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D 7.3 Assessment methodology and User scenario test plan

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Authors (Partner) Fredrik Palm, fredrik.palm@humlab.umu.se
Mona Bonta Bergman, mona.bontabergman@humlab.umu.se
Tõnis Tärna, tonis.tyrna@ra.ee
Edith Seegel, edith.seegel@ra.ee
Peder Andrén, peder.andren@svar.ra.se

Contact Person Tõnis Tärna, tonis.tyrna@ra.ee

Abstract Deliverable 7.3 Assessment methodology and User scenario test plan report for the QVIZ project, co-funded by ICT Research Framework Programme of the European Union.

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2 Introduction

The main objectives of this deliverable are:

1. To describe the methodology for assessment of information to be included into the QVIZ integrated portal by users and to identify the primary user groups for the QVIZ
2. To define the methodologies for the testing activities
3. To describe the concrete work plan for the implementation of selected testing methodologies

The Assessment methodology section deals with describing the potential user groups of QVIZ and identifying their most relevant needs and expectations. There are four major user groups foreseen: family researchers, students, educators and professionals (authorities). Through elucidating their specific interests of research the main characteristics of future content are being touched upon in this section.

The User Scenario test plan section focuses on describing the methodologies and implementation activities of validation of user requirements and prototypes of the project. Two specific methodologies, the functionality testing and the usability testing have been selected for testing of the implementation. The assessment of use cases and user testing of prototypes will provide important feedback to implementation activities and assure the successful fulfillment of the project's objectives.

The concrete examples of testing documentation and templates, test scenarios, questionnaires for the feedback and discussion are given in the appendixes.

3 Assessment methodology:

Identifying the target groups of QVIZ

This topic will touch on the subject of assessment of the information that the users will create in the system. Through describing and depicting the current users of archival institutions and the potential users of the QVIZ system we assess the type of information they will want to provide based on the information they spread today.

Through talks and unofficial interviews with archivists and people working close to the archives we have received a clearer view of our target groups. People closely linked to this project have bestowed valuable information received through their profession concerning the different kinds of people that uses the existing archives and systems.

The expression “opinion leaders” will be used in this section. By this we mean prominent people with influence, who can make our target groups listen to the messages sent by QVIZ. It is essential that these persons have a positive attitude towards QVIZ and that we can reach them in order to promote the product, but it is even more important to listen to them and make a product that they would use.

3.1 Family history researchers (Genealogists) and local historians

Through interviews with archivists located in different parts of Sweden we find that their largest user group is researchers of family history. An investigation conducted by the Swedish National Archive gives us a draft outline of the members of this user group. Archives belonging to the National Archives of Estonia have databases containing details of researchers and according to these archives, family history researchers and local history researchers are the biggest user group of NAE.

In Sweden a significant percentage of the researchers are between 61-70 years of age and 90% are over 41 years old. The usage comparison between men and women is fairly evenly distributed; 53% of the users are men and 47% are women. Most of them have been researching for more than six years and were born in Sweden. Family history researchers' education level is fairly high with 12 years or more in school. Most of these researchers would consider themselves fairly experienced when it comes to their competence as researchers. County archives, church books and personal registers are their preferred sources for information. They usually visit these archives somewhere between once a week and once a month or more sporadically and they prefer to visit the archives during evenings and weekends. It is uncommon that they borrow microfiche to their homes; they prefer to work behind computers with discs and frequently use the scanners and copying machines. They feel that the archives should provide digital photos of archive material on demand for a small sum of money. A great deal of these researchers would like further training when it comes to researching the archives such as: information on the different kinds of sources that the archives provide, methodologies in family research and some help on how to read handwriting. They want more lectures and demonstrations on research.

Estonian researchers are much younger than the average Swedish family researchers. They are mostly between 18 and 47 years of age. There are marginally more family history researchers than other types of researchers.

In Estonia the number of family researchers visiting research rooms has decreased after the launch of the digitalized family history sources database, Saaga, which makes it possible to work online. Saaga statistics show that there are approximately 100 users logged in at the same time. E-mails from Saaga users reveal their interest and alacrity to continue working this way. The users value the 24 hour access to resources available in Saaga.

3.1.1 Ways of research

Family researchers often work from an interest of one particular person described in archival resources. They cross-check correctness across different archival resources and relate different sources to family history descriptions. Often they publish their research results in the form of databases, registers, tables and in existing software locally or on the web. These people are enthusiasts who often belong to some research network or community. In general their expectations on a search system are consultancy, good descriptions and training tools. They often need initial assistance in performing successful searches. Older researchers often lack experience with computers and therefore need more guidance to manage new computerized solutions.

Most of the family researchers have certain types of resources they are used to working with, but they are always eager to gain new knowledge. The older generation of family researchers are gathered in societies and they organize lectures to keep themselves informed about archival news and exciting resources.

Many of these family researchers go on to become amateur local historians. Their interests have evolved into an interest of geographical places and administrative units. Their path towards becoming local historians leads them through the history of manors (villages) onto the history of parishes. They do however keep to their normal manner of publishing, with the addition of possible book publishing. In Estonia local parish governments and different funding bodies are often interested in publishing histories of villages, manors and parishes written by amateur local history researchers.

3.1.2 Opinion leaders

While family researchers are performing their research they will meet archivists who will guide them towards relevant archives and ways to find information. An archivist is a reliable and trustworthy person in the eyes of the family researchers and therefore would be a good opinion maker for this target group. Being an expert on archival information, the archivist is respected for the knowledge he/she possesses.

Whilst conducting research the chance of meeting people with similar interest that are trustworthy and willing to try out new ways of working is high. It might be friends, lecturers or enthusiasts that inspire the researchers or make them start researching in the first place. These people are also opinion leaders.

3.1.3 Needs

- To be able to enlarge text
- Functions that are easy to understand
- Introduction on how to search the archives
- Assistance in reading handwriting
- Methodologies
- Initial assistance
- Guidance

3.1.4 Expectations

- Access to county archives
- Access to church books
- Access to personal registers
- Access to digital data (images)
- Lecturers
- Demonstrations on research
- Possibility to cross check archives
- Consultancy
- Good descriptions
- Training tools

3.1.5 Publications

- Databases
- Registers
- Tables
- Special software
- Web
- Family trees
- Books

3.2 Students

Students are a very difficult group to describe considering that the amount of applicants, their ages and backgrounds differ greatly every year. Instead we will try to depict what needs the students might have while they explore the archives. Although we will be talking mainly about history students, we will also consult religious studies and geography students because they come in contact with the archives through their courses. These courses can be found in various universities across Europe. They are an important group to reach considering that some of them will become teachers and consequently opinion leaders in their profession.

