Discovery & User Experience (DUX) Notes

Thursday, January 23, 2020, 1:30 PM – 3:30 PM
RAILS Burr Ridge

Facilitators:

1. Tara Wood, Manager, User Experience, SWAN

Agenda/Notes:

I.   Welcome and introductions

Some new faces have joined the group and Molly will be joining less often, but does threaten to come if snack announcement is made in advance and is worthy. Molly will be active in the e-Resources Advisory so we are not losing her voice or expertise.

II.   Enterprise 5.01. upgrade post-mortem
   - What went well (both features and communication)?
   - What could be better?
   - What are the next steps?

Generally agreed that preparation time and communication was good. Adequate notification and access to test site gave members an opportunity to discuss at staff meetings.

Some issues surfaced regarding descriptions associated with display locations. Nick suggested that current and home location displaying is actually confusing. Just having current location provides a clearer message. This suggestion was readily agreed by all and implemented after the meeting. See news post - https://support.swanlibraries.net/news/2020-01/67137

Problems associated with On Order items were reported and resolved. The discrepancy related to difference in how libraries create on order items.

Patron and staff usability at Elmwood Park and Eisenhower prior to launch did surface some problems that were corrected before go-live. At Elmwood Park, using iPads as OPACS has always

been rather unstable. This has improved since the upgrade and may also be related to the automatic timeout that was deactivated. This timeout was deactivated due to change in accessibility mode on Enterprise. With this upgrade accessibility mode is on by default resulting in an automatic timeout after 15 minutes. See news post - https://support.swanlibraries.net/node/67023 where this change in behavior and problem is being tracked. For libraries using Public Web Browser (PBW), that timeout feature still functions as expected.

The problem of default scope to my library being persistent, even when changing scope to all libraries, was noted. When initiating a new search, default scope reinitializes.

Some additional locations may still not be accurately reflecting appropriate language and whether they are on shelf or not. Tara will post the logic from the location analysis script showing which locations are reformatted in label displays to properly show they are available even if checked out (e.g. using a display user to check out item – item is really on display shelf and should show as on shelf).

Next steps after 5.0.1 is 5.0.2 which will include some accessibility improvements, but otherwise likely not impactful.

The 5.0.1 upgrade did not address relevancy, so no changes are noted there. The 5.1 Enterprise update will include the latest version of SOLR which should provide more options for relevancy tuning. We do not know what additional metrics will be included/factored into the results (e.g. number of holds, holdings).

III. Clarity Task Force report and findings
   a. Full report available here: https://support.swanlibraries.net/system/files/Public/201912/SWAN_Clarity_Task_Force_Report.pdf

Ang shared that the Clarity Task Force was formed to help clarity the source and specifics examples of the dissatisfaction amongst the membership identified in the strategic planning process. Several issues were identified and 5 major clusters of issues:

- Holds
- Discovery
- Acquisitions
- Reports
- Support/Communication/Training -> Trust

Screen capture, focus groups, journaling, and circulation desk interviews were used to collect input in various formats and from multiple sources.

Key points uncovered which relate to work of DUX:

Searching and discovery covered both Enterprise and WorkFlows.

- Differences due to editions and formats – grouped records in the discovery system (e.g. CPL has grouped results)
- Search results don't favor your copy
- Filters and facets aren't response or persistent
- Want to search and sort by currently available
- Series searching
- Unforgiving with one-word, misspellings, and punctuation – stop words
- E-content appears to rank higher in results than physical material – we did work a little with SirsiDynix to improve (this would be solved by grouped records)
- Multiple barriers to entry in use of e-content

Review corrective action –

- FRBRized display
- Filter on availability and on-order
- Conduct usability testing on e-content usage and access
- SimplyE research (rated as adult content app, can't use hoopla yet)
- Develop online patron registration process
- More frequent harvests of Enterprise
- Evaluate OPAC and Discovery options

IV. Break
V. Discovery platform evaluation
    a. New developments with the Aspen Discovery platform
    b. Activity – Evaluating discovery platforms with a System Usability Scale (SUS)

The Pika open source discovery platform developed and previously supported by Marmot under the development leadership of Mark Noble, has strategically partnered with ByWater Solutions under Aspen Discovery - https://bywatersolutions.com/projects/aspen-discovery.

Attendees participated in the System Usability Scale (SUS) evaluation. Results have been compiled and are available in a report soon to be shared with the group.

VI. Next Meeting
- E-Resource Advisory, Thursday, February 27, 2020 1:30 PM – 3:30 PM (RAILS Burr Ridge)
- DUX, Thursday, March 26, 2020 1:30 PM – 3:30 PM (RAILS Burr Ridge)

Attendees:
1. Nicolas Ayala (Itasca Community Library)
2. Molly Bitters (Eisenhower Public Library District)
3. Abigail Budzynski (Bloomingdale Public Library)
4. Chris Clark (Eisenhower Public Library District)
5. Susan DeRonne (Glen Ellyn Public Library)
6. Graham Dostal (Tinley Park Public Library)

7. Doug Ferrini (Tinley Park Public Library)
8. Amanda Ghobrial (West Chicago Public Library District)
9. Jean Jansen (Villa Park Public Library)
10. Sarah Kovac (Carol Stream Public Library)
11. Michelle Kurczak (Messenger Public Library of North Aurora)
12. Joy Matteson (Downers Grove Public Library)
13. Kelly Mueller (Itasca Community Library)
14. Angela Romano (Oak Lawn Public Library)
15. Sarah Slack (Saint Charles Public Library District)
16. Christine Sporleder (Bloomingdale Public Library)
17. Jason Stuhlmann (Elmwood Park Public Library)
18. Valerie Zulevic (Tinley Park Public Library)

SWAN staff in attendance:
1. Lauren Levaggi, SWAN
2. Aaron Skog, SWAN
3. Michael Szarmach, SWAN
4. Dawne Tortorella, SWAN