

# **Navigating Next Generation Catalogs PORTALS Workshop – May 30, 2008 How to do usability testing - the basic steps**

1. Determine GOALS
2. Determine METHODS
3. Determine the exact TASKS or QUESTIONS you will ask in testing
4. Test the test!
5. Subject recruitment
6. Actual testing (give more time than you think you need!)
7. Make any necessary follow-ups with users
8. Write-up of findings
9. Make recommendations
10. Implement recommendations
11. Follow-up testing

<b>Example GOALS</b>	<b>Example METHODS</b>
<p>1. We want to better understand if our users know how to work with the interlibrary loan function via our catalog.</p>	<p>1. Because we want to understand specific tasks/interfaces within the catalog, we will conduct 1-1 usability testing with 5-8 subjects. We will use an observer/facilitator to record notes on these sessions. Managers and the director will be invited to sit in on these sessions.</p>
<p>2. We want to know if users understand how to read the information as we have it laid out in bibliographic record display for monographs.</p>	<p>2. Since we want to understand specific tasks/interfaces within the catalog, we will conduct 1-1 usability testing with 5-8 subjects. We will supplement this with an online survey using SurveyThing to reach a wider audience. We will record the 1-1 sessions w/ Camtasia.</p>
<p>3. We need to know if the terms we use in the catalog make sense to users</p>	<p>3. We will conduct a card-sorting exercise with 5-8 people for our subject listings page to understand if the categories we have there make sense to users. We will run the resulting prototype (based on the first round of testing) past a group of another 5-8 people.</p>
<p>4. We need to understand users' satisfaction levels with the requesting and other processes via our catalog.</p>	<p>4. We will put out an online survey using SurveyWidgit as well as conducting 2 focus group sessions of 5-7 people each.</p>

## Example TASKS or QUESTIONS

*Note: You will incorporate these into your observer/notetaking form, as seen on page 6 within this document.*

1. A friend recommends that you read a book called *History by Hollywood*. Does the Institution Library have this book?

Question rationale: To examine how users search for known items and whether they could locate a book when they knew the title. The title was chosen so that the broadest keyword search resulted in fewer than fifty matches.

2. Please use the library catalog to ask for a copy of the book *History by Hollywood*.

Question rationale: This task was designed to see if users could determine how to use the request button to request materials.

3. The article you need is in the journal *Kansas Law Review*, volume 49, issue 5, June 2001. Is this issue of the journal in the Institution Library? If so, where is it?

Question rationale: A unique title was chosen so that users retrieved only one match regardless of which search type was selected (keyword or browse). The research team was interested in determining how users interpreted a serials record.

4. Another article you need is in a journal called *Civil Engineering*. You need volume 70, December 2000. Is a copy for this year available on the main campus? If so, which library can it be found in?

Question rationale: To see how users navigated a potentially complex search. The default keyword search options results in over 2,000 matches. The record display includes multiple holdings, with the main campus copy at the bottom of a very long record.

*The above example questions are from:*

Novotny, E. "I Don't Think I Click: A Protocol Analysis Study of Use of a Library Online Catalog in the Internet Age." *College & Research Libraries* v. 65 no. 6 (Nov. 2004) p. 525-537.

## Example SUBJECT RECRUITMENT PLAN and SAMPLE TIMELINE

1. Survey
  - a. Online survey via SurveyMonkey to be opened May 1 and closed May 31 with the following questions:
    - i. What do you use the catalog for?
    - ii. How often do you use the library catalog ([www.catalog.edu](http://www.catalog.edu)) ?
    - iii. When you visit our catalog/site, are you able to find the information you need quickly and easily?
    - iv. What parts of our current site do you LIKE?
    - v. What parts of our current site do you DISLIKE?
    - vi. Other comments/suggestions
    - vii. Would you be interested in participating in a more in-depth 1-1 usability test? Name, email, phone
  - b. Results available from survey as of June 10.
2. Flyers with survey URL and additional call for recruitment put around campus in all major buildings
3. Inclusion of survey URL and call for volunteers in campus newsletter
4. Survey URL and call for volunteers included on bookmarks to be handed out at circulation
5. Liaisons in departments across campus to convey survey email to their individual departments and encourage participation.
6. Recruitment list from survey and other efforts available by June 15.
7. 1-1 testing to be conducted July 1-20.
8. Write-up and recommendations from testing to be presented at August 1 manager's meeting.

## Examples for ACTUAL TESTING

### **Script prior to giving people the usability test (can have same information as form you give to the users)**

Thank you for taking the time today to give us feedback on the OHSU Library web site. We are interested in seeing how you search for the answers to our questions.

Please keep in mind that YOU are not being tested. The web site/catalog is being tested.

If at any time you feel frustrated and can't find what you're looking for, move on to your next question. You are volunteering to do this and can stop at any time.

Please talk out loud as you use the pages. We want to know your thought process!

**Each question assumes that you are starting from the <http://www.ohsu.edu/library> Web page.**

Thank you for taking the time to participate in this feedback to help make the Library site better.

### Recording form you use during the test

(Note! In real life there would be more space in between each question for you to take notes)

### OHSU Library Web Site Usability Testing - Observer's Sheet

**Subject group (student, research, clinician):**

**Subject session (#1, 2, 3):**

**Subject name:**

**Department:**

#### **Task 1: Testing people's conceptualization of accessing journals**

---

- People get confused about where to look for electronic and print.
- What exactly is it that is confusing people?
- What could be change about the display that would help make the journal access easier?
- 

**Question 1:** You want to find an article in a journal you do not access very often, such as *Harvard Business Review*. How would you find out if we owned this? How would you determine if we had this electronically?

**Task 1 notes:**

#### **Task 2: Coverage question**

- This question is designed to see what people are looking for/where they look/what they are seeing and not seeing on the bib record so we can improve how they "see" what coverage is for items.

**Question 2:** You have found the journal title you wanted in electronic format and have determined we have it. What would you look for to determine whether we had access to the correct year for the journal volume you want?

**Example:** We have coverage for *Osteoarthritis and Cartilage* from 1998-2002, but you want an article from a volume from a year outside these dates, such as 1980 or 2005.

**Task 2 notes:**

#### **Task 3: Requesting materials in the catalog**

- This question is designed to see where people think they need to look for requesting in the catalog. Right now many are having a difficult time with this.

**Question 3:** You have done a title search in the catalog (example: *Joslin Diabetes Manual* or *Clinical Guide to Diabetes*) and you see that we own a particular book, but it is not available in the main library. How do you get it?