WebVoyáge Usability Study Task Force (WVUSTF)

Reports on Process
Final Report

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Report on Process
WebVoyáge Usability Study Task Force (WVUSTF)
CARLI

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EXECUTIVE SUMMARY

As part of its original charge, the WebVoyáge Usability Study Task Force (WVUSTF) was instructed "to provide a workable model for member institutions wishing to evaluate their local implementations of WebVoyáge." This report addresses that aspect of the WVUSTF's mission.

The basic process for **usability tests** recommended by the WVUSTF is as follows:

1. Consider which aspects are to be tested.
2. Design the questions.
3. Select the data collection equipment and facilities.
4. Request human subjects testing approval at each participating institution. (See http://www.irb.uiuc.edu/ for an example.)
5. Train the test coordinators.
6. Recruit participants.
7. Conduct the tests and debrief participants.
8. Interpret the data.

For **focus groups**, the basic model is to:

1. Design the questions.
2. Select a moderator and facility.
3. Recruit participants.
4. Conduct the session(s).
5. Transcribe observers' comments and audio recordings.
6. Interpret the data.

While the model is simple enough, and thoroughly outlined in the literature, the WVUSTF discovered that in practice there are a number of major and minor pitfalls that subsequent investigators can avoid by learning from our experience. These lessons make up the bulk of the report that follows. Rather than simply reiterate at length the how-to's of performing the study, we have opted to concentrate instead on what to do and what not to do as ultimately the more useful information for those who follow.

The greatest difficulty in designing a usability study, we found, is writing **questions** that test what needs to be tested without actually forcing the result or situation that you expect. This is why it is important to discuss questions as a group and exchange ideas about questions before committing them to writing.

What you discover during the testing or focus groups is that participants will do or think things differently from what you anticipate and so it is important to be able to manipulate the questions analytically in multiple ways. The temptation becomes to include more questions, or vaguer questions, or more tasks within questions to accommodate this intellectual fuzziness (or complexity), but in fact the opposite must be done.

The question set must be designed economically. Lean, efficient, precisely worded questions stripped of repetitive tasks, and cohesively ordered, will produce a more participant-friendly test. In the case of focus groups, the questions don't have to be quite as precisely groomed, but they still need to be thoughtfully developed to address all the points of interest, and they need to be prioritized and logically ordered so that a moderator can shift naturally from topic to topic and has all the cues and information necessary to make discussion easy and natural.

Related to the questions that will be asked are the **participants** who will be recruited. As a team, future test coordinators will want to decide what characteristics their participants should have. Realize that different populations of participants require different incentives and handling. Recruitment of student populations by means of posters and cash incentives was simple.

Staff and faculty, as well as significant numbers of older participants, would require specially targeted recruiting efforts that entailed an entirely different incentive. Modest cash remuneration is insufficient to get them involved. Appeals to their civic pride or experience would be more likely to induce them to participate, as would the promise of specialized training or services.

The process of **data collection** is crucial to the success of any study. Choosing **Camtasia Studio** was a good decision, although there were some incompatibility problems with MediaPlayer. The primary factors future test coordinators need to be aware of are (1) the importance of training all the members of the team on the software and hardware and (2) making certain that everyone is comfortable with all aspects of the equipment prior to its actual use in testing. Equally important is the need to test all of the equipment in situ on the date of actual testing to make sure that recording equipment, sound levels, internet connections, etc. are all functioning properly. Make sure that every testing facility has all of the equipment necessary for the test and does not have problems with excessive background noise or other distractions.

Observers are, in some ways, like the understudies in a play; they are there to support the leading performers. But that is not to say their part isn't important. In the case of data collection, they can offer the backup check to make sure that equipment checks are performed, that procedure is followed, and that nothing is missed. They also have the vital role of recording the intellectual and emotional responses of the participant to various actions, responses that cannot be readily interpreted from software recordings.

The observer's function is even more important in focus groups, because they can offer a condensed observation of what will, in most cases, only be a transcribed audio tape. Because their work is subjective in nature, it is useful to have more than one observer, and not to try to depend upon their observations for such factual data as is better recorded by software or timed recordings. Their strength is their ability as human observers and the more of them recording their comments, the better the sense of a particular session, and the better results you will have.

Although chronologically the final stage in the process, the development of the **debriefing** questions is closely related to the creation of the other question sets. Of primary concern is length and repetition. Various members of the WVUSTF felt that this portion was too prolonged and would have been radically improved by several possible changes: reducing the number of questions by limiting the dependence on Likert scales, creating a visual aid to represent the Likert values to avoid having to repeat them for each question, and allowing participants to read the questions themselves.

