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Report of Findings: 2022 SILS Usability Testing

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Report of Findings

2022 SILS Usability Testing

University Library
University of California, Santa Cruz

Prepared by:

Discovery User Experience Team

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October 14, 2022

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Executive Summary

This report describes the moderated usability tests developed and implemented to evaluate the effectiveness, efficiency, and user satisfaction with UC Santa Cruz’s implementation of UC Library Search (Primo VE).

Findings indicate that users were able to successfully perform most essential tasks in the system. The only essential task with notable task failure relates to the current configuration to “filter by availability” wherein users cannot surface known items that are not available in full text unless they utilize the availability toggle (or use the Find by Citation form). The team

recommends additional investigation in this area. The team also identified several aspects of the system that caused mild to moderate confusion or frustration, many of which involve labels in the UI; recommendations for improvement in these areas have been outlined below.

Introduction

The UC Santa Cruz University Library launched UC Library Search, a consortial discovery layer based in Primo VE, in August 2021. Prior to UC Library Search, UC Santa Cruz used a single-institution version of Primo VE called “Search” for local discovery, coupled with Melvyl (via Worldcat) for consortial discovery and requesting.

The Discovery User Experience (DUX) Team developed research questions around the effectiveness, efficiency, and user satisfaction with our local implementation of UC Library Search. These questions were primarily in the areas of discovering and requesting consortial materials and filtering CDI materials based on local availability.

Method

The DUX Team developed usability task scenarios based on common library research needs and behaviors of undergraduate, graduate, and faculty users. These tasks were incorporated into test scripts (see Appendix) for an Undergraduate User Group and a Faculty and Graduate Student User Group. The team submitted a study proposal to the review board in August 2021 and received approval for exemption in December 2021 (#HS-FY2022-51).

The study adopted Jakob Nielsen’s (2000)¹ recommendation to test three to five users within each group. Three undergraduate students and two faculty members were successfully recruited². Funding was secured to offer student participants \$25 Amazon gift cards as incentives for their participation. Student recruitment was advertised via news item on the library homepage and through the library’s social media accounts. Faculty were recruited via targeted email invitations. All testing sessions were one hour in length, during which participants were given a series of tasks to perform. Participants were asked several follow-up questions after completing these tasks.

All participants were asked to sign a statement of informed consent outlining their rights as a participant in this type of usability research, consenting to the recording of the sessions, and confirming that they were over 18 years of age. Participants were asked to “think out loud” while performing the tasks and advised to be as forthright as possible when voicing their feelings and opinions. A single moderator engaged the participant in a series of tasks over Zoom, asking probing or clarifying questions as appropriate. Sessions were recorded to eliminate the need for

¹ Nielsen, J. (2000) *Why you only need to test with 5 users*
<https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/>

² The initial goal was to recruit three faculty members or graduate students but we were unable to recruit additional participants

contemporaneous notetaking. Recordings were used to create anonymized transcripts and were only viewed by members of the DUX Team; recordings will be destroyed. Anonymized transcripts were analyzed and coded using Taguette.

Prioritization of Identified Usability Problems

High Priority = Task Failure; Quick Fixes/Easy Wins

Medium Priority = Causes frustration or confusion (but not failure)

Low Priority = Unclear results - further testing required; Aesthetic changes; Requires changes in systems other than Primo

Findings

Previous Use

Both undergraduate and faculty participants were asked about their prior use of the library search tool. 2 of the 3 undergraduate participants reported previous use; one in the previous quarter and the other only hours before the session. Both faculty participants reported previous use; one identified as a frequent user and the other had not used the tool in at least two years.

Book Requiring ILL Request

Both participant groups were asked to review brief results for an item with a status of “Check Availability” that was only available via interlibrary loan request. In this task users were asked to search “[California Water Pollution](#)”. Once the search was done, users were asked about items that displayed “Check availability” status in the brief results. Undergraduates reported feeling unclear about what this meant exactly, but had a general sense that this meant the item might not be immediately available.

Users were then instructed to click into the full record display and then asked about the extent to which the information in the full record screen matched their expectations. Undergraduate users all agreed that, to the extent they knew what to expect, the full record display met those expectations.

Users were then asked how they would go about acquiring the item. Users all quickly realized the need to sign in to request the item and initiated those steps successfully.

Users were asked how long they expected the item to arrive after they requested it. Every user had a different idea and no users displayed confidence in their estimate. When pressed to guess, estimates ranged from a few days to around a week. Undergraduate students indicated that a week would be the most they could generally wait for an item unless they were engaged in a less typical long-term project.

Faculty members were asked the same questions as the undergraduate students. Both faculty demonstrated confusion around the “Check availability” status. Once instructed to click into the full record display, both realized they would need to request the item.

Both faculty were unsure about how long the ILL item would take to arrive; one guessed around a week and a half. Both understood that they could/might get a physical or digital copy of the item through interlibrary loan. Faculty suggested that longer waiting periods were acceptable for their materials, stating that their projects frequently took a quarter or longer.

Both faculty succeeded in requesting the item. One faculty felt very positive about the request process stating, “...it seemed very intuitive– the pop-up box.” They also realized that their initial assumption about “Check availability” was incorrect.

Usability Problems Identified

- Undergraduates may not have time to wait for ILL items to arrive
- Users were uncertain of the waiting period between requesting and receiving an item
- Uncertainty around the “Check availability” status label
- Users believe eBooks are readily available via interlibrary loan

Recommendations:

- Approach ILL in the Fall about adding the ILL wait time note to item records: HIGH
- Investigate when Check Availability displays - opportunities for a clearer status label: HIGH
- Investigate and think about whether or not to display consortial eBooks: LOW
- DUX thinks about changes on the homepage that would improve usability for users entering Primo: LOW

Conference Proceeding Requiring ILL Request

Students were given a link to a conference proceeding that was not available at UCSC, but was available through ILL. (In Task 1, they had already encountered ILL items.) They were then asked a series of questions. The goal of this task was to gauge undergraduate student comfort levels around requesting unfamiliar resource types or formats and to understand sentiment around interlibrary loan requests.

