



Morae[®]

Remote Participant Testing Tips

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Remote Participant Testing with Morae

Morae, in conjunction with a third-party web conferencing/screen sharing application, is a powerful way to conduct remote usability tests.

The basic concept is to use a third-party application to share a computer screen while recording the shared screen with Morae Recorder. While Morae is recording, observers can connect with Morae Observer to view and log sessions.

This brief document provides the following information:

- ▶ **Who Needs What**
- ▶ **Screen Sharing Application Selection**
- ▶ **Computer Sharing and Control**
- ▶ **Remote Testing Session Planning**
- ▶ **Audio Challenges**
- ▶ **Miscellaneous Tips**

Who Needs What

Here are the things that the people involved with a session will need.

Facilitator

As the person setting up and conducting the session, you will need the following:

- ▶ A quiet room
- ▶ Speakerphone
- ▶ Microphone to record participant audio from the speakerphone
- ▶ Computer running sharing application and Morae Recorder
- ▶ A wired, broadband internet connection is recommended
- ▶ If the participant will take control of the facilitator's computer, all test items also need to be installed
- ▶ Optional:
 - Second computer for running Observer to log session and IM/chat for communicating with stakeholders during the test
 - [Wii™ remote for logging sessions](#)

Participants

The person completing the test will need:

- ▶ A quiet room
- ▶ Speakerphone
- ▶ Computer running sharing application
- ▶ A wired, broadband internet connection is recommended
- ▶ Access to the test, prototypes, websites, browsers, etc.
 - If the participant is running the test on his or her computer, all test items also need to be installed

Observers

Observers need to have a computer running Morae Observer and optionally IM/chat for communicating with the facilitator during the test.

Observers should both view and listen to the session through Morae Observer. They should not be on the phone call between the facilitator and participant. This could result in testing disruptions.

Screen Sharing Application Selection

At TechSmith, we often use GoToMeeting, but there are a number of screen sharing or web conferencing tools available.

When you're shopping around consider some of the following:

- ▶ Play the role of a participant, and have a friend or colleague "test" you before you commit.
- ▶ Do a practice test and take a look at what your participant will see.
- ▶ Purposefully disconnect your Internet connection.
 - How is the recovery?
 - Can you reconnect?
 - What would the participant's experience be like should this happen in a real case?
- ▶ How complex is the conferencing software for a participant?
 - Check out the supporting help and don't assume the experience will be the same on all Web browsers.
 - Consider Mac and PC users, if applicable.
 - If you're working with Mac users, you may consider just using iChat (which has benefits of already being installed and allows for also seeing the participant's face).
 - Skype might be familiar to some participants, works on Windows and Macintosh and supports Picture-in-Picture as well as screen sharing.
- ▶ Some people might perceive the download as a security threat, too complex, or just don't want extra software on their computer.
 - What is the conferencing download and install experience like?
 - What messaging does the conference software provide?
- ▶ If you rarely perform remote tests, or if you expect that others might be helping occasionally, consider the ease of use from your perspective. Try to choose an application that you do not have to re-learn each time you conduct a test.

Computer Sharing and Control

Does the participant use his or her computer or take control of yours? In both cases, Morae features can still be leveraged.

In designing a remote test, the choice of which computer to share is a key consideration.

Benefits of Participant Operating Own Computer

- ▶ Asking participants to share their computer allows you to gather data about their environment, and allows them to have a more natural experience – one that they would be most accustomed to using, possibly allowing them to perform more normally and less stressfully.
- ▶ There will be less lag for the participant when connectivity is an issue.
This is especially important if you're testing something where the interaction requires immediate feedback to the participant, or if you are measuring time-based metrics and the accuracy of these measurements is important.
- ▶ The participant will be more comfortable with his or her own computer, and performance will be less influenced by using a strange computer.
- ▶ You can observe the participant in his or her own working context.

Benefits of Participant Controlling Your Computer

- ▶ Sharing your computer allows you to control the test environment and ensures that all participants have a consistent experience.
If they will connect to your machine, what do you need to do to make the experience more like their own or more appropriate for the test? What software besides your own will they need? Do they need certain browsers? How will you make those available?
- ▶ Morae Recorder can utilize its Rich Recording Technology to capture keyboard entry, screen text, web page changes, mouse clicks, and system events.
- ▶ You can test a confidential prototype or unreleased product or website.
- ▶ Participants can take surveys from right within Morae.
- ▶ You can choose to use AutoPilot so participants can read tasks on screen. This also automatically logs task start and stop times and ensures everyone has an identical experience.
- ▶ With all the test items on your computer, you can more easily help people work their way through technical problems with the prototype or pre-release software.
- ▶ Confidential prototypes and pre-release versions of your product are kept on the computer running Recorder and within your organization.

Remote Testing Session Planning

Clear instructions are always important, but we've learned to include all critical information for the session in a single, brief email. We recommend that you send the message through your own email, rather than the conference messaging software, this way the participant can easily contact you with questions.

