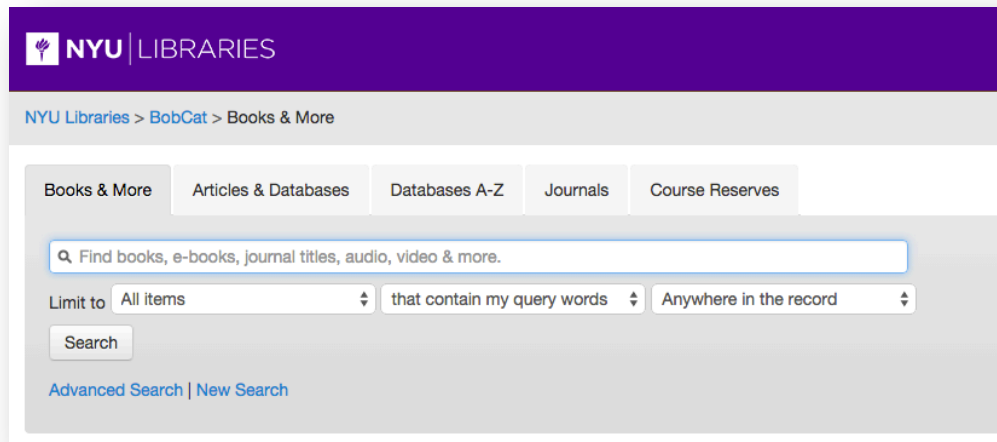


# NYU LIBRARIES: USABILITY TESTING OF BOBCAT BOOKS & MORE TAB



**Report:** Nadaleen Tempelman-Kluit, Houda El mimouni, Heidi Frank

**Participants:** Everett Allgood, Houda El Mimouni (UX intern), Heidi Frank, Carolina Garcia, David Hill, Allen Jones, Bill Maltarich, Nadaleen Tempelman-Kluit

Date: 10/25/2013, 1:00-5:00 PM

## Summary

*Usability testing of the Books & More tab uncovered many issues warranting further exploration. Refinements based on testing already implemented on the development BobCat server include: Search results - title and GetIt links; FRBR results sets, and Facets label (see Category One of Report).*

*Issues requiring further investigation, or inclusion in other projects, include: Facets, Books & More tab labelling, and Holdings information (Aleph & Umlaut).*

*General observations that may not need to be acted on, but should be examined further in conjunction with analytics and other data points, include: Pre-limiting searches, and use of Advanced search.*

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### 1. Background

Usability testing of certain display issues in the BobCat Books & More tab was conceived informally, after a meeting at KARMS which included some Primo Admins, as well as a member of WebDev. Fueled in part by the adoption of MARCIt! (a service that supplies e-records for Journals) by the New School, a conversation arose around whether the “Copies in Library” and “Not Available” text under Umlaut /GetIt “ should be suppressed due to potential issues in deduping of print and electronic records, due to the adoption of MARCIt!

Usability testing is a method of garnering behavioral and qualitative data, and is a useful tool to determine pain points and areas for further exploration. The testing incorporated several Primo interface issues that we’d previously hypothesized might be a confusing to users.

### 2. Method

We employed formal usability testing with seven participants.

## **Participants**

The test was conducted with 7 participants, each of whom were scheduled for 30 minutes. Participants were selected from different categories: three students (one from New School; two from NYU); 2 new library Shanghai staff with no Primo experience; and two faculty from The New School. Participants varied by age and gender, as well as experience with Primo (though none were advanced researchers). One participant (faculty) arrived late and we were not able to complete the test.

## **Test Format**

Five questions were asked in six of seven tests, with four being specific to issues we speculated were problems for users, and the fifth question being open ended to allow users to make general observations (See Appendix 1: Questions). Occasionally clarifying questions were asked at the behest of the observers, who Instant Messaged (IM'd) questions via the GotoMeeting interface.

Usability testing took place in the TechPod, behind the first floor Reference Desk, and the BLCC conference room on Lower Level 1 was set up as the observation room. Nadaleen Tempelman-Kluit asked the first five participants questions, and Allen Jones questioned the last two.