When asked how long they expected to wait before receiving this item, most students expressed confusion. Some were unsure if this was a single paper or a book, the term “conference proceeding” wasn’t a familiar format, and nothing on the record indicated how long it would take to receive the item. One student said, “...in my experience, it’s easier to get books

than articles...³ One student indicated that, if this format were similar to articles, they would expect it to take about 24-48 hours.

When asked if they thought they would request items not immediately available in full text, most students said that it would depend on the quality of the item, and what other items were available online. One student stated, "It's going to give me some more knowledge, deeper knowledge than yes." Another said, "I think I just didn't know that I could do that [make an ILL request]. It's nice knowing that I could do this."

Asked if they could have waited one or two days for a source for their last research project, most said one or two days wasn't a burden, but longer would be difficult. One stated, "But yeah, that [1 or 2 days] wouldn't have been too much of a burden." Another said, "I tend to do things all at once. I like to have everything ready when I start working. But I think one or two days would be okay to wait."

Usability Problems Identified:

- Interlibrary loan ("request") is not a familiar service to undergraduate students
- Students may feel less comfortable requesting unfamiliar item formats (e.g. conference proceeding)

Recommendation:

- Identify where term "Interlibrary Loan" is used - consider replacing or removing (jargon): HIGH

Understanding Item Status Labels

Users were given a link to a page of search results for the [keyword search "child care women gender equality"](#) and then asked a series of questions about the results on this page.

Users were asked to identify how they would get access to various items in the search results by looking only at the brief results (users were instructed not to click into the item records). Items included a book available online, a book available only in print, a book available both online and in print, and a book that had been checked out and therefore only available via interlibrary loan.

Users were able to quickly identify correct access methods for all items except for the checked out book. The item label for this material was "Not available." Users expressed confusion about what this might mean; notably, the frequent user expressed belief that this item would not be available via interlibrary loan, "If it was available for interlibrary loan, I forgot what it says, but it would still be gray, but it says something else."

³ Though articles are often faster to interlibrary loan than books, it also be that the student was referring to articles accessible online (through Google Scholar, OA repositories, or otherwise)

Download PDF [View Issue Contents](#) [Available Online](#) >

12 **BOOK**
Handbook on gender and social policy
 Shaver, Sheila, editor.
 2018
 Not Available >

13 **ARTICLE**
The triumph of instrumental over equality policy in European employment policy
 Ruberv, Jill

Checked out book with “Not Available” item status

Users were then given a scenario in which they needed to find only materials available immediately and asked what they would do to make the results reflect this need. Two users were able to complete this task successfully, using either the “Available Online” facet along or combining that facet with the “Print Books & Journals at UC” facet. The third user demonstrated facet-inattention and attempted to use Advanced Search for this task. Once this user was prompted to look at the facets, they correctly identified the “Available Online” facet as meeting the task need.

Usability Problems Identified:

- “Not Available” label was not well understood
- Facet inattention: some users do not notice the filters in the left column

Recommendation:

- Confirm when “Not Available” label shows consider changing that label to something like “Request or Recall” - something that tells users their options for getting the item: HIGH

Sentiment & Expectations Around Material Availability

Users were asked to view search results on [Lake Tahoe temperature variations](#). Users were asked how they felt about the number of results displayed that required an interlibrary loan request to access. Most of the users expressed concern around the number of items not immediately available. One student said, “[I’d feel] probably stressed. Yeah. Concerned.”

Users were then asked whether they generally expect immediate access to the resources they find in UC Library Search, either online or in print. All of the undergraduate students said they would generally expect to be able to access things immediately; if not all items, then at least a high percentage of the results. One of the users said: “In terms of immediately available, I’d probably say like two thirds of the time, maybe like 70 percent, something like that”.

To gauge their understanding of the impact of filtering on results, students were asked what they would expect when limiting their results set to a specific type of item (in this case, dissertations). Students all stated that they would expect the use of such filters to limit the number of results.

Faculty users were also asked about their feelings when presented with this set of search results. Faculty members stated that they would not feel frustrated by these results, expressing their willingness to use interlibrary loan services to obtain materials.

One user did caution that this sentiment might not be shared by their students, saying, “I know that my students have a more immediate need for things to be clickable in there and that the frustration will be there, especially when they don't have a lot of investment in the research task.”

One user pointed to the label “Check Availability” as somewhat confusing, stating, “I'm wondering whether some of these things might not be available through ILL. And maybe that's why this language is here, “check availability” rather than “request”.”

Usability Problems Identified:

- Undergraduate users are unsatisfied when presented with a majority of items requiring interlibrary loan for access

Recommendations:

- Further research to better understand how inclusion of materials not immediately available in search results impacts undergraduate students. Known item search results may be especially problematic. LOW

CDI Filter by Availability On

Students were given an article citation and asked to show how they would get the article in UC Library Search. In order to succeed at this task, users would need to use the filter by availability toggle.

All students failed to expand the search until given direction to do so. Upon not finding the result in their initial set, students tried various second approaches such as using advanced search and control-f to search within a page. One student said their next step would be to leave UC Library Search and try Google and another said they would go to JSTOR. One student, when asked about their next steps for finding the article, clicked the “Didn't Find It” side-tab. However, even after seeing the contents of the “Didn't Find It” box, they did not use the “Articles Available by Request” link, which would have expanded the search. The student state, ““On the side, I kind of like how they have the Didn't find it button.”

