

# **OAC FIRST ROUND USABILITY TEST FINDINGS**

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OAC Redesign Project

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## Introduction

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The Assessment Unit conducted a round of task-based usability tests on the latest prototype of the Online Archive of California on August 19-20, 2008 at the offices of the California Digital Library. Four sessions were conducted on the first day and three on the second, for a total of seven sessions. Each session lasted one hour.

The purpose of these tests was to gather information that will help the OAC project team answer user interface questions that have arisen during the design phase. The participants' responses to the prototype were generally very positive, and they provided information – outlined in this report – that will improve the OAC for all users.

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## Purpose of the Study

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The purpose of this round of usability testing was to obtain feedback from users about the following objectives:

1. Determine users' general impression/reactions to collection guide. Determine whether user understands the right sidebar structure and navigation.
2. Determine users' reactions to search results (keywords in context) on the collection guide.
3. On collection page of something that's not available online, determine whether users realize that they would need to go to a physical location to obtain items.
4. Determine users' expectations for download and print capabilities.
5. Determine users' first impressions of OAC and the homepage redesign.
6. Determine users' preference for display of citations on search results page.
7. Determine users' interpretation of the Collections and Items tabs.
8. Determine whether users understand how to modify search results by using facet values.
9. Determine users' preference for ordering of items under facets.

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## Participants

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We contacted Mary Ann Mahoney at UC Berkeley, who enlisted the help of three librarians at UC Berkeley to aid in finding participants for this OAC study. Jane Lee created a recruitment flyer, email, and survey and asked the librarians to distribute these items to any email list they thought would yield a suitable pool of participants.

Thirty-four people responded to the recruitment survey. Seven were selected based on their availability and experience with OAC. Their participation was confirmed via email.

Seven participants participated in this round of usability testing. Six were affiliated with UC Berkeley, and one was affiliated with SF State University and the Alameda County Office of Education. The following tables describe participants' positions and experience with OAC. See Appendix B for the complete survey and results.

Position	Count	Percent
Master's student	2	28.6%
Doctoral student	4	57.1%
Faculty member or post-doc	1	14.3%

Frequency of Use of OAC	Count	Percent
Never	5	71.4%
Once	0	0.0%
Rarely	1	14.3%
A few times a year	1	14.3%
Monthly	0	0.0%
Weekly	0	0.0%
Daily	0	0.0%

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## Method

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For the majority of this assessment, we used the latest working prototype of OAC at <http://oac-dev.cdlib.org:8089/> on a laptop running Firefox on Mac OS 10.4. Because the homepage and items tab of the interface were not developed, we substituted paper versions of these screens printed in color. Jane Lee facilitated the sessions, and Rachael Hu observed and took notes on a computer. A digital audio recording of each session was made with the participants' permission.

Participants were asked to come to the California Digital Library offices in Oakland for their sessions. After signing in with security, participants were directed to the fourth floor, where Jane Lee greeted them. In the conference room where the sessions were held, participants met Rachael Hu and were asked to make themselves comfortable.

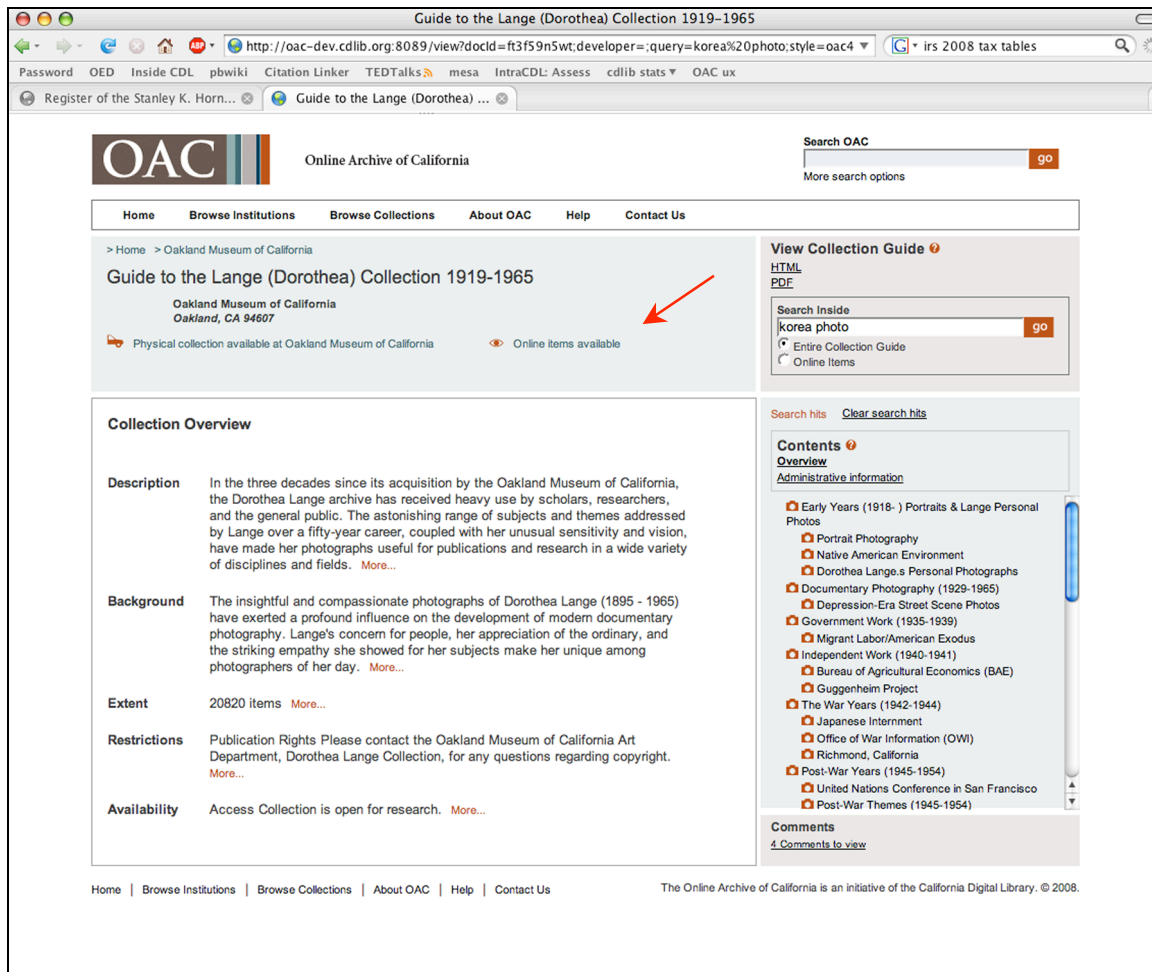
Each session began with an explanation about the purpose of the session and a demonstration of the "thinking aloud protocol." Jane Lee went over two release forms – one for the study and one for the audio recording – and asked participants to sign the forms if they agreed to participate. After thanking participants for their willingness to help improve OAC, Jane handed them a \$65 Amazon.com gift certificate. Participants were then asked to complete a brief survey. (See Appendix B.)

