

MULTIPLE VERSIONS/LIBGUIDE SEARCHING/HELP ACCESS COGNITIVE WALKTHROUGHS

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SCOPE

This walkthrough focused on the functional areas of accessing records with multiple versions, accessing appropriate help resources in-catalogue, and locating research guides in One Stop Search.

USER PROFILES

Generic user profiles were used instead of full user personas due to the minor nature of changes and short timeline available for training evaluators.

UNDERGRADUATES:

The user you are pretending to be is undergraduates who've been attending UManitoba for at least one term. You've used search engines before, and one stop search, but wouldn't call yourself an expert. You are accessing the website for some project work you need to get done in the next week.

GRADUATES:

The user you are pretending to be is a graduate student working on a class paper. Your due date is a few weeks off, so you have time, and you feel comfortable using One Stop Search.

MEDICAL STAFF:

The user you are pretending to be is a medical staff member. You're minimally familiar with One Stop Search, but very busy at the moment and needing to do some quick research.

TASKS

Several tasks were completed in live Primo, and in the sandbox draft of proposed Primo Standing Committee modifications (Primo2).

LIVE PRIMO:

Type in the word "Hamlet" in One Stop Search and search for it.

Click the link to access all versions.

Select the record for the book “The First Quarto of Hamlet”.

Type in the word “fish” in OSS and search for it.

Select the first article you see with online access.

You’re confused about how to access this article – you decide you’d like to check with someone. Click the link to get help.

Type in the words “Chronicle of Higher Education Almanac” into OSS and search for it.

Select the first result.

You’re confused about how to access this article – you decide you’d like to check with someone. Click the link to get help.

SANDBOX PRIMO2

Type in the word “Hamlet” in One Stop Search and search for it.

Click the link to access all versions.

Select the record for the book “The First Quarto of Hamlet”.

Type in the word “fish” in OSS and search for it.

Select the first article you see with online access.

You’re confused about how to access this article – you decide you’d like to check with someone. Click the link to get help.

Type in the word “English” in OSS and search for it.

Select “English” by Lyle Ford, a LibGuide.

Open the LibGuide in its own tab.

ASSUMPTIONS IN THIS EVALUATION

Users will be minimally familiar with searching in One Stop Search.

FINDINGS

UNDERGRADUATE GROUP

ORIGINAL PRIMO

- Evaluators believe students who aren't used to one stop search aren't sure if they're taking successful searching steps until they achieve results.
- Evaluators believed that the view ___ versions link on the right side of the screen would be invisible to new users, and that undergraduates were most likely to click on the title of the top result to access multiple versions.
- The Get It @ UML help link was the agreed upon first place that evaluators felt undergraduates would click if they wanted any help with an online article. It provided enough feedback that the user was on the right track, which evaluators acknowledged as problematic, because many concerns should go through Ask a Librarian first instead.
- Evaluators also acknowledged that undergraduates may not know what "Get it @ UML" as a noun actually is.
- Evaluators believed that there needs to be better feedback that articles available online are available online (adding the word "online" to "full text available" was suggested). Evaluators also discussed approaching this change carefully to make sure it made sense across the board.
- Evaluators noted the Open Source in New Window link is confusing to them, and likely even more confusing for undergraduate users.
- The Document Delivery page that opens in the Get It @ UML pane was thought to be confusing for undergraduate users. Evaluators believed that the list of phone numbers would cause student failure, where students would avoid attempting to figure out who to contact on the list.
- Evaluators noted that notices/places to sign in didn't seem prominent enough.
- There was some discussion that Document Delivery itself didn't convey exactly what the service means. A potential suggested solution was changing the page header to "requesting items through Document Delivery". It was also suggested to change the contact staff link to "Sign in to Request Item through Document Delivery".

PRIMO2

- Multiple versions changes were viewed as a great improvement – evaluators believed the icon made things clearer for undergraduates, and the ability to click on the more visible button OR the basic title was determined to make successful student access far more likely.
- The addition of the ask a librarian icon replacing the trouble with get it link was viewed as a positive, and evaluators believed the Ask a Librarian process provides better feedback to undergraduates that they are on the correct path to receiving help.
- The links underneath the Ask a Librarian link (particularly the one to our Conditions of Access) were viewed as potential causes of confusion/task failure. Evaluators believed that the close proximity of the Conditions of Access link to the Ask a Librarian image could cause confusion in undergraduates – they may take that as a sign that they may not be allowed to access Ask a Librarian services, at least from this access point.
- While evaluators were enthusiastic about the idea of searching for LibGuides, they weren't sure how often this function would be used. Evaluators agreed that more metadata was needed to identify the records as research/subject help for students – suggestions included full librarian name, using another term instead of "LibGuide", and some indicator that this was a help tool rather than a book or article.