Students were pointed to the expand toggle, labeled “Include Articles Available through Interlibrary Loan” and asked what they thought this toggle might do. Students expressed uncertainty. Despite having placed interlibrary loan requests in previous tasks, two students

reported feeling unsure about what “interlibrary loan” was and why they might want to use it. One stated, “The checkbox is pretty noticeable, like it's right there. I would not have known to click it, though. I don't think I connected...” Another said, “Because in previous searches, like when I looked up something, included in the search results were results from interlibrary loan. Yeah, I guess I'm confused on why sometimes that includes it and sometimes it doesn't.”

Neither faculty succeeded in using the expand feature to find the article without direction.

One faculty member went directly to the find by citation feature when presented with the article citation. This created an OpenURL record for an ILL request, bypassing the need to click on the box expanding to all UC articles. The second faculty member suggested they might go to Worldcat (it's possible this approach may have succeeded using the “Get it at UC” button). When pressed to continue in UC Library Search they used the “Didn't find it” side-tab, and chose the “Articles Available by Request” link that enabled the box. When asked about the noticeability of the expand toggle, one faculty member stated, “No, [the checkbox is] not [noticeable]. I mean, it's a very text-heavy page, so my eye is not going to go there unless I have been in research situations where I know that that is a tool available. So I'm not going to probably see that intuitively, just like I didn't really see that, ‘Didn't find it’ thing here.”

Usability Problems Identified:

- Expand toggle is not noticeable
- Poor mental model for what is included in search results: needing to expand articles but not books to All UC causes confusion
- Didn't Find It guidance is not followed
- ILL not a familiar term to undergraduate students
- Users don't necessarily realize that their desired article is “available through Interlibrary Loan” as a category

Recommendations:

- Investigate options for improving user attention on the expand toggle and/or Didn't Find It - MEDIUM

UC LIBRARY SEARCH

Contribution to climate change of the past 100 year X Articles, books, and mo

Sign in to get complete results and to request items Sign in X DISMISS

PAGE 1 16,441 Results

Include articles available through Interlibrary Loan

Sort by Relevance

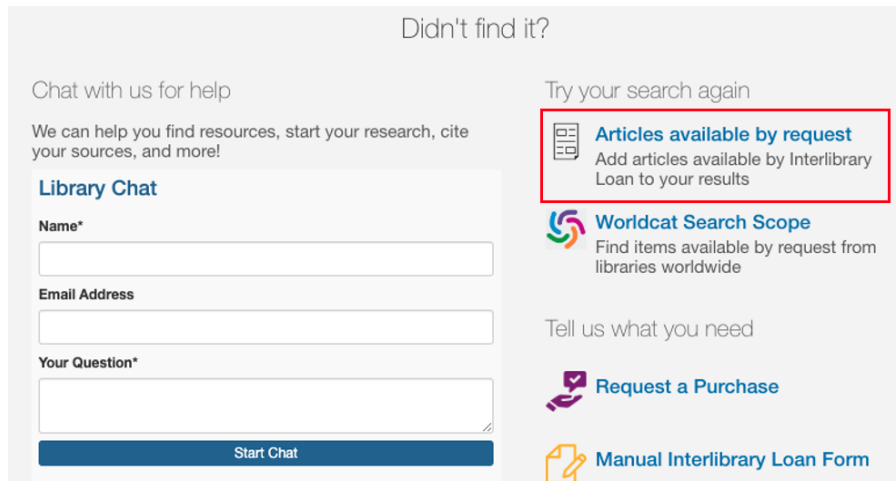
Show Only ^

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Open Access

ARTICLE
Groundwater recharge over the past 100 years: Regional spatiotemporal assessment and climate change impact over the Saguenay-Lac-Saint-Jean region, Canada
Boumaiza, Lamine ; Walter, Julien ; Chesnaux, Romain ; Lambert, Mélanie ; Jha, Madh
Wanke, Heike ; Brookfield, Andrea ; Batelaan, Okke ; Galvão, Paulo ; Laftouhi, Nour-E
Stumpp, Christine
Hydrological processes, 2022-03, Vol.36 (3), p.n/a
** Proper knowledge of potential groundwater recharge (PGR) and its spatiotemporal
are essential for sustainable groundwater management, especially within the context o
change. Here a robust GIS. **



CDI Filter by Availability Off

The goal of this task was to better understand user preference around filtering by availability. Users were directed to the Sandbox UC Library Search site, wherein administrators had turned off the filter by availability setting for CDI results. Users were then asked to, once again, search for the article “The Volcanic Contribution to Climate Change of the Past 100 Years” by A. Robock.

Users were asked to compare their experience finding the article in Sandbox to their experience finding the article in the production system. All users reported preferring their experience in the Sandbox system where the article appeared immediately in their search results (without any additional clicking).

Users were then asked whether they expected to see articles available from other UCs in UC Library Search even if those articles were not available immediately online to UCSC users. Two users expressed an expectation to discover this type of article while the third user said they would not expect those materials to be surfaced.

Users were asked to reflect on whether they would prefer to only surface article available immediately in their search results, requiring an additional click to include articles available via interlibrary loan versus surfacing both types of articles immediately. Two users expressed a preference to surface all articles; both mentioned that they would use the “Available Online” filter (as used previously) if they wanted to limit their results to immediately available articles. The third user astutely stated, “I think this one [Sandbox without availability filtering] the potential problem is clutter.” This user went on to explain that they usually require an article on a broad subject rather than a specific article; using this satisficing approach, the system that only displayed immediately available articles was preferable.