The first question about how participants conduct their research was designed to make participants feel at ease and lead them into the rest of the session. (The complete list of questions and objectives used during the sessions is provided in Appendix A.) At the end of each session, participants were thanked and escorted to the lobby.

## Findings and Recommendations

### Collection Guide Page Design

Figure 1: Collection Guide

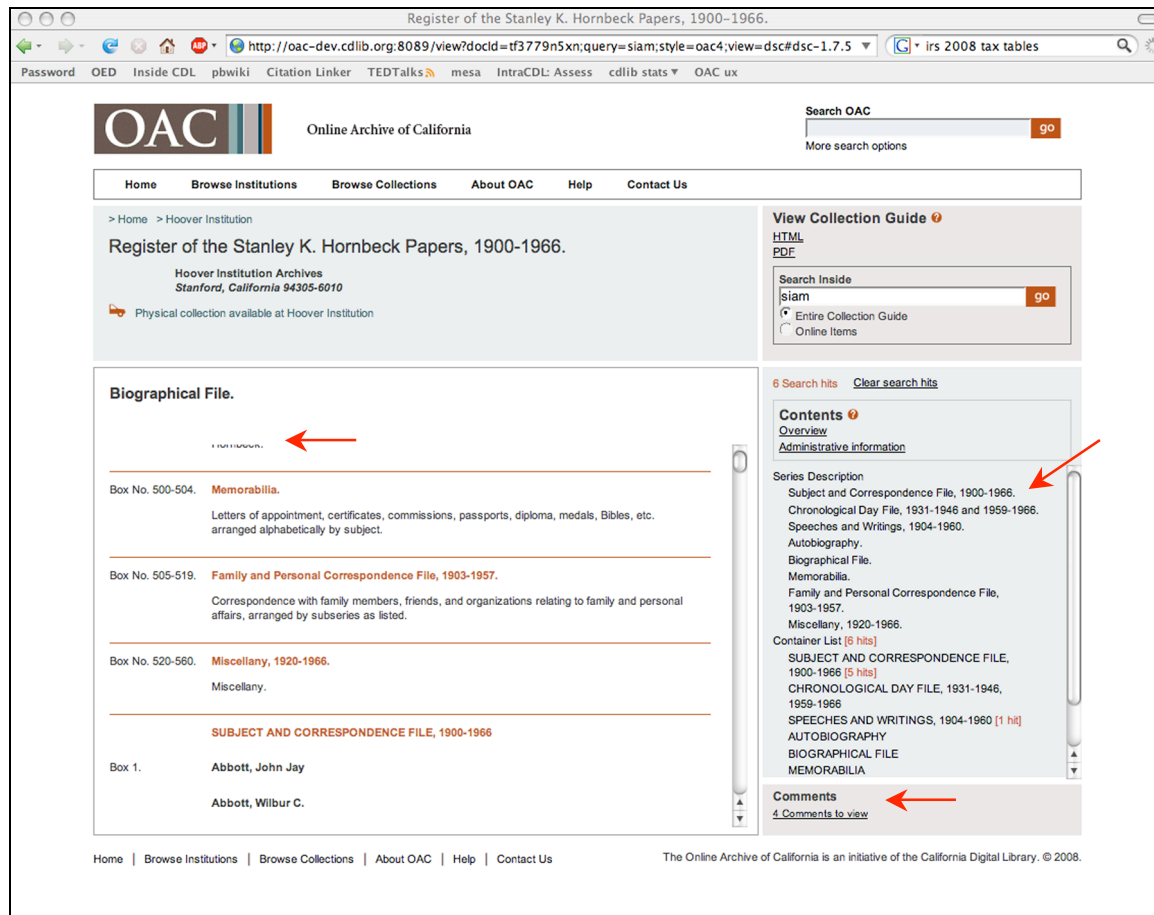


### Header

<b>Observation</b>	Participants stated that the information in header section (title of collection, name of institution, location, availability) was very important. Some suggested that the font size of the location and availability information should be increased.
<b>Recommendation</b>	Increase font size of location and availability information.
<b>Observation</b>	Users did not recognize or note the absence of the "Online items available" link and icon to mean that online items were not available.
<b>Recommendation</b>	Provide an icon and message that states that online items are unavailable.
<b>Observation</b>	The eye icon in the header and camera icon in the right-hand column do

	not match up.
<b>Recommendation</b>	Use one icon to indicate online items.

**Figure 2: Collection Guide with Container List**



## Main Content Pane

<b>Observation</b>	Participants noted that there was a good amount of white space in the main content area.
<b>Recommendation</b>	Keep the white space.
<b>Observation</b>	It is a little odd when text disappears under an invisible box around the header.
<b>Recommendation</b>	Set off the stationary header area with a subtle marker.

## Right-hand Column Navigation

<b>Observation</b>	Users could not tell what was a link and what was not a link. Some users only found out when they incidentally moused over some text.
<b>Recommendation</b>	Use consistent graphic treatment for hyperlinks.
<b>Observation</b>	Some users were unsure what “hits” referred to.
<b>Recommendation</b>	Group message and “Clear search hits” link with search box and search term used.
<b>Observation</b>	As a user scrolls in the main content pane, there is no indication of where he/she is in the right-hand column navigation.
<b>Recommendation</b>	Add a visual indication of where user is by changing the text weight to bold or adding an icon, for example.

## Labels

<b>Observation</b>	Participants expressed confusion over the difference between “Overview” and “Administrative information.”
<b>Recommendation</b>	Combine the two sections into one, and display part of the information followed by a “more...” hyperlink.