Volunteer observers were set up in the BLCC conference room, and spreadsheets (see Appendix 2: Observation Sheet ) were provided for each observer. Observers included:

- Bill Maltarich (seven)
- Allen Jones (five)
- Everett Allgood (three)
- Nadaleen Tempelman-Kluit (two)
- Carolina Garcia (two)
- Heidi Frank (seven)
- David Hill (seven)

## **Task & Test Variation**

The test purposely varied interfaces, with three participants performing the testing on the BobCat Development server; and four on the BobCat Production Server. We provided two different interfaces, with results titles not linked on the development server (as they are on production)

Additional variations included a different question asker for two of the tests. In an effort to make the usability testing inclusive to the group involved, we provided every observer the opportunity to take part beyond observation. This creates additional variation in results.

## Equipment & Setup

GoToMeeting Software was used to facilitate remote observation. This software allowed us to broadcast the sessions for the observers in real time. GoToMeeting was set up in both the interview and observation rooms.

## 3. Findings

Findings are separated into three categories:

### Category One:

These have already been implemented in Development, and will be tested again for confirmation before implemented in Production.

- Search results - title and GetIt links
- FRBR results sets
- Facets label

### Category Two:

These require further investigation as no obvious resolution is apparent. Some (noted) should be considered in conjunction with specific projects, such as Primo 4 upgrade, and the MARCIt! implementation.

- Facets
- Books & More
- Holdings information (Aleph & Umlaut)

### Category Three:

These include general observations that may not need to be acted on, but should be examined further, in conjunction with analytics and other data points, such as Ask a Librarian questions, etc.

- Pre-limiting searches
- Use of Advanced search

### **Category One - Details:**

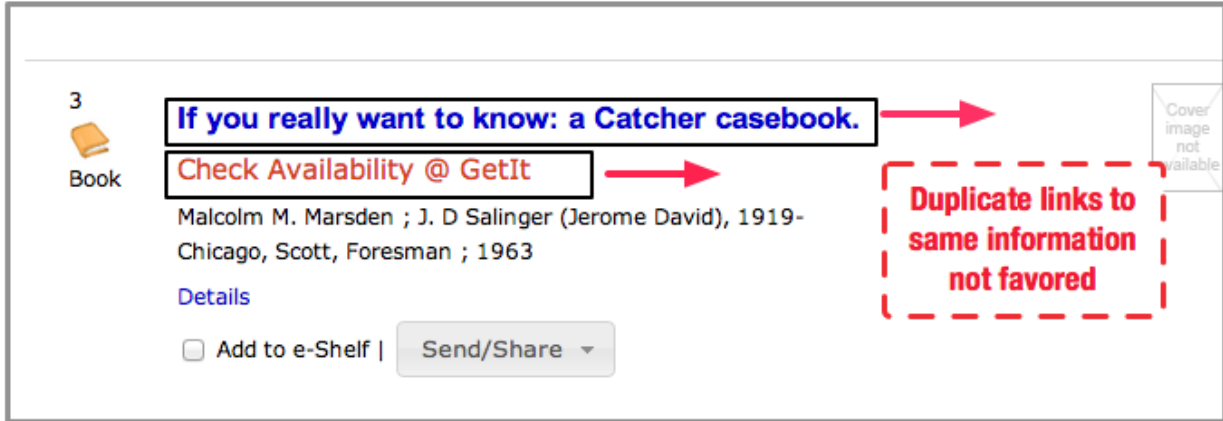
#### **Search Results - Title and Available and Check Availability @ GetIt links**

The “Available @ GetIt” and “Check Availability @ GetIt” links are universally misunderstood.

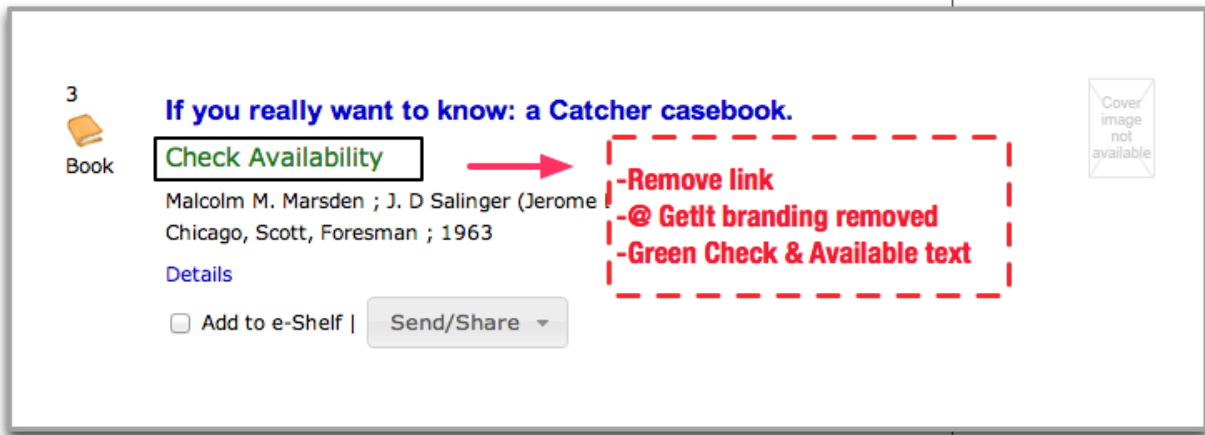
1. Five of the seven participants were confused by either the “@ GetIt” branding, or the red and green labelling, with two assuming red meant not available despite the language to “check availability.”
2. Five of the seven participants found two links to Umlaut confusing, with three participants preferred the standard title be linked. Three noted that title links are

