Usability Test: **TRLN Discovery toggle button and “No Results” page**

**Recommendations**

1. Consider incorporating a drop-down menu on the “Advanced Search” page for users to change the search scope to all TRLN Discovery libraries, as done in Orbis Cascade Alliance member libraries’ catalogs (i.e., [https://bit.ly/2LObQy2](https://bit.ly/2LObQy2)).
2. Evaluate options for making the “No results available at Duke Libraries” text smaller on the “No Results” page and consider options for making the “View this result” link more prominent; an option would be highlighting links upon hover, as done under “This item is about” in individual record pages (i.e., [https://bit.ly/2OGtUrF](https://bit.ly/2OGtUrF) and in the Yale library catalog (i.e., [https://bit.ly/2Mfg3Hj](https://bit.ly/2Mfg3Hj)).
3. Incorporate publication date range fields on the “Advanced Search” page, as done in the Stanford and Princeton library catalogs (i.e., [https://searchworks.stanford.edu/advanced](https://searchworks.stanford.edu/advanced) and [https://catalog.princeton.edu/advanced](https://catalog.princeton.edu/advanced)).
4. Make the “X” icon to remove selected facets on the left hand side red upon hover, as done in the Stanford and Princeton catalogs (i.e., [https://stanford.io/2LSq4xO](https://stanford.io/2LSq4xO) and [https://bit.ly/2Mfg7qx](https://bit.ly/2Mfg7qx)).

**Further Testing**

1. Test the usability of the TRLN expand button with a variety of Duke user groups
   a. 4/8 participants did not locate the expand button right away, as they looked under the “Library Location” label. Would placing the “Library Location” label and facets above the fold help users notice the toggle button faster?
   b. A participant did not click on the toggle button because they were not sure what “Triangle Research Libraries” were. Are most Duke users familiar with the phrase? If not, would incorporating mouseover text to highlight the function of the toggle button help? Multiple features, including the availability information, are highlighted in this way in the Princeton library catalog (i.e., [https://bit.ly/2LMKnNb](https://bit.ly/2LMKnNb)).
2. Test the usability of the “Advanced Search” page. Half of users went to “Advanced Search” during testing, and 3/8 participants started their search there.

**Background**

This study builds on prior findings made in June 2018 by Yu Yuan and Anne Le-Huu Pineault and was conducted to evaluate new iterations of the toggle button to switch between Duke and TRLN catalogs.

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and the “No results” page, as well as to provide recommendations for future improvements and testing. The study was developed and conducted by Anne Le-Huu Pineault with the guidance of Emily Daly.

On July 31, 2018 we recruited 7 users at a table set up in the lobby of Perkins Library at Duke. Data from a pilot test conducted with an undergraduate library staff member is included in this report. Each participant was given a voucher for a coffee or snack in exchange for their time. Anne Le-Huu Pineault served as moderator and notetaker.

Duke’s instance of TRLN Discovery ([https://lib-trln-blacklight-dev-01.oit.duke.edu](https://lib-trln-blacklight-dev-01.oit.duke.edu)) was used for testing.

**Questions we hoped to answer through this study:**

1. Can participants use the toggle button to expand their search to all TRLN libraries?
2. Can users expand their search using the link provided on the “No results” page?
3. What features or design elements are liked best, and which could be changed to make TRLN Discovery more usable?

**Participants**

**Participant demographics:**

- 2 Undergraduates
- 3 Graduate students
- 2 Duke staff members
- 1 Summer Session Student

**Participant familiarity with Duke University Library’s current catalog:**

- 5 were “Very familiar”
- 2 were “Moderately familiar”
- 1 was “Not familiar at all”

Pre-test questionnaire responses are available at the following link: [https://ql.tc/BLHhnJ](https://ql.tc/BLHhnJ).

**Key findings**

1. **Can participants use the toggle button to expand their search to all TRLN libraries?**
   
   - When asked to expand their search to all TRLN libraries, 4/8 users turned to the “Library Location” facets
     - 1 participant did not locate the toggle button and started over the search. When asked for feedback, they mentioned that they had noticed the toggle button but did not click on it because they didn’t know what “Triangle Research Libraries” were.
3/4 participants ultimately located the toggle button, one of which explained that they “Would have expected to see it under Library Location, but now that I know where it is, I realize that the current layout is ideal, as it would get crowded under Library Locations”.

