

Usability Test Report: Default Search / Research Guides

Summary

Emily Daly and Bendte Fagge conducted usability testing of the default search functionality (referred to as the “gear” in this report) and locating research guides on the Duke Libraries website. The test was held outside of the Von der Heyden Pavilion on March 7, 2014 from 10:00 – 11:30am. A pilot was conducted with Steph Matthiesen (note that Steph had not yet seen the gear icon). The test consisted of a short set of background questions, four tasks, and four post-test questions that lasted approximately 5–10 minutes. See Appendix for test script.

For task one, which asked respondents to find a scholarly article, six participants started their search using the Books & More tab. Although half of the participants completed this task successfully, many users seemed to think that Books & More also includes articles in the search results.

Task two, which asked respondents to use the default search functionality, proved to be the most challenging task for users, but three participants did figure out how to use the gear to customize their preferred search option. At the conclusion of the test, we showed the gear to several users who did not seem to notice it during the test, and they were all able to set their preferred default options quickly and easily.

For the task that asked respondents to locate a research guide on the topic of Russian literature, most users either clicked on the link to Research Guides from the Research Support megadropdown menu or clicked directly on the Research Guides Quick Link on the homepage.

Participants

Eight individuals (excluding our pilot participant) completed this test. Participants included two faculty members, two graduate students, and four undergraduates representing the following departments: chemistry, economics, German, political science, and psychology. Two undergraduate interviewees had not yet declared a major but mentioned economics or environmental engineering as potential majors.

Seven out of the eight participants said they have used the Duke Libraries homepage this semester. Of those seven: one uses it every day, three every week, and three less often. Most of these users come to the site to find books or articles, but one user searches for textbooks and another user searches for movies in addition to books.

Key Findings

1. Many users assumed that the 'Books & More' tab includes articles in the search results.
2. When asked to "set their default search box," nearly all users were confused by what we were asking or weren't sure how to complete the task. Upon showing users the gear functionality after the test was complete, users indicated that this functionality made sense and quickly and easily set and then cleared their preferred search option.
3. When asked to find a Research Guide, three users clicked the Research Guides Quick Link on the homepage and two users clicked "Research Guides" from the "Research Support" menu. Overall, users seemed to know where to start in order to find a research guide.

Key Recommendations

1. Change the hint text in the Books & More search field to indicate that journal titles are being searched instead of journals (i.e., 'Find books, journal titles, movies & more'). While this change is subtle, perhaps the text change will indicate more clearly that journal titles rather than journal articles are being searched.
2. Add a link to the Books & More search tab to direct users to the Articles search if they are, in fact, looking for articles.
3. Determine branding language to use when referring to the default search functionality (e.g., default search tab, default search options, default search gear, etc.), and publicize this feature through the Duke University Libraries Blog and other social media outlets. Create an instructional page for using this functionality, or consider the DUL blog post to be an instructional document. Encourage research librarians to incorporate the new feature into instruction sessions.
4. On the Research Guides page, <http://library.duke.edu/research/guides>, the word 'research' is automatically appended to any search terms the user enters. If a user enters 'Russian lit research', then the actual search terms will become 'Russian lit research research.' Consider removing the functionality that appends the word 'research' to search terms entered in the search field on this page (perhaps start by determining how frequently users include 'research' in their search queries).
5. Add a link to Research Databases to the Research Support menu.

Potential Recommendations

1. In the Format facet in the Endeca search results page, include the word 'Title' beside 'Journal, Magazine, or Serial' (i.e., 'Journal, Magazine, or Serial Title').
2. Add color coding to article search results so users can immediately see which items are available online and which items are not available online. (*Note:* Only one user suggested this.)
3. Consider creating a new 'Literature (in foreign languages)' guide or adding a standard 'Literature' tab or box to each guide listed once users choose 'Literature (in foreign languages)' from the Research Guides page, <http://library.duke.edu/research/guides> (currently, users see comprehensive area studies guides rather than guides dedicated to literature specifically).

Results

Task One: Searching for scholarly articles

Task one required participants to find a scholarly article.

