

Yahoo Ad Manager Plus Help Center

Usability Study and Findings

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About the Study

On March 27, 2015, I conducted a usability study of the YAM+ help center. There were four participants, and the study included the following methodologies:

- Before the study, I asked each participant about the level of experience they had with the YAM+ help center.
- Participants were asked to perform four information-seeking tasks.
- After each task, participants were asked to rate the difficulty of the task, given the information in the current help center.
- Participants were asked four post-study questions that sought general feedback about the help center.

About the Participants

Four Yahoo employees participated in the study:

- Two Deployment Managers
- A Platform Strategy and Operations Manager
- A Partner Manager

Familiarity with the Help Center

Participant1 and Participant2 had been involved with the YAM+ platform beta release helping new clients prior to this evaluation. Participant3 had helped me review and structure a new version of the help center prior to the study (though participants evaluated the existing help center, and not the new help center). Participant4 was new to YAM+.

When asked about their familiarity with the help center, participants said the following:

- Participant1: *So far I've just been using the user guide. I have briefly looked at (the help center), I haven't had a chance to really dig in.*
- Participant2: *I've looked around in it. I haven't really fully utilized it.*
- Participant3: *I do not use it right now because I'm not actively working with clients. I used other help centers for YAX and Right Media in the past.*
- Participant4: *I just got access to YAM+. Other than the training I've not been in the interface.*

User Tasks

Participants completed information-seeking tasks and the help center provided varying degrees of effectiveness.

Task 1: Scheduling a Report

For the first task, participants were asked to find information on scheduling a report. The most relevant article was located under the Help tab, Analytics link, and then the Scheduled Reports link to article SOL3198. None of the participants followed that path first. Because the task path was not obvious, 50% of participants expressed that the Help center's tabbed interface was confusing. This issue is addressed in the Findings section.

Three of the participants eventually navigated to the help article entitled *Scheduled Reports* (SOL3198), and one participant sought information in the User Guide. The help article lacked basic conceptual information on how to run and schedule a report. When asked to attempt to schedule a report, 0% of participants could complete the task given the information provided.

Some comments on task 1:

- *I think you could (include instructions on how to) create your report, run your report, and then from there maybe having instructions on how to schedule...* (Participant 1)
- *(We should) Expand it more, (make it) easy to read...maybe a little scroll down so there's more information.* (Participant 2)

On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 3.63.

Task 1 (Report Creation)	
Participant1	5.5
Participant2	5.0
Participant3	2.0
Participant4	2.0
AVERAGE RATING:	3.63

The Help center has been updated to address the issues with the *Scheduled Reports* article. It now includes comprehensive information in a new topic called *How to Schedule a Report*.

Task 2: Adding a Video to a Campaign

For the second task, participants were asked to find information on adding a video to a campaign. The most relevant article was located under the Help tab, Advertisers

link, and then the Creatives link to article SOL2063. Participants used many different strategies to find the relevant article:

- Navigating directly to the article.
- Navigating to the article, navigating away from it, and then searching on “video” to find it again.
- Navigating to the article by way of a link on the “Ads” article (SOL2060).
- Browsing the Campaigns and Getting Started tabs and then searching on the term “video.”

Participants noted the following about the task of adding a video to a campaign:

- Information about video creatives was “buried” (it was not called out in the TOC at any level).
- Advertisers often use the terms “creative” and “ad” interchangeably.
- There were some gaps in coverage of video creatives.

Participants noted that they had to scroll a lot to find the information in the Creatives article. This issue is addressed in the Findings section.

Participants had gained some experience with the Help center layout from having completed task 1, and the Creatives article was, as one participant noted, “one of the better pages.” Those factors may account for a higher rating for task 2. On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 5.0.

