

Usability Test Report: Requesting Library Material

Summary

Emily Daly and Kate Collins conducted usability testing on the processes of requesting library material. The test was conducted at the temporary main entrance of Perkins library on September 3, 2014 from 11:00am - 1:00pm. A pilot was conducted with a student assistant on August 27th. The test consisted of background questions, three tasks and seven post-test questions and lasted approximately 10 minutes. See Appendix for test script.

Participants

Seven individuals (excluding our pilot participant) completed this test. Participants included three graduate students, three undergraduate students and one Alumnus representing the following departments: environmental management, engineering management, and economics.

Key Findings

1. While participants encountered small points of confusion in requesting books, mostly regarding where and the number of times they had to click to complete a request, they reported that it was easy and straightforward.
2. Requesting material from archival collections was made more difficult by a number of factors:
 - The order boxes display in (on the catalog record they are in 6 shows up with 60, on the "Get this Title" page they're in reverse order)
 - Clicking "Place Request" link on the catalog record doesn't create a request for that specific box but requires users to find that box in the "Get this Title" list again
 - Participants who ended up looking at the Collection Guide thought they needed to find the boxes within the inventory to request it.
 - To request multiple boxes users need to go back to a different browser tab to get back to the "Get this Title" request page from Aeon. Some ended up repeating their search instead.
 - The need to choose their Duke login for each box they request, even when they've already logged in
3. Several participants mentioned uncertainty about the three different accounts they had to choose between to log in. Two mentioned that they didn't see either their Rubenstein Library or ILL requests from their "My Library Account"
4. Once in their account, users had a good understanding of what information was presented and the features offered:
 - Finding requested items and deleting those requests was easy. Six out of seven participants were able to either delete or describe how they would delete their request. The other participant figured it out on her second try.

- Only one participant had any books checked out, so she was the only one we could ask about renewing. She initially clicked on the title, but then realized she could use the check boxes to select the books she wanted to renew.
5. Places where the old masthead still displays are places where users want to access their accounts, which aren't linked in the old masthead, or use the masthead search, which results in an error page.
 6. While searching for manuscript material was incidental rather than central to our testing, it was something some participants struggled with, especially in terms of where something like that would come up in Bento.

Recommendations to Consider

1. Reduce the number of steps to request books, or make it clear to users how far along in the process they are.
2. On the "Get this Title" page make the request option for items more prominent
3. Change ordering of Box numbers in listings to numerical order
4. Make it easier to request multiple boxes from a collection either by making it possible to request multiple boxes at once or by making it more obvious how to get back to the list of boxes to request additional boxes.
5. For archival collections, the "place this request" link that displays for each box in the catalog record should place a request for that particular box, rather than taking them to another list. Consider removing this link if that isn't possible rather than make researchers find the same box twice.
6. Find way to bring together displays of three different accounts (Library, ILL, and Rubenstein)
7. Update pages that still have old masthead

Results

Task One: Requesting Item

Task one asked participants to think of a topic they were currently thinking about or researching for a class, project or personal interest, search for materials on this topic using the Books & Media search on the Libraries homepage, and then to locate one item that you'd like to use, and go through the necessary steps to request it.

No. participants	
1	Completed request but expressed confusion about options for pickup location since she was new and didn't know where they were.
1	Item they were interested in had multiple parts (Conference Proceedings). They

	requested Part 4, as it appeared at top of list on “Get this Title” page. Completed request for this item
1	Expressed confusion about when request was completed
1	Thought requesting was finished after he had logged in, expects something like a webstore check out. Decides to hit Request from “Get this Title” page and completes request.
1	Got to “Get this Title” page but didn’t see how to request other than from another library which he thought didn’t see right. Emily Daly points out request button. He does not have sufficient borrowing privileges to request it.
2	Completed request

Task Two: Finding and Requesting Boxes from a Manuscript Collection

Part A – Search for Amber Arthun Warburton from the Libraries website to find boxes of her diaries, correspondence, reports and scrapbooks held at Rubenstein Library.

No. participants	
1	Used All search from homepage. Found her papers in the Books & Media box after skimming through results elsewhere
1	Started from page his current page, “Get this Title” and tries to use website search in (old) masthead, gets error. Emily prompts him to search in (new) masthead again from the error page. Finds her papers under Books & Media.
1	Used All search from library homepage. Clicks “See All” for Books and Media. Emily prompts that we call these her papers. Finds them in Endeca results.
1	Used All search from homepage. Not sure which Bento box is right, thinks scrapbooks would be in Other Resources, clicks “See All.” Clicks through from Summon results to catalog record for papers.
1	Used All search from homepage. Looked through dropdown menu in masthead, choose research support. Searched in masthead for Rubenstein Library. From Bento results found in Research Guides “African American Manuscripts” and clicked through to that guide. Looks for diaries and scrapbooks on Franklin Center page, gets African American Women’s History LibGuide, searches for Amber Arthun Warburton there. Emily directed participant to go back and he goes back this Bento search for Rubenstein Library, chooses another Research Guide about University Archives’ Digitized Collections and Publications. Emily directs him to do new search for Amber Arthun Warburton, clicks through to catalog record for collection from Books & Media.
1	Started from page his current page, “Get this Title” and tried to use website search in (old) masthead, gets error. He went back to the Library homepage and used the All search. Using Bento he finds collection guide for her papers.
1	Used All search from homepage. Considers Research Guides, asks if Books & Media has papers too. Clicks through to catalog record from there.

