

Fall 2018 Usability Test Report

Tara Wood, October 2018

Table of Contents

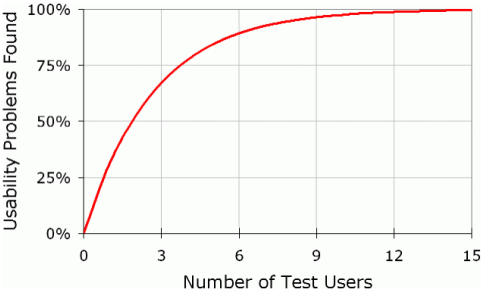
- Overview 1
- Summary 3
- Results 3
- Recommendations 6
- Appendix: Questions & Testing Tasks 9

Overview

A total of 6 people participated in usability testing of the SWAN catalog (OPAC) at the St. Charles Public Library, Tinley Park Public Library, and Oak Lawn Public Library. Testing took place in the last two weeks of September 2018.

Methods

Usability testing is a design research method in which representative users – in this case, patrons who use the catalog – complete typical tasks. The standard number of participants for a usability test is 3-5 participants. The number of additional usability problems found testing with more than 5 participants drastically decreases. As Jacob Nielsen argues, “Elaborate usability tests are a waste of resources. The best results come from testing no more than 5 users and running as many small tests as you can afford.”¹



We recruited two participants from each of the three libraries through an online survey posted to the library catalogs for each library. Through a brief recruitment survey, we asked participants if they preferred physical or digital formats and how frequently they used their library catalog. Selected participants received a \$25 Visa gift card.

Participant	How often do you use the library catalog?	Do you prefer downloads or hard copies?
A – St. Charles	Frequently (once a week)	Hard copies (books, dvds, etc.)
B – St. Charles	Frequently (once a week)	Downloads (ebooks, streaming video, etc.)

¹ Source: <https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/>

C – Oak Lawn	Occasionally (once a month)	Downloads (ebooks, streaming video, etc.)
D – Tinley Park	Rarely (a few times a year)	Hard copies (books, dvds, etc.)
E—Tinley Park	Frequently (once a week)	Hard copies (books, dvds, etc.)
F—Oak Lawn	Frequently (once a week)	Hard copies (books, dvds, etc.)

Members of the Discovery and User Experience Group (DUX) identified common tasks and the most important challenges they wanted to learn more about in this test. The usability testing script is included as an appendix to this report. Patrons looked at three different versions of the catalog:

- Version A: Their current library catalog
- Version B: Their current library catalog, with revised facets for Download Format and an ‘Only Show Available’ button