- Evaluators felt that opening the link in a new window was difficult, and discussed either allowing right click > open in new window or creating an icon for Research Help or Research Guides to use in place of the live site in a smaller pane.
- Evaluators discussed that the ability to search for LibGuides would pair well with greater LibGuide promotion and awareness.

GRADUATE GROUP

ORIGINAL PRIMO

- the evaluator felt that a graduate student was less likely to run into multiple versions than an undergraduate as they tend to search with more specificity/controls
- the evaluator determined that the position of the view ___ versions link was likely to cause task failure for the majority of graduate students due to a lack of visibility.
- the evaluator felt that graduate students may not understand that the versions of hamlet under the view ___ versions link could have slightly different titles.
- the evaluator was concerned that online articles listing as “full text available” in OSS do not communicate that the article is available online to students unfamiliar with our system.
- the evaluator felt that students would default to contact links in the Get It @ UML pane, whether they were the right link to click or not, and that the help link results provided feedback that the graduate student was on the right track for help – but that students were unlikely to fill out a whole form or call a number. The evaluator also noted that the Loansome Doc link could encourage random clicking from confused users.

PRIMO2

- the evaluator felt that the new view ___ versions button and record style was much more successful, and provided better user cues that they were taking the correct action.
- the sign in button in the sandbox was noted as much better for patron search success.
- the evaluator felt that the image icon might be skimmed over by graduate students – they felt that the Need Help? text seemed like a more likely place to click. The evaluator suggested perhaps bringing the text to the left of the icon and making it a clickable link.
- accessing research guides by typing the subject area into OSS on the homepage was deemed potentially likely. The evaluator felt that the record should have more feedback telling the user that this is the guide they want. The lowercase L on LibGuide, and the lack of the full Librarian name, were seen as particular drawbacks.
- the evaluator viewed it as more likely that users would try to open the LibGuide in a new tab through right clicking. More padding around the new window link was discussed as a possibility.

MEDICAL GROUP

ORIGINAL PRIMO

- more prominent placement of Ask a Librarian icon was asked for – evaluator believed user group unlikely to access help from or try other available links.
- records indicating online article access in primo were thought to have a potential failure rate – the user may not realize this is an online article. Evaluator posited that perhaps adding the journal title in the displayed search result entry could be helpful.
- view ___ versions link was deemed extremely unlikely to result in a successful user interaction. It’s location on the right hand side of the screen was deemed likely unnoticeable for busy medical staff.

PRIMO2

- the LibGuide record displayed in the primo search results was thought insufficient for medical staff to know that this is a research help guide. It was recommended that more metadata be added, including the full librarian name and labelling that clearly indicated this was a research help tool.
- The sign-in button at the top of the Get It @ UML menu was viewed as an excellent addition for Medical users, as the evaluator believed it was much more noticeable when placed in the main area of user focus.
- the revised view ___ versions button resolved evaluator concerns. The evaluator felt it was extremely noticeable and provided adequate feedback to ensure users that they were successfully proceeding.
- the addition of an ask a librarian icon to replace links to other help sources was felt to likely increase user access success rates.

SUMMARY

- The Multiple Versions changes have been agreed upon by all evaluators, and are likely to improve user access success rates.
- The sign in button present on the top of the Get it @ UML pane was seen as a step in the right direction. Other options for making sign-in more prominent or entirely forced were seen as worth investigating.
- The addition of Ask a Librarian as a help link in Get it @ UML is universally seen as a positive. Individual evaluators suggested for future consideration both making the “Need help?” text a link to Ask (and moving it to the left of the Ask icon), and removing or somehow setting apart the Conditions of Access link.
- LibGuides should be in One Stop Search, but we need to add more information to the record that displays on the search results screen, and possibly change the LibGuide icon to Research Help/Subject Guide, or similar. LibGuide was generally felt to be a term that not all users find familiar or understand.
- Additionally, LibGuide record results opening in the small pane was viewed as potentially frustrating, as the link to open in a new window isn’t highly visible to users. Solutions of allowing right click opening in a new window, or creating a Click to access Research Guide icon to use in the results Get It @ UML pane, were discussed.
- Beginning a search in One Stop Search seems reasonably intuitive and evaluators generally felt that the search results screen provided enough feedback that all user groups would feel that they were taking successful steps to access an item.
- The “Full text available” label on online accessible articles could use the addition of a clarifying “online” if possible – or something to indicate that that is what “Full text available means for new users”.
- We should investigate the Open Source in New Window link to see if there is a better way to accomplish its functionality or a better label for it.
- The Document Delivery page linked to under the contact staff to get item should be re-evaluated or a different page should be linked to.