

# Usability test report: WorldCat Discovery

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## Recommendations to consider

1. Include “search by editor” option in the drop-down menu available from the Advanced Search screen
2. Clarify that “By” in the search results refers to “Author,” or indicate the appropriate field from the drop-down menu on Advanced Search
3. Provide a way for users to sort search results chronologically; consider doing this by default or after users have filtered by year
4. List search results on a separate page from item detail so users can use the browser’s back button to view the search results alone after looking at an item detail
5. Maintain search fields users select rather than resetting to “Title” and “Keyword” for each new search
6. Provide a way for users to start a new advanced search with the default fields and no search terms instead of having to edit previous searches
7. Include subtitles in item description information, particularly for films

## Background

Emily Daly and Emma Boettcher conducted usability testing on the WorldCat Discovery in the Perkins lobby on September 23, 2015 from 12:30 pm to 2:15 pm. A pilot was conducted with a graduate student assistant the previous day. The test consisted of a short set of background questions, four tasks, and three post-test questions. The test lasted approximately 5-7 minutes. See Appendix for usability test script.

*Questions we hoped to answer through the test included the following:*

- What assumptions do users make when determining items’ availability at Duke?
- What information is available to users from the item record?
- How do users search for items with known editors (as opposed to authors)?
- How do users try to send records to themselves?
- What assumptions do users make about returning to previous WorldCat Discovery pages or views?
- What do users find easy or difficult to do when using WorldCat Discovery to search by keyword?
- What do users find easy or difficult to do when using WorldCat Discovery to locate known items?

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*For more information, please contact [emily.daly@duke.edu](mailto:emily.daly@duke.edu)*

- What would users change about WorldCat Discovery?

## Participants

Seven individuals completed the test; the test was piloted by an additional graduate student in public policy. Participants included one faculty member (14%), four undergraduate students (57%) and two graduate students (29%). They represented the following departments: computer science, global health, classical studies, economics. Three students (43%) were undeclared. When asked whether they had ever WorldCat before, two (29%) responded that they had. None of the participants had used WorldCat since the July redesign.

## Key findings

### ***What assumptions do people make about determining items' availability at Duke?***

Participants were asked to find a particular DVD using WorldCat Discovery and determine if it was available at Duke. All participants were able to determine that Duke owned the DVD.

- Two participants (29%) learned from the search results page.
- Five participants (71%) learned from the item detail record in WorldCat Discovery
  - One (14%) used the Held By field in the top pane.
  - Three (43%) used the Holding Libraries pane.
  - One (14%) used clicking through the link on the Availability pane.

Six participants were able to determine that the item was currently available at Duke.

- One participant (14%) determined the item's availability by clicking through the link on the Availability pane.
- Three participants (43%) clicked through the link under Holding Libraries.
- One participant (14%) clicked through the link from the Held By field on the top pane on the item detail.
- One participant (14%) tried clicking the Sharing and My List buttons on the search results page, expecting menus, before finding the link to the catalog in the Held By field on the search results.

One participant assumed the item was available at Duke; otherwise, she thought it would say it was unavailable on the results page and Holding Libraries pane (she also thought that because Duke's entry had a hyperlink on Holding Libraries, it meant the item was available.)

### ***What information is available to users from the item record?***

Participants were asked to determine the format of the item and whether it had subtitles. All the participants were able to determine that the item was a DVD.

- Three (43%) participants learned the item was a DVD from the search results
- Two (29%) learned it was a DVD from the item description (one confirmed using the top pane that "videodisc" under Description meant DVD)
- Two (29%) learned it was a DVD from the top pane on the item detail.

All of the participants thought the DVD did not have subtitles, though one thought you would be able to find out for certain using the special features on the DVD.

- Five participants (71%) used the Description pane, particularly the Language field.
- One participant (14%) used the Editions and Formats pane.
- One participant (14%) used the top pane on the item detail.

### ***How do people search for items with known editors (as opposed to authors)?***

Participants were asked to search for a book with a particular editor; they could reformulate their search as needed.

- Six participants (86%) used the author field at some point in the process.
  - Of those, one participant commented that she knew editors were sometimes listed as authors, but found that that approach unsuccessful in this case and edited her search to use it as a keyword.
- Three participants (43%) used keyword at some point as the field for the editor's name.
- Three participants (43%) looked for an editor field on the drop-down menu for advanced search page.
- Three participants (43%) filtered their results using the Author facet on the left of the search results (though these searches were unsuccessful because there are several authors named Robert Christensen.)

### ***How do people try to send records to themselves?***

Six (86%) of the participants were able to use the Sharing button to send the record to themselves. One participant (14%) said he would copy the link to the search page and paste it in an email to himself.

- Four (57%) participants used the send email function in WorldCat.
  - One of these used the Sharing button on the results page (despite the item detail being open)
  - Three used the Sharing button on the item detail page.
- Two participants (29%) used a reference system and used that option to upload a citation to those systems.

