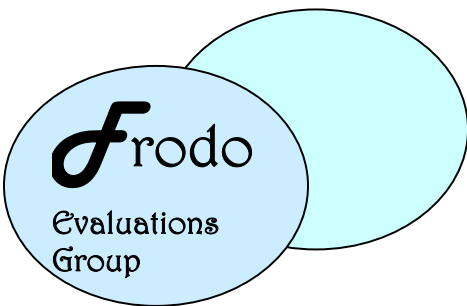


Usability Study

enCore b5



Final Report #B5388

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Project Description

Software Application or Program

EnCore Learning Environment—beta version 5 (enCore b5)

Sponsors

The enCore Consortium, <http://encore-consortium.org>

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Purpose

This usability study collected data about participants’ interaction with the enCore Learning Environment beta version 5 (**enCore b5**). In particular, this study targeted the usability of the point-and-click interface.

Test facilitators noted problems or confusion participants had while performing common tasks using select new features of **enCore b5**. Feedback from the usability study is intended to inform developers about the ways users interact with the software and what specifically interferes with their ability to achieve goals using **enCore b5** to teach a class. With these objectives in mind, the study used specific scenarios, tasks, and questionnaires to emulate situations real users encounter in this learning environment and to allow the facilitators to record important information from those situations.

Participants

Potential users of **enCore b5** are teachers and students in distance-learning or on-site programs. Participants in this test were teachers with a moderate level of experience using earlier versions of the enCore Learning Environment. Five test participants were recruited from a pool of teachers who have taught at least one class with the enCore Learning Environment—one for a pilot study, four for the actual usability study.

Date of Test Study

Pilot Testing:	May 20, 2005
Participant Recruitment:	May 21, 2005
Usability Sessions 1 & 2:	May 23, 2005, 2:30 P.M. and 4:00 P.M.
Usability Sessions 3 & 4:	May 24, 2005, 9:00 A.M. and 11:00 A.M.



Methods Applied

The usability study was conducted in four sessions over two days with one participant per session. The methodology included the following:

- Pre-test questionnaire to determine participants' previous experience with enCore Learning Environment
- Think-aloud protocol, including spontaneous comments and questions, to assess participants' actions and attitudes during task procedures
- Video monitoring of participants
- Post-test questionnaire to interpret participants' responses to the evaluation
- Heuristic to determine severity of participants' difficulties and failures to perform assigned tasks

Tasks Tested (Overview)

Setting preferences

- Change character description
- Change screen layout

Preparing for class

- Create an object (slide projector/document)
- Place new object in classroom

Conducting a class

- Greet student
- Start recorder
- Chat with student
- Find information about student
- Show slides with slide projector
- Stop recorder
- View and email transcript

For copies of the scenario of tasks and facilitator script, see Appendix D, p. 15.

Data Analysis

Data were analyzed through close individual and group observation of video tapes. Observers noted and discussed problem areas then categorized the problems employing affinity diagramming. A four-point heuristic scale was used to indicate the scope and severity of problems.

Problem Identification

Before reporting on specific problems, the team discussed systemic problems within **encore b5**. The usability study revealed fundamental problems with how users interact with the program.

In **encore b5**, three different system models of interface use were identified:

- the MOO/MUD model
- the Operating System (OS)/Windows model
- the web browser model

The intersections of these three interface models are shown in Figure 1.