Task 2 (Add video to campaign)	
Participant1	7.0
Participant2	5.0
Participant3	4.0
Participant4	4.0
AVERAGE RATING	5.0

Task 3: Audiences

For the third task, participants were asked to find information on serving ads to the most appropriate users. The most relevant article was located under the Help tab, Audience link, and then the Audiences article (SOL2065). Only one participant found the most relevant article. Participants used many different strategies to find information about audiences:

- Two participants navigated to the About Audiences article (SOL3186), found it too high level, and then navigated to Audience Data Types (SOL3187).
- One participant navigated to the Network-Level Audiences article (SOL2085).
- One participant navigated directly to the Audiences article (SOL2065).

Participants noted the following about the task of creating an audience:

- The audience articles are very long, and required a lot of scrolling.
- There are gaps in the coverage of audiences.

These issues are covered in the Findings section.

Participants were not asked to create an audience, only to attempt to find information about creating an audience. On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 6.0.

Task 3 (Create an Audience)	
Participant1	7.0
Participant2	7.0
Participant3	5.0
Participant4	5.0
AVERAGE RATING	6.0

Task 4: Previewing a Creative

For the fourth task, participants were asked to find information on previewing a creative. The most relevant article was located under the Help tab, Advertisers link, and then the Creatives article (SOL2063). All four participants found this article right away. This might be because this article was also the most relevant article for Task 2.

Participants noted the following about the task of previewing a creative:

- Advertisers often use the terms “creative” and “ad” interchangeably.
- Information about the CLEAR AD notice, which applies to creatives, would be better placed as an “in app” help blurb.
- There are gaps in the coverage of creatives.

These issues are covered in the Findings section.

On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 6.0.

Task 4 (Preview a Creative)	
Participant1	7.0
Participant2	6.0
Participant3	4.0
Participant4	7.0
AVERAGE RATING	6.0

Findings

The following findings emerged from this help study:

- 100% of Participants Needed Prompting to Find the Help Center
- 50% of Participants Encountered Performance Issues with the Help Center
- 50% of Participants Found the Tabbed Interface Confusing
- 50% of Participants Felt Visual Aids Would Improve the Help Center
- 50% Found that Long Articles Need a Mini-TOC at the Top of the Article
- 100% of Participants Identified Gaps in the Coverage of Video Creatives
- 50% of Participants Noted the Need to Distinguish Between Ads and Creatives
- 50% of Participants Noted Gaps in the Audience Articles
- One Participant Suggested Adding Details about Creative Preview Issues
- One Participant Suggested Adding More In-App Help

100% of Participants Needed Prompting to Find the Help Center

There is no link to the YAM Plus help center in the help center, and users need to know that the help center exists in order to access it. Though two of the participants had seen the help center previously, all four needed assistance to access it.

- Participant 1: Facilitator gave participant the URL “yo/yamplus-help” but needed to clarify “Oh, I think it’s yamplus, the whole ‘yamplus’ spelled out.”
- Participant 2: “Is there a link to the help center in the invite?”
- Participant3: “No, I mean where is the help center located?”
- Participant4 was brand new to YAM Plus, and had been given access to the platform just prior to the user study.

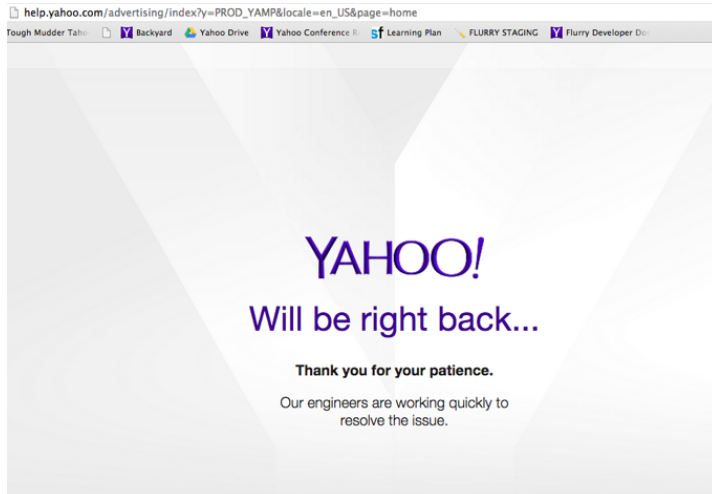
Status: In Progress

This finding is being addressed as follows:

- The Documentation team rolled out a new help center and did the following:
 - Set up a simpler URL:
<https://help.yahoo.com/adv/yahoo-ad-manager-plus>
 - Redirected the old help center to the new help center
 - Updated the yo link: yo/yamplus-help
- YAM Plus product team is working on YAMP-811, which adds a Help link in the platform.