We suggest that you include the following in the session email:

- ▶ A link to the 3rd party web conferencing tool, code (if applicable), and phone call-in number.
- ▶ A request to have a speakerphone or headset available if possible.
- ▶ The scheduled time in all appropriate time zones.
- ▶ A request that they connect through a wired broadband connection, avoiding wireless if possible.
- ▶ A request that they try connecting to the screen sharing prior to the session.
- ▶ Your phone number as well as ask them to reply with a phone number where they can be reached at the testing time.

Wait until the session to provide the participants with information about the session tasks. Participants may attempt to “bone up” on a test if they are given materials in advance, or they are told what they will be testing. For that reason, consider what you give to participants carefully. If you need to email a test booklet or other hard copy, we suggest that you emphasize they shouldn't read it before the test.

Session Checklist

Before test day

- ▶ Schedule the session using your preferred screen sharing solution.
- ▶ Email participants with information and encourage them to try a test connection before the scheduled time.
- ▶ Conduct a test session with a colleague to make sure everything gets recorded correctly and you are familiar with the process.
 - Record the test with Morae Recorder and connect Morae Observer to make sure everything works.
 - Review the recording to make sure the audio quality is acceptable.
 - Make sure to test the audio levels and placement of the microphone near the speaker phone so you get a good balance of audio level between you talking and the audio coming through the speaker. You don't want the speaker to be so loud that your voice can't be heard when you talk.

On test day

- ▶ Connect to the session through your screen sharing application at least 15 minutes before the session starts.
- ▶ Open Morae Recorder and select your study configuration.
- ▶ Recreate the positions of the audio device from your test session.
 - Place your microphone near your speaker phone.
 - Test the levels and make sure they are registering in Recorder.
- ▶ Start recording with Recorder right before you call the participant.
- ▶ Call the participant and help them get connected if necessary.
- ▶ Send the participant any test related materials they will need to complete the test.

Audio Challenges

Good audio quality is one of the biggest challenges in remote testing.

The bottom line is without audio, the session is virtually useless. With bad audio (hard to hear or tolerate e.g. feedback loops or static) the observers and stakeholders likely won't watch the sessions.



Have stakeholders both view and listen to the session with Morae Observer. They should not connect to the phone call between the facilitator and participant. This can save the participant from disruptions during the session.

After trying many VOIP (voice over IP) solutions, we find that our favorite is really low-tech: a speakerphone. This is often our preferred solution for the following reasons:


- ▶ Most participants are more familiar with using a phone than VOIP.
- ▶ Participant microphone quality varies, and there are often technical issues. It's time consuming to troubleshoot as testing is underway.
- ▶ We often call the participant to get the session started. It's convenient just to stay on the line and not try switching to VOIP.
- ▶ While the bandwidth for VOIP is trivial, we think every KB helps.
- ▶ It is more likely to experience audio lag, drops, and jitter with VOIP.
- ▶ Dealing with audio over the phone line is one less technical variable in the equation.
- ▶ One benefit of VOIP is hands-free communication; however, when we contact participants we ask that they use a headset or speakerphone.

Tips for better audio with a speakerphone:

- ▶ If you hear feedback loops from the participant's speakers, ask them to wear headphones, if available, or turn down the speaker volume.
- ▶ Remember that Morae Recorder is running on **your** computer. To make sure that Recorder can pick up the speakerphone audio, put the speakerphone close to your computer's microphone—and TEST it! Before the session starts, call yourself if you have to, but make sure it's picking it up.
- ▶ You're not going to get sound-booth quality audio, but we're not trying to record a Grammy winning album here. We want to be confident the sound will be intelligible, loud enough, and bearable to listen to.

Miscellaneous Tips

- ▶ If file size of the recording is a concern, you can set Morae Recorder to remove desktop wallpaper during recording. In the *Video and Audio Sources* pane of the Recorder interface and click the **Settings** button to find this option.

 This option will only work when running the test on your computer. If running the test on the remote participant's computer, have them change the computer desktop to a solid color.

- ▶ Disable any screen-savers.
- ▶ If possible, the facilitator should use two computers: one to record the session, and one to run Morae Observer. This way you can log during the session.
 - When connecting Observer to the session, choose **Good streaming quality** and enable the **Mute audio for realtime video** checkbox.
These options allow you to use the phone to hear and speak to the participant and for the streaming video in Observer to be as close to realtime as possible.
 - It's also handy to have a second computer in case you want to chat with the development team or need to IM someone for an answer to a question.
- ▶ If you don't have two computers, you can use a [Wii™ remote to help log](#). Just one push of a button will insert a marker on your timeline, so even if you are conducting research as a one-person team, you won't miss a thing.
- ▶ Stakeholders watching the test should use Morae Observer and should not use the third-party web conferencing software. They can add notes and markers in Observer without disrupting the test in any way.
- ▶ Morae's variable playback speed is one of the best features for analyzing and reviewing sessions. Special technology allows you to view recordings at quadruple speed playback without high levels of audio distortion. Depending on the situation, you can log in Manager at about 1.8-2.2 normal speed.
- ▶ Speedily sharing recordings with the development team is often very important. One of the fastest ways is to upload clips or highlight videos straight from [Morae to Screencast.com](#). TechSmith offers a free Screencast.com account and your content can be private and password protected.