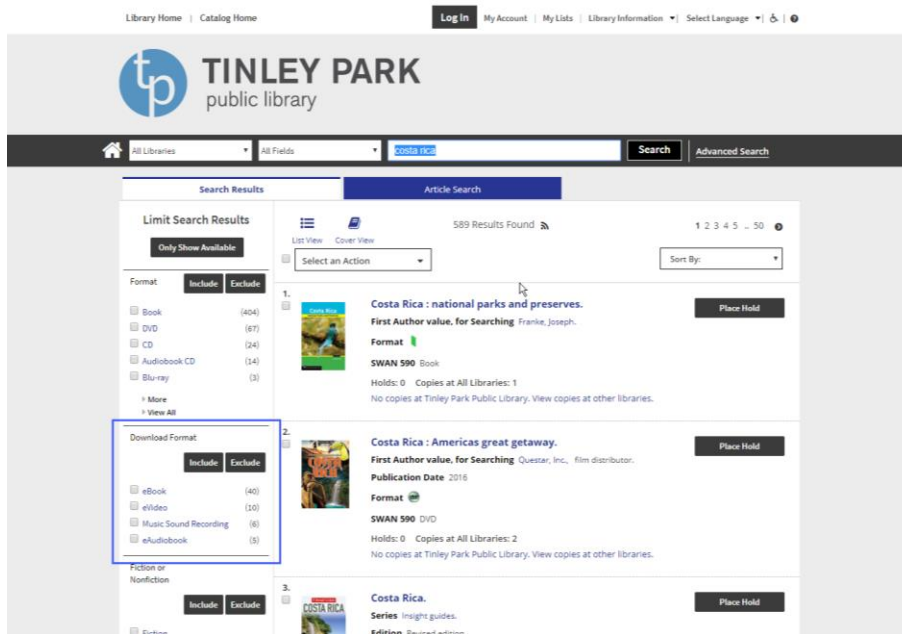


Figure 1 Version B

- Version C: A test version of the catalog with tabs for formats

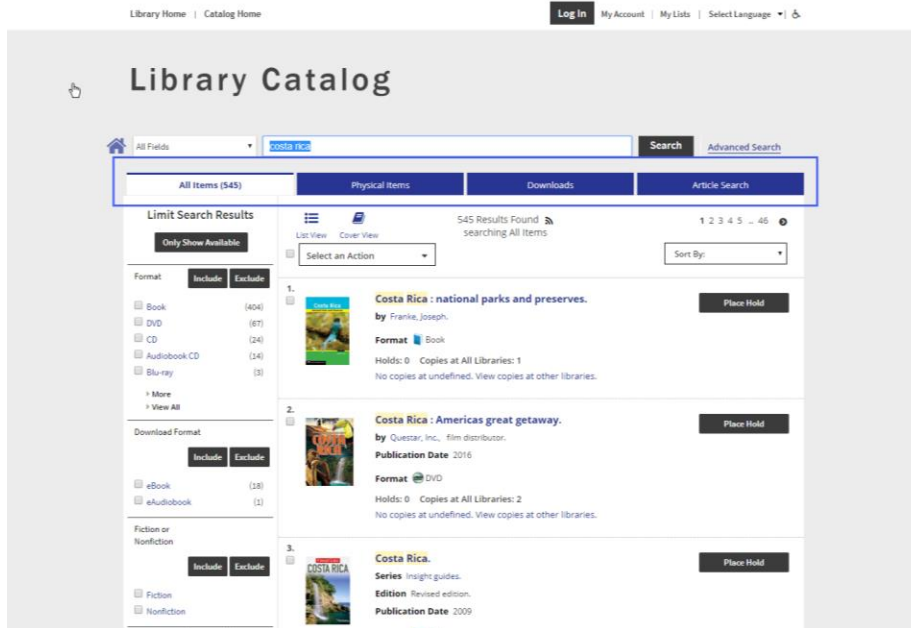


Figure 2 Version C

DUX members from the hosting libraries took notes and observed, while the SWAN UX Manager moderated the sessions.

Summary

The new features we tested – tabs for formats and revised facets for Download Format—were not as helpful to participants as we had hoped. Only one participant noticed the tabs without a moderator pointing them out. Only two participants used the eBook facet in the revised Download Format facets.

Participants were able to navigate the existing facets better than initially expected. When we tested the Only Show Available button, all of the participants looked for it as a facet with checkbox options. However, it was clear that they expected to see downloads and physical formats grouped together. Most of the participants struggled with having the Download Format separated from Format.

Results

Patrons mix-and-match formats and services

Most participants use a mix of downloads and physical items – just one preferred only print, and said their spouse uses downloads.

Some participants noted that they prefer physical items, but they will use a download if it is available. This is a case of “satisficing” -- people don’t always look for what they really want, they settle for what’s good enough.

One participant that likes to check out movies said they used Redbox for newer movies, and the library for older movies since they know they can get the older movies from the library. The same participant said that placing holds is “like online shopping” -- they can order what they want, then pop into the library to pick up their order.

Another participant called Hoopla Hulu. Like the participant who uses Redbox, the library's services fit into a larger constellation of media services they use.

Differences between physical and digital formats aren't always clear

Participants were not always clear on what results were for downloads and what results were for physical materials.

Even when they looked at the formats on each search result, they were not sure if 'Book' included eBooks, or if 'Audiobook CD' might include downloadable audiobooks. It also wasn't clear that eReaders were physical items and not eBooks. One participant thought that the permalink in the detailed item display would show them other formats of a title.

Format means 'All Formats' to users

All participants used the Format facets during the tests, but all participants looked for e-formats under the Format facets even though they only include physical formats.

Sometimes, participants didn't notice when other limits prevented download formats from displaying, such as 'All Libraries (no eBooks)' in the Dropdown limit. Sometimes the download formats were present, and participants still looked in Format and never noticed the Download Formats. This occurred when testing both the current version of the catalog and the new versions of the facets.

EReader means eBooks to users

4 of the 6 participants selected eReader thinking it would return eBooks. When participants saw results for eReaders, they did not realize they were not seeing results for eBooks. Again, this occurred in both the new and current versions of the catalog facets.