50% of Participants Encountered Performance Issues with the Help Center

The Help center showed a blank page when Participant1 tried to access it for the first time.



When participant3 attempted Task 3 (Find Information about audiences), the interface was very slow.

Status: Unresolved

I brought up the issue with the CCOPs team, but they said that they could not reproduce the problem.

Recommendation: Monitor the Issue

If performance problems continue in production, file a CCOPs ticket to improve the performance of the new help center.

50% of Participants Found the Tabbed interface Confusing

At the time of this user study, the YAM Plus help center was created using what's known internally as Oracle KB template 1. Template 1 was the most outdated template. The updated help center uses a slightly newer template, template 2. Further studies will assess the effectiveness of the new help center.

The tabbed interface posed issues because users could not see the layout of the help center without clicking the Help tab. Participants did not have a clear path to the information they needed:

- *I'm looking at this Home page and...there's Getting Started, Contacting Customer Care, About, and then there's Help and Guides. So maybe I'll try Guides. (Participant 3)*
- *With the tabs you have to look into the tabs to see what's actually in them. (Participant 3)*
- *I just want to go in somewhere quickly and have all my choices here. (Participant 3)*
- *I would be torn between going to the Help tab or going to the Guides tab. (At the Guides tab) It doesn't look like anything here is going to help me. (Participant 4)*
- *As an overall comment I definitely have some issues around distinguishing guides and help. (Participant 4)*

The lack of a clear path to the information seemed to cause one participant to lose confidence that they would find the needed information:

- *I guess my only comment would be that it took me probably like 5 or 6 clicks to get to that and I still don't even have anything and I don't know if I'm going to find reporting information in here. (Participant 3)*

Status: Resolved

The Documentation team rolled out a new help center that no longer uses the tabbed interface. The old help center URL redirects to the new help center at: <https://help.yahoo.com/adv/yahoo-ad-manager-plus>.

50% of Participants Felt Visual Aids Would Improve the Help Center

Participants felt that visual elements (screen captures and concept art) would improve the help center because they would help people orient themselves to the UI and improve readability.

Participants made the following comments about the need for visuals in the help center:

- *One thing that might be helpful is to have a visual of how this might look in the UI...so it's not just generic text that I'm looking at. When I go to apply these things in campaigns I have a sense of where in the UI we're talking about right now. (Participant 1)*
- *A lot of the terminology sound similar like "Scheduled Report," "Report Builder" looks confusing...It would be helpful to have a window here that says where the Schedule Report button is. (Participant 1)*
- *It's hard to see what it looks like unless you are in the UI. (With no visuals you have to) go back and forth, back and forth. (Participant 2)*

One participant commented on how visuals would help with the readability of the content:

- *(Visuals would help) to break up the text a bit...there's a lot of text, and not a lot of visuals to break it up. (Participant 2)*

Status: 50% Resolved

The Documentation team had the bandwidth to fully rewrite the Getting Started and Campaign Setup content, but could only partially rewrite the Audiences, Targeting, and Reporting content. The rewritten content includes screen captures and concept art.

Recommendation: Update 100% of the Help Center with Visual Aids

As bandwidth permits, the Documentation group will continue rewriting the YAM Plus help center content.

50% Felt Long Articles Need a Mini-TOC at the Top of the Article

Two of the participants felt that the longer articles needed mini tables of contents at the tops of the pages.

- *It would be nice to have a set of quick links up at the top so I could just click down to previewing a creative and read it. The makeup of these pages is pretty long. (Participant 3)*
- *There should be some sort of navigation at the top of the page that makes it easier to get to the content you are looking for. (Participant 4)*

Status: 75% Resolved

The Documentation team had the bandwidth to add mini tables of contents to the Getting Started and Campaign Setup content, but could only partially rewrite and reorganize the Audiences, Targeting, and Reporting content.

