	0	22	4	18%

| Rank	Function	Task	S	SP	SI	P	I	ND	NR	N	Sum SP, SI, P, I	% Sum SP, SI, P, I
20.	Object Navigation	41	17	0	0	3	1	1	0	22	4	18%
21.	Advanced Search	16	18	1	0	0	2	0	1	21	3	14%
22.	Object Navigation	36	18	0	1	1	1	0	1	21	3	14%
23.	Object Navigation	39	18	0	3	0	0	0	1	21	3	14%
24.	Object Navigation	40	18	0	1	0	2	0	1	21	3	14%
25.	Obtain	44	18	0	0	2	1	0	1	21	3	14%
26.	Basic Search	5	19	0	0	1	2	0	0	22	3	14%
27.	Search Results	26	19	0	2	0	1	0	0	22	3	14%
28.	Search Results	29	13	0	1	1	1	6	0	22	3	14%
29.	Metadata	30	19	0	1	0	1	0	1	21	2	10%
30.	Advanced Search	11	20	0	1	0	1	0	0	22	2	9%
31.	Explore	17	20	0	1	0	1	0	0	22	2	9%
32.	Search Results	25	20	0	1	0	1	0	0	22	2	9%
33.	Explore	20	19	0	0	0	1	1	1	21	1	5%
34.	Object Navigation	35	20	0	0	0	1	0	1	21	1	5%
35.	Advanced Search	9	21	0	1	0	0	0	0	22	1	5%
36.	Advanced Search	10	21	0	0	0	1	0	0	22	1	5%
37.	Advanced Search	15	21	0	1	0	0	0	0	22	1	5%
38.	Explore	19	21	0	0	0	1	0	0	22	1	5%
39.	Search Results	27	21	0	0	1	0	0	0	22	1	5%
40.	Metadata	34	21	0	1	0	0	0	0	22	1	5%
41.	Object Navigation	38	21	0	1	0	0	0	0	22	1	5%
42.	Search Results	23	22	0	0	0	0	0	0	22	0	0%
43.	Metadata	32	22	0	0	0	0	0	0	22	0	0%
44.	Object Navigation	37	20	0	0	0	0	1	1	21	0	0%
45.	Obtain	45	22	0	0	0	0	0	0	22	0	0%
46.	Feedback	46	21	0	0	0	0	0	1	21	0	0%

Round 2 Results

The second round of QA testing for Release 1 was conducted Monday, June 1 - Thursday, June 4, 2009. In all, 20 persons participated: 17 internal users from the Information Technology Services department within the University Libraries and three genealogists from the community. Individuals' test environments were predominantly Windows with a LAN connection. For this round of testing, efforts were made to increase the number of testers using Internet Explorer, as this is the major browser used by Portal users. As a result 12 individuals tested using Internet Explorer compared to four in QA round 1.

Operating system	Windows	Ubuntu	Mac OS
N=20	18	1	1
Browser	Firefox	Internet Explorer	-
N=20	8	12	-
Connection	LAN	DSL	Fiber Optics
N=20	17	2	1

The test script (Appendix B) included 37 items divided into eight functional areas. Overall, participants reported they successfully completed 90% of the tasks.

