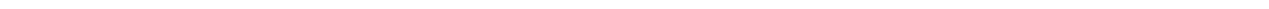


# **UserVue Participant Online Help**

**Version 1.2**



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# Participant Help File

This section provides participant specific help. Continue with the following topics:

- **Participant System Requirements**
- **How a Session Works**
- **Joining a Session**
- **Participant Application**
- **Communicating with the Session Facilitator**
- **Participant Troubleshooting**

## About UserVue

UserVue is a Web-based service that allows you to remotely connect to, interact with, and observe users as they navigate an application or Web site. It is secure, easy-to-use, and works through firewalls. Connecting to a UserVue session is painless for participants because there is nothing for them to install or configure.

UserVue simplifies collecting user experience information so anyone can use it to identify design problems and make critical improvements. Whether you are doing remote user testing, validating a design, or gathering qualitative feedback, UserVue gives you accurate user feedback, rapidly and repeatedly.

UserVue allows you to:

- **Focus on the user's experience**  
Unlike Web conferencing tools that share the moderator's screen, UserVue shares the user's screen, providing a truly accurate view of the user experience.
- **View and share results immediately**  
UserVue automatically creates a Windows Media Video (.wmv) file of the recording which can be viewed and shared immediately following a session.
- **Invite stakeholders to observe**  
Multiple stakeholders can view a UserVue session live and collaborate using chat without disturbing the user.
- **Seamlessly import recordings into Morae**  
Import recordings into Morae Manager version 1.3 for easy analysis and sharing, creating a complete solution for user experience research.

## What is a session?

A session is the remote test run by the facilitator on UserVue. During a session, the facilitator asks you (the participant) to perform some actions on your computer. The purpose of a session will vary with each facilitator. Some examples include: usability studies, design validations, gathering qualitative feedback, etc.

The session may be observed by others. The session is recorded and can later be viewed for analysis by the facilitator.

### **Who is involved in a session?**

**Facilitator**—the individual who conducts the session. The facilitator is responsible for starting the session, running the session, communicating with you (the participant), and ending the session. The facilitator is the individual who is interested in receiving feedback through remote testing.

**Observers**—other individuals that invited by the facilitator to view the session. During a session, your screen is shared with the facilitator and observers.

**Participant**—This is your role during a session. The participant is the person recruited by the facilitator to participate in a session. The participant is asked to complete actions on their computer to test the design, usability, or another aspect of a product, application, Web site, etc. for the facilitator.

The facilitator can communicate with the participant in the Participant Chat window in the application and/or on the telephone. The participant's screen and audio may be recorded by the facilitator. The participant may quit a session at any time.

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## Participant System Requirements

- **Operating System:** Microsoft Windows 2000 and Windows XP or later version of Windows.
- **Web Browser:** Internet Explorer 5.0 or later, Firefox 1.0 or later.
- Enabling Javascript is recommended.



UserVue does not support dial-up connections.

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## How a Session Works

The following describes how a session works for a participant.

### 1. Receive an invitation e-mail or code.

The session facilitator sends you an invitation e-mail or an invitation code. This invitation e-mail includes a hyperlink. Click the session link in the invitation e-mail to open the *Service Agreement* page.

### 2. Accept the UserVue Service Agreement.

Before accepting the UserVue Service Agreement, be sure to close any personal information that you may have open on your computer. You must accept the UserVue Service Agreement to download the application and begin the session.

### 3. Facilitator calls over the phone/chats

The facilitator contacts you either on the telephone or through the chat in UserVue application.

### 4. Facilitator starts the session

The session begins once the facilitator starts the session and you accept the recording dialog message. Your screen and conversation is recorded at this time.