Usability Problems Identified:

- Although users prefer to find a known article immediately (with fewer clicks or required process knowledge), the majority of undergraduate use cases involve searches for broad topics and employing a satisficing approach to selecting articles. In these use cases, surfacing articles not available immediately could erode the user experience.

Recommendations:

- Further research to better understand how inclusion of materials not immediately available in search results impacts undergraduate students. Known item search results may be especially problematic. LOW

Finding Specific Translations of a Work

Users were asked to search for a known item with multiple versions, by a specific translator. They were asked to search for [Plato's Republic translated by C. Emlyn-Jones](#).

All undergraduate participants were able to find the item easily. One user did look for a "Translator" field in advanced search but was able to find the item without help by entering the info given to them in the "Any field" search.

The faculty members were all able to find the material without much trouble but one was confused the "131 versions found" display in the brief results. This faculty member clicked the "versions found link" and expressed some confusion about the resulting set. They stated, "I guess my expectation was that I searched specifically for this version. So I would think that it would prioritize this result. And so I'm wondering why the first result was this (the frbr-ized one), instead of this (the individual result), because I did such a specific search here. And this is exactly what I wanted. So why did it put it as the second result?" This faculty member also displayed frustration by the prominence of the versions found link, stating, "It seems that, that very illogical that this (mouses over the phrase "131 versions") is here, this would be a better place here. So like, I am wondering why this 131 versions found see all versions is the very first line here. And it would be more appropriate maybe for it to be down at the bottom here, like deprioritized. So available at McHenry and then 131 versions found see all versions?"



Usability Problems Identified:

- The undergrads all succeeded at this task with minimal work. One seemed unsatisfied that there was not a “Translator” search field in Advanced search. We do however have an “Author/Creator” option available.
- The main complaints from the faculty member seemed to be that the record layout around title and versions was confusing and that the record we were looking for popped up as the second result in the search

Recommendation:

- Investigate adding “Translator” field to advanced search: MEDIUM
- Investigate changes to the position of the multiple versions link in brief results and/or the label. MEDIUM

Using Resource Type Filter (Newspaper Articles)

Students were asked to search for items on the topic of dark matter, and narrow their results to find only newspapers.

Students had success with this task, finding and applying the Newspapers filter. One student noticed that newsletters and newspapers were both listed so must be different in some way.

Both faculty participants successfully identified the Resource Type facet group for filtering. However, one of the two users misread the “Newsletter Articles” resource type and selected that box rather than “Newspaper articles.”

Usability Problems Identified:

- “Resource Type” is listed alphabetically.
- “Newsletter Articles” label is too similar to “Newspaper articles” and easily misread by users



Resource Type is in alpha order, but gives impression of being in descending # of results order.

Newsletters and Newspapers being so close together is confusing for the eye.

Recommendation:

- Investigate sorting Resource Type by frequency rather than alphabetically: HIGH

Requesting (or Recalling) Checked Out Materials

Users were asked to find the book “Bad Blood” by John Carreyrou (which was checked out with a “Not Available” item status). Users were asked what their options were for getting this book.

All of the users correctly read the item record to discern that the book had been checked out from the library. However, none of the users successfully completed this task by clicking on the request link even though all users were already signed in, making the request link visible.

BOOK
 2 versions found. [See all versions >](#)
Bad blood : secrets and lies in a Silicon Valley startup
 Carreyrou, John, author.
 2018

Not Available >
 Book reviews (5) >

TOP
 GET IT
 SEND TO
 DETAILS
 RELATED LINKS < [BACK TO LOCATIONS](#)
 VIRTUAL BROW... LOCATION ITEMS

McHenry Library
 Out of library , General Collection, 3rd or 4th Floor HD9995.H423 U627 2018
 (1 copy, 0 available)

On loan until 10/19/2022 11:45 PM, PDT
 12 Month Loan

OTHER UC LIBRARIES >

Record for checked out book - request link is visible only to users who are signed in

One user stated, “not available really threw me off...makes me think it’s not available.” Another said, “I don’t know what Interlibrary Loan does, so I don’t know what it’ll do.”

Usability Problems Identified:

- We didn’t test this with non-signed in users, but it is foreseeable that this would be an even larger problem for most users (as most sessions are not signed in)
- Not Available item label is misleading
- “Interlibrary Loan” is jargon to undergraduate students

Recommendations:

- If we eliminate Recall option, investigate styling options for Request through ILL link: TBD

Local Special Collections Materials

All undergraduates successfully completed this task. UG 1 was confused by the second part of task 10.

Users were asked to navigate to the following archive collection [record for Sandra M. Faber papers](#). They were asked what options they saw for getting more details about, or accessing, the papers. All the undergraduates were able to easily understand this task. They understood that you would need to get the materials from special collections and that you needed to use the request form.

Users were then asked what they expect when they click "Collection Guide" in a Spec Coll record. Undergraduate 1 was very familiar with the collections link and undergraduate 3 seemed to understand. UG 2 didn't understand what the collection link was.

Faculty were given a link to a record for the Sandra M Faber papers, and were asked how to get more details or access to this collection.

Faculty 1 moved through the task successfully with little to no trouble. Faculty 2 needed coaching to find the collection guide, and had a number of interesting observations, although most of them were with the OAC site, not Primo.

Quote:

"That makes sense to me. So I don't know why all of this information wasn't available here on this screen [on the middle white part of the screen] because I assumed when I clicked collection guide that I would get the collection guide. I wouldn't get an abstract of the collection guide and then have to click further to get the actual collection guide, which is a type of table of contents, right?...So that wasn't intuitive and I guess my expectation would be all, everything after this click should also be here [middle OAC white space]."

