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Usability Test: *Research Guides Portal*

Recommendations

1. Reorganize the format of the "How-To Guides" page to make the content easy to read.
2. Include step-by-step instructions such as research basics of the topic and how to use the recommended resources in individual guides.
3. Reduce text load in individual guides as necessary.
4. Explore the necessity of including a search box in individual guides.
5. Consider to combine some highly related subject categories, like the Arts & Visual Studies and Performing Arts. (One participant confused when they couldn't find a Film guide in the Performing Arts category.)
6. Conduct a new test with tasks on the "Course Guides" to see how would it be helpful during regular semesters.

Background

Duke University Library updates its Research Guides portal based on LibGuides during 2017 summer. In order to get feedbacks about the new interface with users for improvements, Thomas Crichlow and Andi Zhou conducted a usability test on the new Research Guides portal (http://guides.library.duke.edu/) in the lobby of Perkins Library at Duke University on August 9, 2017.

Questions we hoped to answer through this study:

1. How do users find a guide based on their own interest or purpose from the new research guides portal?
2. Can users find a given guide from the new guides classification?
3. What would users do if they need help?
4. What do they like the navigation architecture (e.g. the navigation tabs, the subject categories, right-side components)?
5. What do they dislike the navigation architecture (e.g. the navigation tabs, the subject categories, right-side components)?
6. What would users expect to get from the research guides?

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Participants

Before the actual test, we had one undergraduate student joined into the pilot test. No changes on the tasks were made after the pilot test. There were six participants in the actual test: 1 undergraduate, 2 graduate students, 1 fresh graduated master, 1 staff member, and 1 visitor. They are either study or working at: Physics, Economics, Environmental Management, Psychology / Neuroscience, Religion, and CIT at Duke. All of them have used the DUL website for various purposes, but only two people have used a guide from the website.

Key findings

1. How do users find a guide based on their own interest or purpose from the new research guides portal? (Answered by Task 1)

    In Task 1, all participants started by exploring the subject categories on the portal page. One of six participants switched to search articles on DUL's Articles portal rather than a guide after navigating around the Research Guides. The rest five users and the pilot participant found a guide related to their own topics without pause and many backtracking. Particularly, three of them managed to choose the right subject category on their first click, two participants found their guide at the second choice, while the other one clicked three subject categories before accessing to their desired guide. None of the participants used the search box at the right side during this task.

    One participant spent a relatively long time browsing the guide they found and said they were hoping to see a search bar within the guide for specific resources.

    Two participants noticed the librarian information within the guides they found and said they would talk to them for further guidance.

    Three of six users shared that they would spend time seeking sources within the guide. Specifically, two of them said they would proceed to one of the recommended databases from the guide.

2. Can users find a given guide from the new guides classification? (Answered by Task 2 and 3)

    All participants found the elementary-level guide in task 2. Five users including the pilot tester found the guide from the "How-To Guides" page, while one user found it under a subject category. One participant did by searching keywords in the search bar on the right side. Overall, five of all participants did not go back to any previous step during the task.

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In task 3, all except one participants succeeded to find the given guide of an unfamiliar subject, in which three participants and the pilot tester completed the task without heading back. However, two participants struggled with navigating through several subject categories when seeking the guide. Interestingly, both of them eventually switched their approach to use the right column search box.

3. What would users do if they need help? (Answered by Task 4)

   Four participants looked for a related guide within the "How-To Guides", while another participant said they would search materials for help within the DUL's Article portal.

   Two participants shared they would use the chat box to ask a question because they knew this way would give them timely replies.

4. What do they like the navigation architecture (e.g. the navigation tabs, the subject categories, right-side components)?

   Four participants stated they like how the "How-To Guides" in the top navigation separated the subject guides that would provide help for certain tasks.

   Four participants mentioned they liked the subject categories that can be expanded, so they were able to see the belonging subjects.

   Three users noted that they liked the prominent chat box on the portal page, which made it easy to contact people for help right away.

5. What do they dislike the navigation architecture (e.g. the navigation tabs, the subject categories, right-side components)?

   Two participants said the division between subject categories seemed arbitrary; some were broad areas, while some were specific subjects. One participant noted that they had trouble finding a guide within the categories.

   Three participants said the individual guides contained lots of detailed information that was challenging to find what they were looking for. Specifically, one participant added that they thought the guides would be helpful to students who were experienced with the subject, but not for newbies.

