Web Advisory Group

Barton catalog usability test results
Nicole Hennig, Web Manager
February 2, 2001

Test 1 - current web Barton
January 22 - Feb. 1, 2001

Overview

The purpose of this test was to find out some general things about what worked and what didn’t work about our catalog interface in order to help us begin to customize the screens for our new ExLibris system. We decided also to test a couple of existing ExLibris catalogs (at McGill and Boston College - since they are very different from each other) to give us some idea of how ExLibris systems (which have different capabilities than our current GEAC system) work for our users.

Thanks to Wayne Jones, Darcy Duke, Jim Eggleston, and Stephanie Hartman for helping to create and carry out the tests!

who we tested:

• 7 undergrad students
• 3 staff of the MIT Libraries (since we are also users of our catalog)

what we focused on:

• the easiest, most basic tasks that a first-time user should be able to accomplish in the catalog

what we looked for:

• any features of the interface that were confusing or unclear
• aspects of the catalog record itself that were unclear (though there is less we can do about this)
• features that were especially helpful or clear that we should preserve in the new system

catalogs used:

• Current web Barton  
  http://libraries.mit.edu/barton
• ExLibris: Boston College - QUEST  
  http://ecs100.bc.edu:4545/ALEPH/
• ExLibris: McGill - MUSE  
2 volunteers used McGill (1 staff, 1 student)
2 volunteers used Boston College (1 staff, 1 student)
6 volunteers used Barton (1 staff, 5 students)

the test:

- each test was about 1/2 hour long
- volunteers were asked to find the answer to 10 questions
- they were asked to "think out loud"
- we asked a few post-test questions (for the subjective opinions)
- instructions for observers
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Questions

Part I - Known item searching

This part of the test looks at how people use the catalog to find known items. In real life people often have incomplete citations or incomplete information about exactly what they are looking for, so these questions will reflect that.

1. Find the book, Biopiracy: the plunder of nature and knowledge. Which library owns it and what is the call#?

2. Do we have any books by Deborah Hayes and if so, give the title of one?

3. Find the book, A century of electrical engineering and computer science at MIT, 1882-1982. How many copies do the libraries own and are any available to check out?

4. Here is a citation to an article in a journal:


   task 4a: find out if we have the journal.

4a. Do we own this journal?
task 4b: understand the holdings info for a serial title, so they know if the citation in hand is available.

[person conducting the test looks up the Journal of the American Chemical Society mentioned in the previous question if not found by user]

4b. **Do we have the issue that contains the article in the citation?**

task 4c: find out if journal is available in print, microfiche, or electronic formats.

4c. **In what formats is this journal available?**

task 5: Find out if we have a particular electronic database and be able to find and click on the hyperlink in the record to access it.

5. **Most of our databases are cataloged in Barton. Find the database called WorldCat and click on the URL to access it.**

**Part II - General research**

This part of the test looks at how people use the catalog to conduct general research. This could mean looking for items on a particular subject or in a particular format. The assumption is that they have a topic in mind or want to find items that will help answer a question, or perhaps they want to browse items on a particular topic.

These questions are more open-ended.

task 6: Find a few books on a particular subject.

6. **Find at least 3 books on holistic medicine.**

task 7: Find the most current books on a topic.

7. **Find some current books on the history of Boston (written since 1990).**

task 8: Find an MIT thesis on a particular topic.

8. **Find an MIT thesis on holography.**

task 9: Find a map or audio CD or video tape or other format on a particular subject.

[Note: give this question 5 minutes. Also, if in searching the next questions the user is still stuck in searching video format only and doesn't realize it, bring them to "new search" after giving them a minute or less to figure it out.]

9. **Find a video showing the construction of a passive solar home.**
task 10: Follow the hyperlinks that lead you to other titles with the same subject heading and author.


10a. Find some other books by the same author.

[Observer brings them back to full record screen.]

10b. Find some other books on the same topic.

Post-test questions:

Observers: First fill them in on any questions they have about how the catalog really works - what would be the best way to search for some of the things we asked, etc.