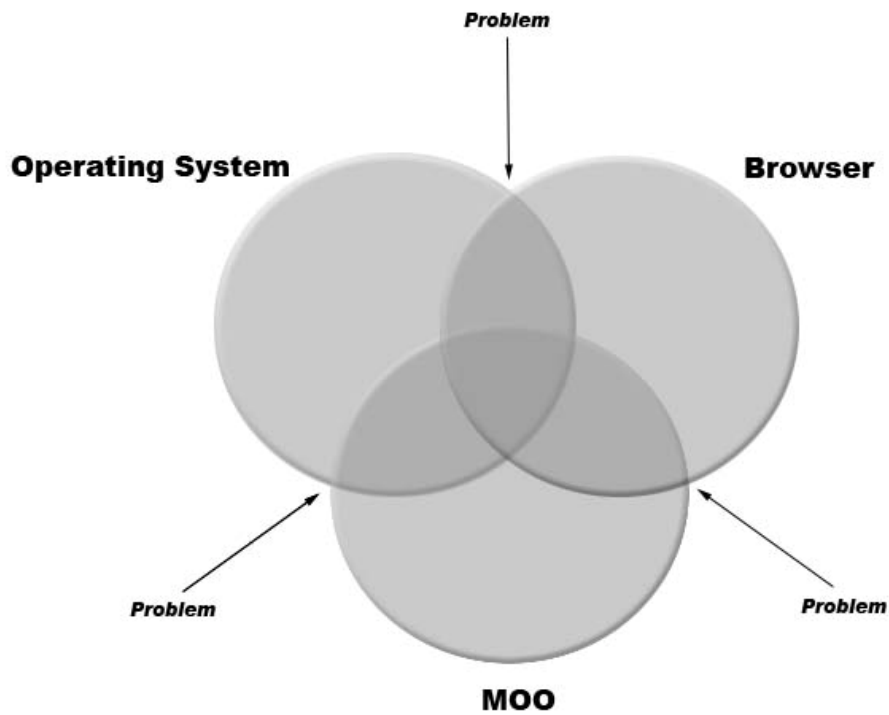


Figure 1: Diagram of Overlapping System Models



The **enCore b5** user interface features the following main functions in separate panels:

- **Who panel:** display of characters present in the room, and recorder operation mode
- **Chat panel:** entering text (“write”) and display of text
- **View panel:** display of equipment in the room or properties of the opened object

The navigation bar is located in the top horizontal panel. For details of the frame-based layout see Figure 2.

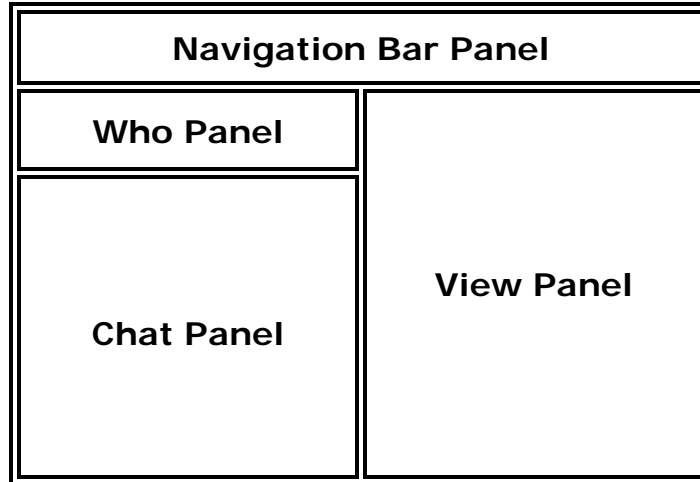


Figure 2: Design of the **enCore b5** User Interface

Users misunderstand MOO/MUD concepts as they attempt to operate the program through the operating system/browser interface. The mismatch between the MOO/MUD model and what users expect to see in an OS/Windows and/or browser model is evident in the following examples:

- The MOO concept of a person’s character holding objects after creation is counter intuitive both to the OS/Windows model and to common sense. The users’ experience is that after they create something, it disappears. As a result, not being able to see the object immediately after creating it confuses them.
- Following an OS/Windows or browser model, users choose browser rather than MOO features to complete tasks. For example, when a new window opens and overlays the room description, users are confused. Rather than choose a command within **enCore b5** (such as *Look*) to return to the room, they use the web browser options either by right-clicking and choosing *Back* or by hitting the *Refresh* button in the browser.
- Common MOO/MUD terms like *object* and *drop* are confusing to most users. For example, the name of the *Objects* button offers users no clue that they must click it in order to create something new in **enCore b5**.