Two participants shown the Course Guides should classified by subjects rather than simply a list of all guides. They both clicked the "Course Guides" at first after we asked them to find a guide of given subjects. One of them said they didn't like that the Course Guides only provided a few guides, and the other shared during the task that they wished they could choose a subject for course resources.

6. What would users expect from the research guides?

Aside from a list of sources in the field, four participants shared that they want the research guides would be a place to tell the basics of conducting a research, such as guidance for beginners, search methods, and where to find good materials around the topic.

Appendix A: The New Research Guides Portal Test Script

[Set up test computer before the test. Open two tabs on the browser: the library homepage and the new research guides portal. Leave the homepage on the top.]

My name is Andi and this is _____. We will be moderating the test with you.

Thank you for agreeing to participate in this study.

We want to improve the library research guides and we would like to learn more about how users interact with it. Your input is extremely valuable for the update.

1. I'm going to start with some general questions about your background: Are you an undergrad, grad student, faculty member, staff member, or visitor to Duke?
   a) If you are an undergrad, what year are you?
   b) For undergrads: What is your major?
   c) For grads, faculty, staff: What department are you in?

2. Have you used the library website?
   a) If yes, what do you normally do with it?
   b) If yes, have you ever used a research guide or course guide?
      i. If yes, how did you get to those guides?
      ii. If no, what do you expect the research guides would help you?

Thanks for your answers.

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I will be asking you to complete four tasks using this laptop. We appreciate if you can share any of your thoughts, observations, or concerns as you are completing the tasks, so try to think aloud as much as you can.

Keep in mind that there are no right or wrong answers for each task; we are testing the tool – not you.

Before we start, do you have any questions?

Here is our first task. (Note: the tasks may be conducted in a different order for each participant to avoid learning effects.)

TASK ONE: Explore a guide for research

Think of a project or paper that you needed to research last semester? (If they didn't have one) Think of a topic that interests you to start a research project.

Could you tell us what the topic is?

Okay, please use this page (URL: http://guides.library.duke.edu/) to find a guide that would help you start researching your topic.

[Open the portal page. Task begins.]

Feel free to share your thoughts during the task. – **Remind them when tend to be quiet; let them pause when they reach out of scope and don't trace back for a while.**

[Task ends. Reset the browser to the new portal page.]

TASK TWO: Find a guide to using Excel

You would like to learn more about Microsoft Excel to process the data for your research. Could you use this page to find a guide that teaches Excel?

Feel free to share your thoughts during the task. – **Remind them when tend to be quiet; let them pause when they reach out of scope and don't trace back for a while.**

[Task begins.]

[Task ends. Reset the browser to the new portal page.]

TASK THREE: Find an unfamiliar given guide

(Note: choice of the subject will depend on each participant's primary major.)

You're beginning research for your [Economics / Neuroscience] class and are going to find a guide for resources. Please use this page to find a guide for your research on [Economics / Neuroscience].

Feel free to share your thoughts during the task. – **Remind them when tend to be quiet; let them pause when they reach out of scope and don't trace back for a while.**

[Task begins.]

[Task ends. Reset the browser to the new portal page.]

TASK FOUR: Get help

Imagine you have a paper due in four hours, and you have a question about how to cite one of your sources. Using this page, show me what you would do to get help.

Feel free to share your thoughts during the task. – **Remind them when tend to be quiet; let them pause when they reach out of scope and don't trace back for a while.**

[Task begins.]

[Task ends. Reset the browser to the new portal page.]

Great! That concludes our tasks. Now I have a few final questions for you.

POST-TEST INTERVIEW:

1. What two things do you like best about this page?

2. What two things do you like least about this page?
    a) Was there anything that you found challenging that you would like to change?
        If yes, then follow-up with: Could you explain it?

3. Is there anything else that you would like to tell us?

Appendix B: *Task Order*

To avoid learning effects, each participant completed the same 4 tasks of different sequences. The order is shown as below:

Participant No.	First task	Second task	Third Task	Fourth Task
Pilot test	Task 1	Task 2	Task 3	Task 4
Participant 1	Task 1	Task 2	Task 3	Task 4
Participant 2	Task 4	Task 3	Task 2	Task 1
Participant 3	Task 2	Task 4	Task 1	Task 3
Participant 4	Task 3	Task 1	Task 4	Task 2
Participant 5	Task 1	Task 2	Task 3	Task 4
Participant 6	Task 4	Task 3	Task 2	Task 1