Simplifying Download Format facets didn't help

When asked to locate an eBook, 2 participants immediately noticed the new 'eBook' facet and were able to more quickly filter to eBooks. It's worth noting that these two participants used a larger computer screen, and for the remaining participants the Download Facet was 'below the fold'.

The remaining participants struggled equally with both sets of facets. One didn't notice the eBook facet, one got stuck in the physical Format facets, and one struggled trying to use Advanced Search instead of the facets.

One participant preferred to filter to Kindle items, and they struggled to find Kindle items with the simplified facets. Devices and download formats are still important for some users to navigate to items available for their preferred device or app.

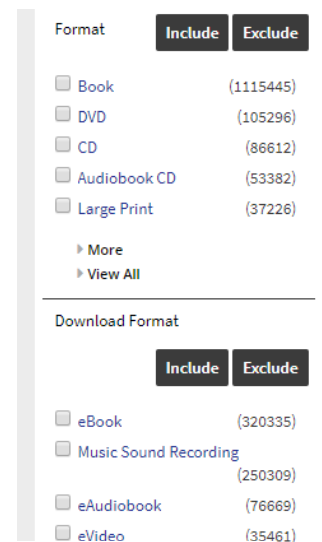


Figure 3 Simplified Download Format facets

Facet selection isn't intuitive

The current facets require patrons to check checkboxes and select 'Include' or 'Exclude' to include multiple facets; or they can click the linked facet label to limit to one. Performing a new search clears facets.

Include/Exclude

Participants used the Include/Exclude buttons and facet checkboxes more than the facet links. However, most expected that checking a facet checkbox would include the facet, and some forgot to click the 'Include' button. Some participants realized after a brief pause that they needed to click include and quickly recovered. Some did not realize the results hadn't filtered, and they thought they were looking at filtered results.

Select-then-search

Several participants expected they could select facets, and then perform a search limited to those facets. Enterprise clears facets on every search.

More vs. View All

All of the participants used the 'More' and 'View All' filters for facets at some point in the test. As one DUX member noted, this is a common feature in many retail sites.

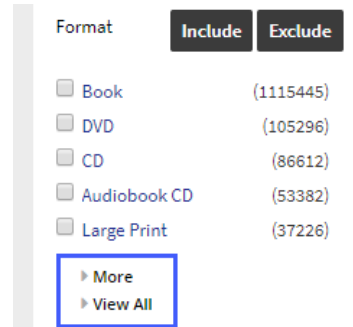


Figure 4 More and View All for facets

Removing Facets

Participants had success removing facets that had been selected. One participant used the 'home' button as a reset, and many used the 'x' to clear individual facets.

The scope of the Library facet is unclear

Some participants thought limiting by library would include downloads, and others thought it would limit to only physical items. The scope of this limit is unclear, especially when considering that there is also a dropdown menu limit for library that includes digital materials, while the facet does not.

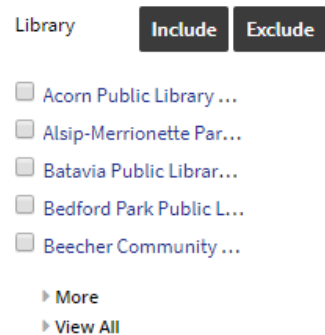


Figure 5 Library facet

The Sort-By Publication Date dropdown is more useful than the Publication Date facet

All of the participants were able to sort by the newest publication date. None reported using the publication date facet.

One participant looking for a DVD from the 1930s knew that the publication date facet wouldn't help them, since it would limit by the DVD release date and not the original release date. They browsed through the results by cover to find what they wanted.

The tabbed search results weren't noticeable

Only one participant noticed the tabbed results. One participant did not see the tabbed results, since there was an Enterprise outage near the end of the test.

When the tabs were pointed out, participants were unclear what 'Article Search' meant, though the Physical Items and Downloads labels were clearer. Only one participant said they preferred the tabs. The others would use the existing facets.

The availability button should be a facet

The 'Only Show Available' button was not noticeable to participants. Those that did eventually find it reported that they were looking for a checkbox.

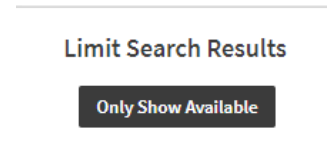


Figure 6 Only Show Available button

Patrons can manage their holds successfully

Several participants selected the 'Cancel Hold(s)', 'Suspend Hold(s)', and 'Edit Pickup Location(s)' buttons before selecting an item (or items).

Enterprise requires you to select the items first, and then use the action buttons. While this sequence is the opposite of what participants expected, they were able to quickly recover.