Then ask the questions below:

1. What do you like best about this system?
2. What do you like least about this system?
3. What could we improve that would have the most impact for you?
4. Would you be interested in participating in future usability tests?
   yes ___ no ___

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Results

I: usability problems

General comments - for all catalogs tested:

- many users didn't realize you can type in the first few words of a title only - they tended to put in the whole title

- many users failed to leave off the initial article, such as "A" or "the"

- many users input author's names with the first name first (firstname lastname)

- most users stuck with the default choices and used whatever options were presented to them first

- users didn't understand the different between browse and keyword searching

- searching for items on the "history of boston" was difficult for people

- people had no idea about structured subject headings, such as "Boston (Mass.) -- history"

- users could not understand the serials holdings, i.e., date ranges, formats available, etc.

- many users didn't ever click on the "full record" link

- users didn't expect to find databases like "Worldcat" in the catalog (every user commented on this)

- some users were confused about searching for article titles vs. searching for journal titles

- clicking on the author's name or the subject heading in a full record to find more titles is something that most users understood and used successfully (if they ever got to a full record)
- when users were having trouble finding something, they often would change several different aspects of their strategy at once, usually making it less likely to find it (entering more info instead of less)

**Current web Barton**

http://libraries.mit.edu/barton

- since Browse is the default, many users never noticed the keyword search option

- since "author" is the default in the menu, some users forgot to switch it to title for a title search

- many users had difficulty finding the screens that let you limit by format (users wanted this available from any screen)

- graphic buttons on left side of screen were hardly noticed by anyone

- some users concluded that we didn't have a journal in print if they saw other formats available, but didn't see the word "print" anywhere (call number was not enough)

**ExLibris: Boston College - QUEST**

http://ecs100.bc.edu:4545/ALEPH/

- previous page and next page wasn't understood in browse list (the whole concept of what a browse list is was confusing - people thought it was the same as keyword results)

- the item you typed wasn't highlighted in the browse list (or marked in any way at all), so people seemed confused about where they were at first

- the label "no of recs" was confusing

- showing previous and next title in the browse list at the top of the results screen was very confusing

- names of libraries didn't sound like library names

- the whole screen was too busy and everything was too bold (hard to see what's the most important information)

- the directions to the user looked like clickable links (but weren't)

- there was confusion between purpose of buttons in the top frame and buttons in the main frame

- after searching journals-only subset, users got stuck there and did subsequent searches without realizing they were still only searching journals (should be very obvious - different background color, perhaps?)

- back button in browser and back button on screens didn't always work as expected

- users could not understand journal holdings - if print is not explicitly
stated, they assumed there was no print version, also could not figure out date ranges

- the term "words adjacent" caused confusion - people didn't know what it meant

- users were annoyed by the fact that clicking on the advanced search button to go back to that screen cleared out everything they had previously typed there

- one good thing: on the basic search screen in the scrolling menu - all 4 options are visible at once - this was helpful

**ExLibris: McGill - MUSE**

- users never clicked on the line number to access the full record (it was as if the full record didn't exist)

- number of copies owned/outs (i.e. 1/0) - users commented that it the zero makes you think that's how many are available - but it's the reverse - they had to think about it for a bit

- "words adjacent: yes, no" -- this option caused confusion, users weren't clear what it meant

- screen that popped up showing holdings sometimes appeared to come up blank - that's because it took longer to load than most people are willing to wait (for a lengthy holdings list) (and there was no que in the pop-up window that something was still happening - no status bar)

- screen that popped up showing holdings was generally confusing with too much information and the important information not clearly jumping out at you

- users were confused by so many links and possible choices at top of page (some are abbreviations "CRL")

- there was confusion between choices in pop-down menu that tell you what fields you're searching, with options that tell you what sub-set of the collection you are searching - users looked for format choices in the menu

- having so many choices in the pop-down menu for browsing caused confusion ("what is 'Subject - Cutter?' ")

- sometimes the name of a library didn't sound like a library (MacDonald campus)

- there was some confusion about where clicking on "results" should take you (it doesn't go back to the browse list)

- URL was not hyperlinked in holdings, only in full record, and on holdings screen it was very difficult to notice near the top of the screen

- limit screen has many options (didn't notice the note that said "You may select only one limit at a time. ")
II. Some suggested solutions

1. Find a way to make it clear to users the difference between keyword and browse searching.
   Some possibilities:
   combine them into one menu, like U Iowa?
   http://infohawk.uiowa.edu:4545/ALEPH
   (with clear descriptions, such as "book/journal title beginning with...")
   or "keyword in title"
   or like BC
   http://ecs100.bc.edu:4545/ALEPH
   "exact author"
   "exact subject"
   "exact title"
   "keyword search"
   On McGill's screen they have 2 different input boxes with descriptions of the difference - but most people don't read the descriptions and just use whichever box is first. (in this case, Browse)

   Other possibilities have to do with the appearance of the Browse list results screen. There needs to be a way to make it clear that this is very different from a keyword results screen - that it's a continuous list that you are just looking at part of. It's difficult since most users are used to keyword search engines on the Internet and never come across browse lists like libraries have.