The problems encountered are summarized in Table 1. For details about the test environment and equipment to assess these usability problems see Appendix A, p. 12.



Table 1: Identified Problems in the Categories Design and User Tasks.
(scale for problem severity: 1 = irritant, 2 = moderate, 3 = severe, 4 = unusable)

Design I - Nomenclature and Symbols	Severity	Sample Video Clips
Non-intuitive text		
<i>Objects</i>	4	Clip 1
<i>Options</i>	4	Clip 2
<i>Look</i>	4	Clip 3
<i>My Stuff</i> (Inventory Manager)	3	Clip 4
Refresh <i>Who</i> panel	3	Clip 5
Non-intuitive descriptors		
Alternative text for graphics (alt tags)	1	Clip 6
Non-intuitive visuals or symbols		
Drop icon	4	
Small icons	3	
Room icon	3	
Slide projector icons	3	
Mail stamp icon for e-mail	3	Clip 7
Buttons in top <i>Navigation Bar</i> panel	2	
Walkie-talkie icon	1	
Recorder icon	1	
Blue pencil icon for edit	1	
Design II – Interface and Layout	Severity	Sample Video Clips
<i>My Stuff</i> (Inventory Manager) window: checkbox	4	
<i>Options</i> : white space	3	
<i>Who</i> panel: background	3	Clip 8
<i>Who</i> panel: location	2	
<i>Chat</i> panel: contrast background versus text	2	
Xpress Object Editor window: full screen stays open	2	
Frame-based panel-layout	2	
Size icons	2	
User Tasks	Severity	Sample Video Clips
Dropping new objects	4	Clip 9 , Clip 10 , Clip 11
Refreshing the screen and returning to room	4	
Creating objects	3	
Saving twice	3	
Saving slides	2	
Loading and editing slides	2	Clip 12 , Clip 13 , Clip 14
Viewing recorder transcripts	2	
Deprecated command lines	2	
Starting and stopping the recorder	1	
Creating slides	1	
Help	1	

Table 2. Video clips Monitoring Participants' Reaction on Selected Problem Areas.

Problem Areas	Video Clips
Mental Model	Clip 15 , Clip 16 ,
Screen Size	Clip 17
Likes	Clip 18 , Clip 19 , Clip 20 , Clip 21
Design/Interface	Clip 22 , Clip 23
Miscellaneous	Clip 24 (Add) , Clip 25 (Hate) , Clip 26 (Memory)



Design I – Nomenclature and Symbols

The largest category of problems that participants encountered was related to the wording for selecting commands and icons within the **enCore b5** user interface. Many of the icons and labels used do not convey the intended action to be taken.

Non-Intuitive Text

- **Objects:** Participants did not intuit that choosing the *Objects* button was correct to create a new “person, place, or thing.” The text of the alternative tag refers to *create* but did not help participants understand the function of the *Objects* button.
- **Options:** When asked to change their character description, participants did not automatically recognize that the *Options* button was the correct choice in the *Navigation Bar* panel. Not only was the label itself problematic but also the design of the icon did not provide any clue to its function.
- **Look:** Participants did not select the *Look* button to clear the *View* panel. Instead, they opted to use the web browser *Refresh* option or to right click and select *Back*.
- **My Stuff:** *My Stuff* button opens the Inventory Manager window; the inconsistent use of terminology was confusing to participants.

Non-Intuitive Descriptors

- **Alternative tags (alt tag):** Alt tag descriptions were not always representative or consistent; some icons included descriptions while others did not.

Non-Intuitive Visuals or Symbols

- **Navigation bar buttons:** Do not represent the associated action and are too large
- **Walkie-talkie icon:** Function is unclear
- **Mail stamp:** Function is unclear; icon does not represent e-mail to some users
- **Room:** “Looks like a Quonset Hut”; missing alt tag
- **Slide projector icons:** Function is unclear; small
- **Blue pencil:** Function is unclear; icon does not represent editing to users

Design II - Interface and Layout

- **Xpress Object Editor window:** opens in full screen and does not close after saving, resulting in confusion about whether task was completed.
- **Inventory Manager window:** function is unclear.
- **Who panel:** Users indicated a preference for continuing to use the right-hand side *View* panel to show location of characters, as in previous versions of enCore Learning Environment, rather than above the *Chat* panel. In addition, users had difficulty with grey lines and poor contrast in the *Who* panel.
- **Frame-based panel layout:** One user reported he would not use an interface structure designed with frames.