3.2.1 Ways of research

Students will visit the archives during an intense period while writing essays or when they collect information as the basis for a thesis and their presence is often decided upon by a tutor. Apart from this intense period of study, visits from students are scarce. Their interests lie in

geographical places, administrative units, interaction between authorities and subjects, social stratification and mobility, changes over time, motifs and mechanisms in the spread of ideologies, ideas and patterns. They do many comparative studies and strictly followed methodology studies as well as examining differing schools of thought whilst trying to find ways to support their hypothesis. The topics are varied, but with specified requests however there is a trend to research newer material from the late 18th century and later. Their results are published through their papers which give extensive references.

In Estonia the University students also have a tendency to detach themselves from the archives. As the curriculum in the University has been shortened to three years at bachelor level, most of the history students visit the archives only in connection with a couple of basic courses. But still, archival studies and using the archival resources is quite popular among students. Often the difficulty of visiting an archive lies in the fear that it will be too complicated to use. Students need more attention and help in the beginning, to build up their confidence and knowledge on how to use the archival structure.

3.2.2 Opinion leaders

As a student one is inclined to trust ones teachers and to act on their ideas and influences. A teacher that is interested in archival methods in their research will pass that on to their students. Furthermore they will have lecturers and other teachers from different backgrounds at some seminars that can influence their future choices. Friends are perhaps the largest influence that students have.

3.2.3 Needs

- Material from the late 18th century
- Interesting historical facts
- Interesting religious facts
- Interesting geography facts
- Guidance in order not to fear complicated searches
- Knowledge for confidence to use archival information

3.2.4 Expectations

- Geographical places
- Administrative units
- Interaction between authority and subject
- Social stratification and mobility
- Changes over time
- Motifs and mechanisms in the spread of ideologies
- Examine differing schools of thought while supporting hypothesis
- Access while enrolled at university

3.2.5 Publications

- Essays
- PM
- Homework
- Papers

3.3 Educators

Through their work the educators visit the archives. An educator is anyone who teaches through their choice of career. And in this case it will be educators within history, religion and geography.

Considering that the education process takes at least 5 years in order to become a teacher we can presume that most of the teachers are 25 years of age or more with various backgrounds. They have an interest or a profession within the research sector and a willingness to perform well defined and prepared lectures. Like in the case of the students we will focus on the history, religious studies and geography teachers.

Curriculums do not require archival studies. This means that the educators end up at the archives by choice. These are also the teachers that will introduce the archives to their students. It is however apparent that the choice of archival resources are made by their availability online.

3.3.1 Ways of research

The educators have most likely been visiting the archives during their education and have a good picture on how it works and seldom need help from a professional. Their focus lies in the same subjects as the students since it is often these people who have been influencing the students in their research. As an educator they need to be innovative and know their way around the archives quite well. They need to know where to find objects suitable for timeline studies, simple comparative and thematic studies, genealogical and local history topics. As pointed out, they need to engage and help students in research topics. They need ways to distribute knowledge and pedagogic aspects of the material. They are also interested in historical methodology. The expectations and demands placed on an archival system by educators must be assumed to be very high.

3.3.2 Opinion leaders

Teachers often have an extensive network with people of the same profession and interests. Through these they learn new techniques and methods of approach. While visiting the archives they come in contact with archivists who can share their experience and introduce new ways of finding information.

3.3.3 Needs

- Instrument for teaching
- Instrument to engage and assist students
- Pedagogic aspects of the material
- Historical methodology

- Online availability
- Suitable object for:
 - Timeline studies
 - Simple comparative and thematic studies
 - Genealogical and local history topics

3.3.4 Expectations

- Will know the archival information pretty well, therefore high expectations
- Ways to distribute knowledge
- Geographical places
- Administrative units
- Interaction between authority and subject
- Social stratification and mobility
- Changes over time
- Motifs and mechanisms in the spread of ideologies
- Ways to distribute knowledge

3.3.5 Publications

- Defined and prepared lecturers
- “Scientific” articles
- Assignments
- Comments

3.4 Professionals (Authorities)

Through their work in different authorities the professionals come in contact with various kinds of archives depending on their mission.

Professionals have specific questions depending on their work. An architect needs to see what he/she is facing in a possible renovation or new building and needs to access land archives and building archives. Lawyers need to make sure that the orders of succession are being made correctly. Some incidents in our history have more influence on people’s lives and have a high news value when the records are being released.

3.4.1 Ways of research

Normally these people ask very specific questions and engage the archivist to assist in the search. Through a series of questions and discussion between the questioner and the archivist the data can be located and can be bestowed upon the questioner.

This target group needs fast and correct service. They would value a database that could help them to speed up their search in the archives.

3.4.2 Opinion leaders

Considering that this target group does not have this kind of information as a line of work it is most likely that the people they come in contact with to discuss or collect information are mostly archivists. Since archives is of little or no interest to this target group, they will prefer that the information will be received quickly without being directly involved and therefore rely a lot on the archivist to provide them with correct information. Perhaps colleagues in their network can assist or friends that have an interest in archival information. However, the archivists have the largest influence on this target group.

3.4.3 Needs

- Assistance

3.4.4 Expectations

- Fast service
- Correct service
- Used to having archivists to assist them

3.4.5 Publications

- Reports for their institution/company

4 User Scenario test plan

4.1 *Functionality trials*

Use cases and user scenarios are described in a system specification and requirement report. In the report the use cases and user scenarios become the requirements on the system that the developers work towards and the testers try out. Consequently the test leader works towards these requirements in order to reach the goals set by the consortium. The idea is also to help the developers discover problems at an early stage where it might be easier to rectify.

To be able to perform a fulfilling functionality trial there must be satisfactory criteria with which to measure the product performance. This is known as ‘Entry’ criteria. There should be clear rules on what needs to be in use in order to make the trial constructive. The entry criteria will differ depending on the use case in question. However every function should have entry criteria that have been approved by both test leader and developer. Another entry criteria is that the functions have been tested through Happy Hacking¹ by the developer him/herself before handed to the test leader.

When a product is made, there must also be ‘Exit’ criteria. It should specify on what premises a function can be considered completed. Functions with many problems that cannot be worked around have not fulfilled the exit criteria. Serious problems must be corrected and resubmitted for testing. Any discovery of serious problems must be followed up and should therefore receive a ranking on the acuteness of the problem. The follow up must have an ID, description of the problem, ranking of acuteness, as well as a possibility to regularly check the progress of the work.

In addition to the strictly functional testing there will be a substance test where the information provided will be tested by an expert on the field. This substance test will be performed on use cases where archival data is being used.