Usability Problems Identified:

- Expectations for links within Primo record not entirely successful.
- Undergraduates seemed to understand the Special Collections designation. However, not all of them understood what a Collection was.

Recommendation:

- Adjusting the wording on the Primo record could set expectations better, since users have to click twice to actually see the collection guide. Will probably require A/B testing and consult with Special Collections (lower priority problem): LOW

COLLECTION
Sandra M. Faber papers, approximately 1968-2018
 Faber, S. M. (Sandra M.), creator. Online Archive of California, publisher of collection guide. 1968 - 2018

Available at McHenry Library Special Collections NRLF - Ask at Special Collections (UA35) >

TOP Collection Guide

GET IT

SEND TO Get It

DETAILS < BACK TO LOCATIONS

RELATED LINKS LOCATION ITEMS

VIRTUAL BRO...
 McHenry Library
 Available, Special Collections NRLF - Ask at Special Collections Desk, 3rd Floor
 (1 copy, 1 available)

Item in place
 Library use only Request from Special Colle

Navigating Journals by Category

Faculty were asked to click “Find Journals” on the top bar of the page, look at Journals by Category, and select a category in which they are familiar. They were asked if they saw the journals they expected to see, and what instance this feature would be useful.

Neither faculty indicated that they saw familiar journals, and noted that the reason might be that the order was alphabetical and included non-English journals.

Both faculty said they thought the feature might be helpful if one wasn’t sure of the journals in a specific area, but the lack of searching and sorting parameters limited the usefulness.

Quote:

“And I think that it would be useful to get a sense of just the... the major journals that the library subscribes to in each of these fields..... And so what I was wanting to do was ... a subsearch of just these 505 results. That didn't allow me to do that. I think I assumed that this was a search of just the 505 results.”

Usability Problems Identified:

- Journals by category usefulness limited by listing journals alphabetically, and lack of searching/filtering by category features.

UC SANTA CRUZ UNIVERSITY LIBRARY

NEW SEARCH FIND JOURNALS FIND DATABASES BROWSE FIND BY CITATION HELP

Journal Search Title or ISSN

Sign in to get complete results and to request... Sign in DISMISS

Journals by category

- > Arts, Architecture & Applied Arts
- > Biological & Health Sciences
- > Business & Economics
- ✓ Earth & Environmental Sciences
 - > Agriculture
 - > Botany
 - Ecology
 - Environmental Sciences

PAGE 1 4,079 journals found: Earth & Environmental Sciences

- JOURNAL
AASP newsletter.
American Association of Stratigraphic Palynologists. Ar
1979
[Available Online >](#)
- JOURNAL
Abhandlungen der Schweizerischen paläontologischen Gesellschaft =
Mémoires de la Société paléontologique suisse.
Schweizerische Paläontologische Gesellschaft.
1874 - 1939
[Available Online >](#)

The search box doesn't limit to the 4,079 journals in the results set – and there is no way to search within this results set.

Recommendation:

- Investigate whether this should be displayed at all: LOW

Special Collections at Other UCs

Students were given a link to a record of Dr. Seuss's manuscripts at UCSD Special Collections, and asked what they would do to see this collection.

Students failed this task, believing they could successfully request this item, although one student thought this request was unlikely to work because they noticed it was a fragile collection of manuscripts.

Usability Problems Identified:

- This record no longer appears.

Recommendation:

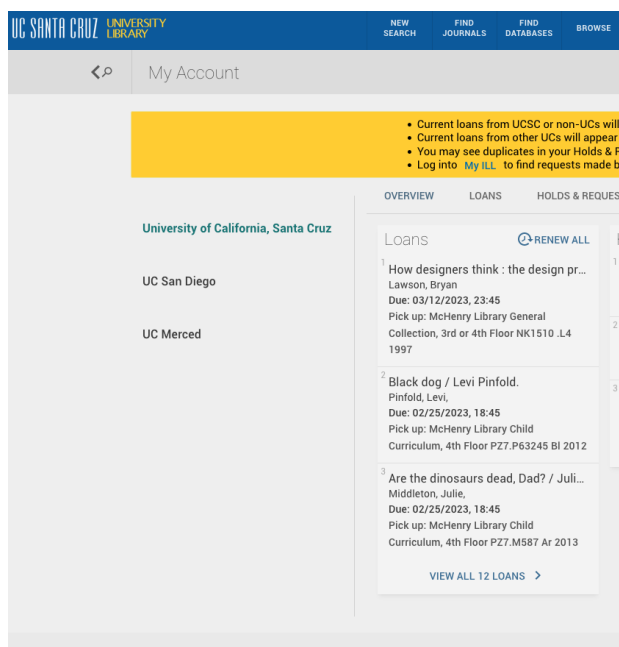
- We should continue to refine special collection records so access is clearer to users: LOW

Renewing ILLs on My Account Screen

Undergraduate participants were navigated to the My Account Overview page and asked where they would click to see the due date for a book they had borrowed from another UC via interlibrary loan.

We were only able to test this task with two of our three undergraduate participants. Neither of the two users completed this task successfully.

This interface design problem was further evaluated by a Usability Student Assistant employing [A/B testing](#) of new UI elements. Testing revealed that users continue to exhibit inattention to the UC campus links presented in the left navigation. This inattention persisted with both a design that visually connected the UC menu item with the body of the Overview page and a design that added a Header to the UC menu area.



