

# Using WebEx for Usability Testing: Considerations for Establishment Surveys

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# Outline

- Background
- The Problem
- WebEx
- How does WebEx compare to in-person interviews?
- Lessons learned
- Future research

# Background

- Testing for the Quarterly Summary of State and Local Government Tax Revenue (Q-Tax)
  - Usability testing
  - Goal: 6 interviews
  - State and local government respondents
  - ~45 minutes

# The Problem

- Limited resources
  - Time
  - Money
- Inability to travel
- Exhausted the target population in local area

# Our solution: WebEx

- Allows for remote testing (no need to travel)
- Available to U.S. Census Bureau staff
- Not too difficult to use
- Previously used for usability testing (Stettler, 2013)
- Ability to view respondent's screen

# Overview of WebEx

- Developed as a web conferencing tool
- Participants “attend” the meeting online
- Participants can view the names of all parties in attendance
- The meeting host can record the session at any time

# The Q-Tax project

- Recruited respondents
- Confirmation via e-mail sent
- Consent form emailed to respondent
- Instructions to log-in to the WebEx session

# Before beginning testing

- Introductions and explanation of the meeting
- Remind respondent to close any browser windows
- Begin recording
- Have respondent share their screen
- Send usability testing link
- Share User ID and PW verbally



# Sample screens

Welcome to Net Conferencing from Census - Windows Internet Explorer

https://census.webex.com/mw0306ld/mywebex/default.do?service=1&siteurl=census&nomenu=true

File Edit View Favorites Tools Help

Welcome to Net Conferencing from Census

**United States<sup>™</sup> Census Bureau**

U.S. Department of Commerce  
Economics and Statistics Administration  
U.S. CENSUS BUREAU

- Web-based meeting service and conferencing tool.
- The usage of sensitive data such as PII, Title 13, and Title 26 during WebEx sessions is prohibited.
- Capacity up to 200 attendees per meeting.

**Meeting Information: Infor on Login**

English : [New York Time](#)

Meeting status: ● Started

Starting date:

Starting time:

Duration: 1 hour

Host's name:

[More Info](#)

● **It's time to join!**

If you are the host, [start your meeting](#).

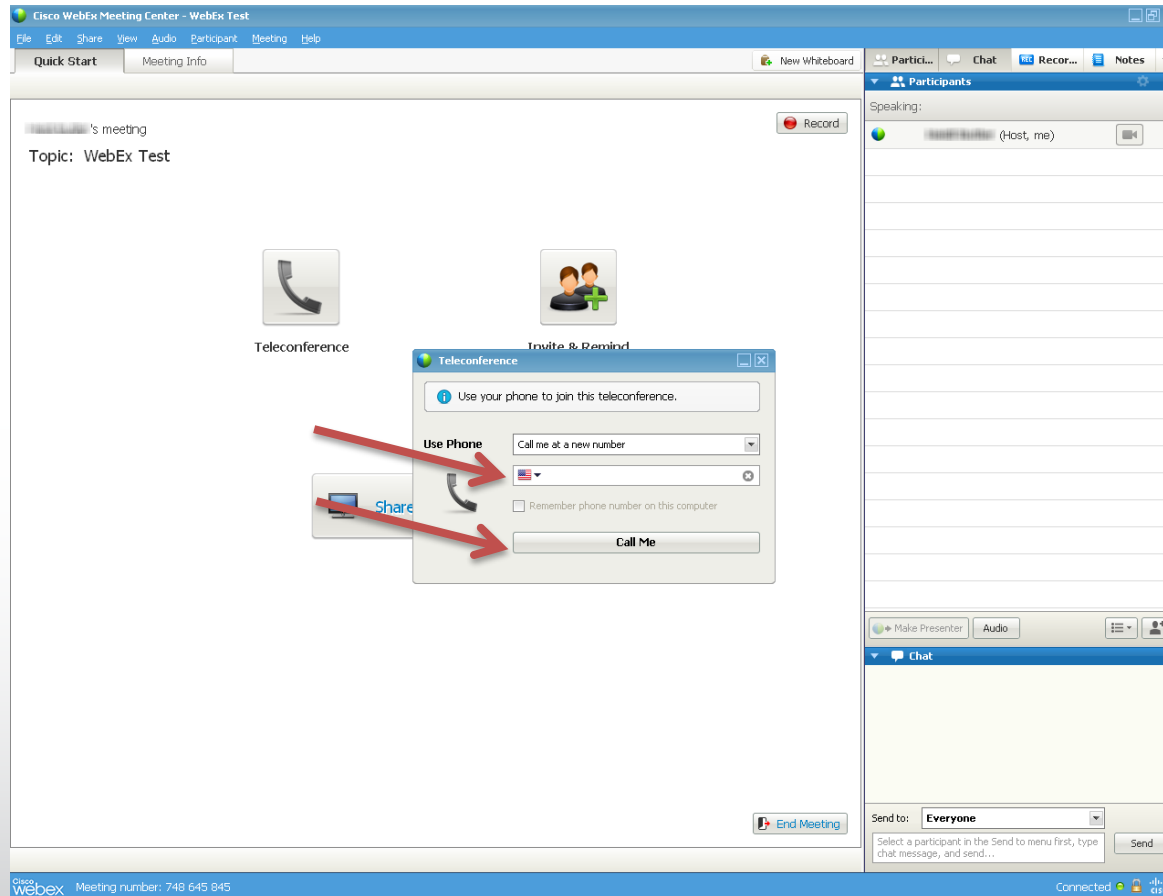
Your name:

Email address:

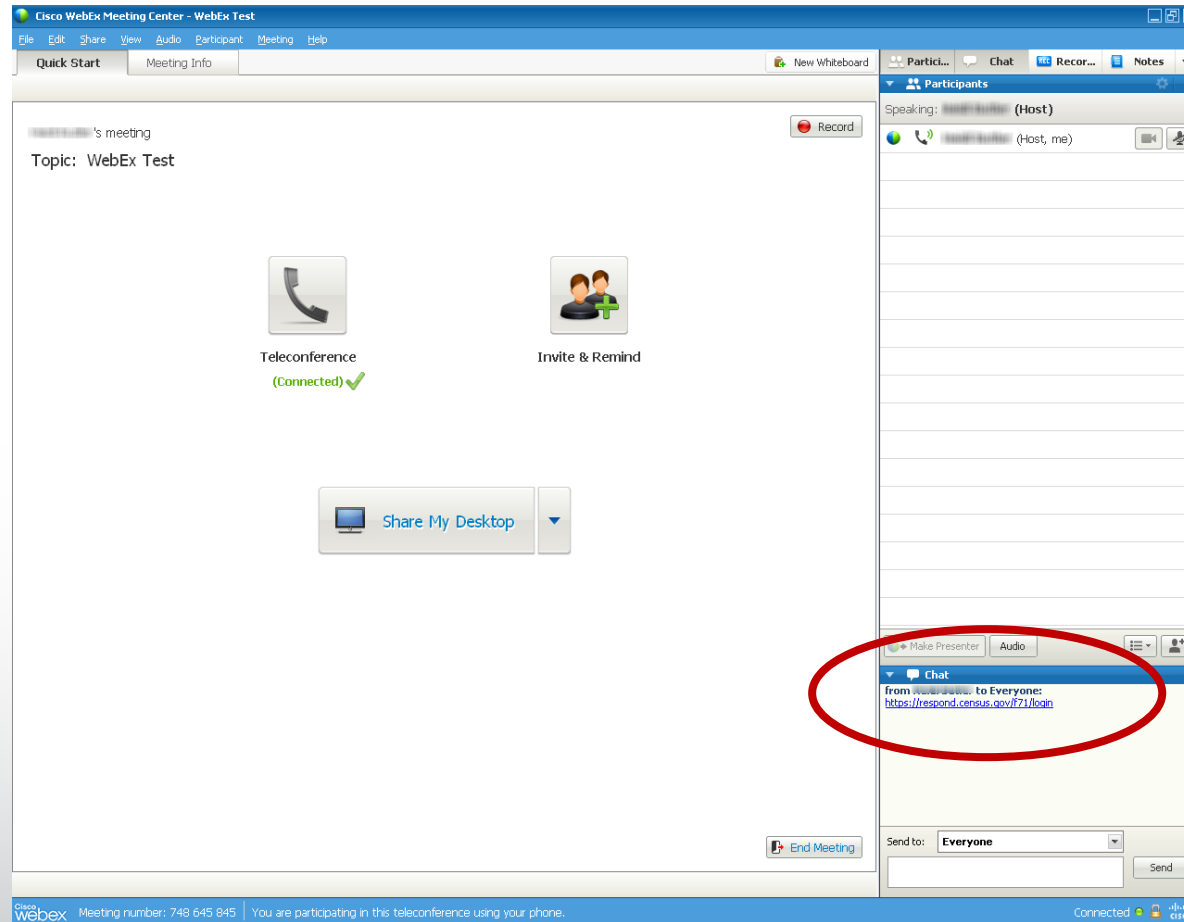
[\(Clear my information\)](#)

