TRLN Discovery – Implementing usability report recommendations

This reports reviews recommendations made in the TRLN Discovery Usability Report - June 2018 (https://hdl.handle.net/10161/17163) for implementation.

Reviewed recommendations

- Make the availability status stand out, both amongst the search results and in records pages by making it bigger and highlighting it, as done in the Princeton library catalog (i.e., https://goo.gl/NPuqsb).
- Consider editing “Access Type” to “Show Only”, as done in the Harvard library catalog (i.e. https://goo.gl/a9sJJC).
- Consider changing the scope of the “At the library” facet to exclude unavailable items and displaying both facets located under “Access Type” at all times, even when zero online resources are available.
- Consider displaying both the local institution and TRLN logos on the expand button (see prototype below). Use short captions and highlighting to indicate what catalog is currently being searched.

TRLN expand button prototype

For more information, please contact emily.daly@duke.edu
Review justification

Previously made recommendation: 2. Incorporate “Availability” as a checkbox near the search box. Though the placement is different, the feature is integrated in this way in the Chapel Hill Public Library catalog (i.e., https://goo.gl/zNeZwH).

At other university libraries

<table>
<thead>
<tr>
<th>University</th>
<th>Availability feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell</td>
<td>No availability facet or checkbox, small logo under each resource to indicate whether resource is available. “At the Library” facet does not filter out items that have been checked out. (i.e. <a href="https://goo.gl/n98Me4">https://goo.gl/n98Me4</a>)</td>
</tr>
<tr>
<td>Stanford</td>
<td>No availability facet or checkbox, users cannot filter out unavailable items, and have to click small “Check availability” button under each resource to view status.</td>
</tr>
<tr>
<td>Princeton</td>
<td>No availability facet or checkbox, users have to look at search results to identify currently available resources. “In Library” facet does not filter out items that are unavailable. Status keyword is clearly highlighted for each record (i.e. <a href="https://goo.gl/Stjz8R">https://goo.gl/Stjz8R</a>)</td>
</tr>
<tr>
<td>Harvard</td>
<td>No availability facet or checkbox, users have to look at search results to identify currently available resources. “In library” facet does filter out items that are unavailable. (i.e. <a href="https://goo.gl/YofXC1">https://goo.gl/YofXC1</a>)</td>
</tr>
</tbody>
</table>

Testing data

- 1 participant pointed to the green “Available” keyword in records as one of their favorite features.
- 1 participant referred to the option to filter results by availability as one of their favorite features.
- 1 participant pointed out that they would prefer to see the “Available” facet near the search bar.

Reviewed recommendation

- Make the availability status stand out, both amongst the search results and in records pages by making it bigger and highlighting it, as done in the Princeton library catalog (i.e., https://goo.gl/WzCGJY).
Previously made recommendation: 1. Evaluate options for renaming “At the Library” to avoid confusion between this filter and “Available.” Alternatively, consider displaying both facets under “Access Type,” even when zero online resources are available.

At other university libraries

<table>
<thead>
<tr>
<th>University</th>
<th>“Access Type” label equivalent</th>
<th>Facets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell</td>
<td>“Access”</td>
<td>“At the library”, “Online”, “On order”</td>
</tr>
<tr>
<td>Stanford</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Princeton</td>
<td>“Show Only”</td>
<td>“In library”, “Online”, “In library or Storage”, “Online”, “Peer-reviewed articles”</td>
</tr>
<tr>
<td>Harvard</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Testing data

- During testing, 2 users were confused by the “Access Type” label and the “At the Library” facet. Both of them associated “At the library” with “Library Location.”
- 2 participants looked to the “At the library” facet when asked to expand their search to all TRLN libraries.
- 1 participant clicked “At the library” when asked to narrow results down to available resources.
- 2 participants didn’t successfully complete the “Availability & Library Location” task. They both assumed that they were being asked to find a book, and neither clicked “At the library” to narrow down their results (one mentioned that they were looking for a “books vs articles option available up top”, the other selected the “Book” facet under the “Resource Type” label). This indirectly reflects that they do not understand “At the library” as a facet pointing to physical copies.
- When asked to look at an individual record and determine whether Duke owned a physical copy:
  - 1 participant interpreted the “At the library” phrase as confirmation that we did have a physical copy
  - 2 participants explicitly mentioned that they were unsure, as they did not know how to interpret “At the library” (Note: this is not specifically about the “At the library” facet, but about the way users might interpret this phrase)

Reflection

While 5/8 participants successfully used the “Online” facet to narrow down results, no data directly indicates that users understand that “At the library” narrows results down to physical copies. Additionally, 2 participants who intended to find books did not use the “At the library” facet. It has also
been observed that some participants associate the “At the library” facet with library location or availability.

Harvard’s approach is interesting in that it combines availability and access type by proposing an “In library” facet that narrows down results to physical resources that are currently available. Harvard’s “Show Only” label works well with the facets’ combined availability and access type function.

[To consider: Does the phrase “At the library” make sense on the TRLN portal, when user is searching multiple libraries’ catalogs?]

**Reviewed recommendation**

- Consider editing “Access Type” to “Show Only”, as done in the Harvard library catalog (i.e. https://goo.gl/a9sJJC).
- Consider changing the scope of the “At the library” facet to exclude unavailable items and displaying both facets located under “Access Type” at all times, even when zero online resources are available.

**Previously made recommendation: 6. Test the usability of the TRLN expand button, focusing on its placement and design.**

b. Do users know what catalog they are searching? Should both local institution and TRLN logos be displayed on toggle button, with current catalog highlighted?

**Testing data**

- When asked to expand their search to all TRLN libraries, 4/8 users located the expand button right away. One of them suggested displaying both Duke and TRLN logos on the expand button while highlighting the catalog currently being searched.
- Including the pilot testing, 4/9 users looked to the “Library Location” facets when asked to expand their scope to include all TRLN libraries. One of them recommended that other TRLN libraries also be listed under “Library Location.”

**Reviewed recommendation**

- Consider displaying both the local institution and TRLN logos on the expand button. Use short captions and highlighting to indicate what catalog is currently being searched (as shown in Figure 1 & Figure 2).
Figure 1. TRLN expand button prototype, close-up

Figure 2. TRLN expand button prototype, page view