User Tasks

Users encountered problems performing the following tasks that are crucial to conducting classes in the enCore Learning Environment.

Dropping an Object

Participants encountered problems in four places while attempting to drop a newly created object into a room:

- Immediately after creating an object and naming it, the participant observed that the Xpress Object Editor window covers the entire screen. After participants clicked *Save*, the window remained open without a cue for what to do next. They also did not know they needed to close the window once the creation task was completed.
- If a participant clicked *My Stuff*, the new Inventory Manager window opened. No clear indication was available in this window for dropping the object. All participants clicked the check box with no effect. They were unaware of the diagram of the parent path.
- When participants clicked the name of the new object in the Inventory Manager window, they often missed that in the background this object is displayed in the *View* panel. The Inventory Manager window is so large that changes in the *View* panel are easily missed. If participants shifted to the *View* panel with a new object open, many missed that the red arrows indicated “dropping” the object in the room. In the case of the slide projector, users who clicked on the red arrows attempted to drag and drop the object into the room instead of clicking on *drop object here*.
- Many participants clicked *Options* and then *Objects*. Seeing their newly created object, they clicked on it, which opened the Xpress Object Editor again and looped back to the same screen they had opened when they created the object.

Refresh *View* Panel (*Look* and *Return to Room*)

Participants did not grasp the MOO/MUD concept that when they opened an object, it would display in the *View* panel and that they should click *Look* to return to room view. This problem manifested itself in confusion over how to place (*drag*) an object and return to room view (i.e., to the *View* panel). Participants interpreted this MOO operation in a web browser paradigm either by using the mouse to right-click and hit *Back* or by using the web browser *Refresh* button. No participants clicked the *Look* button to return to room view.

Participants encountered a closely related problem when they were asked to return to their room while they had the Xpress Object Editor window open. The Xpress Object Editor window opened and obscured the *View* panel displaying the room behind it. Most did not seem to know that if they closed the Xpress Object Editor window, they would return to viewing the room. Instead, they looked for a command in the Xpress Object Editor window that would guide them to return to viewing their room.

Refresh *Who* panel (*Look* or *Browser Refresh*)

Participants became confused by the option to *refresh* within the *Who* panel. They did not know that this command would update the list of characters in their room. The entire



concept of *refresh* is a Web browser system model. The *Look* button in the *Navigation Bar* panel and *Refresh* in the *Who* panel operate under a MOO/MUD model to update the program. Users could not distinguish between the Web browser *Refresh* option and the relevant internal **enCore b5** commands such as *Look* and *Refresh*.

Save Twice (Xpress Object Editor)

When viewing the Xpress Object Editor window for an object, participants often chose to hit the *Save* button twice. Although they had received a message acknowledging the object had been saved, the fact that the window stayed open and contained no prompt toward the next step often caused users to hit the *Save* button again. It seems that they were hoping the *Save* button would close the Xpress Object Editor window. (For more information on the Save Twice problem see Slide Projector Issues)

Handling the Slide Projector

Participants found it easy to move from slide to slide either to create new slides or to edit slides. Entering information on slides was confusing to participants, and they had to figure out what to do by trial and error. They did not understand that a URL on the first line would automatically present that URL when that slide was shown. Also, it appeared as if URLs displayed in a new window rather than within the *View* panel.

When saving more than one slide, two participants commented that after saving the second or third slide, the Xpress Object Editor returned to slide #1. As a consequence, participants were not sure if the additional slides had been saved, causing them to return to slide #2 or #3 to see if they were still there. Confused, the participants often saved again. Participants also were confused by the small icons used for operating the slide projector.