LESSONS LEARNED

The following section is divided into two parts: usability studies and focus groups. Some issues are identical for both the usability studies and the focus groups, while others are distinctive to the type of evaluation being made.

Usability Studies

The process for setting up a usability study involves several steps. Each of these will be looked at in turn.

1. Test Questions (Appendix E)

Designing the questions is one of the most difficult parts of the process. Thinking carefully about exactly what aspect of the interface is to be tested and how best to get at the desired information is crucial. Remember that a particular aspect may not have to be tested directly, depending upon its nature. For example, the WVUSTF assessed the number of times participants resorted to an Any Word Anywhere search regardless of the task assigned.

After a group discussion, writing the original drafts of the questions is best handled by an individual, who understands the likelihood of potentially radical revision. Groups find it much easier to edit than create.

1a. Test Questions: Lessons learned

- *Review questions carefully for repetitive tasks*. Ask why each part of the question is included.
- *Consider the length of the test*. Some participants felt our test was long.
- *Think carefully about the language and terminology*. Our test used the word “items” and some of the participants interpreted this to mean “articles.” Depending upon the person administering the test, they might or might not be corrected. Failures or lengthy solution times then become more difficult to analyze.
- *Designing a question that specifically intends for participants to fail at part of the task is problematic.* Participants in our test were supposed to be unable to find a book locally and so proceed to the union catalog. But lacking confidence in their own abilities, participants who frequently assume that they should be able to find something rule out the possibility of intentional failure.

2. Data Collection

Prior to recruiting participants, test coordinators need to select appropriate data collection tools. The WVUSTF used Camtasia to electronically record participants’ activities.

2a. Data Collection: Lessons Learned

- *Test coordinators should practice with the software* until they are comfortable with it. This is also true for those who will be working with the recordings.
- *Ascertain that the testing facility has the proper software loaded and the necessary recording hardware in place.* One of our institutions did not have a CD burner and this created a number of complexities for them that could otherwise have been avoided.
- *Scroll wheel mice* are extremely helpful when recording clicks to get a sense of the number of actions necessary to perform tasks. It greatly reduces the number of clicks required for simple onscreen movement.
- *Make sure the testing facility is located where sound can be picked up well.* Avoid facilities in which background noise will be a problem.
- *External microphones* are much better for capturing vocal commentary.
- *Test the recording software prior to the recording session.*

- *Observers found the "intended action" section* on the observation form strange since the test was assessing how participants interacted with the catalog – the "intended action" section implied there was one right way and no other ways.

3. Recruiting Participants (see appendix B)

Recruiting volunteers for the tests proved to be an easier task than anticipated in many ways, with certain exceptions.

Prior to beginning the study the WVUSTF hoped to recruit one faculty and one staff participant at each location, with the remainder of the participants being undergraduate and graduate students (depending upon the institution). We also hoped to recruit an equal number of male and female participants.

Test coordinators at all the institutions found that recruiting student participants was easier than expected. Everyone had more than enough people to fill their rosters.

3a. Recruiting Students: Lessons Learned

- *Cash is the best incentive to recruiting students*. We offered participants a relatively modest fee for participating, but this was without a doubt the reason that so many people volunteered. (Although interestingly, one person did refuse the money because s/he felt that participating was helping the library.)
- *Recruiting via a secure web form is the most efficient method*, because it avoids your having to play phone or email tag, voice messages (especially from cell phones) can be garbled, and forms can more effectively preserve potential participants' personal information. Adequate protection of confidentiality is required. Personal data stored electronically must be purged when no longer needed for test-scheduling purposes.
- *Distribute recruitment materials widely* to avoid skewing applicant pool.
- *Consider the placement of recruitment materials* – placing a poster at eye height rather than lower down can change response rate.
- *Take into account any campus procedures when designing signage*. In one case signs had to be approved through the Dean of Students' office and the two-color signs meant that they each had to be hand stamped instead of being reproduced after stamping the original, which would be the normal process.

Unfortunately, participation from staff and faculty members was difficult to secure. Since their needs and abilities are significantly different from those of the student population, WVUSTF members regretted our inability to get more of them involved in the process.

3b. Recruiting Faculty and Staff: Lessons Learned

- *Money isn't what faculty members want*. Clearly the financial incentive is insufficient to draw them in.
- *Scheduling may also be a factor, especially for staff*. If they could participate during their scheduled work time, it might improve the number of volunteers.
- *In the case of staff and faculty, however, the biggest obstacle may be the risk of appearing unskilled before another faculty or staff member*. The WVUSTF could come up with no sound strategies to resolve this situation. A possible solution may be to target a direct appeal to faculty or even to specific departments emphasizing their importance or expertise or an appeal to their sense of civic responsibility to help improve the system.