Portal Release 1 QA - Round 2
Response Percentage by Function
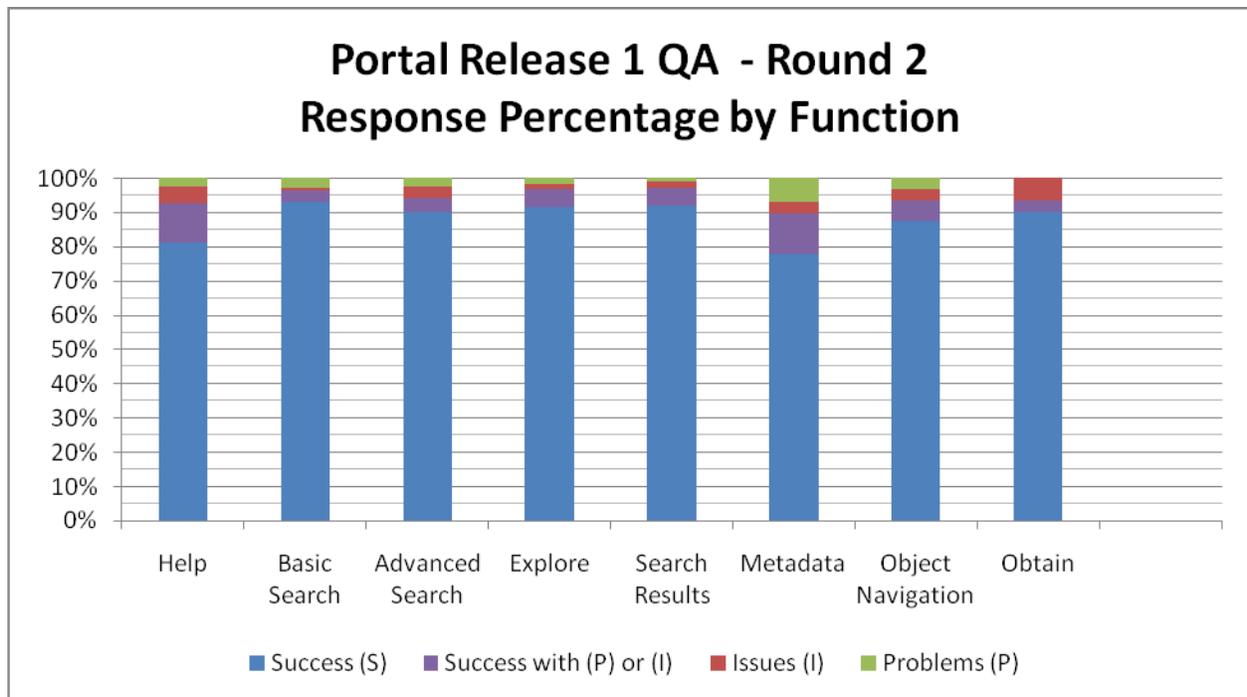
For this second round of testing, 12 of the 37 tasks asked participants to review various *Help Guides*. This was the first user review for most of the Guides and several issues and problems were identified. The following graph illustrates the effect on overall success for each functional area when the results for Help Guide review tasks were removed from individual functional areas and combined in the "Help" function. For example, the "Obtain" tasks are rated 100% successful, with no problems or issues.
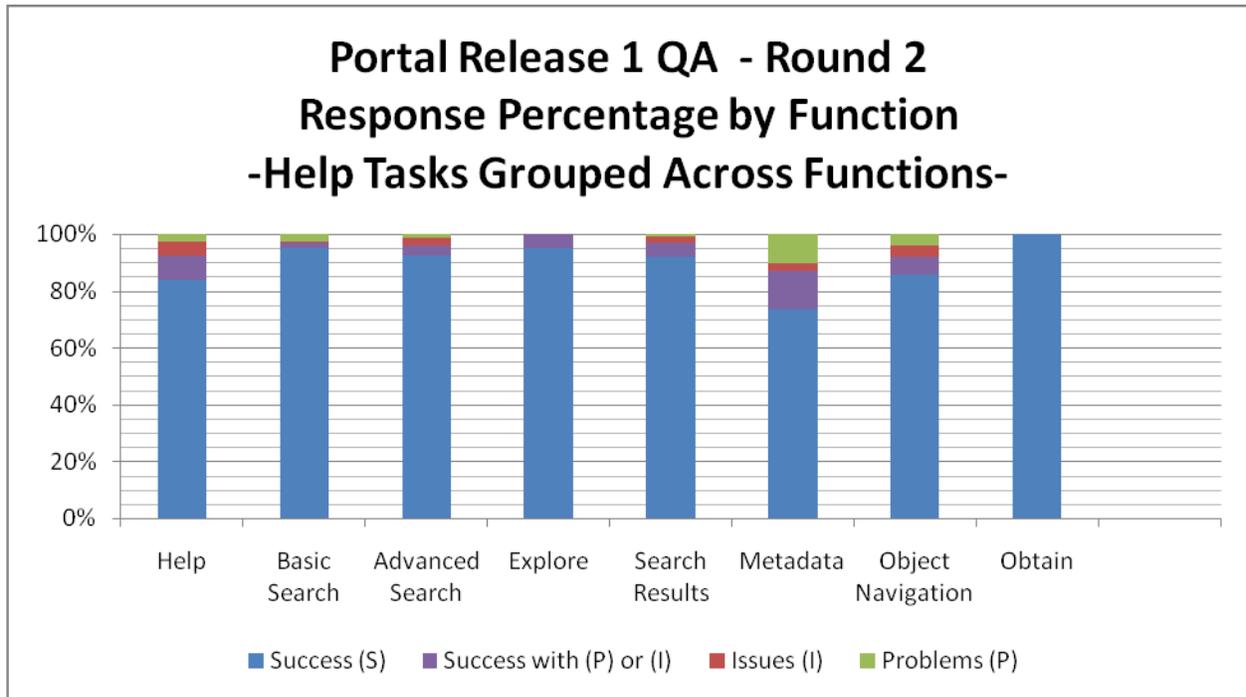
Based on analysis of task completion for each functional area and testers' feedback, a short list of assignments for the design and development teams was identified. Useful Help Guide feedback, offering clarification and identifying confusing text, was also obtained. The following table is a key to the results testers reported. It is followed by a table ranking all 37 tasks in order of the sum of problems and issues reported.