standard in many interfaces; therefore it's more intuitive to employ the same standard in ours.

**Image 1: ISSUE: Duplicate Links to GetIt**



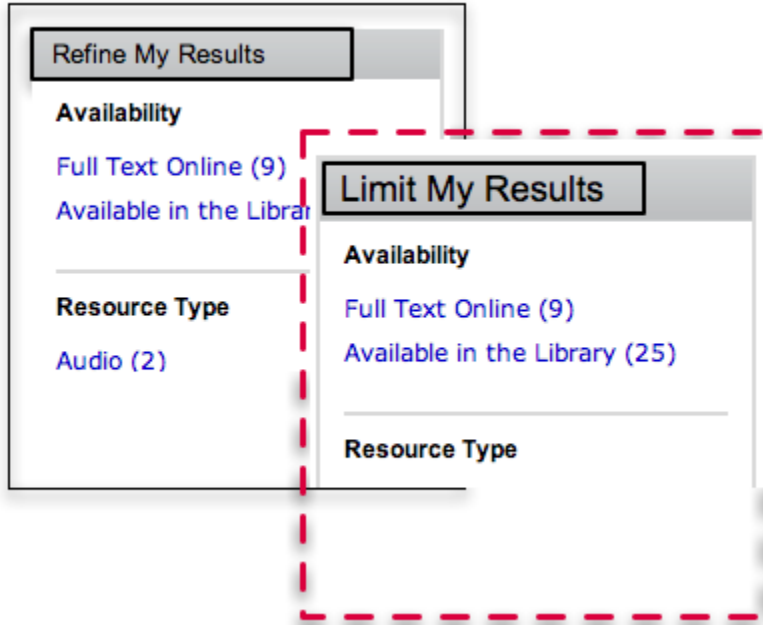
**Image 2: SOLUTION (Implemented in BobCatDev)**



### Facets

None of the users limited their results at anytime using facets. Our solution is to increase the label font, change the language from "Refine My Results" to the more heavily used and possibly understood "Limit My Results."

**Image 3: ISSUE and SOLUTION (Implemented in BobCatDev)**



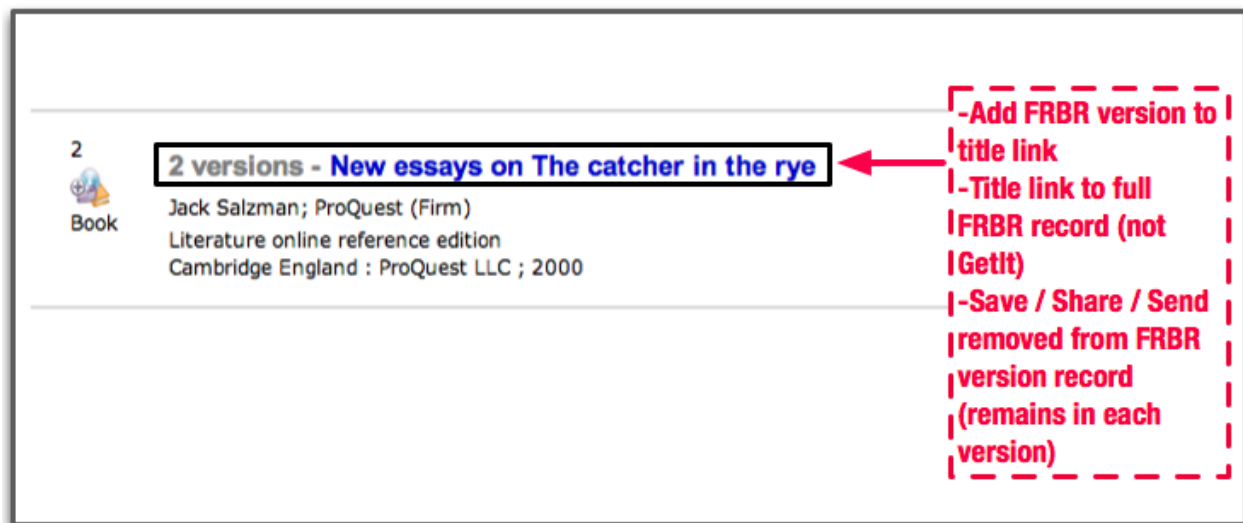
### **Functional Requirements of the Bibliographic Record (FRBR)**