Handling the Recorder

All participants liked the point-and-click feature to start and stop the recorder. One participant did not see the text of the alt tag and had to hunt around to start the recorder but eventually did so successfully. Participants also liked the way the icon displayed in the *Who* panel, indicating that the recorder was on and recording. While most participants liked the way the recorder icon displayed in the *Who* panel indicating that the recorder is operating, one was confused by its location in the *Who* panel rather than *View* panel.

Unlike in previous versions of the **enCore Learning Environment**, users of **enCore b5** are not given the option to label their transcripts upon starting the recorder. Confusion was generated when participants were asked to read a recently generated transcript. Recorders in our test all had previous transcripts listed. When participants went to view a new transcript, they became confused about which transcript was the one they should view. In each case, participants were able to view the transcript successfully, but they experienced moderate difficulty in doing so.

Customizing Character and Interface Settings (*Options*)

When users click the *Options* button, the list of items to customize is excessively long and covers both character and interface settings. The options window opens with a large amount of empty white space.



Recommendations

The results of this usability study on **enCore b5** point to the need to integrate the three different interface models (overview see Figure 1, p. 3). In particular, residual MOO/MUD terms and concepts should be altered to be intuitive to users familiar with Graphical User Interfaces such as OS/Windows and web browsers. In addition, **enCore b5** should provide explicit prompts so that users are aware of subsequent steps. Screen layout and design features also should be redesigned to improve usability.

Design I – Nomenclature and Symbols

The largest category of problems that participants encountered was related to the wording for selecting icons and commands within the MOO. Many of the icons and labels used do not convey the intended action to be taken. The team recommends the use of task-oriented language that directly reflects the associated actions.

Replacement of Non-Intuitive Text Labels

- *Objects* button should be renamed *Create* button.
- *Options* button should be renamed *Settings* button. Furthermore, *Settings* should be split into two sub-categories called *Character Settings* and *Interface Settings*.
- *Look* button should be renamed *View Room*, which is preferable to *Refresh* to avoid potential confusion with the web browser *Refresh* option .
- *My Stuff/Inventory Manager* needs a consistent name that guides users as they seek to view the objects they have created. *My Objects* should be used consistently along with *Inventory Manager of My Objects*.

Replacement of Non-Intuitive Visuals or Symbols

- Buttons in the top *Navigation Bar* panel should be replaced with commonly used drop down menus familiar to Windows interface users.
- Several icons, particularly those indicated as problematic (see Table 1, p. 5), should be replaced with commonly used “public domain” icons from clipart or other collections; among others, the IBM series *Globalize Your On-Demand Business*¹ offers valuable resources such as “Translation Track IV: Internationalization of Graphical Images” (09/2004)²

¹ <http://www-306.ibm.com/software/globalization/topics/index.jsp>

² <http://www-306.ibm.com/software/globalization/topics/translationgraphics/index.jsp>



Design II - Interface and Layout

In addition, the following recommendations address problems with the **enCore b5** interface:

- **Xpress Object Editor window:** window should close after the user clicks the *Save* button; alternatively, a *Close/Exit* button may be added to the Xpress Object Editor window.
- **Inventory Manager window:** functions, such as checkbox and icons, must be labeled more clearly. The ability to delete objects while operating the Inventory Manager window should be added (as was in the previous versions of enCore Learning Environment). On the other hand, typical users do not seem to use the parent path of objects. Hence this feature seems negligible.
- **Who panel:** location at the user interface (see Figure 2, p. 3) should not restrict the size of *Chat* panel; therefore, using the *View* panel for the display of characters present in a room, as in the previous version, might be the superior design option.
- **Chat panel:** background color such as cream or ivory, rather than white, would enhance legibility of the black chat text.

User Tasks

The following are recommended to improve users' ability to complete common tasks.

Drop an Object

- Default location for a newly created object should not be inside the character who created it.
- Users should be prompted to save the newly created object to a specific location.