<b>Observation</b>	Participants were not sure what “View Collection Guide” meant. Some thought that the links might take them to a different page with different information. These participants did not seem to understand that they were looking at the Collection Guide.
<b>Recommendation</b>	Clearly label and indicate that the information presented on this page is the collection guide.

## Viewing Options

<b>Observation</b>	File size matters. Some participants stated that they would avoid PDFs because they take up more space and take longer to download.
<b>Recommendation</b>	Provide options for downloading information.
<b>Observation</b>	One user mentioned wanting the ability to email the guide to herself.
<b>Recommendation</b>	Consider providing the ability to email collection guides.

## Comments Section

<b>Observation</b>	Participants expressed a lot of curiosity about the comments link, which was not active on the prototype. They noted that comments from collections archivists or people who have used archives could be helpful,
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	but comments from random Internet surfers was not desirable.
<b>Recommendation</b>	If a comments feature is desired, develop a policy for this feature's intended use.

## OAC Homepage

Figure 3: Homepage Mock-up



## Design

<b>Observations</b>	Participants reported that the color scheme is pleasing to eye – warm and cool, clean, more modern and professional.
<b>Observation</b>	Participants stated that the browse contributing institutions list is good because it gives sense of what the site contains. The list is also impressive.
<b>Observation</b>	Most participants stated that they would start with search and thought that the search box should be more prominent.
<b>Recommendation</b>	Put greater emphasis on search in the design.

<b>Observation</b>	Some participants stated that the logo and site name should be more prominent.
<b>Recommendation</b>	Increase the font size of the site name.

<b>Observation</b>	In examining the paper prototype, one participant reported that the Browse Collections and A-Z list interactions could be confusing.
<b>Recommendation</b>	Review these interactions on a working prototype.

<b>Observation</b>	Participants liked the main image and found it eye-catching. Several mentioned that it would be nice if the image changed on a regular basis. Images also generated curiosity about Calisphere banner ad. One user recognized Calisphere logo right away.
<b>Recommendation</b>	Provide rotating images.