Response Key

Code	Result	Definition
S	SUCCESS	Completed task successfully
P	PROBLEM	Task failed or presented significant problems that need to be fixed
I	ISSUE	Task might be confusing for some users, but isn't serious enough to be classified as a problem
SP	SUCCESS+PROBLEM	Completed task successfully but task presented significant problems
SI	SUCCESS+ISSUE	Completed task successfully but task might be confusing for some
ND	NOT DONE	Task not done
NR	NO RESPONSE	No result indicated; task may or may not have been completed

Task Ranks
Based on Problems and Issues Reported

Rank	Task	S	SP	SI	P	I	ND	NR	Sum SP, SI, P, I		Help Guide	Function
1.	27	10	2	1	4	1	2	0	8			Metadata
2.	1	16	1	2	0	1	0	0	4		√	Help
3.	2	16	0	2	0	2	0	0	4		√	Help
4.	4	16	0	2	2	0	0	0	4		√	Help
5.	5	16	1	2	1	0	0	0	4		√	Basic Search
6.	32	16	0	0	2	2	0	0	4			Object Navigation
7.	34	16	0	3	0	1	0	0	4			Object Navigation
8.	37	16	0	2	0	2	0	0	4		√	Obtain
9.	3	16	0	2	0	1	0	1	3		√	Help
10.	12	17	0	1	2	0	0	0	3		√	Advanced Search
11.	13	17	0	1	0	2	0	0	3		√	Advanced Search
12.	16	17	0	1	1	1	0	0	3			Advanced Search
13.	18	17	0	1	1	1	0	0	3		√	Explore
14.	22	16	0	1	1	1	1	0	3			Search Results
15.	25	15	0	3	0	0	2	0	3			Search Results
16.	26	17	0	2	0	1	0	0	3		√	Metadata
17.	33	16	0	1	1	1	0	1	3			Object Navigation
18.	6	18	0	2	0	0	0	0	2			Basic Search
19.	9	18	0	0	1	1	0	0	2			Basic Search
20.	15	16	0	1	0	1	0	2	2			Advanced Search
21.	28	18	0	2	0	0	0	0	2			Metadata
22.	31	18	0	2	0	0	0	0	2			Object Navigation
23.	35	17	0	0	0	2	0	1	2		√	Obtain
24.	7	19	0	0	1	0	0	0	1			Basic Search
25.	11	19	0	0	1	0	0	0	1			Basic Search
26.	17	19	0	1	0	0	0	0	1			Advanced Search
27.	19	19	0	1	0	0	0	0	1			Explore
28.	20	18	0	1	0	0	0	1	1			Explore
29.	21	19	1	0	0	0	0	0	1			Search Results
30.	24	19	0	0	0	1	0	0	1			Search Results
31.	29	17	0	1	0	0	1	1	1		√	Object Navigation
32.	30	19	0	0	1	0	0	0	1			Object Navigation
33.	8	20	0	0	0	0	0	0	0			Basic Search
34.	10	20	0	0	0	0	0	0	0			Basic Search

Rank	Task	S	SP	SI	P	I	ND	NR	Sum SP, SI, P, I		Help Guide	Function
35.	14	20	0	0	0	0	0	0	0			Advanced Search
36.	23	20	0	0	0	0	0	0	0			Search Results
37.	36	20	0	0	0	0	0	0	0			Obtain

Appendix A.   QA Test Script for Round 1

Beta Portal Site: [Removed]

Test Dates: Monday, April 6 - Thursday, April 9

Due Date: No later than Thursday, April 9

Email Results to: Kathleen Murray [kathleen.murray@unt.edu]

How to use this script

- Allow 2-4 hours to complete the tasks and document your results.