Part B – Request Boxes 5 and 66 from Amber Arthun Warburton papers

No. participants	
1	From catalog record went to collection guide and looked through it, discovered there aren’t hyperlinks to request items. Emily prompted to look for where to request, and then pointed out “Request for Onsite Use” button on right of page. Found Box 55 first by

	scrolling and places request. Went back to tab with “Get this Title” and requested Box 6.
1	From catalog record, clicks “Inventory” tab, then uses green request button. Scrolled down to find 55. Uses “Save for Later” feature in Aeon. Tries to clear form to request next box. Clicks “Cancel – Return to Main Menu” which only takes him to his Aeon account. He searches in masthead, but that only searches Aeon requests. Clicks Main Menu in Aeon left hand menu, and says that he’s having trouble getting back to the list of boxes. Emily prompts him to check tabs, he went back to Library homepage and started search over.
1	From catalog record he clicks green request button and scrolled through to find Box 6. Gets to Aeon request form and goes to enter date for retrieval, but the calendar disappeared when he clicked to scroll down to see all of it, and it doesn’t come back. He refreshes page, gets calendar back. Finds tab with “Get this Title” list of items and requests Box 55.
1	From catalog record, uses Ctrl+F to search for Box 6. Clicks “Place Request” link, is surprised this this takes him to listing of all boxes on “Get this Title” page. Wants check boxes to request multiple boxes at once. Finds Box 6 and places request. Tries to navigate back to list of items from Aeon using browser’s back function. Realizes the tab is still open and goes back to request Box 55.
1	From catalog record, uses Ctrl+F to search for Box 6. Clicks “Place Request” link takes him to listing of all boxes on “Get this Title” page and clicks again to Request Box 6. On Aeon form looked for way to request two at once but didn’t find one. He went to enter date for retrieval, but the calendar disappeared when he clicked to scroll down to see all of it, and it doesn’t come back. Emily refreshes page for him, he gets the calendar back, entered his date, and points to Submit request but we don’t actually have him submit it. Wants to edit form in Aeon which doesn’t work. He went back to “Get this Title” tab, finds Box 55 and submits request but gets message that he didn’t enter date. He entered date and submitted his request.
1	From collection guide scrolls through to find Box 6. Used the “Request for Onsite Use” button on the collection guide. Scrolled through list of items. Said it was clunky and not user friendly. Found Box 6 and requested it for onsite use. Asked why he needed to log in again. Submitted without entering date, enters date and complete request for Box 6. In requesting Box 55, says he wishes there was a shortcut to get back to his search results. Initially he used the “Library Catalog” link from the Aeon menu, but then found the browser tab with the Collection Guide. Used the in-page search tool in the Collection Guide to find Box 55, uses Request for Onsite Use button, fins Box 55 in listing and requests.
1	Began from catalog record by clicking on the location/map link, then finds the green request button. Requests the first one in the list, not realizing it’s not the one she wants. Goes back and searches using Ctrl+F for Box 6. Encountered same calendar problem where it disappears when she scrolled down to see all of it. Went back to “Get this title” page listing boxes and requested Box 55.

Task Three: Navigating to and Using My Library Account Page

Part A- Navigate to check the status of what you have checked out and make sure your requested items appear

No. participants	
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4	Used "My Account" link on homepage and logged into "My Library Account"
1	Used "My Account" link on homepage. Initially clicked "NetID" link, went back to My Accounts page and logged in to My Library Account.
1	Looked for account from "Get this title" page and didn't see link, so navigated back to home page and logged into My Library Accounts Page
1	Went to main menu in Aeon and didn't see it there. Emily prompted him to go to Library homepage, tried under Search & Find portal. Emily pointed out My Accounts in top right, which he commented wasn't very prominent. Wasn't sure which account he should log into. Asked if Document Delivery was what he needed?

Part b – Using My Library Account Page

No. participants	
3	Understood functions of My Library Accounts page. Successfully cancelled request.
1	Understood functions of My Library Accounts page. Did not select item before renewing, realized problem.
1	Mentioned that they don't see Rubenstein Library boxes they requested. Successfully deleted book they requested.
1	Understood functions of My Library Accounts page. Weren't able to request item, so didn't get a chance to cancel it.
1	Understood functions of My Library Accounts page. When renewing initially clicked on book title. Went back and checked boxes to renew. Noted that ILL doesn't show up here.

