

Aspen Menu & Facets Usability Testing Report

April 2022

Summary

The SWAN User Experience manager conducted usability testing of mockups of the Aspen catalog to test new designs for the search filters, menus, and account dashboard in the catalog. The mockups were provided by ByWater Solutions, who supports Aspen and provides ongoing development. Participants used a provided laptop, and this test focused specifically on the desktop and laptop user experience.

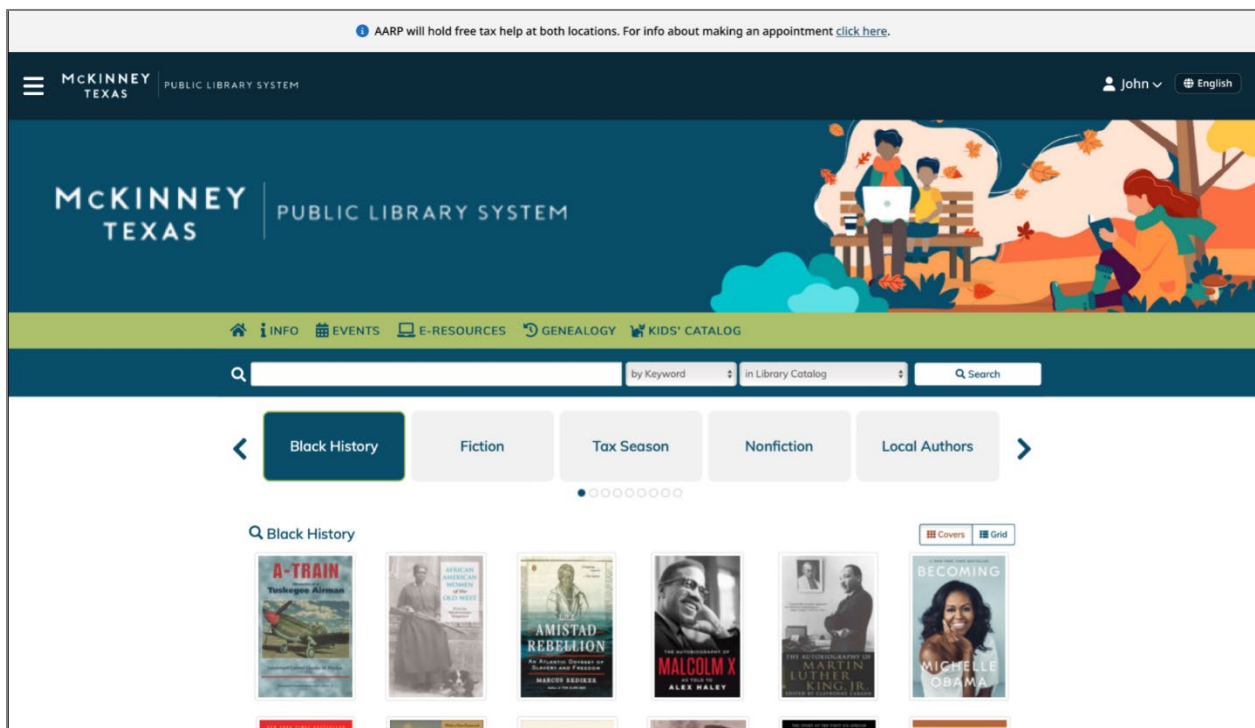


FIGURE 1 HOME PAGE MOCKUP

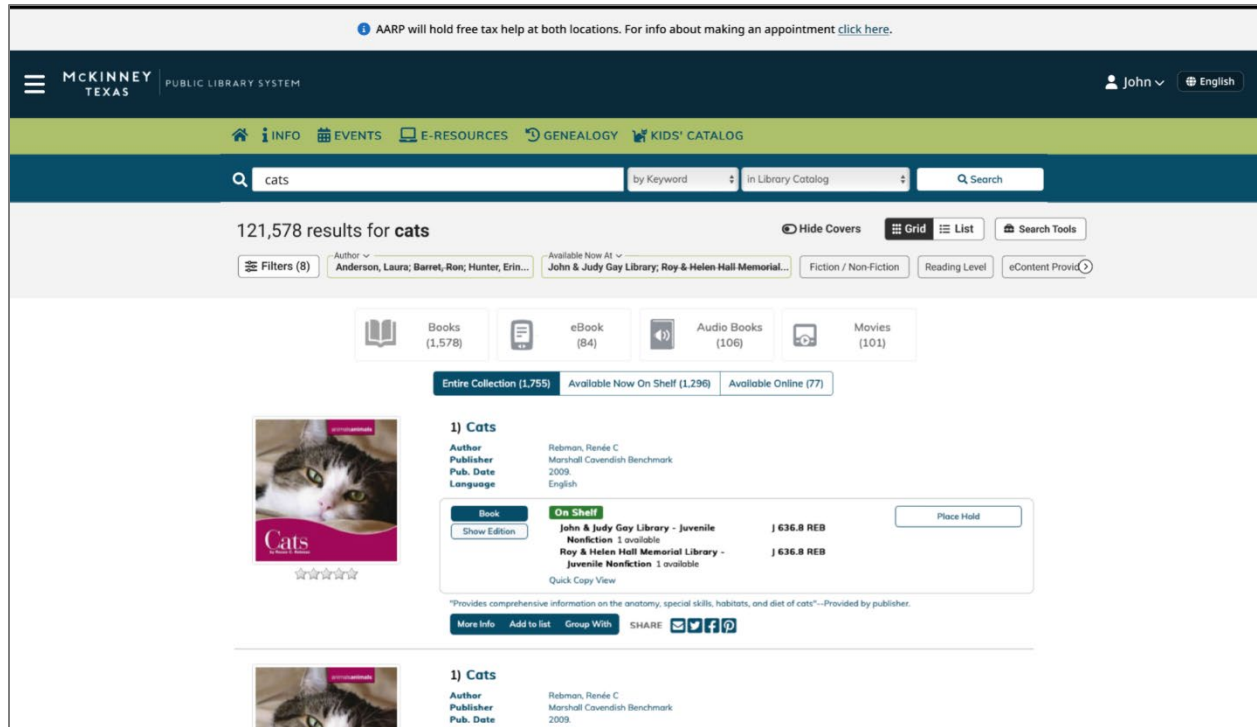


FIGURE 2 SEARCH RESULTS PAGE MOCKUP

Key Findings

1) The “Filter” button and drawer interaction works well

While some participants did not find the filter button immediately, they were patrons who would never use filters in their own day-to-day use of the catalog. One of these participants noted that to search for a specific format like a CD, they would type in the artist name and “CD” into a keyword search. The participants that found the filter button found it quickly and easily – one participant that is a heavy catalog user immediately explored the filter button unprompted.