Before you join the meeting, please [click here](#) to make sure that you have the appropriate players to view UCF

# Sample screens



# Sample screens



# Sample screens

The screenshot shows a Mozilla Firefox browser window displaying the login page for the Quarterly Survey of Property Tax Collections. The browser's address bar shows the URL <https://respond.census.gov/71/login>. The page header includes the U.S. Department of Commerce logo, the title "Quarterly Survey of Property Tax Collections", and the "SURVEY of GOVERNMENTS" logo. A notice at the top right states "OMB No. 0607-0112 Approval Expires: 08/31/2018". Below the header, contact information is provided: Website: [Survey of Governments - Tax Collections](#), Email: [govs\\_atax@census.gov](mailto:govs_atax@census.gov), and Telephone: 1-866-492-0140 weekdays, 7AM to 5PM ET. The main content area is titled "Welcome to the Quarterly Survey of Property Tax Collections" and contains a list of bullet points: "The due date is **January 31, 2014**." and "This is the web collection system that enables public entities to respond to the U.S. Census Bureau's Quarterly Survey of Property Tax Collections via the Internet." Below this is a "Login" section with instructions: "To log in, please enter the User ID and Password indicated on the form and press the 'Login' button.", "User ID and Password are case sensitive.", and "If you forgot your User ID and/or Password, contact us at 1-800-832-2839 weekdays, 7AM to 5PM ET." A "Please note" section states: "You will be logged out of the system after 45 minutes of inactivity. No data will be lost." The login form consists of two input fields: "User ID:" and "Password:", both with masked characters. A "Login" button is positioned below the fields. To the right of the form is a pink callout box with the text: "REPORT ONLINE: It's fast and secure. Respond to this survey via the Internet at the following Web address using the supplied User ID and Password: [respond.census.gov/71](https://respond.census.gov/71)". At the bottom of the page, there is a "WARNING" section with a disclaimer: "You have accessed a UNITED STATES GOVERNMENT computer. Use of this computer without authorization or for purposes for which authorization has not been extended is a violation of Federal law and can be punished with fines or imprisonment (PUBLIC LAW 99-474). System usage may be monitored, recorded, and subject to audit. Use of this system indicates consent to monitoring and recording." The footer contains four links: "Burden Statement", "Accessibility", "Privacy", and "Security".

# How does WebEx compare to in-person usability interviews?

# WebEx vs. in-person interviews

## Overall

- See how respondents interact with the web instrument
- Provided information on the layout and navigation
- Identified “show stoppers”
- Identified issues for future data collection efforts

# WebEx vs. in-person interviews

## Interacting with respondents

- Phone and email contact
- Confirmation email and consent form
- Additional email with link and instructions

# WebEx vs. in-person interviews

## Issues with recruiting

- For usability testing in general
  - Availability of respondents
  - Time of the year
  - Willingness
  - Time commitment (45 minutes)
- For usability testing with WebEx
  - More concern about researcher being an actual US Census Bureau employee
  - Concern about being “observed” from a remote location



# WebEx vs. in-person interviews

## Technical issues

- Web browser compatibility
- IT security
- Direct line needed for conferencing
- Lack of respondent familiarity with WebEx
- Not intended for tablet or mobile devices

# Lessons learned

- Advantages of using WebEx
  - Saves time and travel costs
  - A better view of the respondent's screen
  - Records audio and video of respondent's screen
  - Could recruit replacement cases faster
  - Respondents liked it

# Lessons learned - continued

- Disadvantages of using WebEx
  - Technical issues
  - Recruitment of additional cases
  - Lack of nonverbal cues
  - Missing other details
  - More work for respondent
  - Steep learning curve for the interviewer
  - Recording files are larger
  - May be more difficult for testing paper materials

# Future research

- Expand WebEx with business and household surveys
- Consider behavior coding of recorded sessions
- Explore other remote testing options

# Thanks!

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