- One participant (14%) had clicked on the Sharing button earlier in the study and used that information for this task; the five other participants (86%) who used the Sharing button found the button on their first try.

***What assumptions do people make about returning to previous WorldCat Discovery pages or views?***

Task #4 in particular was intended to have participants reformulate a search and return to a previous page, though participants did so throughout the study.

- Four participants (57%) used the View Filters link to return to their previous results during task 4 or another task.
- Five participants (71%) used the browser's back button as part of the search reformulation process.
  - Three participants (43%) did not comment on if the back button had worked as expected.
  - Two participants (29%) expressed that going back to the original search was a mistake.
  - One participant (14%) thought it was strange that when he used the back button, the fields reset to the defaults even though the search terms stayed the same.
- One participant (14%) used the search bar at the top of the screen to reformulate a search.
- One participant (14%) hovered over the "514 results" label before trying View Filters

In addition, two participants (29%) looked for a button to get back to the WorldCat search page between tasks.

***What do users find easy or difficult to do when using WorldCat Discovery to search by keyword?***

For tasks 3 and 4, participants were asked to look for a topic that interested them and interact with the results.

- Two participants (29%) found filtering the results by year non-intuitive, and expected it to sort results as well as filter them.
  - One (14%) experienced an error when she tried to enter a custom range.
- One participant (14%) commented that she was able to find the year facet quite easily.
- One participant (14%) expressed that he was overwhelmed by the results, and said he preferred Google because it customizes its results to him.
- One participant (14%) commented that he liked the thumbnails for search results.

### **What do users find easy or difficult to do when using WorldCat Discovery to locate known items?**

Tasks 1 and 2 asked participants to look for specific items (Task 1 provided the title of the item; task 2 provided the subject and editor).

- Six participants (86%) needed a hint to identify the correct record or needed the record pointed out to them for Task 1 because the title was in Spanish on the search results page, but in English in the task description.
- Four participants (57%) looked for fields in Advanced Search which do not exist.
  - One participant (14%) looked for a “director” field when searching for the movie.
  - Three participants (43%) looked for an “editor” field when searching for the handbook.
- Two participants (29%) used the director’s name to identify the correct result from the search results for Task 1.
- Two participants (29%) used facets on the results to limit results to videos.
- Two participants (29%) were confused about how to use the “AND” and “OR” operators during the search process.

### **What would users change about WorldCat Discovery?**

- Three participants (43%) commented on “going back” during the task as something they would change.
  - Two participants (29%) specifically commented on the back button when asked what they would change about WorldCat Discovery, saying that it was surprising or not intuitive that it would take the user back to the search page.
    - One participant (14%) tried to use the back button on filtered results to demonstrate and was surprised that it did not take her back to the search page in that instance.
  - One participant (14%) commented that he wanted the option to go back to a plain search instead of one that he had to tinker with.
- Three participants (43%) expressed that they were confused by or would need to learn more about the system.
  - One participant (14%) didn’t understand the “AND” operator and thought the results page was intimidating.
  - Two participants (14%) thought they would be able to get the system to work better if they spent more time learning how it worked.
- One participant (14%) commented that he wanted to see articles in proceedings and wanted better visibility of fields during search.
- One participant (14%) wanted to be able to sort search results chronologically.
- One participant (14%) wanted reviews because that’s how he buys books.

## Appendix: Digital Collections usability test script

Thank you for agreeing to take part in this study.

We are trying to understand more fully how students, faculty and staff interact with a website for finding and using library materials that have been digitized. Keep in mind that there are no right or wrong answers and that we're testing a tool – not you.

Okay, first some general questions:

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? For grads, faculty, staff: What department are you in?

Now I'd like for you to complete five short tasks using the W. Duke & Sons Digital Collection, which includes all kinds of advertising materials and collectibles from tobacco companies (point to <https://repository-pre.lib.duke.edu/dc/wdukesons>). 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.

### TASK ONE

This collection includes trading cards that used to be sold in packs of cigarettes. You're interested in viewing an album of these cards. From this page, <https://repository-pre.lib.duke.edu/dc/wdukesons>, find the albums of cards, and select one.

### TASK TWO

Now, find a page in the album that has some text on it, and zoom in so you can read it easily.

### TASK THREE

You would now like to go back to the homepage for the W. Duke & Sons collection. Show me how you would get to the homepage without using the back button.

### TASK FOUR

Now, find an item on this page that looks interesting. You'd like to save it to your computer to look at later. Show me how you would do that.

### TASK FIVE

You'd like to see the actual item you've just saved. Where is it physically located? Show me how you would request this item so you can see it in "real life."

Okay, that concludes our tasks. I have a couple of questions I'd like to ask you about your experience – feel free to leave this page open if you like.

#### POST-TEST INTERVIEW

- 1) What two things about this site did you like best?
- 2) What two things about this site did you like least?