Post Test Interview

What are your thoughts about your experience just now requesting books and other items to support your research?

- Pretty well laid out, first time doing this, would have figured this out before.
- Pretty simple to get stuff, but should be easier to get back to list of items to request more for same title
- Easier than I expected, pretty straightforward, was able to get through it easily.
- Be easier if I could select multiple from same collection.
- I had to choose my login again even when I was already logged in
- Didn't look at other boxes at first, just at articles [in regards to Bento]
- Looks like you have to look at different accounts to see their status. It'd be nice to have it all on My Library Account. Even if you can't change it, something tell you to go to somewhere else.
- Not good. I don't use the website often, mainly to find where stuff is in the stacks.
- Be good if you could merge ILL and main library account.

IF APPROPRIATE: What are your thoughts about the messages you saw when you attempted to request books through the catalog?

- Helpful, draws your attention to it, but didn't realize the "request for onsite use" button in collection guide was specific to that collection guide
- Reconfirms action is done, draws attention to it
- Pretty clear, no real issues following their prompts
- Those are pretty good, they remind me of recent actions.

What would you change or improve about the current process for requesting books and other items?

- Too much scrolling, logging in.

What are your thoughts about accessing your library account? Using it to renew materials? Track requests?

- Really easy, pretty simple
- Make it go right to your account [meaning my library account] when you click "My account" in masthead
- Make it more obvious which account I'm supposed to sign into.
- Didn't see way of getting to account from catalog "Get this title" page. Wants it to be there. Says I'm logged in, but I can't get to my account. IF I could click on my name and get there that'd be good.
- Make "my accounts" easier to see, more conspicuous, more prominent.

What would you change or improve about the current online account interface?

- Assume that "My Accounts" would take him to "My Library Account" page, doesn't know what other things are, but assumes somebody uses them.

What would you change or improve about the process for renewing materials or tracking requests?

- Know how to select item and hit renew
- Canceling was easy, straightforward.
- Wanting to request more than one box from a collection or if I needed a whole encyclopedia or something.
- Aeon side navigation was complicated, even for someone who considers self good w/technology websites.

Is there anything else you'd like to tell us about your experience today?

- Expected it'd be harder to figure out how to request book
- Can you pay fines through Flex online?

Appendix: DUL usability test script – Requesting Materials

Thank you for agreeing to take part in this study.

We are interested in learning more about how our researchers use our catalog to request items and access their accounts. We hope what we learn will help us improve current functionality in future iterations of our web interfaces.

I will be asking you to complete 3 short tasks that involve requesting books and other resources to support your research through Duke Libraries. 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:

1. Are you an undergrad, grad student, faculty member, staff member?
 - a. If you are an undergrad, what year are you?
 - b. If you are an undergrad, what is your major?
 - c. If you are a grad student or faculty or staff member, what department are you in?

2. Have you ever used the Duke Libraries catalog (point to catalog results interface) website to search for books or other materials to support your research?
 - a. If yes, would you say you search for materials from Duke Libraries every day, every week, every month, once a semester, or less often?

3. Have you ever requested an item using the Duke Libraries catalog (again, point to catalog results interface)?
 - a. If yes, would you say you request items every day, every week, every month, once a semester, or less often?

Now I'd like you to complete a couple of tasks using the Libraries catalog. 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: Think of a topic you're currently thinking about or researching for a class, project or personal interest.

- a. Search for materials on this topic using the Books & Media search on the Libraries homepage.
- b. Locate one item that you'd like to use, and go through the necessary steps to request it.

TASK TWO: You're interested in learning more about Amber Arthun Warburton, and you know the Rubenstein Library has boxes of her diaries, correspondence, reports and scrapbooks.

- a. Search for Amber Arthun Warburton from the Libraries website.
- b. Locate and request boxes 6 and 55 of her papers.

TASK THREE: You'd like to check your account to see what you have checked out and to be sure the items you just requested appear in your list of requested items.

- a. Log in to your library account using the Libraries website, and take a moment to look at this page. What can you do from this page?
- b. Scan the list of items you have checked out, and renew one. If you have no items checked out, where would you go in your account to renew a book?
- c. Check to be sure the book you just requested appears in your account.
- d. Cancel your request (unless you've decided you'd really like to read it, in which case, you can simply show us how you would request this item).

POST-TEST INTERVIEW

- a. What are your thoughts about your experience just now requesting books and other items to support your research?
- b. IF APPROPRIATE: What are your thoughts about the messages you saw when you attempted to request books through the catalog?
- c. What would you change or improve about the current process for requesting books and other items?
- d. What are your thoughts about accessing your library account? Using it to renew materials? Track requests?
- e. What would you change or improve about the current online account interface?
- f. What would you change or improve about the process for renewing materials or tracking requests?
- g. Is there anything else you'd like to tell us about your experience today?