4.1.1 Methodology

There are several ways to perform functionality testing. The test setup will be using the use cases as the requirements on the system that the test leader must consider. From these use cases, test cases will be created. First of all the use cases must be reviewed and understood in detail. Then the test cases must be constructed with a case ID, essential preconditions, case description, expected results and test data. Finally the functionality testing will be performed and a report that handles results and possible defects will be compiled.

The trials will be conducted through performing use cases and user scenarios. In order for this to work there needs to be clearly specified use cases and scenarios. With a set time frame these trials will be performed in iterative cycles as a way to keep the project constantly moving forward. The developers need to send the use cases and user scenarios to be tested at least three weeks in advance in order for the test leader to be able to plan and perform the trial. The trial must be documented thoroughly so that the developers can partake in the result in a constructive way. Every function to be tested must be tested in its entirety. For the system to succeed the test conductor must be harsh, thorough and constructive. Otherwise the system’s performance will fail the final usability test.

¹ The developers test their own functionality while producing and might even ask their colleagues to try it as well.

4.1.1.1 Limitations

The functionality testing is difficult to use for comparisons or follow ups considering it only engages a small group of people.

4.1.1.2 Advantages

This method will give a more objective view of the quality of the functions. It provides a structured method to check what has been done and the quality of the results. This is ensured by the fact that the quality is improved when problems and dysfunctions are discovered and corrected.

4.1.2 Conducting the trial

Less than a year remains of this project and the testing should begin as soon as possible. All use cases available can be turned in to test cases. Chosen use cases and user scenarios need to be tried by following them literally. After that the test subject should disregard the description of the use cases and scenarios in order to test the way functionalities handle problems. All results are to be written down including what did and did not function and how did these functions fit the use cases and user scenarios. It is preferred to have the developers close by should any questions arise and for the test conductors and developers to work together at improving the functionalities. However the developers are not permitted to interfere with the testing.

4.1.2.1 The test conductors

Test subject: A qualified test subject should be innovative and daring enough to try how the system handles errors that can be made by users. The tester needs to be thorough while testing the system and try all functions available and not be afraid to test many different scenarios. The ability to document the testing in a constructive way is an important criterion considering that the test subject documents his/her trial. It is important to avoid any interference that can affect the credibility of the test.

Test leader: A test leader for a functionality trial ensures that the test subject has the necessary information and a template on how to perform the trial. He/she should also ascertain that the test subject is comfortable. The test leader is responsible for making certain that the data gathered from the test subject is comprehensible.

4.1.2.2 Planning

In order for a test leader to be able to perform a functionality trial he or she must have the information on what is to be tested and why at least three weeks in advance. Risks and contingencies must be determined so they can be avoided as well as establishing the existence of entry and exit criteria. It must also be decided what is needed in order for the trial to be carried out, what has to be performed for the product to be considered completed and what will determine if it has passed or failed.

The test leader must find a test subject who has some expert knowledge on systems but who is not involved in the project. It is important that he/she is as objective as possible, which makes it

important to perform the trial away from any developers, that the test subject feels at ease and knows what is expected. There must be a template with use cases and user scenarios to be tested and the computer to be used for the trial must function properly.

4.1.2.3 Documentation

The features tested and the reasons why these particular ones were chosen for the trial must be documented along with the reasons why the other features were not chosen. This is in order to have a clear picture of what has been done and the motivation behind the decisions. The arguments for what makes the system pass or fail the test must be recorded before the trial. The test subject must document his/her test and it should be analyzed and presented to the developers by the test leader. The final document should even contain how many functionalities that passed and failed the testing. The documentation should also address the issues with the functionalities that failed the testing and how much preparation it took to perform the test.

4.2 Usability trial

The potential users of the QVIZ system must be the ones to evaluate the usability. The end-users must have a say in the development process otherwise important aspects could be overlooked. The test team needs to make sure that the use cases and user scenarios are coherent with the target group preferences in a product like QVIZ. It is most important to maintain contact with the target group, in order to ensure that they find the system efficient, effective, that it lives up to their expectations and that the product engages them. Also whether or not the system will tolerate that they make errors, how easy it is to learn to use, and how easy it should be to learn to use it.

To be able to perform a fulfilling usability trial there must be satisfactory criteria with which to measure the product performance. This is known as 'Entry' criteria. There should be clear rules for what needs to be in use in order to make the trial constructive. The entry criteria for this system are; all the buttons that are visible must be clickable and functional. Necessary content to provide the system with substance needs to be implemented into the prototype in order for the test subjects to get an accurate picture of what the system contains. An empty system that leads the test subjects to dead ends gives a dysfunctional trial. Another thing that is very important before entering a usability test is that the functions must have passed the functionality test reasonably well.

When a product is made, there must also be 'Exit' criteria. It should specify on what premises the product can be considered completed. The criterion for this system is; every test subject must get through all the tasks.

Furthermore there needs to be criteria that determine whether or not the system passed or failed the trial. These must be constructed once the features to be tested have been set.

4.2.1 Methodology

When performing a usability trial it must be decided what should be tested and it should be made sure that the functions which are needed have been tested beforehand. If there is a need for test data in the system, this must be provided in order for the trial to be constructive. It must also be decided why certain aspects need to be tested. These aspects of the trial must be decided weeks in advance in order for the test leader and test observers to plan it thoroughly and arrange a quiet environment where the actual trial to take place.

The methodology that has been chosen is the “thinking aloud” method which is efficient and cheap. The test subject performs easy tasks with one observer who takes notes of everything said aloud. The test subject should describe every step he or she takes, what they are doing, what they are thinking, any problems encountered, solutions they make and so on. The observers are not allowed to help the test subjects understand the object of the trial, they must stay silent and just observe. Interference with the efforts of the test subject to understand the system on their own will jeopardize the integrity of the test. The input of the test subject is important whether it is positive or negative feedback. The task instructions set for the test subject cannot be all too detailed. We provide the answers and the test subject are required to find the question by testing the system. The ability of the subject to overcome obstacles and understand the system structure is important and consequently they cannot receive instructions which are all too precise. While constructing these tasks, the testers must consider the scenarios created and whether or not these tasks can be carried out. The test leader and observers must know themselves how the system works and how to reach the answers to the tasks. That is why it is important that the test leader has the use cases and user scenarios for the trial early on. Without this basic foundation it would be impossible for the trial to be constructive.

When the “thinking aloud” trial has been carried out it is important to extract any further information from the test subject. To establish that as much helpful information as possible has been gathered there should be an evaluation. The input and ideas gathered during this process can be most helpful and every opportunity to secure knowledge must be taken. It must be remembered that this is a product that QVIZ wants people to work with in the end therefore the input of the test subject is important for the survival of the QVIZ portals. It is important that the test subjects have a chance to air any feelings they might have towards the portal before they leave the trial area. By having a discussion after the trial and evaluation, questions can be raised and answered in order to secure a non hostile attitude towards QVIZ.