2. Give instructions (& examples, if room) of how to input the data (even then people will still make the mistake - we saw it even when it was indicated at BC) - but we should at least do it.
   such as on BC's screen:
   http://ecs100.bc.edu:4545/ALEPH
   exact author (last name first)
   exact title (omit initial articles)

3. Consider adding the limit choices to the first basic search screen, since this is such a basic and important feature. Especially limiting by format is important to be able to find easily. Make the list of formats very user friendly (don't use words like "realia," for example).

4. Journal holdings information needs a lot of work. Part is an issue about the cataloging records themselves and part is an issue about screen design.
   For the catalog records:
   a) Is it possible to add "- present" to open date ranges? So that:
      1970 -
      becomes
      1970 - present

   b) Is it possible to add the word "print" somewhere? When the words "microfiche" and "internet e-journal" appear, but no word "print" appears anywhere, people assume we don't have the print version. The
call number alone is not enough.

For the screen display:
 a) In the pop-up window that appears when clicking on holdings, is it possible to put only the holdings summary, then make a link for more detailed information? The long lists of holdings for each issue is preventing the window from displaying anything at all in a timely manner - so people just see a blank screen and close it before anything appears.

 b) Must it be a pop-up window for the holdings? If it must be, considering leaving the navigation on the window (like BC, not like McGill) so that the user can tell that something is happening while waiting for the screen contents to appear.

 c) Would it be possible or desirable to include the holdings (summary) in the brief display?

 d) Can we make URLs clickable on the holdings screen? (not just the full record display) (URLs should be clickable wherever they appear - there is no sense in showing a URL without being able to click on it!)

5. No one ever clicked on the line number to see the full record. It was as if the full record didn't exist. We need to make it more obvious. Since this supposedly can't be changed, the best work-around I've seen is what U. Iowa does -- adding a text link that says: "[display full record]"

6. Brief display needs to have enough info in it to tell which format something is and what date it is (or date range). Important elements to include: Author, title, publisher, date, format, location (i.e. library name and call number or URL).

   Ideally URL should be displayed and clickable on the brief display. Consider using the list form of the display instead of the table form (since it can hold more info). See U. Iowa for an example.

7. Look into no frames options. The trainer said you loose some functionality without frames. I think we should investigate the details of this.

III. Summary

In general, we were amazed at the things people have trouble with that we take for granted! Also this gave us a new appreciation for the Barton we already have, since there is a certain simplicity to the screens compared to most ExLibris screens.

Though it is a challenge, we are hopeful that we can solve most of these basic problems and make it much easier for most of our users to succeed at the basic tasks of using our catalog. We'll conduct more tests as soon as we have our first draft of screens working with a test database.
Test 2 - overview: Barton catalog usability tests: MIT Libraries

MIT LIBRARIES

Web Advisory Group

Barton catalog usability test results
Nicole Hennig, Web Manager
June 1, 2001

Test 2 - draft web Barton screens (ExLibris ALEPH)
May 21 - June 1, 2001

Overview
The purpose of this test was to discover usability problems in our first draft of the new web OPAC screens. The 3rd-Barton OPAC team has been working on these screen designs for the past few months. We used data from our previous usability tests of other ExLibris web OPACs to help us design these screens. We wanted to avoid some of the problems we saw users having with those screens. This is the 2nd in a series of usability tests.

Thanks to Wayne Jones, Erja Kajosalo, and Peter Munstedt for helping to carry out the tests!

who we tested:

• 3 students
• 4 staff of the MIT Libraries (since we are also users of our catalog)

what we focused on:

• the easiest, most basic tasks that a first-time user should be able to accomplish in the catalog

what we looked for:

• any features of the interface that were confusing or unclear
• aspects of the catalog record itself that were unclear (though there is less we can do about this)
• features that were especially helpful or clear that we should preserve in the new system

catalog used:

• a copy of our current development version of web Barton
http://grammy.mit.edu:8080/ALEPH/-/con-Ing/use

• this version of our system still had many bugs in it at the time of the testing (like holdings appearing twice, some indexes not working, etc.). When we ran into problems during the test, we explained the known bugs to the user.
the test:

- each test was about 1/2 hour long
- volunteers were asked to find the answer to 10 questions
- they were asked to "think out loud"
- we asked a few post-test questions (for the subjective opinions)
- instructions for observers

- we used the same set of questions that we used in our previous test (with the exception of using a different book title for number 10)
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May 21 - June 1, 2001

Questions

Part I - Known item searching

This part of the test looks at how people use the catalog to find known items. In real life people often have incomplete citations or incomplete information about exactly what they are looking for, so these questions will reflect that.

task 1: Find a book by title, recognize the call number and know which library has it.

