

Heuristics Review

Reviews often include:

- Heuristics Analysis – focuses on established design standards, guidelines, and best practices
- Style Compliance Review – focuses on design consistency
- Verification and Validation Review – focuses on whether the interface works as intended

Factors: Set 1

User Experience

1. Visitor Control and Freedom
 - a. Forward paths / navigation options are available
 - b. Backward paths / navigation options are available
 - c. Lateral paths / navigation options are available
 - d. Presents “emergency exit” for unintended actions
 - e. Offers ability to undo and/or redo
 - f. Offers ability to set or modify choices or configurations on the same page
2. Correspondence with Visitor Experience
 - a. Meets visitor expectations
 - b. Consistent with visitor experience online
 - c. Consistent with visitor experience offline
 - d. Uses language, voice, and tone familiar and appropriate to visitor
 - e. Information is organized in a logical and natural order
 - f. Organization of information reflects visitor expectations not corporate structure
3. Minimize Cognitive Load
 - a. Forward paths / navigation options are findable / visible
 - b. Backward paths / navigation options are findable / visible
 - c. Lateral paths / navigation options are findable / visible
 - d. Instructions are findable / visible
 - e. Presents necessary information without relying on visitor memory
 - f. Carries necessary information forward through successive steps
4. Flexibility and Efficiency
 - a. Shortcut keys / accelerators are available for advanced visitors
 - b. Advanced options and/or functions are available for advanced visitors
 - c. Site and/or pages may be personalized with visitor settings and preferences
 - d. Extended / advanced information is concealed but available
 - e. Concealed information is findable and displayed upon demand

Design (Visual, Information, Interaction)

5. Consistency and Standards
 - a. Visual design is consistent throughout site
 - b. Brand presentation is consistent throughout site
 - c. Brand presentation is consistent with offline channels
 - d. Information design is consistent throughout site
 - e. Interaction design is consistent throughout site
 - f. Language, voice, and tone is consistent throughout site
 - g. Language, voice, and tone is consistent with offline channels
 - h. Page layout / grid layout is consistent across page types and templates
 - i. Nomenclature and labels are consistent throughout site
6. Aesthetics, Minimalism, and Reducing Redundancy
 - a. Pages contain no extraneous, superfluous, or unnecessary information
 - b. Dialogs contain no extraneous, superfluous, or unnecessary information
 - c. Pages contain no extraneous, superfluous, or unnecessary functionality
 - d. Dialogs contain no extraneous, superfluous, or unnecessary functionality
 - e. Previously entered data are retained and pre-populated when possible

Content (Text, Imagery, Multimedia)

7. Visibility of System Status and Current Location
 - a. Uses navigation system indicators
 - b. Provides breadcrumb
 - c. Uses page headers and sub-headers
 - d. Presents progress indicators
 - e. Presents other feedback messages and indicators (non-error)
8. Instructions, Documentation, and Help
 - a. Provides instructions for functionality
 - b. Instructions include step-by-step guidance
 - c. Instructions include representative examples
 - d. Instructions are written in simple, clear, and understandable language
 - e. Provides context-sensitive help
 - f. Help content is indexed and searchable
 - g. Help includes representative examples
 - h. Help content is written in simple, clear, and understandable language

Errors

9. Error Prevention
 - a. Functionality does not present opportunities that enable failure
 - b. Eliminate error-prone conditions
 - c. Validates data entry
 - d. Requests confirmation for actions that cannot be undone
10. Describing, Diagnosing, and Resolving Errors
 - a. Error messages do not blame the visitor
 - b. Error messages use simple, clear, and understandable language
 - c. Error messages describe the error and probable causes
 - d. Error messages contain information and guidance for resolving the error
 - e. Error messages only include error codes when visitor may report the error

Rating Scale 1:

- | | |
|---------------|----------------------------------------------------------------------------------------|
| 0 – Fail | - Not present, cannot learn or find, fails, generates error, non-functional |
| 1 – Poor | - Weak, difficult to learn or find, confusing, occasional errors, partially functional |
| 2 – Average | - Typical, average, acceptable, functional |
| 3 – Good | - Better, learned or found with experience, clear, strong functionality |
| 4 – Excellent | - Best practice, learned or found first time, obvious, superior functionality |

Rating Scale 2:

- | | |
|-------------|-------------------------------------------------------------------|
| Frequency | - percentage of visitors affected by the problem |
| Impact | - the ease with which the problem may be overcome |
| Persistence | - the likelihood of encountering the problem on subsequent visits |

Factors: Set 2

1. Organization
 - a. Site has purposeful, natural, and logical organization
 - b. Related items are grouped together or presented with visual similarities
 - c. Unrelated items are differentiated
 - d. Interface behaviors are consistent across the site
 - e. Interactivity and functionality is appropriate and where the visitor expects/needs it
2. Simplicity
 - a. Site uses familiar and appropriate language
 - b. Depth of content is appropriate
 - c. Avoid technical language
 - d. Links and buttons use active, directive, and predictive language
 - e. Interactivity and functionality is easy to learn and use
3. Visibility
 - a. All navigation options are visible and findable
 - b. All content options are visible and findable
 - c. Interface does not obstruct, occlude, or distract visitors
 - d. Non-HTML links are indicated with similar type and size
 - e. Interactivity and functionality is easily found and utilized
4. Efficiency
 - a. Reduce need for visitors to remember information across pages or steps
 - b. Pre-populate known data whenever possible
 - c. Group tasks and data logically
 - d. Facilitate scanning with headers, sub-headers, and lists
 - e. Provide search functionality
 - f. Visitor paths are continuous and match expectations
 - g. Interactivity and functionality contain no superfluous or extraneous features
5. Feedback
 - a. Provide status and progress indicators for sense of action
 - b. Provide location indicators for sense of place
 - c. Use available / unavailable / visited indicators for buttons and links
 - d. Interactivity and functionality respond quickly to visitor input
6. Tolerance
 - a. Prevent errors
 - b. Error messages describe error and offer help for resolving error
 - c. Allow undo / redo
 - d. Accept variable input
 - e. Validate data soon after input
 - f. Interpret reasonable actions reasonably
7. Credibility
 - a. Site has high-quality, professional design
 - b. Visitor experience meets or exceeds expectations
 - c. Provide explicit privacy policies
 - d. Use secure data transmissions and transactions
 - e. Present third-party security validation and certification
 - f. Use standards-compliant code
 - g. Avoid dead, inactive, or inaccurate links
8. Accessibility (optional)
 - a. Conforms to W3C Guidelines
 - b. Conforms to US Federal Section 508 Guidelines
 - c. Accommodates screen readers
 - d. Accommodates voice recognition
 - e. Accommodates color deficient vision