### 5. Facilitator conducts the session

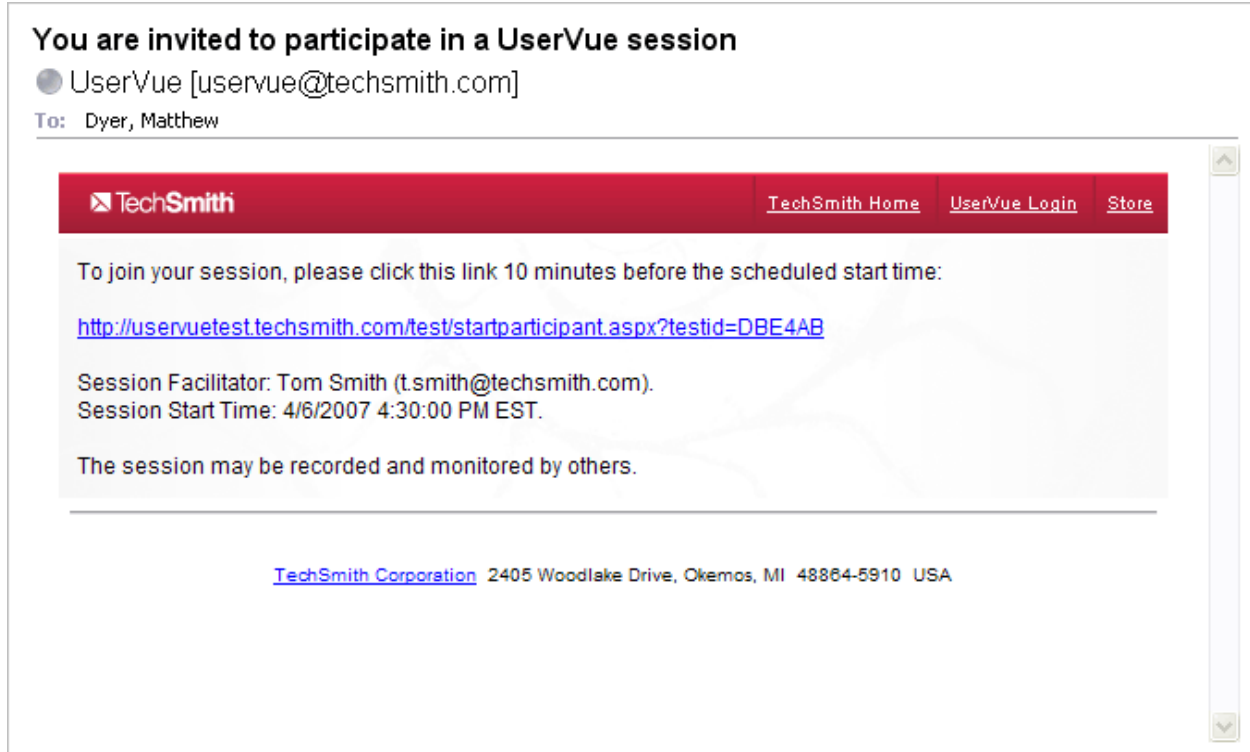
The facilitator asks you to perform actions on your computer. The session may be viewed by other observers.

### 6. Session ends

The session ends when you choose to end the session or the facilitator ends the session. You may choose to end a session at any time by clicking the **Quit** button on the Participant application toolbar. The UserVue application is automatically removed from your computer.

## Joining a Session

The first step is to join a UserVue session. To do this, click the Session link in the invitation e-mail or enter your invitation code. The *Service Agreement* page opens.