None of the participants reported having used the functions to cancel or suspend holds, and only one participant had used the 'change pickup location' feature before.

All but one participant was able to complete these tasks. That participant noted they would just ask at the reference desk and did not try to complete the tasks through Enterprise.

Advanced search is confusing

Participants that used the Advanced Search struggled with distinguishing multiple search boxes and format limits. Participants were not prompted to use it, but some chose to use it after struggling to limit to eBooks.

The advanced search form allows patrons to choose conflicting combinations of search options, for example and patron can limit to 'All Libraries (no eBooks)' and 'Downloadable eBooks and Audiobooks', which would return no items.

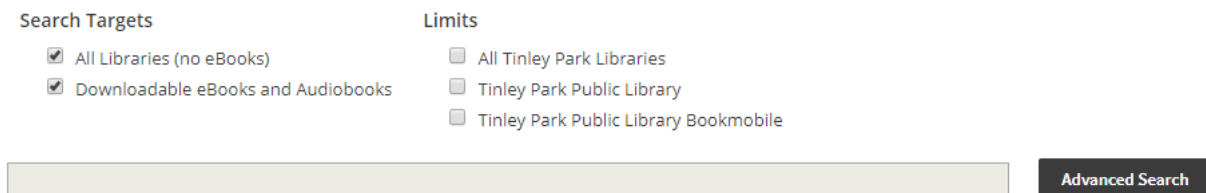


Figure 7 Advanced search with conflicting limits

Recommendations

Remove eReader facet

Since 'eReader' vs. 'eBook' was confusing for patrons, we should find a new facet label that makes it clear that a preloaded device is a physical item to check out.

Using 'e(term)' only for downloadable items will help make it clearer what's a download and what is a physical item to check out.

Next step: Cataloging Advisory should determine a better facet term.

Combine physical format and digital format facets

We should include facets for eBook, eAudiobook, etc. in one Format facet. SWAN's customized 590 field for format makes this more challenging, and we will discuss with SirsiDynix how we might approach this.

Next step: Speak with SirsiDynix in a SureSailing call about options available to combine the 590 field facets and digital format facets.

Use hierarchical facets

To clarify confusion around whether or not 'Book' includes eBook, we could use hierarchical facets. This would require significant changes to the catalog from SirsiDynix, so this would not be a near-term step.

Next step: Submit an enhancement request to SirsiDynix.

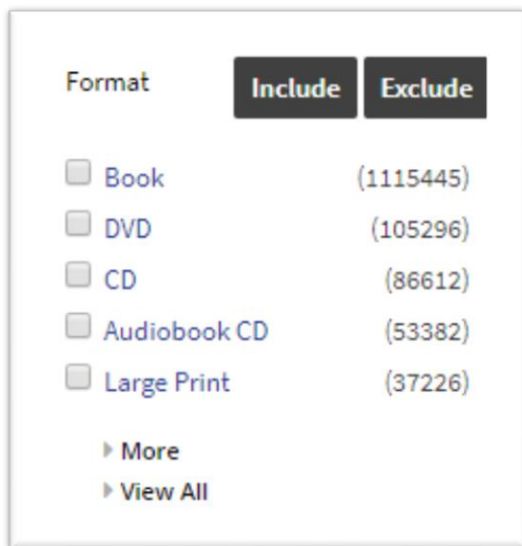


Figure 8 Current facets

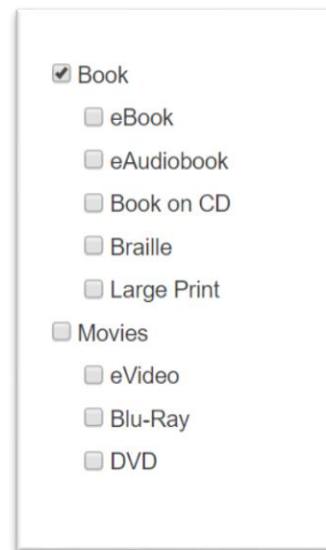


Figure 9 Desired hierarchical facets

Use persistent facets, with a "clear search" function

Users expect to have control over clearing their facets. Selected facets should remain applied until a user clears their facets. Again, this would require significant changes to Enterprise from SirsiDynix.

Next step: Submit an enhancement request to SirsiDynix.

Remove the “include/exclude” function for facets

The include/exclude functionality doesn't match patron's mental models. One short term step could be to include only an 'Apply' button, which is more commonly used on retail sites.