- Work through the 46 tasks in the test script in order and record your results directly on this document.

- Record a result for each task by placing an (x) below the word(s) that best describes your result(s).

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

SUCCESS	Completed task successfully
PROBLEM	Task failed or presented significant problems that need to be fixed
ISSUE	Task might be confusing for some users, but isn't serious enough to be classified as a problem
NOT DONE	

- A task may result both in success and problems or issues; please document and explain in comments.

- Include any comments that help explain your results. It's always helpful to know what works well, so that those features aren't changed.

- When reporting problems and issues, please be as specific as possible. It is very helpful if you paste the URL for the page you are commenting about in your comments. Screenshots are also helpful.

- Feel free to take actions not included in this script: explore any page, make deliberate mistakes, etc. When you make comments, include a brief explanation of what actions you took.

- Unless otherwise stated in a task, you are free to search using keywords and phrases of your own choice. However, keep in mind there are a limited number of items in the beta Portal site and you may not get many or any results. The next page lists keywords and phrases for your use.

- When you are finished testing, email this document to Kathleen Murray [kathleen.murray@unt.edu].

- If you encounter a serious failure that prevents you from moving forward with testing, report the problem directly to Mark Phillips [mark.phillips@unt.edu].

Suggestions for Search Terms and Phrases

Phrases	Terms
"Fort Worth"	confirmation
"Denton County"	roundup
"Sam Houston"	Foster
"young man"	tombstone
"Santa Anna"	cemetery
"Civil War"	courthouse
"Fair Park"	Abilene
"Dallas County"	president
"bow tie"	tobacco
"Texas history"	cotton
"Brazos River"	independence
"Red River"	revolution
"summer vacation"	judge
"Christmas concert"	minister
"University of Texas"	hotel

Record Your Name & Test Environment

Name:	
Operating system:	
Browser name and version:	
Connection (LAN, DSL, dial-up, etc.):	

TASKS

Home Page

1. Navigate to the beta site for the Portal to Texas History [http://beta.texashistory.unt.edu/] and explore the homepage content. Confirm that it is clear to you what the Portal to Texas History is and what it contains.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Basic Search

2. Access and review the *Help Guide* for *Searching* the Portal. Confirm that you found the guide. Was the information clear? Were the examples helpful?

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

3. Execute a Basic Search using any keyword. (Choose your own word or a word from the list provided.) Confirm that the results match your keyword.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

4. Execute one Basic Search using any keyword and then, in the search box at the top of the search results page, execute a different keyword search. Confirm that the results match your second keyword.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

5. Execute a Basic Search for the phrase, "Fort Worth". Be sure to enclose the phrase in *quotation marks.* Select an item from the search results list and evaluate the hits. Confirm that the results match your search phrase.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

6. Return to the search results page for task 5. In the search box, add another search phrase *enclosed in quotation* marks to your first phrase, for example, "Fort Worth" "longhorn cattle" or "Fort Worth" "Sam Houston". Confirm that the hits match your search phrases.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

7. First, execute a Basic Search for the phrase, "Texas history". Next, *in the search box on the search results page*, limit the results by entering a *minus sign* (-) in front of a keyword, for example, -Abilene. In this example, the search box would contain: "Texas history" -Abilene. Execute the search and confirm that the results match your search criteria.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

8. From the Basic Search screen, *limit* your search to Photos and execute a search using one of these phrases or keywords: Fort Worth, cemetery, child, or congregation. Confirm that the results include only photographs.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Advanced Search

9. Locate the link to "Advanced Search" on the Portal homepage. Confirm that it was easy for you to locate the link on the page.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

10. Execute an Advanced Search based on any *date range*. Confirm that the results match the date range.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

11. Access the *Help Guide* for *Genealogical Materials* and read the search strategies and examples for name and location searches. Confirm that the guide was clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

12. Search for the *name of a person* from the Advanced Search screen, for example Sam Houston, Lyndon Johnson, Hartman, or Foster. Confirm that your results match the name.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

13. Search for both a *name and location* from the Advanced Search screen, for example Foster and Tarrant County -or- Sam Houston and Dallas County. Confirm that your results match the name and location.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