- In all cases, through testing of the display of FRBR clusters, it became clear that the link saying “there are x versions of this item” was overlooked.
- When asked about the FRBR link, three users noted that they would expect the title to link to the FRBR set, rather than linking to the GetIt page for the first result in the FRBR set.
- For FRBR sets, the brief display of the result set only represents the first record in the FRBR set; therefore add to e-Shelf and send/ share is misleading and unnecessary. The proposed change is to have the FRBR title link into the FRBR results set, while non-FRBR titles will continue to link directly to the GetIt screen.
- The number of versions for each FRBR set will be displayed as part of the title link
- Because the change in the above bullet would mhe FRBR record level, the Send/ Share to e-Shelf link should be removed as the record in the e-Shelf would represent only the first holding in the FRBR set. E-shelf link will be provided for non FRBR results.

Image 4: ISSUE: FRBR links overlooked



Image 5: SOLUTION (Implemented in BobCatDev)



### Category Two:

Books & More tab title: Confusion over "More."

- This should be addressed in conjunction with the Journal tab in BobCat. Despite us explicitly saying that we were testing "Books & More," two users went to Journals tab

Holdings records and buttons in Umlaut confusing

- Explore whether Umlaut could replace Aleph as the full holdings screen (as there is a lot of duplicate information). Further testing necessary.

Is copies in library accurate

- Continue to explore whether the “Copies in Library” results are mostly reflective of our holdings.

### Category Three:

- Six users used the pre-limits for their searches rather than post limiting in facets.
- No users limited to facets unless specifically directed there. Future exploration should include more testing on facets to determine their use, and to explore use analytics.
- Six users employed advanced search frequently during the testing.

## Appendix One: Questions

### Questions

Question Asker: Nadaleen

October 25th: 1:00-1:30

Participant: P1

Student

**DEV SERVER: bobcatdev.library.nyu.edu**

#### 1. Using the Books & More tab:

Find volume 1 of the *Journal of Marriage and the Family*

#### 2. Using the Books & More tab:

Find the first two programs of the Video *Discovering Psychology*.

#### 3. Using the Books & More tab:

You’ve been told of an article that would help your research, which is in volume 50 of the journal of “Architectural Digest”. How would you go about getting the article?

#### 4. Using the Books & More tab:

You’re interested in the T.S. Eliot annotated version of *The Adventures of Huckleberry Finn*. How would you go about getting this version?

5. Do you have any other observations for us? Which of these questions did you find particularly straightforward and easy, and which were difficult?



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**Appendix Two: Observation Sheets**

Observer Name \_\_\_\_\_

<b>Tasks (ALL USING BOOKS &amp; MORE TAB)</b>	<b>EXAMPLE P0: Student</b>	<b>P1: Student, Dev: NOTES</b>	<b>P2: Faculty, Dev: NOTES</b>	<b>P3: student, Dev: NOTES</b>	<b>P4: Student, Prod: NOTES</b>	<b>P5: Lib Staff, Prod: NOTES</b>	<b>P6: Lib Staff Prod; NOTES</b>	<b>P7: Faculty, Dev: NOTES</b>
1. Find Volume 1 of the "Journal of Marriage and the Family"	seemed hard for student-at least a 3. took a long time it seemed. improvement could be to change blah blah							
2. Find the first two programs of the Video Discovering Psychology.	1. found it super easily. she said she gets videos all the time and knows AFC							
3. An article in volume 50 of the journal of "Architectural Digest" would really help you with your research. How would you go about getting the article?	4. didn't even get to getit.							
4. You're interested in the T.S. Eliot annotated version of The Adventures of Huckleberry Finn. How would you go about getting this version?	4. didn't find the right version and eventually we moved on							

## Key

- 1 no problem w/ task
- 2 slight effort
3. considerable effort
4. can't do it
5. not scored

P1, P2 (participant 1, 2, etc

Prod: Production server: bobcat.library.nyu.edu

Dev: Development server: bobcatdev.library.nyu.edu

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## Appendix Three : Preamble

### Usability Testing: Process and Signature

We're testing some functionality in the Books & More tab of our interfaces to determine how we can best display information to our users. Your feedback will help us determine what's working and what isn't working so we know where to make improvements.