While an 'Apply' button would work the same way as the 'Include' button, and it wouldn't save users any clicks, it would reduce the mental effort of choosing between include and exclude.

Next step: The SWAN User Experience manager writes a custom widget to hide the Exclude button and change the label for Include.

Implement an Availability facet

An availability facet matches our users' mental models better than the button that is currently provided for Enterprise. A facet could also provide options to only show available items at all libraries and for the current profile. This would require significant changes to Enterprise from SirsiDynix.

Next step: Submit an enhancement request to SirsiDynix.

Research facets and fields to include in search results for vendor and device information

It isn't clear to users when they skim their search results which results are for downloads and which results will work for their device. We need to investigate what exactly users are looking for, for example 'Kindle' or 'Libby', and see how we can get that data from eRC and display it in search results. Then, we can use those same terms as a facet.

Next step: The UX Manager and Electronic Resources Consultant will develop a research plan to find what labels patrons are using, and some potential ways we can work with eRC data.

Research ideal facet behavior

In the Discovery Services Advisory Group, there was some debate over what was the best facet behavior: a 'select your facets, then click an apply button' approach, or a 'click and results immediately narrow down' approach.

Next step: DUX conducts a survey of popular retail sites and their facet behaviors.

Research a better label for Article Search

Since the Article Search label was confusing for patrons, we should see if a better label draws more interest.

Next step: The Electronic Resources Consultant develops a plan to A/B test new labels and measure the effect on use.

Research a better way to get to Article Search

Statistics show us that use of Article Search is low through the dropdown menu, and usability testing showed that users do not notice the tabbed display. We need to see if there is a better way to guide users to Article Search, through the catalog and/or libraries' websites.

Next step: The Electronic Resources Coordinator conducts a trial period for an article search search box embedded into a library's website. In addition, the User Experience Manager and Electronic Resources Coordinator will work together to develop prototypes for alternate locations in the catalog to guide users to Article Search. This work should happen after testing an alternate label, so we can measure the results of a label change.

Appendix: Questions & Testing Tasks

Pre-test questions

- What do you like to use from your library? (services, types of things to borrow)
- Do you ever download items from the library?
 - If yes, do you have a favorite app? What device do you use?
 - What kind (ebook, eaudiobook, etc.)
 - Do you use the catalog, or go straight to the app?
 - What do you like about downloads?
- What's something/the best thing you checked out recently or downloaded from the library?

Testing tasks

Current catalog

1. You said the last thing you checked out was _____. How would you find that in the catalog again?
 - Backup: Secret Life of Pets
2. Let's say you'd like to search for books by Nora Roberts. How would you search for those?
 - (Choose item not owned by library)
 - ("No copies at..") What does this message mean?
 - How would you get that book?
3. How would you find the newest books by this author?
4. If you wanted to check out an audiobook of this from the library, how would you find that?
5. Let's place a hold on this item (pick an item from the results)
 - How would you check to see how long it will take to get that?
 - How would you see a list of your holds?
 - Have you ever used this before? (My Account)
 - How would you change where to pick up a hold?
6. If you were going on vacation, how would you make sure it didn't come in while you're on your cruise ship?
7. How would you cancel that hold?
8. Let's go back to the search results, and this time let's say you were looking for an ebook by this author you could download [to favorite app if they have one]. How would you do that?

Catalog with revised Download Format facet

9. This time, we're going to search for ebooks about hurricanes.
 - How would you find an ebook on that topic?
 - How would you download and read that ebook?

- Was this easier, or harder this time?
- 10. Now let's say we want print books about hurricanes that are available to check out now. How would you find this?
 - (if they don't notice Only Show Available button) What does this button do?
 - Tell me what this information means (item availability table)
- 11. (Map It) What does this button do? (St. Charles Only)
 - Tell me about what you're seeing?
- 12. Let's look at these things on the left.
 - [Review each facet not used] Is this something you have ever used?
 - What do you think will happen if you limit to:
 - Format
 - Download Format
 - Fiction/Non
 - Audience
 - Subject
 - Publication
 - (Ask about terms in the facets) Tell me what that term means?

Tabbed search results display

- 13. I'm going to show you a different version of these search results.
 - Tell me about what you're seeing?
 - How would you get _____(preferred format)?
- 14. Which display do you prefer?(Switch back and forth if needed)

Questions to ask throughout

- Is that something you download, or get from the library? How can you tell?
- What does that term mean?