Usability studies

This document includes three usability studies done against the "Catholic Portal" this past Fall. They now need to read, have their recommendations prioritized, and put into practice. The document include results from Marquette, Seton Hall, and Villanova.

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Eric Lease Morgan
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CRRA Catholic Portal: Usability Testing at Marquette University

Marquette University conducted usability testing of the Catholic Portal between August 31st and September 14th. Five sessions were conducted and included 3 faculty members and 2 graduate students:

- Associate Professor of Theology (Systematic Theology)
- Full Professor of History (U.S. Urban)
- Faculty Associate (PhD, Catholic Social Action)
- Graduate student in Theology (dissertation-stage)
- Graduate student in Theology (dissertation-stage)

Sessions were conducted by Bill Fliss, Archivist, and Ann Hanlon, Digital Projects Librarian. For each session, we met with one subject and, while one person walked the subject through the eight tasks, the other took notes on the process. Following each session, the note-taker shared notes with the session leader, who commented for clarity and accuracy. After all five sessions were completed, Bill Fliss and Ann Hanlon met to review the sessions as a whole and to look for patterns in subjects' approaches to the eight tasks. Based on our interpretation of the results, we arrived at a list of the most urgent issues in need of attention in the Catholic Portal. We have also included notes for each subject's session in this report in case this is useful as a comparison with others' results.

Ranked List of Improvements based on how many of the 5 subjects experienced or expressed issues:

- Remember results after Creating an Account (5/5)
- Make site banner relevant to the Portal, not CRRA administration (3/5)
- Clearly label "From" field as requiring an email address (3/5)
- Auto-fill should be expanded so the entire entry is legible (3/5)

Notes on each task:

1. 5/5 FAIL: All five subjects knew the answer to this task, but went about trying to determine the answer using the Portal. All five failed to arrive at a record for the Dorothy Day papers. However, all five assumed that they had determined the correct answer at some point (usually they had found either a book or audio material located at Marquette University). This may indicate that further discussion of the appearance of different genres in the Results may be needed.

2. 5/5 SUCCESS, but, 5/5 CONFUSED by absence of search results after Create an Account completed.

3. 5/5 SUCCESS: Note the discrepancy with task 1 here. In part, this can be attributed to the fact that our subjects all had prior knowledge that the Dorothy Day papers were at Marquette. However, all five conducted a similar search to Task 1 and the results, in this case, appeared on the first page of results.

4. 3/5 FAIL: Subjects had no problem searching for and locating a relevant record. Subjects had no problem locating the Email This button. However, all three faculty entered initials or a name into the "From" field, rather than an email address. None understood that the blank Email form that appeared after they had submitted the first form might mean they had been unsuccessful. They

all assumed that they had successfully emailed the record to their account.

5. 5/5 SUCCESS: However, the graduate students expressed concern about determining whether the records in their results sets were relevant. The faculty subjects based their determination of relevance on what they knew about individual authors whose names appeared in the results set.

6. 4/5 SUCCESSFUL locating the Our Sunday Visitor records; 2/5 CONFUSED by the series titles in the results (which one is the main record?); 4/4 (those who located the OSV record) FAILED to locate a phone number. 3/4 of those tried to locate a phone number by using the links in the site banner (Participants, Contact, and Directory)

7. 3/5 FAIL. In this case, the faculty all failed to answer the question regarding French materials. Both graduate students were able to answer, using the facets, though based on only a portion of the records in the Portal.

8. 5/5 SUCCESS (The wrong document is associated with the record, though).

The most commonly desired improvements are listed above; however, subjects also made individual suggestions for improvement:
- Make the login bigger (i.e., more visible)
- Make Advanced Search link more obvious.
- Under Advanced Search, allow the patron to limit the search to "unpublished" or "archival" material.
- For collections of personal papers, consider adding a Note field that briefly describes the individual person.

The subjects of our study -- in addition to suggesting improvements -- also praised aspects of the Catholic Portal. To end on a positive note, here is a list of favorable comments:
- Data mining feature could be useful, although it would be even better if searchers could mine across multiple documents.
- Auto-fill is handy.
- Liked the simple, Google-style search box.
- Liked the ability to limit searches by language.
- Liked the facets.
- Liked the similar items suggestions.
- Impressed with the map of CRRA sites on the Participants page.
- Would have benefitted from this site had it existed when subject was in graduate school.

SETON HALL USABILITY STUDY

Facilitators: Chrys Grieco and Marta Deyrup

Summary: We completed the usability study with three religious scholars (a fourth scholar is scheduled to be interviewed two weeks from now). Below is our list of technical issues to be addressed, however, we'd also like to note the overall response to the site. All three scholars were enthusiastic about the Catholic Portal as a concept and could see the value of a site limited to rare Catholica. They also enjoyed searching for their own subject areas of expertise and quickly found materials. Questions about the scope of the portal included: what qualifies these items as rare; why would I go here, if I can get these items in my own library; why would I go here, if I cannot request these items from another library; why would I go here if Google indexes the same sites; why are there so few full-text materials; why is there no click-through to full-text sources (like those provided by the Vatican). These are questions that should be addressed by the committee as a whole.

Survey pool: 1 Chair of Religion and Director of CORE, 2 Seminary Professors, 1 Vice Provost and Law Professor, 1 English Professor.

We asked all the questions suggested by Notre Dame.

- 3 allow user to email more than one record at a time

- 3 Label and place prominently on homepage button to create an account

- 3 Make obvious how to search by language (i.e., French)

- 3 Search filter should not continue automatically from one search to next

- 2 Make library/archive institutional contact information more obvious

- 2 Make "my favorites" more obvious

- 2 Default search should be home institution

- 1 Label all records with tags, "digitized; print; interlibrary loan; archival"

- 1 Sort records by original language first.