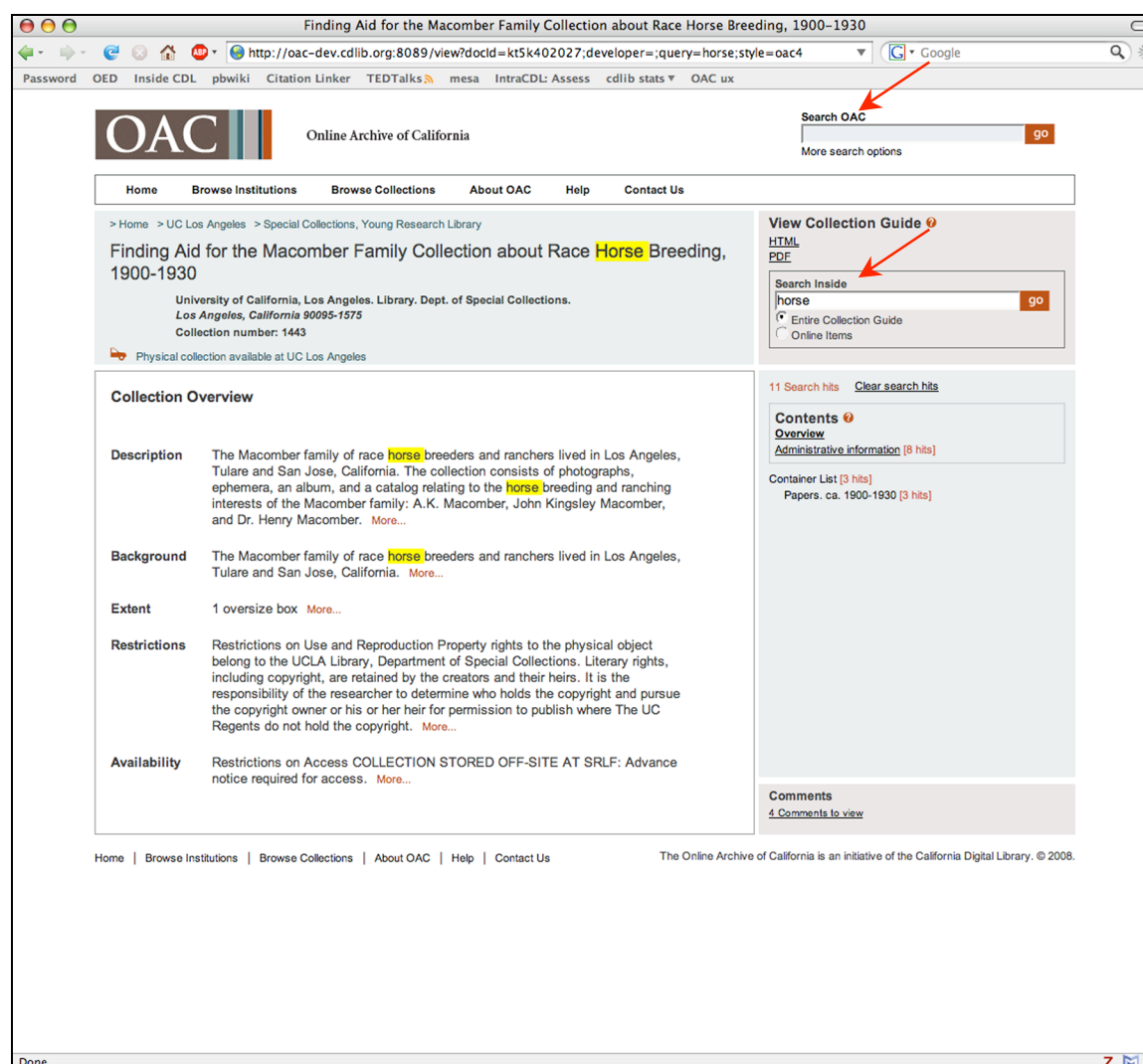
### Map Feature

<b>Observation</b>	Participants reported that having an idea of where archives are located geographically can help in planning. "If I need a source in Stockton [I] can visualize how far it is." Some stated that they would use Browse Institution to find a particular institution, but they recognized the value in having a map as well.
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<b>Observation</b>	The map gives users a sense of where things are and reinforces that idea that the site is about archives in California.
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## Search