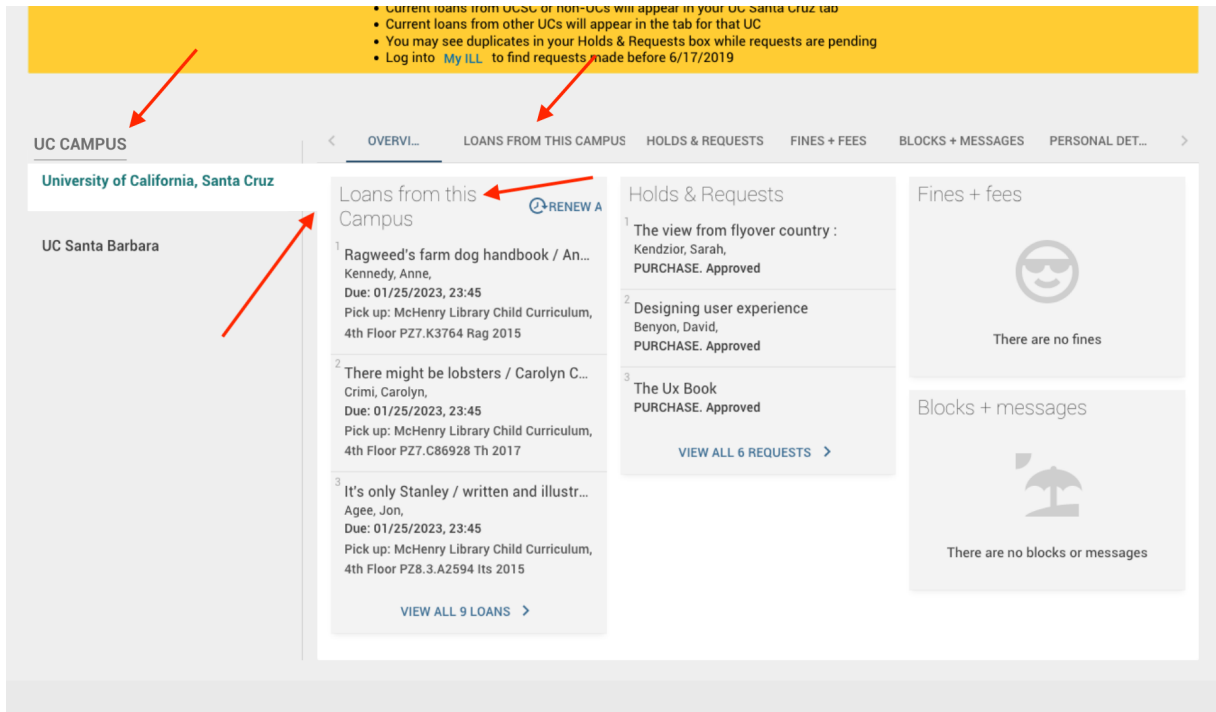
My Account Overview page - UC campus menu in the left navigation area

Usability Problems Identified:

- Users do not realize that loans from other UC campuses do not appear on the Overview page or the Loans page until they select the appropriate UC from the left navigation area

Recommendation:

The Team recommended an approach that incorporated both of the UI design elements explored in A/B Testing as well as a change to the “Loans” label: DONE



Proposed UI changes for the My Account Overview page

Summary of Recommendations

Recommendation	Priority
Add the ILL wait time note to item records	HIGH
Replace “Check Availability” label	HIGH
Replace or remove the term “Interlibrary Loan” (jargon) - Request link and the expand toggle	HIGH
Replace “Not Available” label (maybe to something like “Request or Recall” that tells users their options for getting the item)	HIGH
Sort Resource Type by frequency rather than alphabetically	HIGH
Change the position of the multiple versions link in brief results and/or the label	MED
Direct user attention to the expand toggle and/or Didn’t Find It	MED

Investigate options for making access process for other UC special collection materials clear to users	LOW
Investigate whether to display the journals by category	LOW
Research how the inclusion of materials not immediately available in search results impacts undergraduate students. Known item search results may be especially problematic	LOW
Change wording in the Primo record to set expectations around what users will find when they click the “collection guide” link.	LOW
Investigate changes on the homepage that would improve usability for users doing research	LOW
Investigate and think about whether or not to display consortial eBooks	LOW
Add “Translator” field to advanced search	LOW
If we eliminate Recall option, investigate styling options for Request through ILL link	TBD
Update My Account screen for ILL renewal transparency	DONE

Appendix: Test Scripts

Moderator Testing Script: Undergraduate Student

Hi, welcome, thank you for coming.

My name is [MODERATOR NAME]. I’m helping the University Library understand how well our new tool, UC Library Search, works for our users. We would really like to know what you think about it and what does and doesn’t work for you.

The procedure we’re going to follow today goes like this. I’m going to show you UC Library Search and have you try out some things with it. I’ll also ask you some questions that aim to learn more about your use of the library search tool. Finally, we’ll wrap up. The session will not last any longer than one hour.

Thank you for providing the signed statement of informed consent. It sets out your rights as a person who is participating in this kind of research. As a participant in this research:

- You may refuse to participate at any time.
- You may take a break at any time.
- You may ask questions at any time.
- Your answers are kept confidential.

We’re also going to be recording your screen during this session for analysis only. Recordings will be seen by some members of the development team and by me. It’s not for public broadcast or publicity or promotion or anything like that.

Do you have any questions before we begin?

Ok, before I begin the recording could you please use the Rename feature to change your display name to “Undergraduate Student”?

Also please leave your video turned off.

Next, please open chat by clicking the “Chat” button in the panel. Please make sure the chat is opened as a panel on the right side of the screen and not a pop up in front of the screen.

And I’ll ask you to start sharing your screen with me, specifically the screen showing the browser window you will be doing the tasks for this session in.

Now I’m going to start the recording [*click “Record” in the Zoom toolbar*]

To begin with I do have a few questions for you:

- Have you used the search tool on the library website before?
 - If so, when did you last use it?
 - What were you searching for?
 - What was your general impression of it?