4.2.1.1 Limitations

Thinking aloud is very difficult to perform. The insecurity and worries from the test subject on how they are perceived might hinder their comments. A lot depends on the environment of the trial, whether or not the test subject feels at ease whilst performing the trial. They must be comfortable enough to think aloud.

This method does not consult a large group of people as it would be too time-consuming to carry out. Therefore it is very important to get a good representative group of the overall target groups. It has been shown that a group of around five people can give measurable result.

The time it takes to perform the tasks cannot be measured since they have to think aloud throughout the trial and that prolongs the actual time it takes to perform the test.

4.2.1.2 Advantages

The thinking aloud method points to specific problems in the system and why it is a problem through the comments and questionnaires made by the test subjects. There is also an observer per subject present with knowledge of the system who can explain any encountered problems in his or her report.

By sitting next to the potential users during the trial their attitudes towards the system are registered and can be used to improve the implementation in future exploitation. There is also an opportunity to see how the user works and what a user might need in a system like QVIZ. In this way a small group of people can give a lot of quality data.

4.2.2 Conducting the trial

Since there is so little time remaining on the project only one more usability test will be performed, preferably in March 2008. That allows time for the developers to correct any faults found by the functionality testers in December 2007.

There will be four parts to this trial:

- Testing of the query-visualization environment
- Testing of the collaborative environment.
- An evaluation of the trial
- A discussion concerning the trial

The trial will also assess if the system is flexible and how the design is perceived. Does the system provide enough help and documentation? In short the test team needs to know how the system functions in comparison with the user requirements and how the system is perceived. Has the system been constructed in a way that appeals to the users?

4.2.2.1 Demands

To be able to develop a product like the QVIZ portal it is very important that there are clear goals on what the product is to be used for, who will use it and what functions it will have. This is provided through the use cases and user scenarios and more specifically the deliverable D 4.1.3. Whilst choosing what use cases and user scenarios to use, consideration must be given as to why these are to be tested and why others are not. By examining the answers to these questions we reduce the chance of missing important issues. These clearly defined requirements help the developers to produce the product, the testers to perform trials and the disseminators to exploit the product.

4.2.2.2 The test conductors

Test observer: As pointed out before it is very important that the observers only documents and observes. They are not to influence the test subjects in any way. The data collected from the trial would be false had someone guided and helped the user in any way.

Test leader: The test leader is the project leader of user trials and should be responsible for the explanatory session in the beginning of the trial. It is important to stress the point that the test subjects are not there to be tested, but to test the QVIZ system, and that any problems they encounter helps the developers. The test subjects should not be ashamed to tell us about any obstacles they encounter since they are selected on the basis of their varying computer knowledge. If the system fails to deliver to them as expected then this reveals a design error on the part of the QVIZ developers rather than a fault in the approach of the test subject. The test leader must make this point crystal clear.

Test subjects: When constructing a group of test subjects, there are a lot of things that need to be considered. The subjects must be taken from the specified target groups and they should be of different usage background, gender and age.

Test groups: When conducting a usability trial it is important that a test group is constructed that is representative of the target groups. Our trial is based on quality and will therefore have a test group from different backgrounds in order to catch the whole span of usability that might come to pass on the QVIZ system. Considering that this is a quality test and that we want a lot of information from a small group of people, the test groups should consist of five people, one from each target group and two from the biggest one. It must contain both men and women. Their ages should be spread as much as possible without straying from the set target groups. Computer knowledge must be varied, but here as well, only as much as the set target groups allows.

4.2.2.3 Planning

The test group must consist of people with different usage background, gender and age from each of the target groups. Use cases and user scenarios to be tested must be in the test leaders' possession at least two weeks in advance. They should contain an explanation of the reasons behind the selection made in the choice of cases and scenarios. Planners should try to foresee any risks and create contingency plans in order to avoid them. They should make sure there are exit and entry criteria as well as an explanation on what premises the system will pass or fail the trial.

The test subjects must feel at ease during the trial. They are not to be made to feel inferior or stressed at any point. Any stimulus that might interfere with the subjects' sense of calm is to be extracted. There should not be any other people, any mobile phones or anything else likely to cause disturbance in the room.

Make time for a last run through with the computers to be used, the test leader, the observers and one objective pre-tester not involved in the project. If this last run through fails the trial should not be performed at all as it does not fulfill the project's entry criteria.

Have a thought-out explanatory session and use the same manuscript for every session to be consistent. Have trial reports, questions, evaluation and if needed discussion topics printed.

Make sure that the observers are certain of their role. Have a template to help them in their documentation. Have the tasks written down and hand them out at the explanatory session. Have an evaluation printed and ready for use. It could help to have some questions to help the discussion, but it should be avoided if possible in order not to decide the outcome of the discussions. It is meant to be ventilation towards the system and the test.

4.2.2.4 Documentation

The features tested and the reasons why they were chosen must be documented as must reasons for not choosing the other features, in order to have a clear picture on what has been done and why. When it comes to the "thinking aloud" method there is a need to document step by step what the test subject says, encounters and investigates. All observations must be written down in full as they occur and the evaluation must be collected and summarized. The discussion is to be recorded and made available, however a résumé is allowed.

5 Appendix section

5.1 List of prioritized use cases and functional requirements

These requirements and use cases have been prioritized according to the MoSCoW method.² That method gives a tool to prioritize and a better quality control for implementation and validation:

- M - MUST have this.
- S - SHOULD have this if at all possible.
- C - COULD have this if it does not affect anything else.
- W - WON'T have this time but WOULD like in the future.