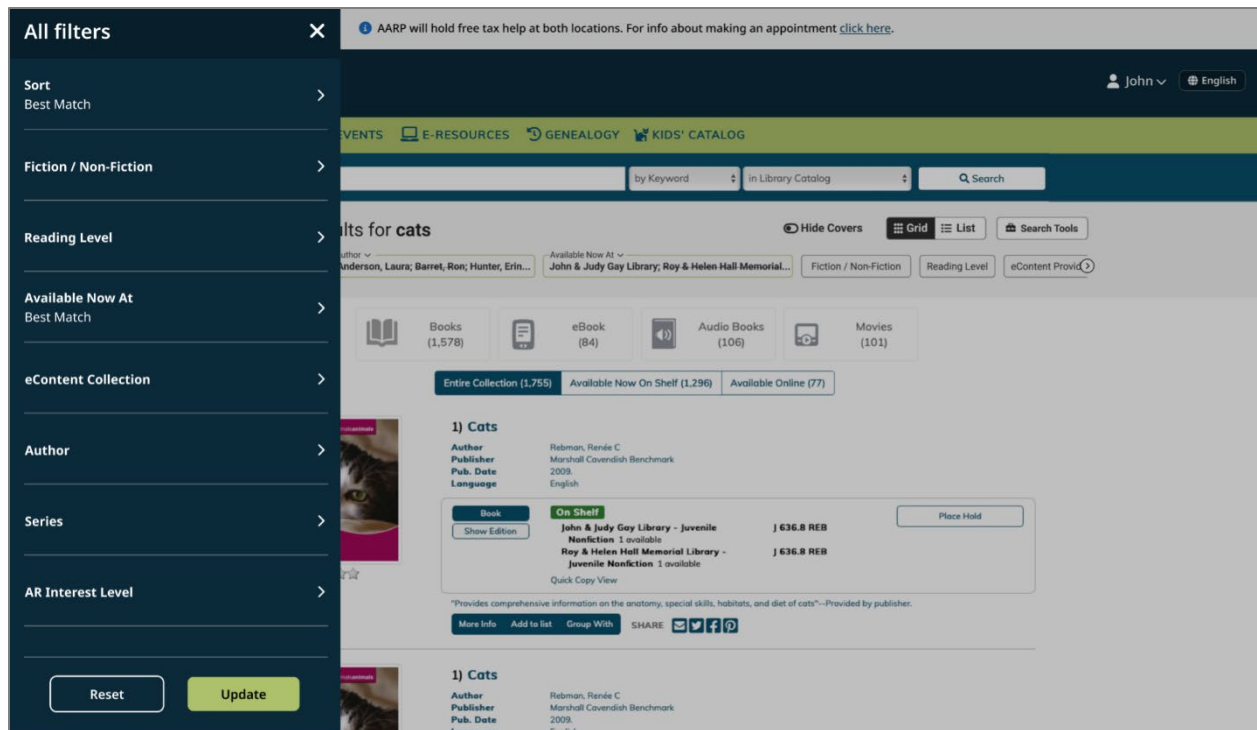


FIGURE 3 FILTER DRAWER INTERACTION

The fact that some participants found the filters and others didn't is in some ways a best outcome: The progressive disclosure of the filter options keeps them out of the way of the people that would never use them, while still making them easily found for the people that do.

In turn, it is also important to acknowledge the patrons that will only ever use keyword search, and consider how keyword filtering or ranking could be beneficial.

Recommendation 1a: Further iterate and implement the new filter “drawer” design

Recommendation 1b: Explore ways of narrowing results using a keyword search, ensuring common keyword filters for formats, etc. are improving results

2) “Sort” continues to be a mental model challenge

In past usability testing, we've seen that people struggle with both locating the sorting features and with understanding how sorting works, sometimes assuming the catalog automatically sorts in chronological order. Participants in this test - using a very different sort design - continued to struggle in the same ways. That said, participants were also able to successfully use the catalog to meet their personal needs without using a sort feature. One participant mentioned they specifically only search by a specific title, and use the “Show Editions” function if they want to make sure they get the most recent version.

Recommendation 2: Test with audiences that would be more likely to need and use a sorting feature

Most likely, people that would never use the sort features will continue not to use them with the new design. The priority should be to ensure that people that currently use these features heavily find the new interface continues to meet their needs – and likely library staff would be a good group to test with for this use case.

3) Include and exclude interactions were easy to use, but testing the horizontal filters was inconclusive

All of the participants were able to easily understand the interaction to click once to include a filter, twice to exclude, and three times to set back to “neutral”. Even participants that struggled with other aspects of the filter functionality had no issues with applying the include and exclude features.

However, it is less clear if participants understood what filters were already applied and how to use the horizontal scrolling filter features. None of the participants used the horizontal scrolling features for the filters. One participant recognized that the options shown were filters, and that they displayed some authors and libraries were crossed out, indicating they are excluded.



FIGURE 4 HORIZONTAL SCROLLING FILTERS

Recommendation 3: Conduct additional testing with search scenario mockups

While the interaction was easy for participants, it is not yet clear what issues could arise when patrons are using include and exclude features in real-life search scenarios. Past testing has shown that participants struggle to understand and apply filters in the ways that will return the best results for their goals, and more options are not always better.

Testing a series of mockups that follows a search from start to finish could help us see if patrons can reset their filters and understand what filters are included and excluded. Scenarios could include filtering by a series, returning no results and resetting, and adjusting currently applied filters that were included and excluded. Library staff or specifically recruited power users could be target audiences for this testing.

4) The “My Account” menu and dashboard worked well – once people got there

Participants struggled to find their “My Account” menu, as well as the “hamburger” menu, and most participants failed to locate these two menu options. For some, using mockups with a “fake” login name was confusing.

However, once participants got to the account drawer menu, they were able to easily find the account options and navigate to their account dashboard.