I’m going to give you a few tasks to do using the new UC Library Search tool. While doing the task, please try to “think out loud”. This means that you should describe what you are thinking as you use the website. For example, say what it is you are trying to do, what you are looking for on the screen, and any decisions you are making. If you get stuck or feel confused, please say that out loud too.

Be as honest as possible. If you think something is awful or doesn’t make any sense, please say so. Don’t be shy: you won’t hurt anyone’s feelings. We really want to know exactly what you think and what does and doesn’t work for you.

The most important thing to remember is that you are testing the library Search tool — we are not testing you. There is absolutely nothing that you can do wrong. We know the library search tool is not perfect and we are here today to understand how we can improve it.

[Start Tasks]

Now I’m going to chat a [URL](#) to you. Please copy that URL and enter it into your browser.

[After user has successfully started sharing their screen and the desired page is seen]

Now I’d like you to try a couple of things with the library Search tool. I’m going to give you a scenario and I would like you to work just as you would normally, narrating your thoughts as you go along.

TASKS

1. *[Evaluate term “check availability” & ILL Book Request]*

Please search for **California water pollution**. Looking at result #XX, Before you click on that title, what do you think the phrase “Check Availability” there means?

- a. How would you expect to obtain this book?
- b. Go ahead and click that title, please. Is this what you expected to see?

- c. Before clicking anything else on the screen, I have a few questions:
 - i. How long would you expect it to take to receive the book?
 - ii. How would you expect to receive it?
 - iii. How long would you be willing to wait to receive a book you requested?
 - iv. If you knew that this book would arrive within 1 week, do you think you would request it?
 - d. Now show me what you would do next in order to request this book. *[If user says they would Sign In, instruct them to stop screen sharing briefly while they sign in]*
 - i. What is your impression of the process for requesting that book?
2. *[Requesting other materials through ILL]*
[Give user [this URL](#)] You need this conference proceeding. Before you click anything, I have a few questions for you:
- a. How long would you expect it to take to receive this?
 - b. Do you think you would request articles or other materials that are not immediately available in full text?
 - c. Thinking back on your last research project, would you have been able to wait 1 or 2 days for an article?
3. *[Give user [this URL](#)]* Looking at the results on this page, without clicking on any of the titles, how do you think you would get access to:
- a. *[full text online]?*
 - b. *[Print only]?*
 - c. *[Online or in print]?*
 - d. *[“Check availability”]?*
 - e. Let's say your paper is due very soon and you only want to use materials you can get access to right now. Show me what you would do to restrict your results to items you could read today.
4. *[Give user [this URL](#)]* Let's say you are researching changes in the temperature of Lake Tahoe. Five out of these 10 results show "Check Availability" and need to

be requested through interlibrary loan. How would you feel about this number of results that require an interlibrary loan request?

- a. When you use the library search tool, do you normally expect to be able to access all of the results pretty immediately - either online or in print at the library?
- b. Please click the words "Dissertations" under in the Resource Type section on the left. (You might have to click more.) All of these results show "Check Availability" and need to be requested through interlibrary loan. How would you feel about this number of results that require an interlibrary loan request?
- c. Is this what you would expect when limiting your results to just one type of resource?

5. *[Limit by Availability: Include ILL checkbox]*

You need the article "The Volcanic Contribution to Climate Change of the Past 100 Years" by A. Robock, published in the journal *Developments in atmospheric science*. Show me how you would get that article using UC Library Search.

[If user failed the task, ask questions a & b]

- a. There is a checkbox in the left column that says, "Include articles available through Interlibrary Loan" - what do you think clicking this checkbox will do?
- b. Do you think this checkbox is noticeable?

6. *[Limit by Availability: Sandbox version]*

[Give the user [this URL](#)] This is an alternative version of UC Library Search. Please try your search for "The Volcanic Contribution to Climate Change of the Past 100 Years" by A. Robock in this system.

- a. How does this compare to your previous experience looking for this article?
- b. When you use UC Library Search, do you expect to see articles available from other UCs even if they are not available at UCSC in full text?
- c. Taking note of the number of search results on this page that are not available in full text and comparing that to the other version of UC Library Search where only articles available in full text are shown by default (until you click the checkbox), which system do you prefer?

7. *[Give the user [this URL](#)]* Alright, now we're back in the original version of UC Library Search. You need to read Plato's "Republic" and there are many translations available. Your professor recommended the translation by C. Emlyn-Jones. Show me how you would find that book.
8. You are looking for newspaper articles on dark matter. How would you narrow your results to find only newspapers?
9. *[Checked out book]*
You would like the book "Bad Blood" by John Carreyrou - what are your options for getting this book?
10. *[Local Special Collections materials]*
[Give user [this URL](#)] Looking at this record for the Sandra M. Faber papers, what options do you see for getting more details about this or gaining access to it?
 - a. What would you expect to find when clicking the "Collection Guide" link?
11. *[Special Collections at other UCs]*
You are researching Dr. Seuss's early works and manuscripts. What would you do if you were interested in seeing [this item](#)?
12. Now I'm going to share my screen with you for this final task. Looking at this screen, where would you click to see the due date for a book you borrowed from another UC through Interlibrary Loan?

WRAPPING UP

1. Were the tasks realistic to you?
2. Do you have any final questions or comments?

That's the end of our session. I really want to thank you for taking the time to speak with us. Your insight is really valuable for improving our Search tool.

If you have any other thoughts or ideas, please feel free to send me an e-mail.

Moderator Testing Script: Faculty & Grad Student

Hi, welcome, thank you for coming.