1. Find the book, Biopiracy: the plunder of nature and knowledge. Which library owns it and what is the call#?

task 2: Find a book by author.

2. Do we have any books by Deborah Hayes and if so, give the title of one?

task 3: Be able to tell if an item is checked out or not and when it is due.

3. Find the book, A century of electrical engineering and computer science at MIT, 1882-1982. How many copies do the libraries own and are any available to check out?

task 4: Given a journal article citation:

4. Here is a citation to an article in a journal:

V 122, 49 (Dec 13, 2000)

task 4a: find out if we have the journal.

4a. Do we own this journal?

4b. Do we have the issue that contains the article in the citation?

task 4c: find out if journal is available in print, microfiche, or electronic formats.

4c. In what formats is this journal available?

5. Most of our databases are cataloged in Barton. Find the database called WorldCat and click on the URL to access it.

Part II - General research

This part of the test looks at how people use the catalog to conduct general research. This could mean looking for items on a particular subject or in a particular format. The assumption is that they have a topic in mind or want to find items that will help answer a question, or perhaps they want to browse items on a particular topic.

These questions are more open-ended.

task 6: Find a few books on a particular subject.

6. Find at least 3 books on holistic medicine.

task 7: Find the most current books on a topic.

7. Find some current books on the history of Boston (written since 1990).

task 8: Find an MIT thesis on a particular topic.


task 9: Find a map or audio CD or video tape or other format on a particular subject.

9. Find a video showing the construction of a passive solar home.

task 10: Follow the hyperlinks that lead you to other titles with the same subject heading and author.

Observer finds the book, Coastal and shelf sea modelling. Bring up the
full record screen.

10a. Find some other books by the same author.

[Observer brings them back to full record screen.]

10b. Find some other books on the same topic.

Post-test questions:

Observers: First fill them in on any questions they have about how the catalog really works - what would be the best way to search for some of the things we asked, etc.

Then ask the questions below:

1. What do you like best about this system?
2. What do you like least about this system?
3. What could we improve that would have the most impact for you?
4. Would you be interested in participating in future usability tests?
   yes ___ no ___

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Results
1. Detailed results  II. Summary of problems  III. Conclusions

I. Detailed results:

- task 1: Find a book by title, recognize the call number and know which library has it.

  **Find the book, Biopiracy: the plunder of nature and knowledge. Which library owns it and what is the call#?**

  When asked to find a known title, 6 of 7 users chose "title begins with..." from the basic search screen. 1 user chose keyword. Everyone found the title, and easily said which library had it and the call number.

  One user had trouble because of a typo and ended up on the browse list, one screen past where he needed to be. Needed help with navigating to previous page.

- task 2: Find a book by author.

  **Do we have any books by Deborah Hayes and if so, give the title of one?**

  Everyone chose "author (last name, first)". They all found the books. In our previous tests people were inputting first name first, since there was no instruction on that. This works better now that we have the instruction.

- task 3: Be able to tell if an item is checked out or not and when it is due.

  **Find the book, Peopleware: productive projects and teams. How many copies do the libraries own and are any available to check out? If not, what is the due date?**

  3 of 7 people had trouble with this. They didn't click on "library holdings" or "all holdings" to find the info (or clicked on it only after clicking just about everywhere else).

  Because of the odd way that ExLibris displays "owned/out" information
(which people had trouble with in our previous test) we decided to not show it on the brief display (since it was more confusing than helpful).

There was also a slight problem with the browse screen - it doesn't contain the subtitles. So those users who typed more than the first word ended up one screen after where they needed to be.

Example:
Peopleware: productive projects and teams
ended up on screen that begins with this other title:
Peoplework, communications dynamics for librarians

We made a choice to have the browse screen begin with the title you typed, but maybe we should set it back to showing one previous title before it in the list?
ExLibris doesn't let you make the title you searched for bold, or otherwise marked on this screen.

