# Scoping a Website or Application for Full Manual Evaluation

This guide provides Digital Accessibility Coordinators and website content owners guidance on determining the use case scope for a full manual evaluation.

## What is a Representative Sample?

Ideally, a full manual evaluation looks at every part of every page, and for many smaller websites, this is often what should be done. However, for large websites and applications, this is not typically practical. On large sites, there are hundreds of pages with content that follows a repeated pattern, so testing a smaller subset of these pages will give an accurate picture of the whole. That smaller piece is referred to as a **representative sample**.

A representative sample is not a random sample. It’s a carefully considered and intentional selection of pages and elements that cover all functionality of the website as a whole. A valid representative sample will cover the primary use cases, major landing pages of an application, the different content layouts that can be created, and all components or interactive widgets that make up the website.

## Gathering a Representative Sample

### Primary Use Cases

Primary use cases are the primary tasks a user will complete on the website. For example: do users come to this website to locate directions to a campus building? If so, the path a user takes to accomplish that task is a use case. Another example is a Registration Form: a user enters the site on a landing page, selects a program from a menu, clicks a register button on a second page, then fills out a form on a third page. Every page in the process is part of a single use case. Provide those use cases to the evaluator and be prepared, if asked, to provide instructions for completing those tasks.

When determining use cases, avoid redundancy. If two different tasks send the user through the same pages except for one step, just include the extra step page in the evaluation scope.

You are identifying the primary actions users will perform on the website, not every action a user would do. “Find the privacy link on the homepage” is too specific an action. “Performing a site search and locating the expected result within the results page” is about the right level of specificity.

### Major Landing Pages

Next, identify the primary landing pages through which a visitor will enter this website (e.g. from searches or links on other websites). These are the “main hubs,” typically custom special pages that link the users to other sections of the website.

Include pages that contain vital legal, accessibility, or privacy information or guidance. These pages have particular importance and their accessibility is critical.

Compare this list with your original use cases. If these pages are already in the use case scenarios, do not include them twice.

### Layouts and Content

Next, look at the different sections of the website. Typically, websites are made up of a series of layouts for different types of content. For example, a typical academic site will have different layouts for news articles, events, profile pages, and program pages. There might be variations of these layouts, so consult the developers or content managers to identify a complete listing. The goal is to identify a piece of content from each layout available to the website content creators.

Include special web pages in your sample. These are pages that follow non-standard layouts that were made in a one-off fashion for a specific purpose. These are hopefully pretty evident and may have already been identified as landing pages. In the previous use case example, the “Registration Form” page is an example of a custom page.

Again, don’t include any pages that were identified in the previous sections.

### Components and Interactive Content

Menus, Accordions, Slideshows, Forms, Maps — these are all types of website “components,” the pieces of functionality that users interact with. Sometimes components are shared across pages and sometimes they are unique to a page. They are all high-risk elements for accessibility issues.

Some components will already be included in the representative sample. For example, a primary website menu that exists on every page is already included in the representative sample because it exists on pages in the sample.

However, additional components will need to be identified. For example, are there other menus on the site? Possibly a menu on internal pages in a sidebar column, or a section-specific sub-menu? Pages that contain these components need to be included in the sample.

Look through the website, make sure all webforms, menus and embedded widgets are included in the sample.

Anything that a user clicks on or types into (rather than just read content presented to them) is an interactive element. If these elements are repeated on multiple pages, one of those pages is sufficient for the sample, but all interactive elements need to be represented in the sample.

### Finding items you may not know about

A lot of the elements above are going to be easy to find by looking through the primary areas of the website. However, some websites are older and have hundreds (even thousands) of pages created by users over time, with content that the current content owners are not necessarily familiar with.

In PopeTech, a reporting filter has been created that will look for interactive content on the website. Running this report will provide a list of pages to manually review for components and other interactive elements that are not already included in the representative sample. Follow the instructions below to run this report:

1. Run a content scan within PopeTech on the website (for instructions on this, see the [PopeTech documentation in the Accessible Website Project](https://buckeyemailosu.sharepoint.com/:u:/r/sites/DigitalAccessibilityCoordinators/SitePages/Public-Website-Project.aspx?csf=1&web=1&e=KcPLdu)).
2. Once the scan is complete, click on “Accessibility” in the left panel.
3. Click “Reports,” and select the website from the website dropdown.
4. In format, select PDF or HTML; either will work. If you intend to pass this report on to someone without access to PopeTech, PDF is the better choice.
5. Select “Result Detail” under Report Type.
6. Click “Configure Results.”
7. Under Preset, choose “Potential Interactive Content.”
8. Click “Set Results.”
9. If you would like to, you can enter an email or choose a user to send the report to. Otherwise, it will be available in PopeTech to download.
10. Click “Create.”
11. At the bottom of the page, your report will show near the top of the list of reports. Once the status says “complete,” the report is ready. If it says “queued” or “creating,” refresh the page.
12. In the actions column there is a download button to download a copy of the report.

The report will be broken down by elements that are possible indicators that a page has a component that poses an accessibility risk. Look at each page in the report and examine it in the context of the instructions outlined in this document. Is there something unique on this page? A form field that is not elsewhere, a special menu, a map or other embedded widget? If there is anything that makes this a special page, it should be included in your representative sample.

## Compiling and presenting a Representative Sample

Finally, review the items you identified – the use cases, major landing pages, content layouts, special pages, components, and interactive elements. Look for pages that overlap and pages that are redundant. Did you select a page because it had a specific component, but that component is already represented on a major landing page? Maybe the redundant page can be removed. The goal is to present a collection of elements and pages that the evaluator can use to efficiently test all layouts and interactions a user will have with the website.

Sometimes, it can be helpful to evaluators to separate out a component from pages and use cases. For instance, if a component is special but appears on an otherwise standard page, identify just the component to simplify the process for those evaluators so that they test just that special element instead of retesting the entire page.

Discuss your representative sample with your evaluator and how you came to it. The evaluator may have questions and recommendations for altering your sample. This is expected; work with the evaluator to create a proper scope for a successful, complete, and efficient manual evaluation of the website.

For additional guidance, contact Digital Accessibility Services at das@osu.edu.