or

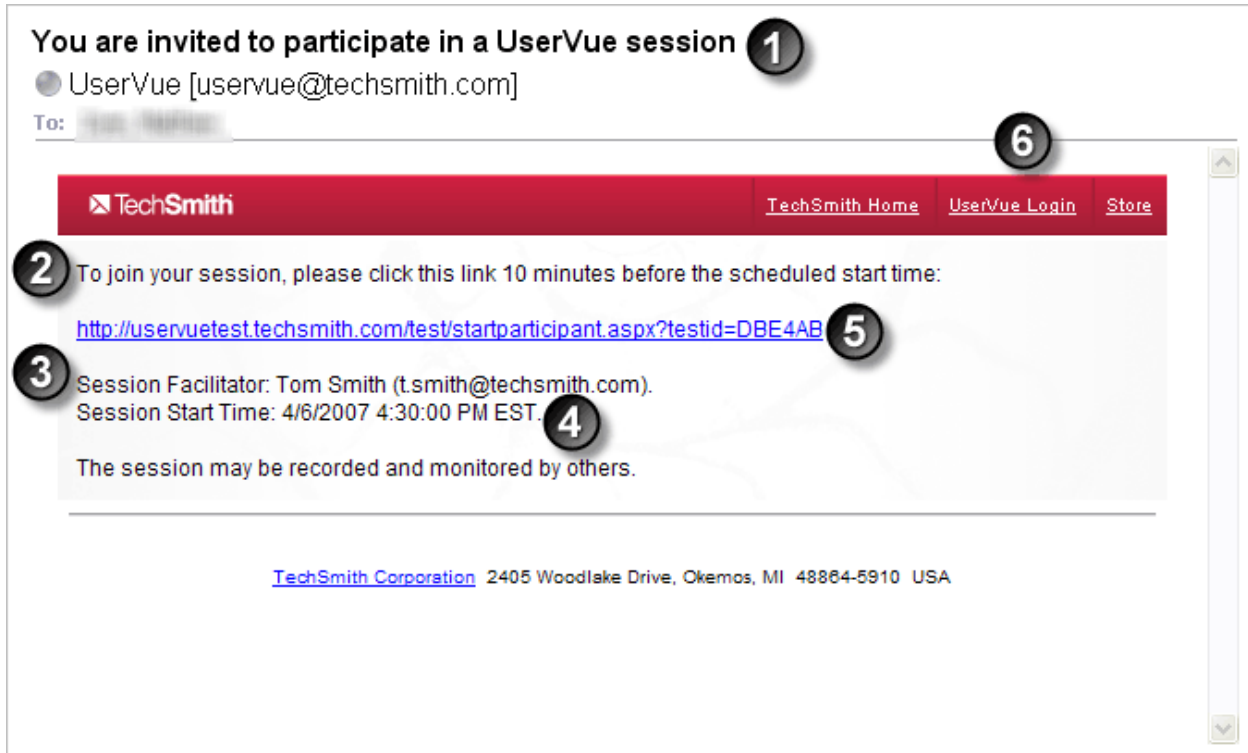
The screenshot shows a web form titled "Joining a session?" with a help icon. The form prompts the user to "Enter your invitation code:" and features a text input field. Below the input field is a "Join Session" button.

See Also:

- **Invitation Email**
- **Entering Invitation Codes**
- **Downloading the Participant Application**

## Invitation Email

The facilitator sends an invitation e-mail to you to participate in a session. The invitation gives important information about the session. The following table describes the information given in the invitation e-mail.

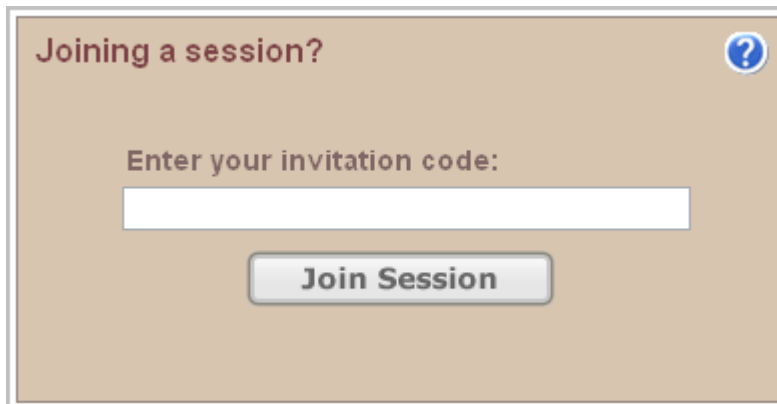


	Name	Description
1	Subject	Invitation e-mail subject. The default subject text is shown in the image above.
2	Facilitator Instructions	Information provided by the facilitator about a session. The default Facilitator Instructions are shown above.
3	Session Facilitator	Displays facilitator's contact information including: the session facilitator's name and e-mail address.
4	Session Start Time	The scheduled session start time.
5	Session Link	Link to connect to the UserVue web page and download the Participant application.
6	UserVue Links	Links to pages on the UserVue web site.