14. Enter *two different phrases* in the Advanced Search screen, for example, Dallas County and Fair Park -or- Texas History and Civil War. Confirm that your results match the phrases.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

15. Select the *Where the West Begins collection* from the drop-down list on the Advanced Search screen. Execute a search using keywords or phrases, for example: Gernsbacher, Schur, rabbi, confirmation class, or consecration class. Confirm that your results match your search criteria.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

16. On the Advanced Search screen, select the yearbook collection from either Abilene Christian University or Hardin-Simmons University from the drop-down list. Try *various advanced searches*, using phrases, keywords, and dates. Confirm that your results match your search criteria.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Explore

17. From Explore>Locations, select either Tarrant County or Ellis County to find items related to that county. Then select a few items from the results list and view the location information in their full record(s). Confirm that a location listed in the Coverage field matches the County you selected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

18. From Explore>Locations, select Tarrant County to find items related to that county. Execute a *follow-on search to limit the result list* to one of these names: Foster, Shaw, Walton, Samuels, Gernsbacher, Schur, or Carb. Confirm that your results match the name.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

19. From Explore >Dates, enter a range of dates and confirm the results by examining the dates listed in the search results.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

20. From Explore > Collections, select *Where the West Begins collection* and sort the items in the results list by title, then dates, and then creator. Confirm that the results list matched each sort option.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

21. Investigate the other Explore categories: Subjects, Types, and Partners. Explore the links and the content. Report your reactions as well as any problems.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Search Results

22. Search for cemetery -or- agriculture using Basic Search and *limit* the search to *Books*. Select an item from the search results list and then locate the "hits" navigation feature. Confirm that pages with hits displayed.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

23. Execute a Basic Search *limited to Photos* using one of the following keywords: Beth -or- Worth. Sort the list by the oldest creation date and confirm that the results list sorted as expected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

24. Using the search results list from task 23, display the list without thumbnails. Confirm that the list displayed as expected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

25. Execute another Basic Search *limited to Photos* using either of the following keywords: Beth -or- Worth. Confirm that the search term is displayed in the search box at the top of *each page* in the search results.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

26. Execute another Basic Search, *limited to Photos*, using either of the following keywords: Beth -or- Worth. This time, in the search box at the top of the search results page, execute *a follow-on search* by adding a second search term: confirmation. Confirm that your search results were modified to match the follow-on search.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

27. Using the search results from task 26, confirm that the number of items in each view of your search results (i.e., list, grid, and brief views) matches the number of results indicated at the top of each page.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

28. Once again use the search results from task 26. This time, examine a few items in both the list view and the grid view and confirm that the search terms are highlighted in the item records.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

29. Print your search results from task 26 *with and without thumbnails*. Confirm that the results printed and that you got what you expected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Metadata

30. Review the Citation Help Guide. Confirm that it is clearly written and that it identifies the citation standard(s) implemented on the Portal. [*Note*: The citation format in this testing environment is a temporary placeholder and *does not match* the format in the Guide. This does not affect the testing.]

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

31. Execute a Basic Search using the any keyword, for example: courthouse -or- tobacco. From the results list, select an item and print its record. Confirm that it is clearly formatted and includes the citation.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

32. View a citation for an item in the search results from task 31. Confirm that the permalink and access date are included in the citation.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

33. Once again, using the search results from task 31, display and save a metadata record for an item. Confirm that you were able to complete this task.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

34. Again, using the search results from task 31, display the full record for a few items. Follow some of the hyperlinks in the record. Confirm that the results are what you expected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Object Navigation

35. Execute a Basic Search, *limited to Photos,* using the keyword: confirmation. From the results list, select an item and confirm that the display provides a clickable feature to submit feedback to Portal staff, including error reports.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

36. *Examine the records* for a few items in the search results of task 35. Confirm that you are able to identify date, location, and personal name information *in the item records*.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

37. Once again using the search results for task 35, select and view a few items. Confirm that the *search term* is *both* clearly identified on the page and highlighted in the item records.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

38. Execute another Basic Search this time *limited to Books* and using any term or phrase, for example revolution -or- "Brazos River". From the results list, select an item and try out the *navigational controls (icons)* for rotating left and right and moving forward and backward. Confirm that you were able to navigate the book.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