Catholic Portal Usability Study – Villanova University

A Catholic Portal Usability Study was conducted at Villanova University in September, 2011.

Study Questions

We asked participants to complete eight tasks, adapted from the original Notre Dame tasks. We removed the "text mining" task since we had difficulty finding an example record (perhaps a "text mining available" facet would be useful). We added an open-ended question at the end of the test to encourage user experimentation and comment. We also ended up modifying one question midway through the test process: #2 originally explicitly instructed the user to "create an account" but we decided to remove it and see if users would figure out that they needed an account in order to proceed (indeed, users stopped stumbling over this task once we changed the question).

1. Identify the library or archive holding the papers of Dorothy Day.
2. Find a record whose author is J. R. R. Tolkien. Add the Tolkien record to your favorites, tagging it as "jrrtolkien."
3. Locate resources, including primary resources, on the Augustinian Order.
4. Find a set of records on the topic of "conscientious objectors." Choose one from the retrieved set and email it to yourself for future reference.
5. Locate materials on the topic of 17th century sermons. Which library seems to have the most records on this topic?
6. Who owns "Our Sunday Visitor Records"? What telephone number would you call in order to schedule a time to visit the collection?
7. What is the earliest edition of St. Augustine's Confessions that you can find in the Portal?
8. Perform a search on a subject you are currently researching. Are you able to find any useful materials?

Facilitators and Participants

Four Villanova staff members were involved in the study: one to schedule the subjects, one to facilitate the test sessions, and two to record (different recorders were available on different dates). Six subjects were tested, all graduate students in the theology program but representing a surprisingly diverse range of backgrounds and demographics.

Complications

Unfortunately, there currently seems to be a bug in the Portal which prevents lightbox pop-ups from functioning properly. This made testing difficult, since several tasks rely on pop-ups. As a workaround, we disabled Javascript in the web browser used for testing – this ensured that users did not encounter

fatal errors, but it also meant that certain features of the portal (autocomplete, advanced search) were non-functional for most of our test sessions, possibly skewing results.

Another minor technical difficulty had to do with recording the sessions. We used the open source CamStudio package to capture the sessions, and after completing the tests, we discovered that there were some audio synchronization problems (audio got ahead of video). This did not prevent the recordings from being useful for reference, but if others use CamStudio, it may be worth doing more experimentation to find the ideal audio/video settings to obtain the best output.

Findings

Our findings are broken down into three sections: the top five user issues (problems that showed up in the most sessions), the top five facilitator issues (problems that facilitators voted as being most important), and then all remaining issues that were noted (which may or may not be important – just being shared for everyone's reference).

Top Five User Issues

1. Pop-up lightboxes do not function correctly (6)
2. Facets are easy to overlook, and the most useful ones are not at the top of the list (6)
3. If you create an account in the middle of performing an action (like "add to favorites"), the software loses track of what you were originally doing once you finish the account creation process (5)
4. Doing searches for "St." vs. "Saint" yield very different results (the more archaic "s" abbreviation may also factor in here); it might be worth adding a synonym to the system (3)
5. The email dialog box is always empty; it might be useful to pre-populate the current user's email address if they are logged in, and a default "From:" address might also be helpful (i.e. no-reply@catholicresearch.net). (2)

Top Five Facilitator Issues

1. The "Subject" search is not always helpful if users are not familiar with Library of Congress Subject Headings; we should set better expectations or offer authority-based suggestions
2. The "suggested topics" box seems to mislead people (it narrows the search, but some seem to expect it to broaden the search); maybe it should be turned off and the topic facet added to the usual facet list on the left.
3. In the author module, the "related subjects" box on the left is somewhat confusing; perhaps this should be replaced with the standard facet box for consistency with other areas of the interface
4. The "Create Account" link is hard to find, and the "Login" link should be on the right rather than the left (by general convention)
5. Autocomplete suggestions seem to distract and mislead the user

All Remaining Issues

1. The default font size is too small, and using red text in the text boxes makes it hard to read
2. The "suggested authors" box may be too big and distracting
3. The "format" option on the advanced search screen is confusing
4. The autosuggestion box is too small
5. There are almost never book covers on display; should we use format-related icons instead or disable them entirely?
6. Some of the formats displayed at the bottom of record entries (i.e. "Archival material") do not have corresponding icons.
7. The graphic for "CRRA: The Movie" on the front page is not clickable; it should be linked. As well, the graphic and link for "CRRA: The Movie" should be made more prominent on the front page so it's more quickly and easily seen by users.
8. Users sometimes get lost when they click on finding aids at other institutions and don't realize they have left the portal; should we add a pop-up or frame to indicate what has happened? Is the forced opening in a new window problematic?
9. The login screen should include a paragraph explaining that CRRA has its own accounts – users sometimes try their own institutional logins
10. One user requested subject-specific research guides as part of the portal to help provide search tips
11. The portal uses "Topic" in some places and "Subject" in others; perhaps one term should be used everywhere for better consistency
12. The "Call Number" facet is confusing; should it be relabeled as "Classification" or "LC Classification"?
13. More prominent contact information (perhaps associated with the "Location:" field) would be helpful.
14. The facet bar is very long. Would it be easier to use if the contents of each facet were collapsible?
15. It would be useful to geocode items based on home institution and allow current user's location to impact relevancy; perhaps plot on a map.
16. The gradient background used on the advanced search screen is hard on the eyes
17. Some date sorting fails because of bad data in the index (for example, search for "confessions" and sort by "Date Ascending" – many items show at the top of the list because of blank dates)
18. User request: digitize out-of-copyright theses.