These lists gives an overview of the use cases and their respective requirements

No.	Description	Prio
QVIZ-UC5	Get QVIZ account	
QVIZ-RQ5:1	Create a QVIZ account	M
QVIZ-UC60a	AU selection from Faceted Browser	
QVIZ-RQ60a:1	Select administrative unit from faceted browser	M
QVIZ-UC60b	AU selection from map	
QVIZ-RQ60b:1	Select an administrative unit from map	M
QVIZ-UC61	Set temporal filter.	
QVIZ-RQ61:1	Setting of temporal filter using timewindow	M
QVIZ-UC62	Removal of the temporal filter using "Remove Time Filter" button	
QVIZ-RQ62:1	Remove temporal filter	M
QVIZ-UC63	Change of the current year in the map using time slider	
QVIZ-RQ63:1	Change of the current year in the map	M
QVIZ-UC64	Facet filtering with map extent	
QVIZ-RQ64:1	Do facet filtering with map extent. Filter archival resources based on map extent.	M
QVIZ-UC65	Removal of the extent filter	
QVIZ-RQ65:1	Remove the extent filter	M
QVIZ-UC66	Usage of the "History of the Point" tool	

² http://en.wikipedia.org/wiki/MoSCoW_Method

QVIZ-RQ66:1	Usage of the "History of the Point" tool Showing changes of admin unit borders on a particular place in different time periods.	M
QVIZ-UC67a	Opening of the legend window Visualize counting of archival resources on map for a particular time period and particular geographical area based on queries in faceted browser	
QVIZ-RQ67a:1	Open legend window.	M
QVIZ-UC67b	Closing of the legend window	
QVIZ-RQ67b:1	Close legend window.	M
QVIZ-UC67c	Changing thematic coloring of the map	
QVIZ-RQ67c:1	Change thematic coloring of the map	M
QVIZ-UC68	Selecting a polygon from chronological list of AU polygons in contextual area	
QVIZ-RQ68:1	Select a polygon from chronological list of administrative unit polygons in "context". Visualizing administrative unit borders for a particular time. Showing changes of border a particular administrative unit in different time periods.	M
QVIZ-UC69	Pan in map	
QVIZ-RQ69:1	Pan in map	M
QVIZ-UC70	Zooming in and out of the map	
QVIZ-RQ70:1	Zoom in and out of the map	M
QVIZ-UC71	Swapping facets in the Faceted Browser	
QVIZ-RQ71:1	To swap facets in the faceted browser	M
QVIZ-UC72	Add a facet in faceted browser	
QVIZ-RQ72:1	Add facets in faceted browser	M
QVIZ-UC73	Remove facet in faceted browser	
QVIZ-UC73:1	Remove facets in faceted browser	M
QVIZ-UC74	Select a CoP attribute in faceted browser	
QVIZ-UC74	Select a CoP attribute in faceted browser.	M
QVIZ-UC75	Selecting a resource reference in the result list	
QVIZ-RQ75:1	Selection of link to archival portal in faceted	

browser result list and redirection being made

QVIZ-RQ75:2 Selection of link to QVIZ collaborative environment in faceted browser result list and redirection being made

No.	Description	Prio
CoP-Mgt-UC21	List CoPs	
CoP-Mgt-RQ21:1	List CoPs based on searching by name	M
CoP-Mgt-RQ21:2	List CoPs based on searching by other attribute	M
CoP-Mgt-UC22	List users of a CoP	
CoP-Mgt-RQ22:1	List users of a CoP	M
CoP-Mgt-RQ22:2	List users of a CoP searched by name, topic/subject in user profile, by objects created and their CoP's.	M
CoP-Mgt-UC23	View public information about a CoP member condition	
CoP-Mgt-RQ23	View public information about a CoP member condition From each CoP a limited amount of information will be displayed corresponding to semantic annotation summary.	M
CoP-Mgt-UC24	Get a CoP membership	
CoP-Mgt-RQ24	Get a membership account to join a restricted CoP (becomes CoP-member). These accounts will later be managed by the CoP moderator that may approve the membership to the CoP.	M
CoP-Mgt-UC25	Create a new CoP	
CoP-Mgt-RQ25	Create a new CoP	M
CoP-Mgt-UC26	View my CoPs	
CoP-Mgt-RQ26	List of communities which the user belongs to	M
CoP-Mgt-	Remove myself from CoP	

UC27			
CoP-Mgt- RQ27	Member removes himself and deletes a CoP from his/her list		M
CoP-Mgt- UC28	Remove member from a CoP		
CoP-Mgt- RQ28	Remove member from a CoP		M
CoP-Mgt- UC29	Approve membership to a CoP		
CoP-Mgt- RQ29	Approve membership to a CoP		M
CoP-Mgt- UC30	Select active CoP		
CoP-Mgt- RQ30	Select active CoP		M
No.	Description		Prio
COP-COL- UC6	Create Tree based collection		
COP-COL- RQ6:1	Create Tree based collection		S
COP-COL- RQ6:2	Set permissions on collection		S
COP-COL- RQ6:3	Manage collection properties		S
COP-COL- RQ6:4	Create typed collection		S
COP-COL- UC24	View a social bookmark of archival resource		
COP-COL- RQ24:1	View a social bookmark of archival resource		M
COP-COL- RQ24:2	Create dynamic query to view social bookmarks from collections		S
COP-COL- UC25	View a collaborative article from a collection		
COP-COL- RQ25	View a collaborative article from a collection		M
COP-COL- UC28	Add a social bookmark of archival resource to a collection		
COP-COL- RQ28	Explore bookmarked archival resources in lists		M

COP-COL-UC29	Remove a social bookmark of archival resource from a collection	
COP-COL-RQ29	Remove a social bookmark of archival resource from a collection	S
COP-COL-UC30	Add a collaborative resource to a collection	
COP-COL-RQ30	Add a collaborative resource to a collection	M
COP-COL-UC31	Remove a collaborative resource from a collection	
COP-COL-RQ31	Remove a collaborative resource from a collection	S
COP-COL-UC105	View collection hierarchies	
COP-COL-RQ105	View collection hierarchies	S
COP-COL-UC106	View collection hierarchies of the User workspace	
COP-COL-RQ106	View collection hierarchies of the User workspace	S
COP-COL-UC107	View collection hierarchies of the User's CoPs workspace	
COP-COL-RQ107	View collection hierarchies of the User's CoPs workspace	S
COP-COL-UC108	Paste a reference into a workspace collections	
COP-COL-RQ108	Paste a reference into a workspace collections	S

No.	Description	Prio
CoP-QVIZ-UC2	Store bookmark for archive resource sent from bookmarking web form	
CoP-QVIZ-RQ2	Store bookmark for archive resource sent from bookmarking web form_	M
CoP-QVIZ-UC3	Query and Display bookmark(s) for archive resource from URL	
CoP-QVIZ-RQ3	Query and Display bookmark(s) for archive resource from URL	M
CoP-QVIZ-UC4	Archive Hub - List of Users	