39. Return to the search results from task 38. Select a few books and navigate to specific pages *using the drop-down list*. Confirm that you were able to use this navigation.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

40. Once again, return to the search results from task 38. Select a few books and display *all their pages*. Then, select a page to display and browse the book's content using the *navigational controls on the image* itself. Confirm that you were able to browse the book using the navigation controls on page images.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

41. Execute another Basic Search, *limited to Books,* using any keyword or phrase, for example: courthouse -or- "Red River". Select a few items and *display some pages containing hits*. Confirm that your search term is highlighted on the pages and that you are able to turn highlighting off and on.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

42. Return to the search results for task 41 and display a page with hits. *Rollover the information icon* next to the Page drop-down list to display its text. Confirm that the text is clear and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Obtain

43. Review the Printing Help Guide for clarity and usefulness. Confirm that it is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

44. Select Explore>Collections and display the list of items for one of the collections. Open a few items and *view the image sizes available for downloading*. Confirm that you are able to download and print a few different image sizes.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

45. Return to the list of items for the collection you selected in task 44. Select another item and try one or more of the *options for sharing* the item. Confirm that you are able to share an item.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Feedback

46. Review the Feedback Help Guide. Confirm that it is clear and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

When you are finished testing, email this document to:

Kathleen Murray [kathleen.murray@unt.edu]

Thanks very much for your help!

Appendix B.   QA Test Script for Round 2

Beta Portal Site: [Removed]

Test Dates: Monday, June 1 - Thursday, June 4

Due Date: No later than Thursday, June 4

Email Results to: Kathleen Murray [kathleen.murray@unt.edu]

How to use this script

- Allow 1-3 hours to complete the tasks and document your results.

- Work through each task in the test script in order and record your results directly on this document.

- Record a result for each task by placing an (x) below the word(s) that best describes your result(s).

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

SUCCESS   Completed task successfully
PROBLEM   Task failed or presented significant problems that need to be fixed
ISSUE   Task might be confusing for some users, but isn't serious enough to be
                 classified as a problem
NOT DONE

- A task may result both in success and problems or issues; please document and explain in comments.

- Include any comments that help explain your results. It's always helpful to know what works well, so that those features aren't changed.

- When reporting problems and issues, please be as specific as possible. Describe the actions you took and include your search criteria, if pertinent. It is very helpful if you paste the URL for the page you are commenting about in your comments. Screenshots are also helpful.

- Feel free to take actions not included in this script: explore any page, make deliberate mistakes, etc. When you make comments, include a brief explanation of what actions you took.

- When you are finished testing, email this document to Kathleen Murray [kathleen.murray@unt.edu].

- If you encounter a serious failure that prevents you from moving forward with testing, report the problem directly to Mark Phillips [mark.phillips@unt.edu].

Record Your Name & Test Environment

Name:	
Operating system:	
Browser name and version:	
Connection (LAN, DSL, dial-up, etc.):	

TASKS

Help

1. Access and review the *Browsers and Settings Help Guides*. Confirm that you found the guides. Was the information clear? Were the examples helpful?

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

2. Access and review the *FAQ* documentation. Are the questions and responses clear and helpful? Were any of them confusing?

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

3. Access and review the *Glossary* documentation. Are the explanations clear and helpful? Could any of them be improved?

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

4. Access and review the *Search Overview Help Guide*. Confirm that you found the guide. Was the information clear? Were the *Tips* helpful?

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

Basic Search

5. Access and review the *Basic Search Help Guide*. Confirm that you found the guide. Was the information clear? Were the examples helpful?

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

6. Execute a Basic Search using any keyword. Confirm that the results match your keyword.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

7. Execute one Basic Search using any keyword and then, in the search box at the top of the search results page, execute a different keyword search. Confirm that the results match your second keyword.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

8. Execute a Basic Search for the *phrase*. Be sure to enclose the phrase in *quotation marks.* Select an item from the search results list and evaluate the hits. Confirm that the results match your search phrase.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

9. Return to the search results page for task 8. In the search box, add a second search *phrase enclosed in quotation* marks after your first phrase. Confirm that the hits match your search phrases.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

10. First, execute a Basic Search for a *phrase enclosed in quotes*. Next, *in the search box on the search results page*, limit the results by entering a *minus sign* (-) in front of a keyword. Re-execute the search and confirm that the results were limited as expected.

    NOTE: The Basic Search Help Guide explains how to limit searches using the minus sign (-).