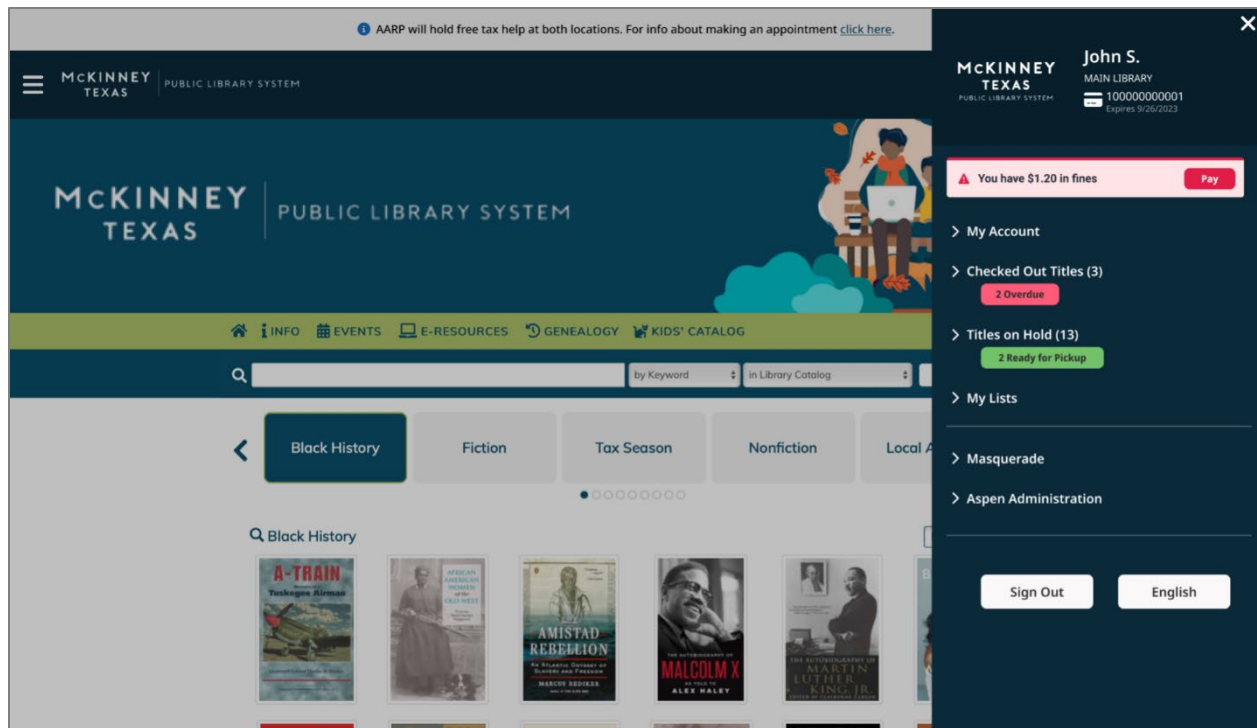


FIGURE 5 ACCOUNT DRAWER MENU

Recommendation 4: Conduct additional testing on the account menu, using testing scenarios

While the participants were informed they would be using mockups and not a working catalog, they were not sufficiently prepared to “pretend” during the testing. A subsequent test could provide patrons with a scenario, e.g. “Pretend that you are John Garcia, and you are a patron at X library, and you are seeing this library catalog for the first time.”

Testing mockups with and without a large header image and with and without the additional menu link options could help determine if those may be impacting the findability of the menu options.

Methods

The SWAN User Experience Manager conducted in person usability testing of interactive mockups provided by ByWater Solutions.

For COVID-19 safety, the participants used a laptop that shared their screen through Zoom, so the moderator could maintain a safe distance and view the screen. Tests were scheduled for 30-45 minutes using the script in the Appendix.

For more information on usability testing, see:

- Moran, Kate. “Usability Testing 101,” Nielsen Norman Group, December 1, 2019, <https://www.nngroup.com/articles/usability-testing-101/>

- Krug, Steve. 2010. *Rocket Surgery Made Easy: The Do-it-yourself Guide to Finding and Fixing Usability Problems*.

Participants

Through a brief recruitment survey posted to the Chicago Ridge Public Library catalog, potential participants were asked about their library use and experience with the catalog. One participant that was recruited did not appear for the test. Two additional participants were recruited on-the-fly by library staff. Selected participants received a \$25 gift card incentive.