Refresh View Panel (*Look* and Return to Room)

- *Look* should be renamed *View Room*.
- Cues should be given to the users to help them understand the MOO/MUD system model. For example, if users click on a Note to “read” it, there should be some cue indicating what the user is doing—either on display in the *View* panel or as a message on display in the *Chat* panel. The *View* panel might have a message at the top, “*You are now reading this Note. Click here to put this Note down and view the room.*” The green *Back* arrow icon is not sufficient to prompt users.

Save Twice (Xpress Object Editor)

- Alternative options to either “*Save and Continue Editing*” or “*Save and Exit*” should be provided.

Load Slides to Projector

- Clear instructions are needed for loading slides; i.e., how to input a URL or text into the Projector.
- Projector window should return to the same slide view after a user saves a slide.



Operate the Recorder

- Recorder should allow the user to name the transcript (either upon creation or later). In this way, users would more easily be able to identify their own transcript(s).

Options

- When the Xpress Object Editor window opens, it should have two pull down menus and less white space.
- See above “Design I—Replacement of Non-Intuitive Text Labels” for a differentiation between preferences for character settings, and preferences for interface and layout settings.



Appendices

Appendix A - Usability Lab (Design and Equipment)

The usability lab in the Department of English at Texas Tech University is designed to allow participants to operate under controlled conditions.

Usability Test Room

The test room is supplied with the following equipment:

Computer desk

- Each workplace consists of a computer desk with a pullout keyboard shelf and an office chair that allows for adjustable seating.
- Each workplace is furnished with a PC (Pentium 4; OS: Microsoft 2000 Professional; Ethernet connection broad bandwidth in local-area network).
For display, 15" monitors (600 x 800 resolution) and a standard Web browser (Microsoft Internet Explorer) are provided.

Cameras

- A ceiling mounted camera and three desktop cameras allow observers to monitor each participant from multiple angles during interviews and while participants perform given tasks
- In addition to video cameras, a PC-to-TV scan converter allows for each participant's actions on the computer screen to be recorded.

Microphone

- Each workstation is equipped with a boundary microphone to capture participants' verbal responses in real time.

Usability Control Room

A control room, which is adjacent to the usability lab, records the participants' actions on video. Both rooms are separated through a mirror window that allows monitoring the activities in the test room. Communication between the two rooms is ensured by a hand-held intercom set up.

The control room contains the following equipment:

Video Monitor

- Multiple video monitors permit the camera operator to view and record the participant from numerous directions.

Microphone Mixer

- The mixer ensures that the audio levels are adequate to capture all of the participants' utterances as well as any instruction from the test administrator.



Appendix B - Development Team

The Frodo Evaluations Group is proud of their ability to be a flexible team. As such, the development team for **enCore b5** rotated the tasks between test days.

Table 3. Tasks Performed for the **enCore b5** Usability Study by the Development Team.

Tasks/ Jobs	Monday, May 23, 2005	Tuesday, May 24, 2005
Parlor		
Greeter	Lawrence Irvin	Pam Brewer
Observer	Pete England	Tommy Hern
Test Room		
Facilitator	Kendall Kelly	Barbara D'Angelo
Observer	Sally Henschel	Charlotte Kaempf
Student (remote)	Pam Brewer	Sally Henschel
Control room		
Tech set-up	Barbara D'Angelo Tommy Hern	Fawn Musick Lawrence Irvin
Time Log Engineer	Fawn Musick	Kendall Kelly
Administrator	Charlotte Kaempf	Pete England



Appendix C - Consent Form

Usability Test Study of the enCore beta v5 Learning Environment

I agree to participate in the research titled Graduate Student Usability Testing of the beta version 5 of the enCore Learning Environment, which is being conducted by the online Ph.D. students in the graduate program of Technical Communication and Rhetoric at Texas Tech University, under the direction of Dr. Locke Carter. I understand that this participation is entirely voluntary; I can withdraw my consent at any time without penalty and have the results of the participation, to the extent that it can be identified as mine, returned to me, removed from the research records, or destroyed.