My name is [MODERATOR NAME]. I'm helping the University Library understand how well our new tool, UC Library Search, works for our users. We would really like to know what you think about it and what does and doesn't work for you.

The procedure we're going to follow today goes like this. I'm going to show you UC Library Search and have you try out some things with it. I'll also ask you some questions that aim to learn more about your use of the library search tool. Finally, we'll wrap up. The session will not last any longer than one hour.

Thank you for providing the signed statement of informed consent. It sets out your rights as a person who is participating in this kind of research. As a participant in this research:

- You may refuse to participate at any time.
- You may take a break at any time.
- You may ask questions at any time.
- Your answers are kept confidential.

We're also going to be recording your screen during this session for analysis only. Recordings will be seen by some members of the development team and by me. It's not for public broadcast or publicity or promotion or anything like that.

Do you have any questions before we begin?

Ok, before I begin the recording could you please use the Rename feature to change your display name to "Faculty Participant"?

And I'll ask you to start sharing your screen with me, specifically the screen showing the browser window you will be doing the tasks for this session in.

Now I'm going to start recording your screen [*click "Record" in the Zoom toolbar*]

To begin with I do have a few questions for you:

- Have you used the search tool on the library website before?
 - If so, when did you last use it?
 - What were you searching for?
 - What was your general impression of it?

I'm going to give you a few tasks to do using the new UC Library Search tool. While doing the task, please try to "think out loud". This means that you should describe what you are thinking as you use the website. For example, say what it is you are trying to do, what you are looking for on the screen, and any decisions you are making. If you get stuck or feel confused, please say that out loud too.

Be as honest as possible. If you think something is awful or doesn't make any sense, please say so. Don't be shy: you won't hurt anyone's feelings. We really want to know exactly what you think and what does and doesn't work for you.

The most important thing to remember is that you are testing the library Search tool — we are not testing you. There is absolutely nothing that you can do wrong. We know the library search tool is not perfect and we are here today to understand how we can improve it.

[Start Tasks]

Now I'm going to chat a URL to you. Please copy that URL and enter it into your browser.

[After user has successfully started sharing their screen and the desired page is seen]

Now I'd like you to try a couple of things with the library Search tool. I'm going to give you a scenario and I would like you to work just as you would normally, narrating your thoughts as you go along.

TASKS

1. *[Evaluate term "check availability" & ILL Book Request]*

Please search for **California water pollution**. Looking at result #XX, Before you click on that title, what do you think the phrase "Check Availability" there means?

- a. How would you expect to obtain this book?
- b. Go ahead and click that title, please. Is this what you expected to see?
- c. Before clicking anything else on the screen, I have a few questions:
 - i. How long would you expect it to take to receive the book?
 - ii. How would you expect to receive it?
 - iii. How long would you be willing to wait to receive a book you requested?
 - iv. If you knew that this book would arrive within 1 week, do you think you would request it?
- d. Now show me what you would do next in order to request this book. *[If user says they would Sign In, instruct them to stop screen sharing briefly while they sign in]*
 - i. What is your impression of the process for requesting that book?

2. *[Finding Worldcat items]*

You need the book "Explore Europe on Foot" by Cassandra Overby. Show me how you would get this book.

3. *[Give user [this URL](#)]* Looking at the results on this page, without clicking on any of the titles, how do you think you would get access to *[full text online]*?

- a. *[Print only]*?
 - b. *[Online or in print]*?
4. *[Give user [this URL](#)]* Let's say you are researching changes in the temperature of Lake Tahoe. Five out of these 10 results show "Check Availability" and need to be requested through interlibrary loan. Would you feel frustrated by this number of results that require an interlibrary loan request?

- a. When you use the library search tool, do you normally expect to be able to access all of the results pretty immediately - either online or in print at the library?
- b. Please click the words "Dissertations" under in the Resource Type section on the left. 8 out of 10 of these results show "Check Availability" and need to be requested through interlibrary loan. Would you feel frustrated by this number of results that require an interlibrary loan request?
- c. Is this what you would expect when limiting your results to just one type of resource?

5. *[Approach to finding articles by citation] [and, added in May 2022, include ILL checkbox]*

You want this article. How would you get it?

Yves Rolland, et.al. La fragilité de la personne âgée : un consensus bref de la Société française de gériatrie et gérontologie. *Gériatrie et Psychologie Neuropsychiatrie du Vieillissement*. 2011;9(4):387-390.

doi:10.1684/pnv.2011.0311

[If user failed the task, ask questions a & b]

- a. There is a checkbox in the left column that says, "Include articles available through Interlibrary Loan" - what do you think clicking this checkbox will do?
 - b. Do you think this checkbox is noticeable?
6. *[Give the user [this URL](#)]* Please click "Find Journals" in the top bar on the page. Looking at Journals by Category, please select a category in which you are most familiar. Are these the journals you expected to see?
- a. In what instance would this feature be useful?
7. You need to read Plato's "Republic" and there are many translations available. You specifically want the translation by C. Emlyn-Jones. Show me how you would find that book.
8. You are looking for newspaper articles on dark matter. How would you narrow your results to find only newspapers?
9. *[Checked out book]*
You would like the book "Bad Blood" by John Carreyrou - what are your options for getting this book?

10. *[Local Special Collections items]*

Looking at [this record for the Sandra M. Faber papers](#), what options do you see for getting more details about this or gaining access to it?

- a. What would you expect to find when clicking the “Collection Guide” link?

WRAPPING UP

1. Were the tasks realistic to you?
2. Do you have any final questions or comments?

That's the end of our session. I really want to thank you for taking the time to speak with us. Your insight is really valuable for improving our Search tool.

If you have any other thoughts or ideas, please feel free to send me an e-mail.