Participant	Recruited	Last Use of Catalog	Is the library catalog easy to use?
A	Online	This week	Strongly agree
B	On-the-fly	This week	N/A
C	Online	I'm not sure	Strong agree
D	On-the-fly	Never	N/A
E	Online	This week	Neither agree nor disagree

Task Completion Rates & Observations

Comments: First impressions of the home page (Task 1)

No participants mentioned the change in the account and hamburger menu placement.

Use the hamburger menu (Task 2)

Pass: 1 of 5

Only Participant E used the hamburger menu. Participant B used the hamburger menu in the browser expecting it to provide functions like signing out. Participant C was especially thrown off by the menu bar options in the mockup (Info, E-Resources, etc.) and most participants gave up looking beyond the menu bar options even with prompting.

Find My Account dashboard (Task 3)

Pass: 2 of 5, one passed with difficulty

Participants were thrown off by not seeing their own names in the mockups, which at least in part may account for the low pass rate for this task. Participant A typically signs into their account through a link of the library website, and did not realize that there was an option to sign in from the catalog.

Identify number of checkouts (Task 3a)

Pass: 5 of 5

While some participants had to be prompted to click on “John” (the placeholder name in the mockups), once they did they easily found their checkouts in the account flyout drawer menu as well as on the Account Dashboard.

Identify number of holds (Task 3b)

Pass: 5 of 5

All participants easily found the number of holds and number of holds ready to pick up.

View my card from the dashboard (Task 3c)

Pass: 5 of 5

All participants easily found their library card from the dashboard, even though the concept of a digital card was unfamiliar for most of the participants.

Find Your Lists on the dashboard (Task 3d)

Pass: 1 of 5

All participants looked in the account pages sidebar navigation for “Lists”. Two thought that “Materials Requests” might be “Lists.” Participant C explored the Account Dashboard and the Lists area, but didn’t match the task to what they were seeing.

Comment: Where would you update your PIN? (Task 3e)

4 of 5 participants expected to locate it under “Profile”. Participant B easily found this option under “Preferences & Security.” Participant E noted that they expected to click their card under “Profile” and be able to update the PIN.

Find Account dropdown > Sign Out (Task 3f)

Pass: 4 of 5, one passed with difficulty

Participants A, B, expected to see a sign out option in the account menu navigation initially.

Participant B realized at the end of the test that “Sign Out” is usually “under my name” but looked in the browser hamburger menu during the test.

Scrolling issues for the account flyout drawer menu made it difficult for all participants to locate the “Sign Out” button since it was partially cut off.

Comments: Where would you add a linked account? (Task 4)

3 participants expected to find this under “Preferences & Security,” where it is currently included in the mockup. However, Participant A navigated to this area and didn’t locate the Linked Account options on the page. 2 participants expected to find this under “Profile” and Participant A also thought it could be under “Profile” after they didn’t find it under “Preferences & Security.”

Comments: First impressions of the search results screen (Task 5)

Participant A: Described the “setup” as being different, but noted features in the current catalog, e.g. “Available Now On Shelf.” Participants B & E noted that the results count was more prominent, and Participant E immediately noticed that the filters were collapsed and accessible via the filter button. None of the participants commented on the placement of the hamburger menu or account menu.

Find format category buttons (Task 6)

Pass: 5 of 5

Participant A noticed the format category buttons, but noted they would add the format in the search, such as the name of an artist and “CD.” Participant C found the format category buttons, but thought they were results counts for each format and not a filter.

Click Filter button (Task 7 or 9)

Pass: 3 of 5

Participant A noted they would always search by keywords. The concept of filtering a search was not in their mental model for using the catalog. Participant C also had to be prompted to find and use the filter button, but also didn’t seem to have used filters in the past.

Scroll across the horizontal filters (Task 7a or 9)

Pass: 0 of 5

No participants attempted to scroll through the horizontal filters, using either a mouse-dragging interaction or trying to click the arrow, even when prompted to explore those options.

Participant E noted that the options were filters and that some options were clearly excluded. When interviewed, the other participants seemed less clear on what these options would do.

Click Filters > Sort > Sort by Publication Year or Date Purchased (Task 8)

Pass: 2 of 5, two passed with difficulty

All participants struggled with this task, and the two that completed it required significant prompting. For participants A and C, sorting search results did not seem to be in their mental models of using results. Participant A thought the catalog already sorted by the newest first. Participant D, who had not previously used the catalog, found this option the most quickly, but Participant E, a frequent user of the catalog and filter options, thought the “added in the last” filter was best to complete this task.