Figure 4: Collection Guide with Highlighted Search Terms



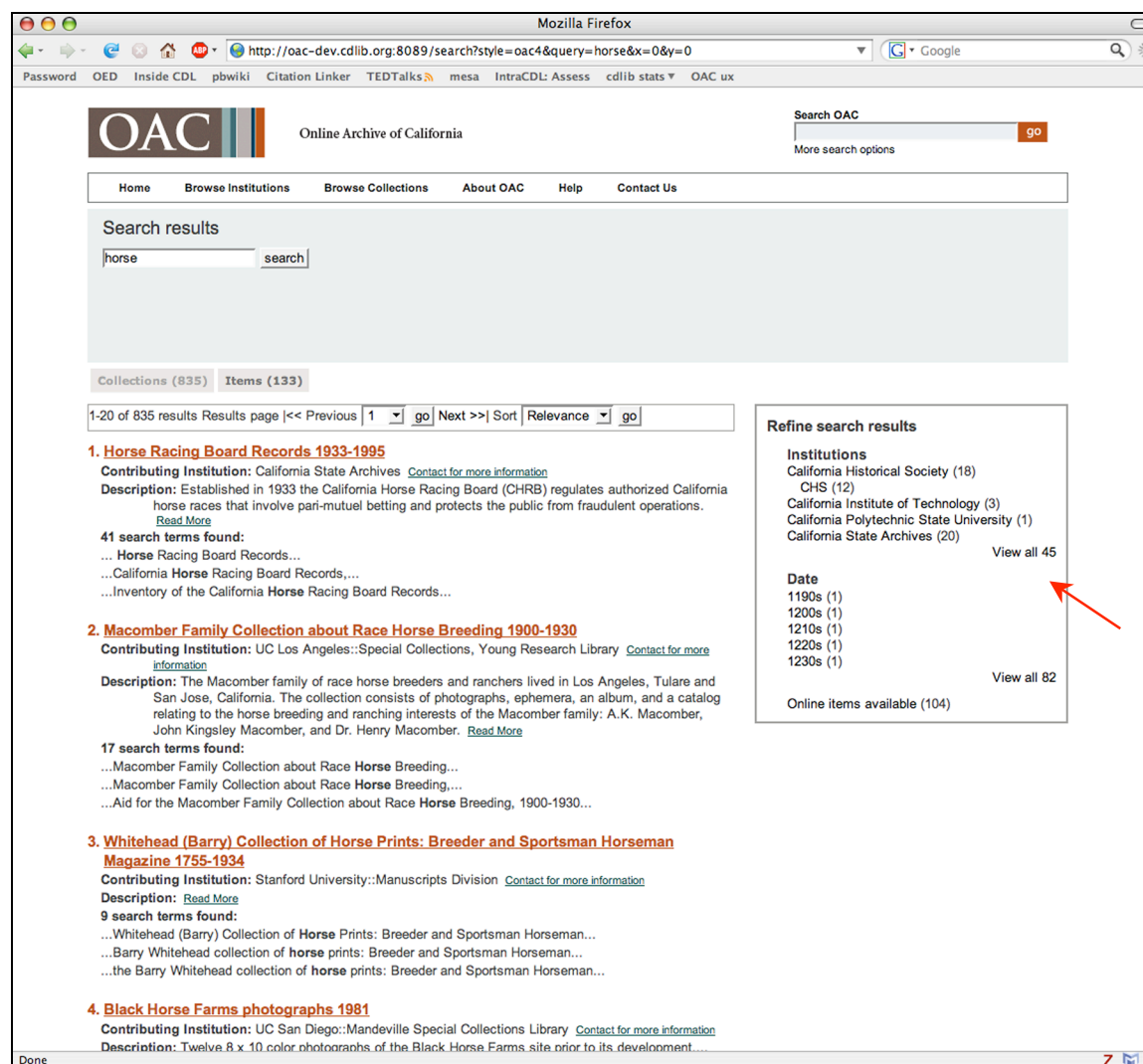
## Global Search vs. Search Inside

Observation	Participants reported really liking the persistence of global search feature. They want it to be more prominent, with the label in larger font.
Recommendation	Increase the visibility of the search box.
Observation	Many participants stated that the difference between the global search box and “search inside” box is unclear. Participants expressed uncertainty that “search OAC” meant search the entire site. The also wondered, “Search inside what?”
Recommendation	Clarify the label of the “search inside” box. Directly state what is being searched. Possibly change “Search OAC” to “Search Entire Site.”

## Search Term Highlighting

<b>Observation</b>	Participants reported that the yellow highlighting of search terms was helpful. One noted that yellow contrasts well with the background colors.
<b>Recommendation</b>	Make sure that highlight color contrasts with background colors.

Figure 5: Search Results – Long Format

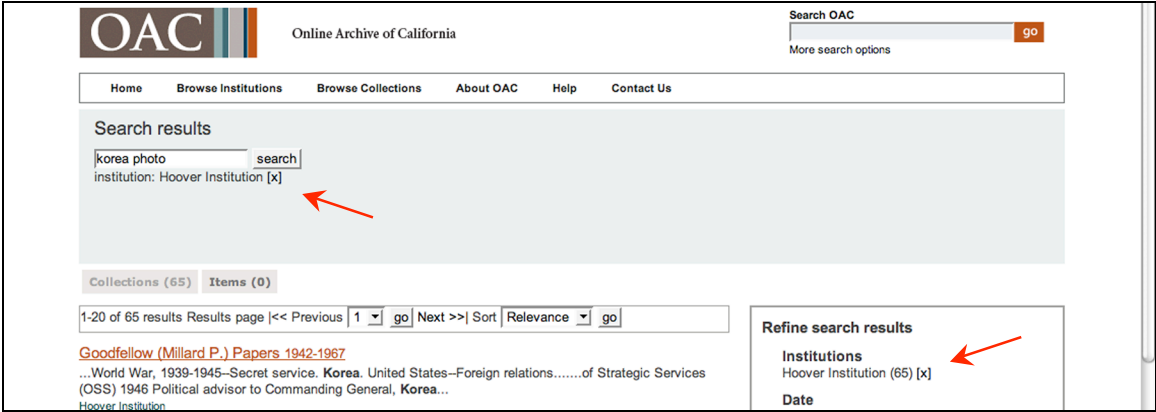


## Modifying Results with Faceted Browse

<b>Observation</b>	Participants expressed appreciation for the information given. "I can tell right away that I really like this box.... I like that it tells me where things are and that it's organized by date."
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<b>Observation</b>	Some participants did not see how to expand the list of institutions or dates.
<b>Recommendation</b>	The “View all” link needs to be left justified in order to make it more visible. Inconsistent link treatment adds to the confusion.