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

11. From the Basic Search screen, *limit your search to Photos* and execute a search. Confirm that the results include only photographs.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Advanced Search

12. Access and review the *Advanced Search Help Guide*. Confirm that the guide is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

13. Access the *Help Guide* for *Genealogical Materials* and read the search strategies and examples for *name* and *location* searches. Confirm that the guide is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

14. Search for the *name of a person* from the Advanced Search screen. Confirm that your results match the name.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

15. Search for both a *name and location* from the Advanced Search screen. Confirm that your results match the name and location.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

16. Enter *two different phrases* in the Advanced Search screen. Confirm that your results match the phrases.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

17. On the Advanced Search screen, select collections or partners of interest to you and try *various advanced searches*, using phrases, keywords, and dates. Confirm that your results match your search criteria.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Explore

18. Access and review the *Explore Help Guide*. Confirm that the guide is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

19. From Explore>Locations, select any Texas county to find items related to that county. Using any keyword(s), execute a search of all the records in the county you selected. Confirm that your results match your search term(s).

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

20. Investigate the other Explore categories: Subjects, Dates, Types, Partners, and Collections. Explore the links and the content. Report your reactions as well as any problems.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Search Results

21. Execute a Basic Search using any keyword and *limit* the search to *Books*. Select an item from the search results list and then locate the "hits" navigation feature. Confirm that pages with hits displayed.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

22. Using the search results list from task 21, display the list without thumbnails. Confirm that the list displayed as expected.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

23. First, execute a Basic Search, *limited to Photos*, using any keyword. Next, in the search box at the *top of the search results page*, add a second keyword and execute another search. Confirm that your search results were limited to match the second search.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

24. Execute a Basic Search using any keyword. This time, examine a few items in both the *list view* and the *grid view* and confirm that the search terms are highlighted in the item records.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

25. Print your search results from task 24 *with and without thumbnails*. Confirm that the results printed and that you got what you expected.

    NOTE: You can use Print Preview in lieu of printing.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Metadata

26. Access and review the *Learning about Items Help Guide*. Confirm that the guide is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

27. Execute a Basic Search using the any keyword. From the results list, select an item and print its record. Confirm that it is clearly formatted and includes the citation.

    NOTE: You can use Print Preview in lieu of printing.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

28. Using the search results from task 27, display and save a metadata record for an item. Confirm that you were able to complete this task.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Object Navigation

29. Access and review the *two Help Guides for Selecting and Viewing Items*. Confirm that the guides are clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

30. Execute a Basic Search, *limited to Photos* and using any keyword or phrase. *Examine the records* for a few items in the search results. Confirm that you are able to identify date, location, and personal name information *in the item records*.

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

31. Execute a Basic Search *limited to Books* and using any keyword or phrase. Select a few books and navigate to specific pages *using the drop-down list*. Confirm that you were able to use this navigation.

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

32. Using the search results from task 31, select a book and display *all its pages*. Then, select a page to display and browse the book's contents using the *navigational controls on the image* itself. Confirm that you were able to browse the book using the navigation controls on page images.

RESULT	SUCCESS	PROBLEM	ISSUE	NOT DONE

Comments:

33. Execute another Basic Search, *limited to Books,* using any keyword or phrase. Select a few books and *display some pages containing hits*. Confirm that your search term is highlighted on the pages and that you are able to turn highlighting off and on.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

34. Execute a Basic Search *limited to Newspapers* and using any keyword or phrase. View individual pages containing hits using the *zoom navigation* feature. Experiment with the zoom navigational controls and then return to the normal item display. Confirm that you could easily navigate page contents and readily return to the normal item display.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

Obtain

35. Review the *Printing Help Guide* for clarity and usefulness. Confirm that it is clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

36. Select Explore>Collections and display the list of items for one of the collections. Open a few items and *view the image sizes available for downloading*. Confirm that you are able to download and print a few different image sizes.

NOTE: You can use Print Preview in lieu of printing.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

37. Review both the *Emailing* the *Sharing Help Guides* for clarity and usefulness. Confirm that they are clearly written and easy to understand.

	SUCCESS	PROBLEM	ISSUE	NOT DONE
RESULT				

Comments:

When you are finished testing, save this document and email to:

Kathleen Murray [kathleen.murray@unt.edu]

Thanks very much for your help!