Use include, exclude, and neutral filters (Task 9a)

Pass: 4 of 5 (1 not asked)

Even participants that didn’t typically use filters on the catalog had no issues with the include, exclude and set-to-neutral checkbox behavior.

Additional Comments & Observations

Participant A exclusively uses the library website to sign into their account. They also navigate to the browse categories on the home page by signing out (which directs them to the home page) then sign back in to place a hold.

Participant C noted that they did not like the menu bar options (Info, E-Resources, etc.) and that it was a distraction.

Some participants were able to easily “suspend disbelief” to use the mockups, while others struggled with using an interface where they couldn’t log in with their account, complete actual searches, etc.

Appendix: Script

Introduction

Hi, _____. My name is _____, and I’m going to be walking you through this session today.

Before we begin, I have some information for you, and I’m going to read it to make sure that I cover everything.

We’re here to test out mockups for some new features in the library catalog.

The first thing I want to make clear right away is that we’re testing the mockups, not you. You can’t do anything wrong here. There might be times during the test that something may not work and we will need to reset, and that is just because we’re testing mockups and not a full working catalog.

As you use the catalog, I’m going to ask you as much as possible to try to think out loud: to say what you’re looking at, what you’re trying to do, and what you’re thinking. This will be a big help to us. Also, please don’t worry that you’re going to hurt our feelings. We’re doing this to improve the catalog, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them, and if you need to take a break at any point, just let me know.

If it is okay with you we’d like to record this session – it will just be audio and your screen, no video of you. That will just help us take fewer notes.

START THE SCREEN RECORDING

Pre-Test Questions

No pre-test questions.

Tasks

[Open <https://www.figma.com/proto/DQf0783OgrXNNn1XtW35IS/Aspen-Mockups?node-id=101%3A33&scaling=contain&page-id=101%3A29&starting-point-node-id=101%3A33>]

Now I'm going to show you the mockups of the catalog.

- 1) Tell me about what you are seeing: what is different than you are used to seeing in the catalog? *(Note response)*
- 2) How would you find the library hours? *(Success: Click on the hamburger menu > Library Hours & Location)*
- 3) How would you find what you have checked out right now? *(Success: Click on name > My Account > View Dashboard)*
 - a) *(From account dropdown) Tell me about what you are seeing? (Note response – if failed task 2, direct to account menu)*
 - b) How many checkouts do you have?
 - c) How many holds do you have? How many are ready for pickup?
 - d) How would you find your library card? *(Success: View my card from the dashboard)*
 - e) How would you create a list of things to read later? *(Success: Find Your Lists on the dashboard, can't create a new list)*
 - f) How would you update your PIN? *(Note response)*
 - g) How would you sign out? *(Success: Account dropdown > Sign Out)*
- 4) Let's say you wanted to add your family member or a friend to your account so you could also pick up their library books. How would you do that?

Now I'm going to show you a different mockup of search results.

[Open <https://www.figma.com/proto/DQf0783OgrXNNn1XtW35IS/Aspen-Mockups?node-id=152%3A36&scaling=contain&page-id=101%3A29&starting-point-node-id=101%3A33>]

- 5) Tell me about what you are seeing. *(Note response)*
- 6) Let's say you'd like to narrow this search to just books. How would you do that? *(Success: Find format category buttons, not currently configured)*
- 7) Let's say you're looking for the Splat the Cat series, how would you narrow this down to just the Splat the Cat books? *(Success: Click Filters>Series or scroll across horizontal filters)*
 - a) How can you tell that you've limited to the Splat the Cat Series? *(Success: scroll across the horizontal filters)*

- 8) How would you find the newest books in this search? (Success: *Click Filters > Sort > Sort by Publication Year or Date Purchased*)
- 9) How would you narrow down to just books by the author Kathi Appelt? (Success: the “Author” horizontal filter or *Filters>Author*)
 - a) How would you exclude books by that author?
 - b) How would you reset?

Wrap Up

Thanks, that was very helpful.

- Prompt note taker and observer to ask any questions they have
- Ask their questions, then ask any follow up questions you have

Do you have any questions for me, now that we're done?

STOP the SCREEN RECORDING