**Figure 6: Representation of Undo Facet Value**



<b>Observation</b>	All participants used the browsers “back” button to undo facet values. Users perceived no other way to go back to the previous state, so they used their default method: the back button.
<b>Recommendation</b>	The current implementation of undoing a facet is too subtle. Give the undo feature a stronger visual presence.

Figure 7: Search Results – Short Format with Expanded Institutions

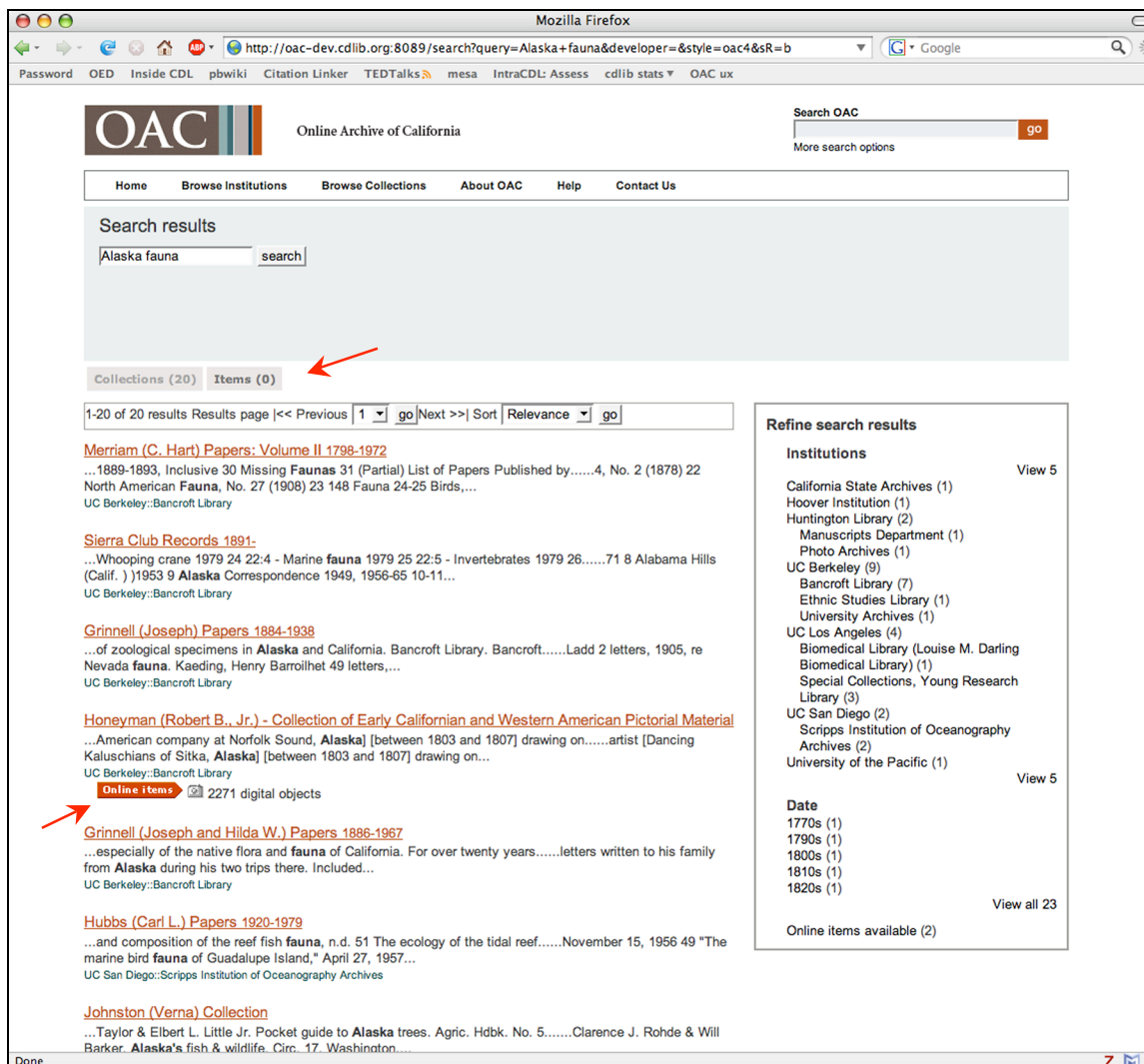
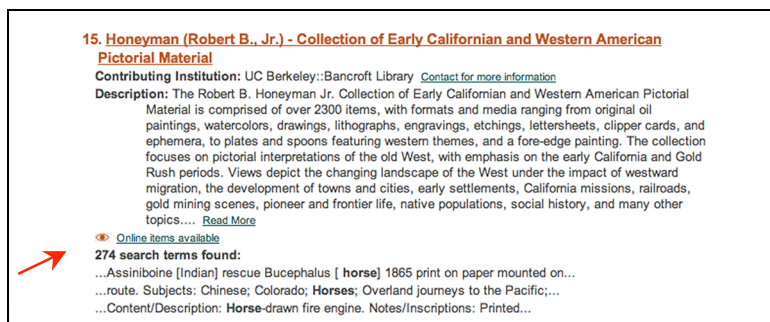


Figure 8: Long Format Online Item Icon



## Search Results Format

<b>Observation</b>	<p>Most participants expressed a preference for long format citations over short format citations. One stated that if you're browsing, it's nice to have a little more information. However, they also reported a desire for the highly visible red arrow to be used to indicate online items instead of the often overlooked eye icon.</p> <p><b>Other Comments:</b> Long format tells you what you're looking at by naming fields.</p> <p>Short format is "Google-like", familiar – might be good for when you know exactly what you're looking for. Doesn't give enough information. Doesn't tell you what field you're looking at – just presents keywords in context, but not enough context. Results not numbered.</p>
<b>Recommendation</b>	Present search results using the long format as the default.

