Guidelines for Observers

Thank you for your interest in the PE2E user sessions. These guidelines have been developed to optimize the experience for both participants and observers; please contact the UX team if you have any questions.

All the sessions that we conduct over the course of a week (typically hour-long in-person and/or remote sessions that we run concurrently on Tuesdays and Wednesdays) are about the same topics and use the same set of questions. We try to ask a mix of general questions about an examiner’s background and individual search methods, and specific questions about user interface design ideas and features.

# General guidelines

## Confidentiality

Anything participants say or do during these sessions will be held in confidence. We are relying on you as an observer to maintain this confidentiality and not share any information about a participant’s comments, questions, or performance during the sessions with that person’s manager or peers, or with that person him/herself.

## Respect

At all times, we must treat participants with respect.

* **Be quiet.** Keep noise levels to a minimum to avoid disrupting the session. If you are observing via WebEx and need to mute your phone, please be careful NOT to use the “hold” feature of your phone system; this may subject everyone on the call to hold music or other recorded announcements.
* **Do not discuss participants’ personal attributes.** It is inappropriate to discuss participants in any way that is not directly related to the work we are carrying out.
* **Do not include participant names** in any notes you make.
* **The facilitator is in charge of the session.** At any stage the facilitator may request that any observer(s) leave the session. If this happens, please comply immediately and without discussion.

# During the Sessions

* **Take notes.** Please make notes about anything interesting you notice, particularly points where the user was confused or couldn’t get the tasks done. We won’t quote these notes directly but they’ll be used to flesh out the facilitators’ documentation of the sessions.
* **Make a list at the end of each session.** After each session, use the attached sheet to jot down the three most significant things you noticed in that session.

**Notes and “Top 3” observations should be emailed to the facilitator [insert email address here] at the end of each session.**

* **If you think of a question you’d like to ask the participant, write it down**. Near the end of each session, we’ll check to see if you have any questions.
* **Try to avoid distracting others.** Following a test can require concentration. Try to limit your conversation to what you’re observing. If you need to have another kind of discussion or answer a phone call, please step outside the room. Think of it as a movie theater: don’t talk loud enough or long enough that the people around you can’t follow the plot.

Thanks for your help!

# Top three observations

List the three most significant things you observed about system features or user tasks during the session. These can be features that work well or need improvement, new ideas for features, or anything you feel is significant.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_