No. Participants	Path from Search Box on Homepage
1	Books & More – User wanted eJournals, but couldn't find it – Looked for old eJournals tab, but no luck
1	Books & More – Entered search terms (drop-down was ISBN) – No results – Back to homepage – Books & More tab says 'books, journals & more' so user thought he should find articles – Clicked Subject Headings dropdown and entered search terms
1	Books & More – Entered search terms – User said they would use facets on left-hand side of screen to get to articles
1	Books & More – Didn't actually search – Clicked Articles tab – Entered search terms – Noted that if Articles doesn't return enough results, then uses All search tab
1	Books & More – Entered search terms – Tried to refine search via dropdown options near search and format – User realized they were in Books & More – Back to homepage – Clicked Articles tab – Entered search terms (Keywords option) – Got to an article
1	Articles – Entered search terms (Keywords option) – Got to an article
1	Books & More – Entered search terms – Used facets to narrow to Journals and Magazines – Back to Books – Narrowed to Author – Some times narrows to Language – Didn't find an article, but when asked insists on using Books & More or would try finding a Research Guide for tips on finding articles
1	Articles – Clicked 'Peer-reviewed only' – Entered search terms (Keywords option) – Refined by Content type

Task Two: Choosing a default search box

Task two required participants to change their default search option.

No. Participants	Path from Homepage
1	Clicked Books & More – Wanted this tab as default and thought by clicking on the tab it would set the default
1	User wasn't sure what this task was asking – Search & Find menu – Clicked Articles – Didn't understand task
1	User wasn't sure what this task was asking – User usually uses Books & More and sorts from there – Realized there was an Articles tab
1	User would choose Articles – Wasn't sure what we meant by the task – Moved mouse and saw hover – Went to Gear and selected/set to All – User hovered over Gear again
1	User would choose Articles – But, had no idea how to do it – Searched on website for 'how to change default search box' – Tried to find instructions – Found LibX
1	Went to Gear – Selected Books & More – Thought it was easy and liked that Gear was below tabs instead of being in the right-hand corner similar to other applications that use this symbol
1	User wasn't sure what this task was asking – User would generally use All for default, but depends on what they are looking for – Would click the All tab to make it a default – Wasn't sure how to make a persistent change, so would go Ask a Librarian
1	User had no idea how to do this, but said they would try – Clicked Advanced Search – Back to homepage – Clicked Search & Find – User tried to see if there was a FAQ or something to figure out how to do this task

Task Three: Finding Research Guides

The third task required participants to find a research guide that would help them start their research for their Russian literature class.

No. Participants	Path from Homepage
1	Clicked Research Databases link – Searched for 'Russian Literature' – No results found
1	Research Support – Research Guides – Entered 'Russian lit research' into search box (<i>Note: the word 'research' is automatically appended to any search term entered so this search became 'Russian lit research research'</i>) – No results found
1	Clicked Research Guides from Quick Links – Keyword search in search box – Went to LibGuides – Browsed by subject link on right side of page – User not sure what Russian literature falls into – Used Browser Find to find Russian Literature (faster to use Ctrl+F to find Russia on the page)
1	Clicked Research Guides from Quick Links – Chose International Studies – Chose Slavic, Eurasian and East European Studies – Went to database

	on Erik's guide or would email Erik for assistance
1	Chose Our Website tab – Entered search terms 'guide for beginning research+Russian lit' – Clicked into LibGuides – Searched for 'Russian literature research' in LibGuides search interface – Got to Russian Art and Politics
1	Research Support – Research Guides – Clicked Literature (non-English) – Clicked Slavic Studies guide and started to look – Clicked Related Guides and looked for literature – Didn't see any that looked like a literature guide – Went back to Getting Started in LibGuide – Went to Russian Reference Works – Wasn't sure if that was really what they were looking for
1	Clicked Research Guides from Quick Links – Clicked Arts & Humanities – Clicked Literature (in English) although not sure if Russian lit would be here – Tried to search Sara's guide for Russian – Went back to Browse – Chose Linguistics – Said they had no idea – Searched LibGuides interface for 'Russian' – Found Russian Art and Politics guide – Would look more to see what's available on guide – Likes what is on guide – Would also try keyword searching and/or use Google to find famous authors, then search library site for that
1	Books & More – Searched for 'Russian literature' – User not sure what would count as a guide – Added the word 'guide' to search in Books & More – Found reference book, <i>Guide to Russian literature</i> , in catalog

Task Four: Clearing default search

Task four required participants to clear the default search they had previously set in task two.

No. Participants	Path from Homepage
1	Went back to Books & More and clicked it again
1	Wasn't sure how to do this and said they would have to figure it out
1	Wasn't sure what default search meant – Searched for 'Latino' again – Clicked Start Over from Endeca page
2	Clicked Gear – Clicked 'Clear Selection'
1	Would search again in Our Website for how to clear default search
1	Would refresh to get back to Books & More – Or would click back to Books & More
1	Hovered over Gear and realized this was where defaults could be set/cleared – Noted that the Gear functionality was cool and it wasn't hard to change after figuring it out

Post-Test Interview

Participants had the following responses in their post-test interview.