## Facet Value Ordering

<b>Observation</b>	Participants stated that chronological presentation of dates makes sense to them and that they do not need the ability to reverse the order.
<b>Recommendation</b>	Present date facet values in chronological order.

<b>Observation</b>	Participants stated a preference for alphabetical ordering of institutions, but they also recognized the value of hit-count ordering.
<b>Recommendation</b>	For institutions, the best scenario would be to give users the option to sort alphabetically or by hit count. If unable to give users this option, then alphabetical ordering is preferred by users. It may be easier to scan for numbers than it is to scan an un-alphabetized list for a particular institution.

## Collections vs. Items

<b>Observation</b>	Participants expressed confusion about how these two categories related to one another, especially when collections outnumbered items.
<b>Recommendation</b>	It may be desirable to combine both collections and items into a single results list, if user can sort or filter by category.

## Desired Information

### For Here

Participants stated a desire to know what's in a collection and what its strengths are. They want general subject headings, dates for materials, and contents of containers. Participants also emphasized the importance of information about availability.

*Is this an online or physical collection? When can I go? Do I have to bring anything special, i.e., multiple IDs? Can I take item out of the archive? What are the restrictions on access?*

### To Go

Participants stated that they would want to keep some combination of the following pieces of information:

- Title, administrative information, date and time of retrieval
- Exact location, box, and folder information, what item was grouped with, call number
- Search term used
- Title and link, collection overview
- Collection guide
- Container list



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## Appendices

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### Appendix A: Questions and Objectives

#### 1. Determine users' typical strategy for finding primary sources.

Ask user to briefly describe their process.

What is your typical process / strategy for finding primary sources?

Google? OPAC?

What are you currently working on?

Collection Guide

#### 2. Determine users' general impression/reactions to collection guide. Determine whether user understands the right sidebar structure and navigation.

Ask user to explore and describe the page. Ask user to navigate within the page.

Ask user if she knows where she is. Ask how he knows where he is when he's navigating around contents.

#### 3. Determine users' reactions to search results (keywords in context) on the collection guide.

Ask user to describe the page. Listen for user comments about how his/her search has been indicated.

[Ask user to find keywords in a specific container list section. See how they get to that section. (Do they use right sidebar navigation?) See if they can find those keywords. Note how they navigate between keywords. Ask user to find next instance of their search term.]

#### 4. On collection page of something that's not available online, determine whether users realize that they would need to go to a physical location to obtain items.

Ask user what they would do to obtain/view the actual item. [does user understand car icon?]

#### 5. Determine users' expectations for download and print capabilities.

Ask user to identify and describe the different download and print options available to them.

Ask user to share expectations. Then, present user with different versions of the interface and ask for reactions.

Homepage

#### 6. Determine users' first impressions of OAC and the homepage redesign. [Paper prototype]

Ask user to explore homepage and describe what they see. Ask user to state what they think OAC is.

## Search Results

### 7. Determine users' preference for display of citations on search results page.

Ask user to enter a search. Present different versions:

- Long format – includes labels and collection descriptions
- Short format – no labels or collection descriptions

Ask user to discuss pros and cons of each. Ask whether he/she has a preference.

### 8. Determine users' interpretation of the Collections and Items tabs. [Paper prototype for Items tab]

Ask user to explore page and comment on what she sees.

If user does not discover tabs, point them out and ask him/her to explore and describe their function.

### 9. Determine whether users understand how to modify search results by using facet values. (Will users find facets? Use them successfully?)

Ask user to find a collection located in particular institution or time period. Ask user to find hidden collection. "Are there any items in *x*?"

### 10. Determine users' preference for ordering of items under facets.

Ask user to describe facet area. Ask if it looks/behaves the way he/she expects.

- For date, do users prefer chronological or reverse chronological order?
- For institution, do users prefer alpha or hit-count ordering?

#### Notes:

Test site: <http://oac-dev.cdlib.org:8089/>

#### URL modifications for facet reordering

;sR=b

;fI=value

;fI=reverseValue

;fI=totalDocs

;fD=value

;fD=reverseValue

;fD=totalDocs

## Appendix B: Participant Survey

1. Name: \_\_\_\_\_

2. Are you affiliated with an academic institution?

Response	Count	Percent
No	0	0.0%
Yes, UC Berkeley	6	85.7%
Other (please specify)	1	14.3%

Other Responses:

SFSU, Alameda County Office of Ed

3. Which best describes your position?

Response	Count	Percent
Undergraduate student	0	0.0%
Master's student	2	28.6%
Doctoral student	4	57.1%
Faculty member or post-doc	1	14.3%
University staff	0	0.0%
K-12 faculty	0	0.0%
Other (please specify)	0	0.0%