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Task 4: Given a journal article citation:
a: find out if we have the journal.

**Here is a citation to an article in a journal:**
Effects of Metal Ions on the Electronic, Redox, and Catalytic Properties of Cofactor TTQ of Quinoprotein Amine Dehydrogenases
Shinobu Itoh, Masato Taniguchi, Naoki Takada, Shigenori Nagatomo, Teizo Kitagawa, and Shunichi Fukuzumi
*Journal of the American Chemical Society* V 122, 49 (Dec 13, 2000)

**a. Do we own this journal?**
**b. Do we have the issue that contains the article in the citation?**
**c. In what formats is this journal available?**

All 3 students had trouble finding the journal. Two did keyword searches and got hopelessly lost in way too many results. One did "title begins with..." but thought it was really a keyword search (didn't read "begins with...") and typed in words from the middle of the title (left off "journal of"), so had the same problem.

All 4 staff found the title, using the "title begins with..." search. However, several of them hesitated or expressed confusion about the browse screen, since it looks like this:

1 Journal of the American Chemical Society
1 Journal of the American Chemical Society - Supporting Information: vol.118:no.14, 1996 only (microfiche)
5 Journal of the American Chemical Society
2 Journal of the American Chemical Society Supplementary material
1 Journal of the American Chemical Society. Supporting information
1 Journal of the American Chemical Society. Supplementary material
1 Journal of the American Chemical Society Supporting information
1 Journal of the American Concrete Institute
5 Journal of the American Concrete Institute
Most chose the first title, which happened to be the right one. (but they wondered about the 3rd choice:
5 Journal of the American Chemical Society

b: understand the holdings info for a serial title, so they know if the citation in hand is available.

Here is what the Summary Holdings looks like:

Internet Resource - Electronic Journal | **SEE URL(s)
v.118:no.1 (1996)-

Science Library - Journal Collection | QD.A512
v.1 (1879)- ; Microfiche: v.97 (1975)

Retrospective Collection - Microforms | QD.A512
v.1 (1879)-v.107 (1985)

3 of 4 staff understood how to interpret the holdings, the one who didn't found the answer anyway by looking at the detailed holdings. One commented, "that little dash is really hidden."

All 3 students had trouble with this and were especially confused by this line:

v.1 (1879)- ; Microfiche: v.97 (1975)

It would be great if the catalog record could read:

v.1 (1879)- present
Microfiche: v.97 (1975)

(not sure if we can make this happen)

c: find out a if journal is available in print, microfiche, or electronic formats.

All staff answered correctly that we had print, electronic, and microforms, though someone asked "what's the difference between microform and microfiche?"

1 student understood that we had electronic and microfiche, and said she assumed this meant we also had the print version in the Science Library.

The other 2 students didn't get this far.
task 5: Find out if we have a particular electronic database and be able to find and click on the hyperlink in the record to access it. **Most of our databases are cataloged in Barton. Find the database called WorldCat and click on the URL to access it.**

Everyone made some kind of comment that they would normally go to Vera to find a database. A couple of people were still confused even when we said that databases are also in Barton - it took them a while to realize they could search for it by title, like anything else - they were looking for special lists of databases.

Once they actually searched for it by title, no one had a problem. They easily found it and clicked on the URL to access it.

One staff member noticed that on the brief display for Worldcat, it says, "format: book". She found this confusing.

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**task 6:** Find a few books on a particular subject. **Find at least 3 books on holistic medicine.**

4 of 7 people did a keyword, or keyword in subject search. The 3 others did "subject begins with...". They all found relevant results, except for one person who did "subject begins with..." and typed in "medicine", when that didn't work, tried it again by typing "holistic." (holistic medicine happens to be a subject heading)

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**task 7:** Find the most current books on a topic. **Find some current books on the history of Boston (written since 1990).**

Most people did some sort of keyword search (most from the Advanced Search), and tried the following:

```
keyword: boston
AND
keyword: history
AND
date: [here they tried to input a range of dates, for example:] 1990?
>1990
1990*
```

Unfortunately the system is not set up to limit by date in advance (only after the search). However, the default for the brief results screen is to sort it in reverse chronological order by publication date. So they end up finding the newest titles first in the list anyway. (not true in our old catalog) We need some sort of note on the search screen that explains that you can’t limit by date until after the search.
As for finding books on the history of Boston, that is a difficult task, since the subject heading is "Boston (Mass.) - history", and those people who chose "subject begins with..." had a difficult time getting to that subject heading. They ended up on "Boston Housing Authority" or "History of Science" (if they typed in "history of boston"), and even moving back or forward several screens in the subject heading list doesn't get you to the right place.