What participants like about using the Duke Libraries website to complete these tasks:

- Easy to type in keyword searches
- Like going for the first option (Books & More default)
- Very convenient
- Ask a Librarian function
- Easy to change search options (Books & More, Articles, All, Our Website)
- Location of Gear to change default search (like that it's not in the upper right corner, where it "normally appears")
- Research Guides interface
- Like being able to narrow down exactly what I'm looking for; nice to have specific options for articles

What participants dislike or find confusing about using the Duke Libraries website:

- There is a lot of information on the screen. It's hard to work out what is relevant.
- Found it confusing that words pre-populated in search boxes
- Sometimes it's hard to find more info about books such as table of contents. Sometimes table of contents display really nicely on catalog records, whereas other times there are no table of contents.
- Hard to know the distinction between Articles and Journals
- Seems like there is another way to search by database
- Having so many options sometimes confuses me. Sometimes it's easier to just have one option.
- Was confused because I thought the default search was All; didn't know that Books & More and Articles were separate search options
- Finding a guide for Russian literature was the most confusing task
- Was much easier to use the old eJournals tab
- Hard to know how to customize search options

Recommendations for Default Search function:

- I think it is fine as is.
- Many users didn't understand the question, but after some prodding several users figured out that they needed to use the gear and found the functionality useful.
- Would make gear more prominent and put text beside gear to indicate what it does
- Would prefer All as the default search option

Recommendations for Research Guides page:

- Would like to search within results on actual LibGuides interface, not Browse page. **Note:** There is a search bar on LibGuides pages.
- Would be nice if tertiary categories popped out liked the secondary categories do. **Note:** Tertiary categories do pop out just like secondary categories.
- Would make Research Guides link more prominent on the homepage

General comments about experience using the site:

- I think I need more practice using the site since it is hard to use at first
- Seems pretty helpful and useful, pretty ergonomic
- Sometimes you search for an article and the link doesn't take you to the article
- Would be nice to have translations of non-English results
- Sometimes I find papers that look good, but they are not available online
- Would be nice to color-code articles that are available online and articles that are not available online
- I love using the site and it is part of my identity at Duke. I appreciate that knowledge is accessible and the site is a good starting point.
- Add a link to Research Databases on the Research Support tab.

Appendix: Default Search / Research Guides Usability Test Script

Thank you for agreeing to take part in this study.

We launched a new Duke Libraries website earlier this semester. The purpose of this test is to learn more about how well our site works for researchers.

I will be asking you to complete a few tasks using our new homepage. Keep in mind that there are no right or wrong answers and that we're testing a tool — not you. If you have any questions as we go along, feel free to ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done, I'll try to answer them then.

Okay, first some general questions:

1. Are you an undergrad, grad student, faculty member, staff member?
 - a. If you are an undergrad, what year are you?
 - b. What is your major/what department are you in?
2. Have you used the Duke Libraries homepage this semester?
 - a. If yes, would you say that you use it every day, every week, or less often?
 - b. If yes, what do you come to the Duke Libraries homepage to do?

Now I'd like for you to complete four short tasks using the Libraries homepage. It would be

really helpful if you would share your thoughts and observations as you are completing the tasks, so try to think aloud as much as you can. Like I said, there are no right or wrong answers.

**Use <http://pre.library.duke.edu/> for all tasks. Note that respondents will need to use the back button instead of the DUL logo to get back to pre.library.duke.edu at the start of each task.*

TASK ONE: Searching for scholarly articles

Using the Libraries homepage, search for a scholarly article about a topic you're researching for a class this semester or a on a topic that that interests you.

Notes:

TASK TWO: Choosing a default search box

You'd like to change your default search box on the Libraries homepage. Choose a new default search box.

Hint, if needed: Your choices are Books & More, Articles, All, and Our Website.

Notes:

TASK THREE: Finding Research Guides

You're beginning research for your Russian literature class and have heard there are guides for doing research in many different subject areas. Use the Libraries homepage to find a guide that will help you start your research for your Russian literature class.

Notes:

TASK FOUR: Clearing default search

You'd now like to clear the default search you just selected. Clear your default search from the Libraries homepage.

Notes:

POST-TEST INTERVIEW

1. What did you like about using the Duke Libraries website to complete these tasks?
2. What did you dislike or find confusing about the Duke Libraries website?
3. If you could change the Default Search function in any way, what would you change?
4. If you could change the Research Guides page in any way, what would you change? *[skip question if users are not able to get to Research Guides]*
5. Is there anything else you'd like to tell us about your experience using this site?

Note: Clear all default search options before starting a new test.