4. What is your reason for using archives / finding primary sources?

Response	Count	Percent
Class assignment	3	42.9%
Dissertation or thesis	5	71.4%
Publication	1	14.3%
Curriculum development / teaching preparation	4	57.1%
Film or video	0	0.0%
Family history project	1	14.3%
Administrative or work-related product	1	14.3%
Gathering info without a final project in mind	3	42.9%
Other (please specify)	0	0.0%

5. How often have you visited archives?

Response	Count	Percent
Never	1	14.3%
Once	0	0.0%
Rarely	1	14.3%
A few times a year	3	42.9%
Monthly	1	14.3%
Weekly	1	14.3%
Daily	0	0.0%

6. Which archive(s) have you visited?

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7. How often have you used **paper** finding aids in archives?

Response	Count	Percent
Never	2	28.6%
Once	0	0.0%
Rarely	2	28.6%
A few times a year	3	42.9%
Monthly	0	0.0%
Weekly	0	0.0%
Daily	0	0.0%

8. How often have you used **online** finding aids?

Response	Count	Percent
Never	1	14.3%
Once	1	14.3%
Rarely	0	0.0%
A few times a year	1	14.3%
Monthly	3	42.9%
Weekly	1	14.3%
Daily	0	0.0%

9. How often have you used the Online Archive of California (OAC)?

<b>Response</b>	<b>Count</b>	<b>Percent</b>
Never	5	71.4%
Once	0	0.0%
Rarely	1	14.3%
A few times a year	1	14.3%
Monthly	0	0.0%
Weekly	0	0.0%
Daily	0	0.0%

## Appendix C: Screenshots

### Homepage

The screenshot shows the OAC homepage with a navigation bar at the top containing links for Home, Browse Institutions, Browse Collections, About OAC, Help, and Contact Us. A search bar is located in the top right corner. The main content area features a large welcome message and a list of institutions. A map of California on the right side highlights various locations. At the bottom, there is a section for 'Need to Find a Digital Image?' and a 'callisphere' logo.

OAC Online Archive of California

Search OAC More search options go

Home Browse Institutions Browse Collections About OAC Help Contact Us

Welcome to the Online Archive of California. Discover the rich collections from cultural collections, museums, libraries and archives across California.

Browse the Collections

From A to Z  
0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

By Institutions

- Albany Library
- Anaheim Public Library
- Areadia Public Library
- Archives and Special Collections Department
- California State University, Dominguez Hills
- Art Center College of Design Archives
- Arts Library Special Collections
- UC Los Angeles
- Rancroft Library, UC Berkeley
- Berkeley Art Museum/ Pacific Film Archive, UC Berkeley
- Berkeley Public Library
- Biomedical Library (Louise M. Darling Biomedical Library), UC Los Angeles
- California Historical Society
- California Institute of Technology

Browse the Institutions

Eureka Chico Sacramento Santa Rosa Stockton San Francisco San Jose Santa Cruz Fresno Santa Maria Los Angeles Long Beach Oceanside

Need to Find a Digital Image?  
A world of primary source materials is available to you online.

callisphere

Home | Browse Institutions | Browse Collections | About OAC | Help | Contact Us

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### Items Tab

The screenshot shows the OAC search results page for the 'Items' tab. It displays a list of search results with details such as title, contributing institution, date, and from. A 'Refine search results' sidebar on the right allows filtering by institutions and dates. The page includes navigation links at the top and bottom.

OAC Online Archive of California

Search OAC More search options go

Home Browse Institutions Browse Collections About OAC Help Contact Us

Search results

Limited to:  
Institution: UC Berkeley, Bancroft Library  
Institution: UC San Francisco, University Archives

Modify Search

Online text available Go to institution

Collections (200 hits) Items (50 hits)

1-20 of 200 results Results page: 1 << Previous 1 Next >> 1 Sort: Relevance

1. **Sutter's Fort, Sacramento, California**  
Contributing Institution: Bancroft Library.  
Date: 1900  
From: Robert B. Honeyman, Jr. Collection of Early Californian and Western American Pictorial Material

2. **The Vivian Mill - Carson River**  
Publisher: The Bancroft Library, University of California, Berkeley.  
From: Hearst Mining Collection of Views by C. E. Watkins.

3. **Vivian Jasker dressed as a nurse and holding a Red Cross poster**  
Contributing Institution: San Diego Historical Society  
Date: 1924  
From: California Border Region digitization project

4. **Sutter's Fort, Sacramento, California**  
Contributing Institution: Bancroft Library.  
Date: 1900  
From: Robert B. Honeyman, Jr. Collection of Early Californian and Western American Pictorial Material

5. **Sutter's Fort, Sacramento, California**  
Contributing Institution: Bancroft Library.

Refine search results

Institutions  
Institution 1 (20)  
Institution 2 (20)  
Institution 3 (20)  
Institution 4 (20)  
Institution 5 (20)  
Institution 6 (20)  
View all 10

Dates  
1920s (200)  
1930s (200)  
1940s (200)  
1950s (200)  
1960s (200)  
Online items available (40)

Home | Browse Institutions | Browse Collections | About OAC | Help | Contact Us

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