One way people sometimes found that subject heading was by finding a title on the brief display that came up in a keyword search, and clicking on the subject heading for that title, "Boston (Mass.) - history." It's good that we have the subject headings on the brief results display.

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**task 8:** Find an MIT thesis on a particular topic.

**Find an MIT thesis on holography.**

At the time of the test, the "MIT Theses" search screen was not yet functional, so people tried other ways to find them.

Everyone found them. Most people used the advanced search screen and limited by format. The first one happened to be a thesis not from MIT, but from Univ. of California. All the others were from MIT, but the only way to tell from the brief display is by surmising it from the call number.

This problem will be solved when the "MIT Theses" screen is turned on and functional.

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**task 9:** Find a map or audio CD or video tape or other format on a particular subject.

**Find a video showing the construction of a passive solar home.**

Everyone found this one. They all went to the Advanced search and limited by format.

---

**task 10:** Follow the hyperlinks that lead you to other titles with the same subject heading and author.

**Observer finds the book, Coastal and shelf sea modelling. Bring up the full record screen.**

**a.** Find some other books by the same author.

**b.** Find some other books on the same topic.

Everyone found and clicked on the hyperlinked author's name and the hyperlinked subject. (though 2 people clicked on the hyperlinked title, realized it went nowhere, then clicked on subject).

A few people commented on how confusing the next screen that came up was, but then randomly clicked on the first link in the first link in
the set, which worked for them.

(They wondered, "what is the difference between "author browse," "personal browse," and "all browse?")

II: summary of usability problems

This test is designed to cover only the most basic tasks that people should be able to complete successfully in our catalog.

Of the 10 tasks we came up with, 7 of them were completed successfully by the test participants. This is a big improvement from the "out of the box" version of the screens and from the problems we saw users having with the catalogs at Boston College and McGill. See our success summary for details of improvements we made that solved usability problems seen in the first round of tests.

However, 3 basic tasks still have serious usability problems that need to be fixed.

1. being able to tell whether an item is checked out or not and when it is due (question 3)
2. understanding the journal holdings (question 4)
3. subject browsing where the subject is not an obvious subject heading (question 7)

In addition, there are a 2 other problems that are less serious than the problems above, but should still be fixed:

1. Getting the user to the correct place in a browse results screen, and making it clear where they are. A few decisions have an impact on this:

   a. whether the subtitle of a title should be displayed in the browse results
   b. whether the item you entered should be displayed first or second in the browse results list
   c. having a marker or other visual cue to highlight the title you input (so far ExLibris doesn't offer this capability)

2. It's not clear to the user what the various choices mean on the screen that comes up after following a link on the full display under author's name or subject.
III. Conclusions

Problems we are working on tend to fall into different categories:

a) problems we can fix by changing the HTML or changing a setting in the tables
b) problems we can fix by adding our own custom programming
c) problems that only ExLibris can fix, due the way the system is programmed
d) problems we can fix by changing our indexing decisions
e) problems we can fix by changing how the data is input
f) problems we can fix by changing cataloging practice
g) problems that involve a mixture of the items above

In addition, some problems will be solved when we get the "no frames," "minimal javascript" version from ExLibris.

As you can imagine, some of the items above are easier to change than others. In these reports we will suggest optimal solutions, even if they are not always achievable. We realize that most changes will involve some compromises and sometimes it's necessary to choose from the "lesser of evils" when all the factors aren't under our control.

We are happy to note that there are far fewer usability problems now than there were in the original "out-of-the-box" screens from ExLibris. (see our success summary) Even though serious problems remain to be fixed, we are optimistic that we'll be able to find solutions that make the catalog more usable for everyone.