CoP-QVIZ- RQ4	Archive Hub - List of Users	S
CoP-QVIZ- UC5	Archive Hub - List of CoPs for User	
CoP-QVIZ- RQ5	Archive Hub - List of CoPs for User	M
CoP-QVIZ- UC6	Archive Hub - List of Users and their CoPs	
CoP-QVIZ- RQ6	Archive Hub - List of Users and their CoPs	S
CoP-QVIZ- UC7	Archive Hub - Store social bookmark for archive resource	
CoP-QVIZ- RQ7	Archive Hub - Store social bookmark for archive resource	M
CoP-QVIZ- UC8	Archive Hub - Store archive resource metadata	
CoP-QVIZ- RQ8	Archive Hub - Store archive resource metadata	M
CoP-QVIZ- UC9	Show a list of social bookmarks of archival resources for any attribute of archival resource	
CoP-QVIZ- RQ9	Show a list of social bookmarks of archival resources for any attribute of archival resource	S
No.	Description	Prio
CoP-QVIZ- UC2	Store bookmark for archive resource sent from bookmarking web form	
CoP-QVIZ- RQ2	Store bookmark for archive resource sent from bookmarking web form	M
CoP-QVIZ- UC3	Query and Display bookmark(s) for archive resource from URL	
CoP-QVIZ- RQ3	Query and Display bookmark(s) for archive resource from URL	M
CoP-QVIZ- UC4	Archive Hub - List of Users	
CoP-QVIZ- RQ4	Archive Hub - List of Users	S
CoP-QVIZ- UC5	Archive Hub - List of CoPs for User	
CoP-QVIZ-	Archive Hub - List of CoPs for User	M

RQ5

CoP-QVIZ-UC6	Archive Hub - List of Users and their CoPs	
CoP-QVIZ-RQ6	Archive Hub - List of Users and their CoPs	S
CoP-QVIZ-UC7	Archive Hub - Store social bookmark for archive resource	
CoP-QVIZ-RQ7	Archive Hub - Store social bookmark for archive resource	M
CoP-QVIZ-UC8	Archive Hub - Store archive resource metadata	
CoP-QVIZ-RQ8	Archive Hub - Store archive resource metadata	M
CoP-QVIZ-UC9	Show a list of social bookmarks of archival resources for any attribute of archival resource	
CoP-QVIZ-RQ9	Show a list of social bookmarks of archival resources for any attribute of archival resource	S

No.	Description	Prio
CoP-UC1	Edit a collaborative page	
CoP-RQ1	The system may allow CoP-member to Edit a collaborative page	S
CoP-UC2	Create a new typed collaborative article (page)	
CoP-RQ2	The system may allow CoP-member to create a new typed collaborative article (page)	S
CoP-UC7	Remove protection of article	
CoP-RQ7	The system may allow CoP-member to Assign and remove protection of article. The system should be able to limit the types of access and the duration of accessibility.	S
CoP-UC8	Protect article	
CoP-RQ9	The system may allow CoP-member to Assign and remove protection of article. The system should be able to limit the types of access and the duration of accessibility.	S
CoP-UC51	Prepare wiki for publication	
CoP-RQ51	The system may allow CoP-member to prepare wiki for publication.	S

CoP-UC61	Use WYSIWYG content editor	
CoP-RQ61	The system may allow CoP-member to use WYSIWYG content editor for a new article.	S
CoP-UC62	Manage important metadata for article	
CoP-RQ62	The system may allow CoP-member manage the metadata for article	S
CoP-UC63	Create internal hyperlink in collaborative article	
CoP-RQ63	The system may allow CoP-member to create/edit internal and external hyperlink in collaborative article	S
CoP-UC64	Create external hyperlink in collaborative article	
CoP-RQ64	The system may allow CoP-member to create/edit internal and external hyperlink in collaborative article	S
CoP-UC65	Edit internal hyperlink within collaborative article	
CoP-RQ65	The system may allow CoP-member to create/edit internal and external hyperlink in collaborative article	S
CoP-UQ66	Forward User to content editor when user selects open editing link for new article	
CoP-RQ66	The system may allow CoP-member to use WYSIWYG content editor for a new article.	S
CoP-UC100	Copy reference to clipboard for future pasting action	
CoP-RQ100	The system may allow CoP-member copy reference to clipboard for future pasting action	S
CoP-UC101	Paste reference copied within collaborative environment into content WYSIWYG editor	
CoP-RQ101	The system may allow CoP-member paste reference copied within collaborative environment into content WYSIWYG editor	S
CoP-UC102	Simple Search in Collaborative environment	
CoP-RQ102	The system may allow CoP-member to make simple search in CE, which will produce result list displays.	S
CoP-UC103	Display Result List	
CoP-RQ2	The system may allow CoP-member to make simple search in CE, which will produce result list displays.	S
CoP-UC104	View public parts of any resource	

CoP-RQ104	The system may allow CoP-member view public article and public parts of any resource.	S
CoP-UC52	Approve article for publication	
CoP-RQ52	The system may allow CoP-Experts to approve article for publication in content and legal issues. It has to be made before this document is public published in the collaborative social environment.	S
CoP-UC53	View public article	
CoP-RQ2	The system may allow CoP-member view public article and public parts of any resource.	S
No.	Description	Prio
CoP-UC80	View semantic annotations of collaborative article	
CoP-RQ80	View semantic annotations of collaborative article	S
COP-UC81	View annotation of social bookmark of archival resource	
COP-RQ81	View annotation of social bookmark of archival resource	M
COP-UC82	View annotation of link to content	
COP-RQ82	View annotation of link to content	M
COP-UC83	Add annotation to collaborative page	
COP-RQ83	Add annotation to collaborative page	S
COP-UC50	Assign a type to a collaborative page	
COP-RQ50	Assign a type to a collaborative page	S
COP-UC84	Remove annotation of collaborative page	
COP-RQ84	Remove annotation of collaborative page	S
COP-UC85	Add annotation to social bookmark of archival resource	
COP-RQ85	Add annotation to social bookmark of archival resource	M
COP-UC86	Remove annotation of social bookmark of archival resource	
COP-RQ86	Remove annotation of social bookmark of archival resource	S
COP-UC87a	Add annotation to link to content	
COP-RQ87a	Add annotation to link to content	M
COP-UC60	Assign a type to an internal link in a collaborative page	

COP-RQ60	Assign a type to an internal link in a collaborative page	S
COP-UC87b	Remove annotation to link of content	
COP-RQ87b	Remove annotation to link of content	S
COP-UC24	Assign an Admin Unit (AU) property to a resource	
COP-RQ24	Assign an Admin Unit (AU) property to a resource	M

No.	Description	Prio
CoP-UC95	View social annotation for resource	
CoP-RQ95	View social annotation for resource	S
COP-UC88	Add social annotation to resource	
COP-RQ88	Add social annotation to resource	S
COP-UC96	Reply to social annotation	
COP-RQ96	Reply to social annotation	S
CoP-UC97	Modify social annotation	
COP-RQ97	Modify social annotation	S