Recommendation: Update 100% of the Help Center with Mini-TOCs

As bandwidth permits, the Documentation group will continue rewriting and reorganizing the YAM Plus help center content. Breaking up articles or adding links at the top is a normal part of the rewrite process.

100% of Participants Identified Gaps in the Coverage of Video Creatives

All four participants found gaps in the coverage of video creatives. Two participants wanted to see more information about loading creatives, and two participants wanted the information on video creatives to be more prominent and findable.

Comments about the coverage of loading creatives:

- *You might want to talk about whether this automatically loads the video when you upload it.* (Participant 1)
- Participant 1 also suggested that we fold some of the technical details from the User Guide into the help center. In particular, we should include information on “Video lines and File Size Limits.”
- *One thing I would recommend is (for video types)...might be helpful to list the ones that aren’t accepted.* (Participant 2)

The following comments apply to the findability of information on video creatives:

- *Video was the most important thing I’m looking for...I went to Ads and the video link was buried. It would be helpful to have it listed out...the different types of ads you could build...at the top.* (Participant 3)
- *It’s not obvious where you would add a video to a campaign from the information under Campaigns, so I would somehow look for “video” but there’s nothing...* (Participant 4)

Status: Unresolved

The Documentation team did not have the bandwidth to add technical details about video creatives or restructure the content to make information about video creatives more prominent.

Recommendation: Improve the Video-Related Content

As bandwidth permits, the Documentation group will continue rewriting and reorganizing the YAM Plus help center content to include better coverage of video content.

50% of Participants Noted the Need to Distinguish Between Ads and Creatives

The old help center had separate articles for “Ads” and “Creatives,” and defined an ad as “a creative that is added to a line.” Two participants noted the potential for confusion between the two terms.

- *One thing that took me a while to reinforce with both myself and my partners when I go to deployments (is) that the creatives all live at the advertiser level and you won't be able to upload them at the line level. (Participant 2)*
- *Some clients use the terms 'ads' and 'creatives' interchangeably. We don't because we differentiate between what a creative is and what an ad is...but if a partner says how do you create a video ad and they click on Ad there's no information here...They have to know to go to creatives. (Participant 2)*
- *I know that Ads is a terminology that's used in YAM Plus and I think Participant2 mentioned this earlier that creatives and ads are oftentimes used interchangeably so it depends on who you are talking to. (Participant 4)*

Status: Resolved

The Documentation team rewrote the Campaign Setup content and restructured it to better distinguish between ads and creatives.

50% of Participants Noted Gaps in the Audiences Articles

Participants expressed that the audience-related articles need to provide more information about audience data types, and what it means to work with the different audience data types.

Some excerpts:

- *Need to clarify the difference between General Interest and Yahoo Data. (Participant1).*
- *I don't know what the difference is between General Interest (and Yahoo Data when General Interest is) composed of Yahoo Data. (Participant 3)*
- *Some of the contracts have fees just for 3rd party data and not for Yahoo, or they have data costs for both. (Participant 3)*
- *It would be great to see all of the 3rd party data providers that are available so I could make sure maybe I already have a contract with someone and I like their data then I could just quickly see that it was available. I mean I would go here and read about data and then I would go in and start looking at campaigns and targeting the data and testing it.*

Status: Unresolved

The Documentation team did not have the bandwidth to improve the coverage of the Audience articles.

Recommendation: Improve the Audience-Related Content

As bandwidth permits, the Documentation group will continue rewriting and reorganizing the YAM Plus help center content to include better coverage of audience content.

One Participant Suggested Adding Details About Creative Preview Issues

Participant 1 cited the need to add information about creative preview issues.

Some excerpts:

- *If there were certain creatives that won't preview here. For some reason. Expandables. I might put that in. Rich media campaigns. Anything that won't preview. A clarification because preview doesn't necessarily mean it will serve on the site.* (Participant 1)
- *To truly replicate an ad serving on a page you have to actually look at the web site and see if it served there because there's a different environment potentially.* (Participant 1)
- Participant 1 also recommended that we fold information on creatives from the User Guide into the help center.