We plan to continue with several small rounds of usability testing throughout the design and rollout of the "no frames" version.
# Web Advisory Group

**Barton catalog usability test results**

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June 1, 2001

## Success summary:

**improvements that solved usability problems**

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>- many users failed to leave off the initial article, such as &quot;A&quot; or &quot;the&quot;</td>
<td>include examples of how to input data near the search box, and in the menu of search choices</td>
</tr>
<tr>
<td>- many users input author's names with the first name first (firstname lastname)</td>
<td>example: <strong>Author (last name first)</strong></td>
</tr>
<tr>
<td>- most users stuck with the default choices and used whatever options were presented to them first</td>
<td>make the default choice be what makes sense for most searches, i.e., &quot;cast a broad net&quot;</td>
</tr>
<tr>
<td>- users didn't understand the difference between browse and keyword searching</td>
<td>don't require users to understand this difference, instead build it into the system in an obvious way</td>
</tr>
</tbody>
</table>

example:

basic search screen combines browse and keyword searches in one menu:

- keyword
- title begins with...
- title keyword
- author (last name first)
- author keyword
- subject begins with...
- subject keyword
<table>
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</thead>
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<tr>
<td>Many users didn't ever click on the &quot;full record&quot; link</td>
<td>Include enough info in the brief results so that they rarely would ever need to look at the full record (especially subject headings and URLs). Also, make it easy to see how to view the full record. Example: We added a text link: &quot;display full record&quot;.</td>
</tr>
<tr>
<td>Some users were confused about searching for article titles vs. searching for journal titles</td>
<td>Use the phrase &quot;journal title&quot; in the menu of the journals search screen to help remind users that they should enter the title of the journal, not the article title.</td>
</tr>
<tr>
<td>Many users had difficulty finding the screens that let you limit by format</td>
<td>Make the format limits easy to find on the search screen. We have them on the advanced search screen. (It would be nice to also have them on the basic search screen, but this creates problems in ExLibris).</td>
</tr>
</tbody>
</table>
| The label "no of recs" was confusing                                 | Use plain English and no abbreviations when labeling parts of the screen. We changed this to: 
  # of titles
  
  (this appears at top of browse results screens)                      |
| Showing previous and next title at the top of the browse detail screen was very confusing | Put the most important information at the top of the screen. Leave out unnecessary information to keep screens simple and clear. Example: On our browse detail screen we... |
eliminated the display of previous and next title at top, in order to make the actual results list more obvious as the first thing you see

- names of libraries didn't sound like library names, for example:
  Science

  make sure the name of each library or unit is clear out of context, since these will show as locations
  example:
  we used "Science Library" instead of just "Science", "Humanities Library" instead of just "Humanities"

- the whole screen was too busy and everything was too bold (hard to see what's the most important information)

  - some screens had as many as 24 buttons in 3 rows at the top of the screen - this was confusing

  - use bold sparingly
  - keep screens simple and clear
  - minimize number of buttons and choices available on each screen
  - emphasize important information
  - locate button near information it refers to

  examples:
  we moved "select all" and "deselect all" near checkboxes they refer to
  we grouped major navigation buttons into unchanging table cell on left
  changed most buttons to plain text links

- on advanced search screen, the term "words adjacent, no or yes? " caused confusion - people didn't know what it meant

  use conventions that people are used to from other sites on the Internet
  many search engines use the term "phrase" (hardly anyone uses "words adjacent")
  example:
  we changed the two radio buttons to a menu, with "words" as the default:
  Search as:
  words
| phrase | give clear visual cues to show the scope of what you are searching, especially if you are searching a sub-set of the whole catalog examples: (we use color, it’s the only orange text on the screen) **Search for Journals Only** **Search for Conferences only** **Alphabetical Results List from Journals only** everywhere a URL is visible it should be a hyperlink (why even have a URL on the page without being able to click on it?) make URLs prominent and visible on brief and full displays example: we added clickable URLs to the brief display, so users are no longer required to click on a different screen to find the URL we moved URLs higher up on the full display avoid making users read instructions on the screen (most won’t) if an instruction is necessary, put it near the place it’s needed and make it very brief design the screens to make things so obvious that instructions aren't needed

**Other general improvements we made:**

1. got rid of so many pop-up windows, used them only where it was convenient to leave the previous screen visible, for example, the
"save/email" screen

2. grouped outer navigation links in ways that make sense, for example:

   - all links to search screens are on the left side of the page and stay visible on all screens
   - links to custom features, such as "your account," "your bookshelf", and "your previous searches" are grouped together at the top
   - links that take you out of the catalog are grouped together at the top: "help," "tutorial," "other catalogs"

   .. or at the side/bottom:
   Order forms: RetroSpective Collection, Interlibrary Borrowing, etc.

3. carefully worded each link and each label to avoid jargon, add clarity, and stay consistent