To learn how to begin a session, see **Testing your Session Connection**.

## Entering Invitation Codes

Invitation codes allow easy connection to UserVue sessions for both participants and observers. After obtaining a invitation code from the facilitator, go to the UserVue home page (<https://www.uservue.techsmith.com>) and enter your code in the “Joining a session?” box.

A screenshot of a web dialog box titled "Joining a session?". The dialog has a light brown background and a thin grey border. In the top right corner, there is a blue circular icon with a white question mark. Below the title, the text "Enter your invitation code:" is displayed in a dark grey font. Underneath this text is a white rectangular input field. At the bottom center of the dialog is a grey button with rounded corners and the text "Join Session" in a bold, dark grey font.

### See Also:

- **Joining a Session**

## Testing your Session Connection

It is recommended that you test your ability to connect to the session prior to the scheduled start time.

### To test your connection

1. Click the **Session Link** in the invitation e-mail or copy the **Session Link** into a Web browser. See Error! Reference source not found..
2. Accept the UserVue Service Agreement. See Error! Reference source not found..
3. Download the Participant application. See Error! Reference source not found..

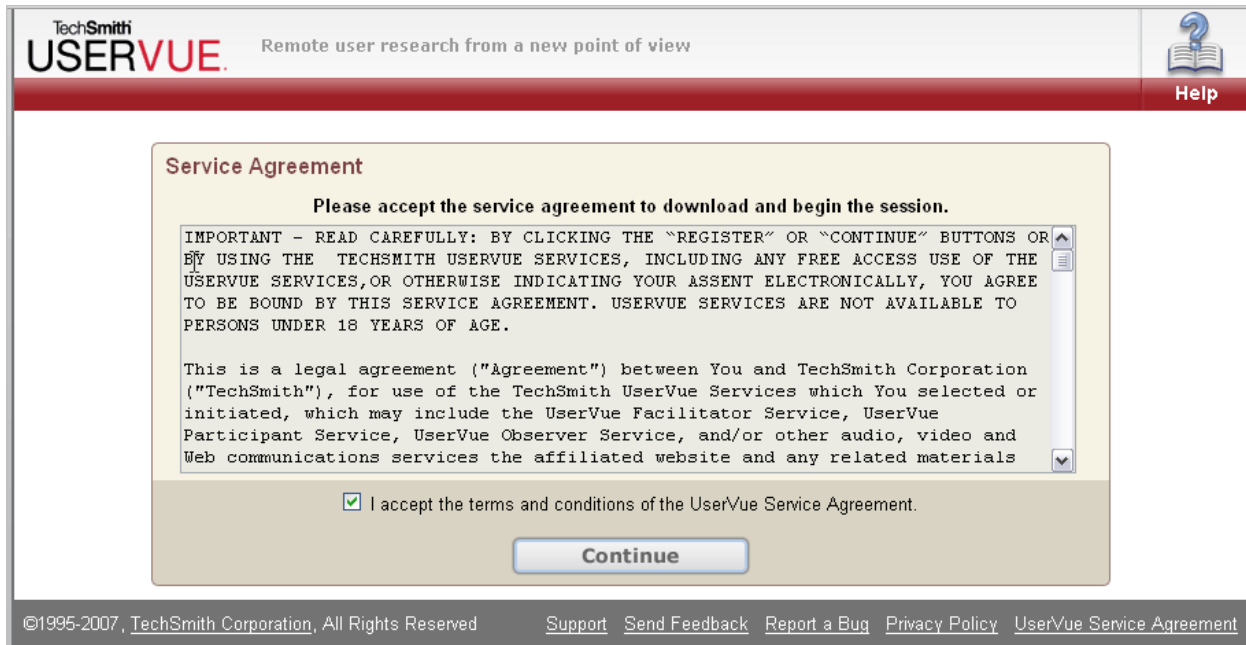
If your connection is successful, the following application and dialog message appears:

#### See Also:

- **Invitation E-mail**
- **Accepting the UserVue Service Agreement**
- **Downloading UserVue**

## Accepting the License Agreement

After clicking the Session link in the invitation e-mail, the UserVue *Service Agreement* opens. You must accept the UserVue Service Agreement in order to join a session.



### To accept the UserVue Service Agreement

1. Click the **I accept the terms and conditions of the UserVue Service Agreement** checkbox.
2. Click the **Continue** button.
3. The UserVue *Download* page opens.

The next step is to download the UserVue Participant application.

#### See Also:

- **How a Session Works**

## Downloading the Participant Application

To join a session, you need to accept the UserVue Service Agreement and download the Participant application.

The UserVue components are permanently removed from your computer when the session is completed. See **Ending a Session**.

### To download the Participant application

1. Click the Download button to download UserVue.
2. From the dialog box that appears, do one of the following:
  - a. To start the download immediately, click Open or Run.
  - b. To save the download to your computer for a later time, click Save.
  - c. To cancel the download, click Cancel.
3. The UserVue Download status dialog box appears.

The UserVue Participant application should download successfully.

If a problem occurs when trying to join a session, contact the session facilitator. To learn where to locate the facilitator contact information, see **Contacting the Facilitator**.

#### See Also:

- **How a Session Works**
- **Testing your Session Connection**
- **Join a Session**
- **Accepting the UserVue Service Agreement**

## Participant Application

After downloading the Participant application (see **Downloading the Participant Application**), the Participant application toolbar appears at the top of the participant's screen.



The following table describes the elements in the Participant application toolbar.

Item	Name	Description
1	Show Chat	Opens the chat window. The Participant Chat is enabled when the participant and facilitator are both connected to UserVue.
2	Hide Chat	Hides the chat window.
3	Chat window	Displays the chat between the participant and the facilitator.
4	Session status message	Displays the session and recording status. The status informs the participant when their screen is being shared and recorded.
5	Send	Sends a text message to the facilitator.
(Not shown)	Web site for session	Opens the Web site set up by the facilitator for the session in the participant's default Web browser.
7	Help	Opens the Participant help file.
8	Quit	The participant may quit a session at anytime by clicking this button. For more information, see <b>Ending a Session</b> .

## Status Messages in the Participant Application

The Participant application provides messaging that informs the participant of the recording, session, and connection status for a session.

The following table gives a description of the status messages that appear within the Participant application.

Status Message	Description
Connected to UserVue	You are connected to UserVue.
Not sharing your screen	Your screen is not being shared with the facilitator or observer(s). You should close any personal information that you may have open on your screen at this time.
Facilitator connected	The facilitator is connected to UserVue.
Session started	The facilitator started the session.
Your screen is being shared	Your screen is being shared and recorded by the facilitator.

## Sharing and Recording your Screen

The session may be recorded by the facilitator. The facilitator controls when the session is started. You will receive the following dialog message after the facilitator starts the session:

“You are about to let your screen be shared and possibly recorded. Are you sure that’s ok?”

- Click **Yes** to agree to share your screen and have the session recorded.
- Click **No** to refuse to share your screen with the facilitator.



Close any personal information or other screens prior to the beginning of a session that you do not want recorded.

The session can not begin until you click the **Yes** button on the dialog message to allow your screen to be recorded.

### Recording Status Messages

The following table describes the recording status messages displayed in the Participant application window.

Status Message	Description
Not sharing your screen	Your screen is not being recorded by the facilitator. Your screen may only be recorded once you have accepted the UserVue Service Agreement and clicked the <b>Yes</b> button on the dialog message to allow your screen to be recorded.
Your screen is being shared	Your screen is now being recorded and captured by the facilitator.