- 4/8 users located the expand button right away
- 3/8 users commented on the toggle button placement
  - 2 users especially liked the toggle button placement. One mentioned that it is more intuitive than in the current catalog
  - 1 user wishes it would also appear on the “Advanced Search” page, where they tend to get started with their search

2. Can users expand their search using the link provided on the “No results” page?

- 4/7 users who viewed the “No results” page (the pilot test participant accessed the record via the TRLN interface) clicked “View this result”
  - 2/4 liked the page layout and the way the option was presented. One of them mentioned that they noticed the option easily as it is displayed similarly in the current Duke catalog.
  - 2/4 participants would have liked the hyperlink to be in a different color to make it more noticeable
- 3/7 users did not click “View this result”
  - 2 users used the toggle button instead, one of which explained that they would have liked to see the “View this result” on the first line on the page, because they “don’t usually find useful information on pages like this”
  - 1 user explained that they would contact a librarian for help
- A participant commented “accessibility wise the [No Results] page is nice because the words are large and there are no colors that make it difficult to read”

3. What features or design elements are liked best, and which could be changed to make TRLN Discovery more usable?

- 2/8 users were not sure about how to clear facets (specifically “Library Location” facets).
  - One user commented that they were not sure what the “X” near the selected “UNC Chapel Hill” facet on the left hand side meant, and the other thought one had to click “Start Over” to clear facets and select a different institution. *Note: starting over does not clear facets.*
- 3/8 participants tried to find an Interlibrary Request button
- 3/8 participants started their search on the “Advanced Search” page
  - All 3 looked at the fields located under the “AND have these attributes” heading
o 1 mentioned that they would want an option to restrict their search to specific publication years

● A participant mentioned that they would like to be able to save and organize records they are interested in
Appendix A: Test Script

Hello [NAME]. Thank you for volunteering to participate in this study. My name is [NAME] and I will be walking you through our tasks today.

The goal of this study is to test the usability of a new search tool for library resources and materials here at Duke.

Today’s activity should take around 10 minutes. There is no right or wrong action, because I am testing the system, not you. I will ask you to think aloud while you complete tasks using the system so that I can get an idea of the thought process behind your behaviors. Your input is very valuable to our research so please be as honest as possible when providing feedback. Do you have any questions for me so far?

Before we get started, I need your full name to confirm that you’ve consented to participate in this study.

[TAKE DOWN PARTICIPANT’S NAME]

Thank you.

Now I’d like you to answer a few questions about your previous experience.

[FACILITATOR ASKS PRE-TEST QUESTIONS VERBALLY AND RECORDS ANSWERS USING QUALTRICS]

Thank you. Now I’m going to ask you to perform specific tasks. Please remember to think aloud as you complete each task.

[TASK 1]

Let’s say you’re doing research on “tourism”. Try searching for that topic. Remember to think aloud while searching.

1. Now you’d like to see if there are items on this topic at other libraries in the Triangle. Show me how you would do this.
   [OBSERVE: does user look to the TRLN expand link?]

   [If user does not find the expand link, click it for them before the next question.]
2. How many online resources on “tourism” can you find across the different University libraries in our area?  
[OBSERVE: can user find total number of results?]

3. You will be in Chapel Hill tomorrow and want to see how many books on your topic are currently available at UNC Chapel Hill. Can you narrow down your results to find books about “tourism” that are available at UNC?  
[OBSERVE: can user use the left-hand facets to narrow down their results?]

[TASK 2]

Let’s say you just searched for the title “Women and the Hindu right: A collection of essays”, which you need for a class. You landed on this page.

[SHOW USER NO RESULTS PAGE]

1. Is there another way to get a copy of this book? Show me what you would do next.

[OBSERVE: can the user locate and interpret “Expand your search” link on the “No Results” page?]

2. Where is this book available?

[OBSERVE: do they notice the difference between the Duke and TRLN interfaces?]

ASK: I noticed that you [CLICKED ON or DID NOT CLICK “EXPAND YOUR SEARCH” BUTTON]. what do you think of this page? [point to explanatory text in the middle of the page]

[END TASKS]

Great! That concludes our final task. I have some additional questions I’d like to ask you.

[POST-TEST QUESTIONNAIRE]

Thank you!

Do you have any questions?

Thank you so much for your participation in this study.

Have a great day!
Pre-Test Questionnaire

1. Which of the following describes you best?
   - Undergraduate student
   - Graduate student
   - Doctoral candidate
   - Faculty
   - Staff
   - Other: _________

2. IF UNDERGRAD/GRAD/DOC: How many years have you been enrolled at Duke?
   _______________________

3. IF UNDERGRAD/GRAD/DOC: What is your major or program of study?
   _______________________

4. IF FACULTY/STAFF: How many years have you been in your current position?
   _______________________

5. IF FACULTY/STAFF: What is your department?
   _______________________

6. On average over the last semester, how frequently have you visited the Duke University Libraries website for research purposes?
   - Never
   - Once or twice
   - Monthly
   - Weekly
   - Daily

7. How familiar are you with using the libraries’ current catalog to search for a book, journal, or other materials?
   extremely familiar – very familiar – moderately familiar – slightly familiar – not familiar at all
Post-Test Questionnaire

1. What are two things you liked least about switching between Duke and other libraries?
   ____________________________

2. What are two things you liked best about switching between Duke and other libraries?
   ____________________________

3. What are two things you liked least about the “No Results” page [SHOW PAGE https://goo.gl/UhYTMN]?  
   ____________________________

4. What are two things you liked best about the “No Results” page [SHOW PAGE https://goo.gl/UhYTMN]?  
   ____________________________

5. Do you have any other comments or suggestions?
   ____________________________