5.2 Checklists

5.2.1 Checklist for the functionality test leader

- Make sure you know what needs to be tested and have these criteria in your possession at least three weeks ahead of the trial.
- Make sure that the developers document what features that are to be tested and why. Do the same with the features which are not going to be tested.
- Construct the test case/s
- Determine the risks and contingencies and try to avoid them
- With assistance from the developers, decide the criteria for the system to pass or fail the trial as well as entry and exit criteria.
- Book time for a trial session with a test subject (Not necessary if you yourself perform the test)
- Find and book a suitable room for the trial
- Have the use cases ready and readable before the trial
- Have a template ready to help the test subject to document the trial
- Make sure that the prototype and the computer functions properly by conducting a small test yourself
- Introduce the test subject to the room
- Make sure that the test subject is comfortable and do not disturb him/her during the trial
- Collect the information and make sure you understand it
- Gather and report the results as soon as possible, preferably within one week after the trial is performed

5.2.2 Checklist usability for the test leader

- Book the test subjects and the observers, (approximately three weeks in advance)
- Make sure you know what needs to be tested and have these criteria in your possession at least three weeks ahead of the trial.
- Determine the risks and contingencies and try to avoid them
- Make sure that the developers document what features that are to be tested and why. Do the same with the features which are not going to be tested.
- With assistance from the developers decide the criteria for the system to pass or fail the trial as well as entry and exit criteria.
- Find and book a suitable room for the trial (approximately two weeks in advance)
- Have the test printed and ready (approximately a week in advance)
- Have the evaluation printed and ready (approximately a week in advance)
- Have discussion questions ready (approximately a week in advance)
- Have explanatory session manuscript ready (approximately a week in advance)
- Make sure that the prototype and the computer functions properly by making a small test yourself (approximately a week in advance)
- Extract all unnecessary stimuli from the test environment (approximately the same day or same week)
- Have an explanatory session with the test observers (approximately the same day or same week)
- Have an explanatory session with the test subjects (on the same day as the test)
- Introduce the test subject to the room (on the same day as the test)
- Make sure that the test subject is comfortable (on the same day as the test)
- Document everything said aloud and keep reminding the subject to talk aloud (on the same day as the test)
- Hand out an evaluation form to be filled in then and there (on the same day as the test)
- Gather all test subjects for a small discussion (on the same day as the test)
- Compile everything said during the trial (on the day after the trial)
- Assemble all information gathered during the trial in a test report (the week after) (Things said aloud, evaluation/questionnaire and discussion notes)
- Document if there are any remaining test tasks

5.3 Example of a template for functionality testing

- Use cases selected
- User scenarios selected
- Test all cases literally
- Test all cases by disregarding recommendations.

Use case	Comments:
ID: QVIZ-UC60a Name: AU selection from Faceted browser Source: Iteration: 1.0 Actor: QVIZ-user	ID: QVIZ-UC60a Name: AU selection from Faceted browser Source: Iteration: 1.0 Actor: QVIZ-user
Dependencies Summary	Dependencies Summary
Precondition None	Precondition None
Triggers User selects an AU from the "FB" by clicking a term in the "FB".	Triggers Comments:
Ordinary sequence 1. "MAP" zooms onto the selected AU. The AU is drawn on the layer 2. "SELECTED" highlighted with a red border. 3. "FB" highlights the selected AU. 3.1 "RESLIST" displays weblinks to archival resources connected to the selected AU. "Directly related resources" are displayed first, "Indirectly related resources" second. 3.2 "RESLIST" will for every archival resource display a weblink to display social bookmark for that particular archival resources. 4. "CONTEXT" shows the following information: 4.1 AU name, AU minimum creation date, AU maximum abolition date, 4.2 chronological list of AU polygons (with AU name, AU creation date, AU abolition date). 5. "TIMEWINDOW" does not change. 6. "TIMESLIDER" moves to the start (or end) of the AU time period depending on the positions of the "TIMEWINDOW". That is because the "TIMESLIDER" has to fall into the period defined by "TIMEWINDOW".	Ordinary sequence Comments: 1 2 3 3.1 3.2 4 4.1 4.2 5 6
Postcondition The QVIZ user has got the result of the query show in the result list.	Postcondition Comments:
Performance: Instantaneous	Performance: Comments:

- How did the system behave while using it literally?
- Are the functions of the use case described coherent with the functions available?
- How did the system behave while disregarding recommendations?
- How does the system handle errors?
- Is the system efficient?

5.4 Tables for test cases and time plan

Test cases

ID	Precondition	Description	Expected results	Test data	Date for the test
QVIZ-UC69-1		Pan in map			
QVIZ-UC70-1		Zooming in and out of map			

Time plan

Use case	Description	Priority	Time	F, U or F/U	Comments (test data, dependencies)

5.5 Example of usability testing

5.5.1 Tasks in the QVIZ system:

How often do people take the Holy Communion in Viru-Jaagupi and in Åkullsjön Västerbotten County?

How old are the people when they take their very first communion, in both Åkullsjön-Jaagupi archives?

How old were they when they were confirmed?

5.5.2 Time-spatial interface:

Narrow down your search using facet categories in different orders.

Comments and observations:

Try to find a unit with many archival resources.

Comments and observations:

Select that unit.

Display resources for that unit.

Did you have any difficulties or questions about these functions?

Comments and observations:

Did you receive any information in the result list?

Any thoughts on how it was displayed?

Comments and observations:

What could be added to the result list?

Comments and observations:

Try the links you received. Where do you end up?
How is that information displayed according to you?
Comments and observations:

Has anything happened with the map during this time?
What happened?
Comments and observations:

What happens to the map when you move around the time bar?
Comments and observations:

Try to find the same information you got earlier using the map.
Comments and observations

5.5.3 Collaborative environment

Find the community page
Comments and observations

Edit this page.
Comments and observations

Create a link.

Comments and observations

Save and view changes.

Comments and observations

Create resources.

Comments and observations

Comment/annotate resources.

Comments and observations

Visualize content.

Comments and observations

5.6 Example of observer template

Reactions from the test subject before test started.

Question 1

Said aloud by the test subject:

Raised questions from the test subject:

Problems encountered by the test subject:

Solutions suggested by the test subject:

Question 2 /.../

Reactions from the test subject after the test finished.