The research has been explained to me as follows:

- The purpose of the study is to evaluate the usability of certain features of the beta v5 of the enCore Learning Environment. The researchers wish to determine the ease of use of the program for teachers and how teachers perceive it.
- Participants will work at a computer that has access to the enCore Learning Environment. While the participant tries various tasks, he or she will be directly observed and videotaped so that the research team can review the participant's interactions with the program and the participant's comments during this interaction. The entire activity will take approximately 1 ½ hours.
- The participant's identity will be kept confidential in any transcriptions and reports generated from this research. Any comments or expressions made during the usability evaluation may be used for the purpose of evaluating the program and showing the results of this research. The videotape will be included as part of the final report submitted to the course instructor. All videotapes related to this research project will be turned over to the Technical Communication and Rhetoric Department.

The researcher will answer any further questions about the research, now or during the course of the project.

Please sign both copies of this form. Keep one and return the other to the researcher.

Signature of Participant/Date



Appendix D - Evaluation Checklists

Please indicate in the “Evaluation” columns below the Problem severity according to the following 4-point scale: 4: Unusable, 3: Severe, 2: Moderate, 1: Irritant. Please add a check for successful completion of task.

Table 4. Facilitator Scripts and Evaluation Sheets for Participant Performance.

Scenario 1: Setting Preferences	
<p>Script</p> <p>In the enCore b5 Learning Environment, you can change your settings such as your “description” or your layout of the program.</p> <ol style="list-style-type: none"> 1. Where would you go to change these settings? 2. Please describe yourself briefly. 3. I’d like you to set one more options—modify your screen size. 	<p>Evaluations</p> <p>___ Finds options button</p> <p>___ Finds pull-down menu</p> <p>___ Chooses description for inputting profile</p> <p>___ Saves description</p> <p>___ Chooses screen size & layout option from pull-down menu</p> <p>___ Reset screen size</p> <p>___ Closes quick editing window</p>
Scenario 2: Preparing for Class	
<p>Script</p> <ol style="list-style-type: none"> 4. We are now ready to prepare for class. The first thing you need to do is create a Note (or now called “Document”) to communicate your class agenda to your students. (Encourage them to type one line.) 5. Put the new Note (or Document) into your classroom. 6. Now you need to prepare two slides within the Slide Projector for presentation. Please create one slide containing text and one slide containing a URL. 7. Would you now close the Xpress Object Editor window? 8. You have decided to change one of your slides. Please edit one slide. 	<p>Evaluations</p> <p>___ Finds objects button to create document</p> <p>___ Finds create new object button</p> <p>___ Finds icon to create document</p> <p>___ Names document</p> <p>___ Closes object editor window</p> <p>___ Drops document in room</p> <p>___ Finds my stuff button</p> <p>___ Clicks name of document in inventory window</p> <p>___ Clicks “drop here”</p> <p>___ Loads slide on slide projector</p> <p>___ Edits slide on slide projector</p>



Table 4 (cont.). Facilitator Scripts and Evaluation Sheets for Participant Performance.

Scenario 3: Conducting a Class	
Script	Evaluations
<p>9. We've finished preparing your room, and you will now start class. In order to get class started, clear the right pane so you can begin.</p> <p>10. Welcome your student(s).</p> <p>11. Who is the student who just arrived?</p> <p>12. Please start the recorder.</p> <p>13. Now it's time for a project presentation. Please present your two slides to your class.</p> <p>14. Class is now over. Everyone is gone. It's time to shut the recorder down.</p> <p>15. Please email this transcript to yourself.</p> <p>Thank you.</p>	<p><input type="checkbox"/> Chats with student</p> <p><input type="checkbox"/> Clicks on student's description</p> <p><input type="checkbox"/> Starts the recorder</p> <p><input type="checkbox"/> Shows slide to class</p> <p><input type="checkbox"/> Stops recorder</p> <p><input type="checkbox"/> Views transcript</p> <p><input type="checkbox"/> Mails transcript</p>