Status: Unresolved

The Documentation team did not have the bandwidth to add troubleshooting information about creatives.

Recommendation: Improve the Audience-Related Content

As bandwidth permits, the Documentation group will continue rewriting and reorganizing the YAM Plus help center content to include better coverage of creative preview-related content.

One Participant Suggested Adding More In-App Help

Participant 1 suggested that the platform could have more help blurbs in the app itself:

If you're in YAM Plus and you're in the CLEAR Ad notice section, there could be a link to this section here. I think that would be helpful for clients.

(Participant 1)

For an example of existing in-app help in YAM+ go to the Advertisers tab, select the row of a campaign that isn't activate. You see the popup "This campaign isn't activated, be sure to..."

Information about the CLEAR ad notice could be placed on the YAM Plus Creatives tab. When you open a creative, at the Enable Ad Choices line, information about the CLEAR Ad Notice should pop up.

Status: Unresolved

Recommendation: Work with the Product Team to Implement More In App Help

The Documentation group should file a bug to incorporate this and other in-app help content where needed.

Additional Insights

This section includes general impressions of the Help center that participants expressed during a brief post-study question and answer session.

Overall Impression of the Help Center

If you were describing this help center to someone who had never seen it before, what type of words would you use to describe the information, layout, and overall ease of use?

- Participant1: I'd say there was a good hierarchy, a logical hierarchy that points you in the right direction.
- Participant2: A knowledge base...a wiki type of tool generated by our support team (or) our product people...a Wikipedia type of knowledge base for YAM Plus (that serves as a) reminder how to set up a campaign...how to set up a creative. How to preview a creative.
- Participant3: It's not terribly intuitive. I think you could have a simpler start page without all the tabs and there's not a whole lot under each tab...obviously Product Bulletins that could go by itself but I think these topics under Help should be the most prominent.
- Participant4: The information is great. I think that these step-by-step lists are really great. The way that it's organized hierarchically I am guessing when you drill in and you get to pages like this with these long scrolls...I think that that needs to be re-thought out. A better way to organize it.

Help Center Goals

Just looking at the help center, what do you think is the primary goal of the instructions?

- Participant1: To give you a high level and detailed overview of working with the YAM Plus platform.
- Participant2: To reinforce things that you know you might forget after training, like how to build an audience, for example.
- Participant3: I think it's supposed to be a reference guide. I would really love to have every detail in the documentation. Like a true piece of documentation so I know absolutely everything I could possibly know about the product.
- Participant4: To help our clients learn how to use the system effectively.

Help Center Audience

Who do you think is the intended audience of this help center?

- Participant1: I would say these are the network gardeners, the people that are in there day to day trafficking these campaigns on the platform.
- Participant2: Our partners, or perhaps new people who join the company (so) we don't have to do this training over and over. (It can also) be used by partners who want to train a new employee or new partner to use the platform.
- Participant3: Clients and internal folks that work with the platform a lot or work with clients.
- Participant4: Yes, the seat holders on YAM Plus I would think would use it the most. In addition to the Oss and AMs. But I think the primary audience is seatholders.

Information Relevancy

Do you think there is too much information, not enough information, or just the right amount? What, if anything, should we add or remove?

- Participant1: I think (information should be) all over the UI. Everywhere you go (there should be) some popups with question marks.
- Participant2: (I see a need to) break up the text. I don't think there's too much information (but it feels) like a lot of information, (like) a wall of text. It doesn't feel like there's a lot of information (in the Audiences article, SOL2063) just because it's broken up into relevant categories so even though you have to scroll down quite a bit there's not anything that I would take out.
- Participant 3: I think if anything you can add more detail. I like the level of detail you have right now but you can probably go even further with it. Make it really comprehensive.
- Participant 4: There really isn't such a thing as too much information. I just think it needs to be organized properly.