We'll be asking you about five questions, mostly about how whether information you're looking at is clear and understandable. The test should take around 30 minutes. We'll be recording you as you so we can make sure we capture all the input you are providing, and so we can take notes virtually. We'll be saving these recordings so we can synthesize information, after which we'll delete them.

As we ask you the questions, please remember that you are not being tested. This is not a reflection of your skills and abilities. We are testing the system, not you.

We ask you to be as honest as you can about the system. We will certainly not take offense at any criticisms you have. We welcome your criticisms and will use them to make improvements.

Please sign this form as a record of your agreement and bring a copy to the session tomorrow. Thanks!

Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Appendix 4: Results Synthesis from Observer Notes:

### Multiple links are confusing: 5 participants

#### Notes:

- More info could be call number and stacks map.

- Confused about the so many links
- Thought that the More Info link would include online versions
- She'd check for more info for volume info but did not.
- Prodded to use More Info. Prodded to use Request button. Suggested multiple times she would call to check availability
- Reluctant to use More Info link
- Looks for volume number in GetIt.

**Prefers Title Link: 3 participants:**

**Notes:**

- Prefers titles to be links and not GetIt.
- Clicked on the title, ignored the FRBR and GetIt links.
- Thinks the title should be linked
- likes when blue indicates link

**“Check availability” link neglected: 1 participant**

**Notes:**

- Did not try clicking on GetIt or “Check availability.”

**GetIt link neglected: 4 participants**

**Notes:**

- GetIt link is not necessary
- Did not try clicking on GetIt or “check availability”.
- Thinks GetIt is not needed in the search results and preferred available or “check availability”.
- Clicked on the title, ignored the FRBR and GetIt links.

**Confused about the availability of item: 4 participants**

**Notes:**

- “Check availability” is too vague. Availability of which volume
- Not in library makes him assume there is not print
- No copies available means no copies in physical libraries.
- "Not available" text says to him not to look further.
- Feels that what is presented on the GetIt screen is all there is
- Copies in Library "Available" text looks like link to online resource
- “More information” makes it look more authoritative. People don't know when they're at library or somewhere else.

**Availability color illusive : 3 participants**

**Notes:**

- Check availability in red is illusive.
- The color of check availability is confusing
- Would not click on red link “Check Availability”.

**Wants to know item type before clicking: 3 participants**

**Notes:**

- Wants specific icons to distinguish between bound books and microfilms. Wants to know if something is a microform before getting into FRBR
- Checks Jstor to see what's in the document.

- Wants to see cover image

#### **Wants call number labeled clearly: 2 participants**

##### **Notes:**

- The call number should be labeled clearly to be identified.
- Non circulating status is confusing.

#### **Item tables confusing: 3 participants**

##### **Notes:**

- Did not expect to find a list when clicking on more info next to the specific item.
- Confused by item tables
- Intimidated by Aleph holdings table.

#### **Used advanced search and like to limit: 6 participants**

##### **Notes:**

- User wants to be able to limit the search and put volume
- Likes advanced search.
- Prefers advanced search as she likes to limit
- Limit series window by volume number
- Starts with Google search to get more information to be able to limit and refine the search
- No volume # in coverage.
- Prefers to start with Google Book search to find right edition. Then goes back to Bobcat.
- Starts with simple search, goes back to advanced search
- Used Advanced search and wanted to search and limit on same screen to volume

#### **Prefer e- to print: 5 participants**

##### **Notes:**

- Prefers digital to print
- Prefers electronic format and uses online to see if it is worth getting the print esp. if long
- Seeks online version first. Would prefer EDD but worries about completeness of data.
- Prefers online version if had to use a document for a class
- Only looking for online content and didn't notice the physical holdings

#### **Went to journal tab: 2 participants**

##### **Notes:**

- Goes straight to Journals tab
- Went to Journals tab

#### **Separate tabs confusing: 1 participants**

##### **Notes:**

- Found the separate tabs confusing (Books & More, Articles & Databases, Journals) - not sure what to expect in each

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[Appendix 6: Notes From All the Observers on Each Participant \(please request access if you are interested\)](#)