5.7 Example of evaluation

5.7.1 Time-Spatial interface

Put a circle around your choice

Male

Female

Age

Occupation &
Country

Test Person ID

How did you find the map in terms of:

Understandability

Easy

Somewhat Difficult

Very Difficult

Impossible

Maneuvering

Easy

Somewhat Difficult

Very Difficult

Impossible

Filling the function of a search engine

Perfect

Good

Tolerable

Awful

Design

Beautiful

Nice

Tolerable

Hideous

Functionality

Very good Good Tolerable Bad

How did you find the time bar in terms of:

Understandability

Easy Somewhat Difficult Very Difficult Impossible

Filling the function of a search engine

Perfect Good Tolerable Awful

Design

Beautiful Nice Tolerable Hideous

Functionality

Very good Good Tolerable Bad

How did you find the Facetted browser in terms of:

Understandability

Easy Somewhat Difficult Very Difficult Impossible

Filling the function of a search engine

Perfect Good Tolerable Awful

Design

Beautiful Nice Tolerable Hideous

Functionality

Very good Good Tolerable Bad

How did you find the Result list in terms of:

Understandability

Easy Somewhat Difficult Very Difficult Impossible

Design

Beautiful Nice Tolerable Hideous

Functionality

Very good Good Tolerable Bad

How did you find the Contextual data in terms of:

Understandability

Easy Somewhat Difficult Very Difficult Impossible

Design

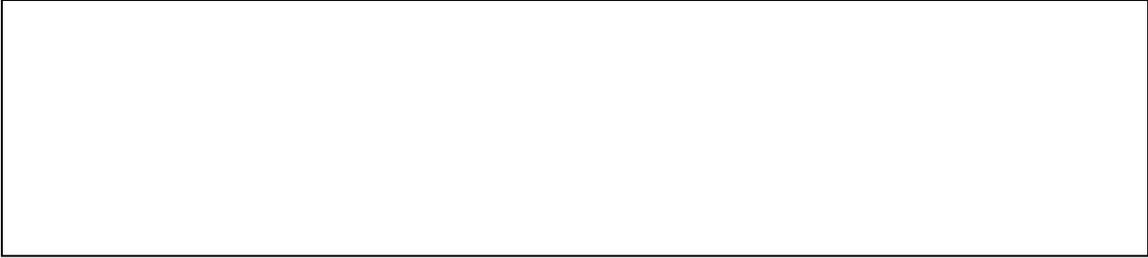
Beautiful Nice Tolerable Hideous

Functionality

Very good Good Tolerable Bad

Given the possibility what would you change in the following:

Map

A large, empty rectangular box with a thin black border, intended for writing suggestions for changes to a map interface.

Time bar

A large, empty rectangular box with a thin black border, intended for writing suggestions for changes to a time bar interface.

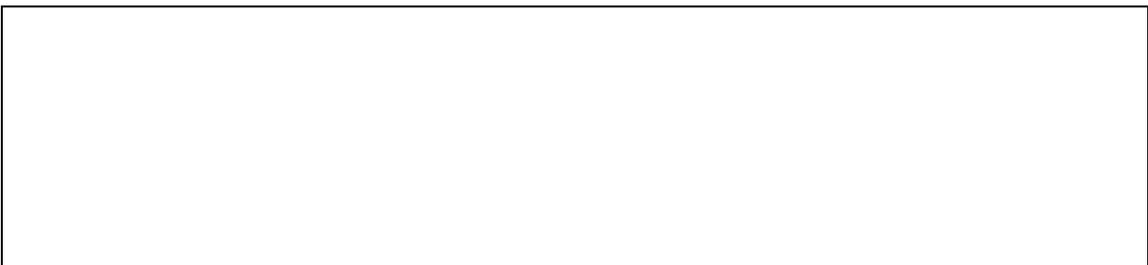
Faceted browser

A large, empty rectangular box with a thin black border, intended for writing suggestions for changes to a faceted browser interface.

Result list

A large, empty rectangular box with a thin black border, intended for writing suggestions for changes to a result list interface.

Contextual data

A large, empty rectangular box with a thin black border, intended for writing suggestions for changes to a contextual data interface.

5.7.2 Collaborative Environment

How did you find the Collaborative environment in terms of:

Understandability

Easy Somewhat Difficult Very Difficult Impossible

Maneuvering

Easy Somewhat Difficult Very Difficult Impossible

Filling the function of a search engine

Perfect Good Tolerable Awful

Design

Beautiful Nice Tolerable Hideous

Functionality

Very good Good Tolerable Bad

How did you find the task of adding pages:

Easy Somewhat Difficult Very Difficult Impossible

How did you find the task of adding a link:

Easy Somewhat Difficult Very Difficult Impossible

How did you find the task of annotation:

Easy

Somewhat Difficult

Very Difficult

Impossible

How did you find the task of making lists:

Easy

Somewhat Difficult

Very Difficult

Impossible

Given the possibility what would you change in the following:

Design

Functions

Content

5.8 Example of discussion topics

Difficulties encountered in relation to the:

Map
Time bar
Faceted browser
Result list
Contextual data

Functionality of:

Map
Time bar
Faceted browser
Result list
Contextual data

Design of the:

Map
Time bar
Faceted browser
Result list
Contextual data

What was good about the:

Map
Time bar
Faceted browser
Result list
Contextual data

Understandability of the:

Map
Time bar
Faceted browser
Result list
Contextual data

Recommended changes to the:

Map
Time bar
Faceted browser
Result list
Contextual data

5.9 Glossary

5.9.1 List of record titles (Estonien)

Sünnimeetrika, sündinute	Parish register of births
Kirikuraamat, Sünnid, kihlad, mahakuulutused, abiellumised, surmad, armulauualised, leerilapsed.	Parish register. Births, engagements, banns, marriages, deaths, communicants, confirmands.
Leerilaste nimekiri	List of confirmands
Abielumeetrika	Parish register of marriages
Surnameetrika	Parish register of deaths
Personaalraamat, Saksa pihtkond	Parish member list. German congregation
Personaalraamat, Eesti pihtkond	Parish member list. Estonian congregation
Kogudus	Congregation
Kommunikantide	The ones who attend the Christian sacrament commemorating the Last Supper by consecrating bread and wine
Metrikaraamat	The same as kirikuraamat - parish register. It consists of information about people who were born, married and died in this congregation.

5.9.2 Words often used in record titles (German and Swedish)

Trauung	Marriage
Männliche	Male
Weibliche	Female
Wann das Heilige Abendmahl genossen	When they took their Holy Communion
Jahre	Year
Gewerbe	Trade
Name	Name
Stand	Stand in society

Rang	Rank
Wo und wann	Where and when
Geboren	Born
Konfirmirt	Confirmed (Holy Communion)
Kenntnisse	Characteristic
Getraut	Married
Von wo und wann in die Gemeinde gekommen	When and from where they came to the parish
Wann gestorben oder die Gemeinde verlassen	when they died or left the parish
Besondere bemerkungen	Special remarks
Stånd och namn	Status and name
Födelse, år och dag	Birth, year and date
Nattvardsgång	Holy Communion
Åkullsjön	Village in the county of Västerbotten
Giftår	Year they got married
Hvarifrån	From where
Hvarthän	To where
Dödsår	Year of death
Anmärkningar för seder	Remarks on customs
Förhör	Questioning