To get a description of the other messages displayed in the Participant application, see **Status Messages in the Participant Application**.

## Communicating with the Session Facilitator

There are two ways for the facilitator to communicate with you (the participant) during a session:

- By calling you using the UserVue calling service.
- In the Participant Chat Window.

**See Also:**

- **Contacting the Session Facilitator**
- **Chat in the Participant Application**

## **Contacting the Session Facilitator**

If a problem occurs when trying to join a session or if you experience issues during a session, please contact the session facilitator for assistance. You can find the facilitator's contact information in the invitation email.

## Chat in the Participant Application

UserVue allows for the facilitator and you to communicate before and during a session in the Participant Chat window. The Chat window allows for you as the participant to ask questions, lets the facilitator guide you through the session, and provides a way for the facilitator to provide you with session instructions.

The **Send** button in the Participant Chat window is enabled when the facilitator connects to UserVue. If the facilitator invited any observers to view a session, they are also able to see the Chat conversation between the facilitator and you.

The Participant Chat window is view-only for observers. The observer(s) cannot chat with the participant. However, the observers can view the conversation between the facilitator and the participant in the Participant Chat window in the Observer Application.

The Participant application toolbar automatically opens the chat window whenever the facilitator sends you a chat message.

### ***Sending a Chat Message***

1. Click the **Show Chat** button in the Participant application toolbar to open the chat window.
2. Type your message and click **Send** to send your message to the Facilitator.

### ***Participant Chat Status Messages***

#### ***Chat Text Colors in the Participant Application***

<b>Role</b>	<b>Chat Color</b>
Facilitator	Blue
Participant	Red

### ***Chat Options***

#### **Copy and Paste Chat text**

UserVue allows the copy <CTRL + C> and paste <CTRL + V> function in the Chat windows in the Participant application. This includes:

- Copying text from the text entry area or the Chat window and pasting it into another area.
- Copying text from other sources and pasting the text into the text entry area of a chat window.

#### **Resizing and moving the Chat window**

The Participant Chat window in UserVue can be resized but not moved on the screen.

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## Ending a Session

### Quitting a Session

You may choose to quit a session at any time. To quit a session, click the **Quit** button in the upper-right corner of the Participant application toolbar.

The following message dialog displays: *Closing this application will end the current session. Do you want to continue?*

- Click **Yes** to end the session and permanently remove the UserVue components from your computer.
- Click **No** to return to the session.

When you quit a session, the UserVue components are automatically removed from your computer. The facilitator receives a dialog message informing them that you have quit the session.

### Facilitator Ends the Session

If the facilitator ends the session, the following dialog messages appear:

- Thank you. The session is now over.  
Click **OK**.
- The UserVue Participant will now be removed from your computer.  
Click **OK**.

# Participant Troubleshooting

## Session Already in Progress

**I received the following message, “The session is already in progress.”**

This message is displayed if:

- Another participant is already connected and the session is in progress.
- The session has already been completed.

If you receive this message, please contact the facilitator. The facilitator needs to resend the invitation to the session or set up a new session.

## Cannot Connect

**I am unable to connect to UserVue.**

If you are unable to connect to the UserVue application, please contact the session facilitator for assistance.

## Reconnection

**Can I reconnect to a session after closing the application?**

The *facilitator*, *participant*, and *observer(s)* may all reconnect to a session as many times as desired until the facilitator clicks the **Start Session** button to begin the session.

The *facilitator* cannot restart a session. If a problem occurs during a session and the session ends unexpectedly, the facilitator must create a new session and resend the invitations to start a new session.

Only one *participant* can be connected to UserVue at a time. For more information on participant connection issues, see **Session Already in Progress** above.

## Telephone Calls and Reconnection

**Do I need to hang up the phone when starting a new session after a disconnection?**

No, UserVue is able to use the same phone call for audio on two different sessions. Stay on the phone with the facilitator for instructions (such as a new invitation code).