4. Testing (see Appendices C and D)

The testing went relatively smoothly, but the WVUSTF made several observations regarding changes that would have made things simpler, clearer, or more secure.

4a. Testing: Lessons Learned

- *If testing an account or login feature, set up a dummy account in advance*. Clear the account as necessary between tests to avoid confusion on the participant's part. In one case, Camtasia recordings had to be altered to remove identifiable patron information because participants were using their own accounts to log in.
- *Agree in advance how all test coordinators will handle problematic aspects of questions*. For example, if a scenario asks participants to request an item from another library, determine what that means. This may mean the question needs reworded or it may mean that you want the test coordinators to prompt the participants to actually go ahead and use their dummy accounts.
- *Agree on whether or not test coordinators will read the questions to the participants,* or whether the participants will be asked to read the questions aloud themselves. (In either case the questions should be articulated to minimize the chance of misunderstanding by the participant.)
- *Agree on whether a complex task should be read in its entirety or broken into stages*, or perhaps read in its entirety and then the secondary task reread. Some participants forget the later aspects of the test assignment, especially if they run into difficulty. The test coordinators need to feel confident about whether or not they can or should remind them of the other aspects of the task.
- *Decide whether it is necessary to time the task*. Camtasia records time internally, and external timers could be applied to the recordings after the fact. Many on the WVUSTF felt that external timing was not truly necessary. If the decision is made to time the different tasks, do not require the observer to do this. It makes it very difficult to make other observations. Ideally a stopwatch would be used.
- *Remind participants to speak aloud* about their thought processes frequently.
- *Participants who speak English as a second language may encounter unexpected problems* with the test. Be sensitive to this possibility. It is often especially hard for them to articulate their thought patterns aloud.
- *Bring a pencil or pen for debriefing*.

5. Observers (Appendix F)

Many test coordinators were pleased to have an observer for the usability tests. One recommended having two observers for each test. In addition, observers learned some things about the form where the observer comments are typed.

5a. Observers: Lessons Learned

- *The test coordinator can help out the observer by pausing between questions*, allowing the observer more time to write. An observer commented that: "It was very difficult to write quickly enough to capture the experience. It will be very useful to look back at the Camtasia recordings."
- When processing the Camtasia data and correlating it with the observer comments, it was noted that observers frequently made errors about things such as the screen displaying when the scenario began. It might be useful to *limit the types of observations to those that might be harder to assess from Camtasia recordings alone,* such as the participant's reactions to particular choices and actions.
- *Make sure to insert the questions onto the blank comment form beforehand.*
- *When typing summaries, forms need to be set to "form-filler*. Then the observer would not have to worry about formatting each Word document.

6. Debriefing (Appendix G)

The WVUSTF members felt a number of changes would have improved the debriefing procedures.

6a. Debriefing: Lessons Learned

- As with the test questions, *analyze the debriefing questions carefully for repetitiveness*. Because the language of the questions was necessarily repetitious as we were asking people to use Likert scales, it was especially unfortunate that we didn't realize they also were repetitive. Keep the number of questions reasonable.
- *Make sure that the answer being requested is meaningful*. Don't ask for a scaled rating when a simple yes/no would be better.
- *If using a Likert scale, making a visual aid to show the scale* values works better than repeating the values over and over.
- *Consider whether adding more open-ended questions would be useful.*
- *Decide as a group whether debriefing will be done by reading questions to participants or by letting them read the questions themselves and then answer.* They can be guided through sets of questions that refer to particular web pages if necessary by the test coordinator.
- *If conducting the debriefing aloud, decide whether to record the session.* Recording is recommended.
- *When asking about a particular web page or interface, show it to the person.*

Focus Groups

As with a usability study, the process involved in setting up a focus group involves several steps. Again, each of these will be looked at in turn.

1. Recruiting

As with the usability studies, recruiting for the focus groups proved relatively easy in terms of student participation. Faculty and staff participation was non-existent, but in this case had not really been expected.

Signs were prepared offering money in return for participation. These were posted at campus locations in Chicago for two focus group sessions there and at the University of Illinois and Danville Area Community College campuses for one session down-state. Recruitment was handled by a point person at each general geographic area.

1a. Recruiting: Lessons Learned

- *Consider carefully the choice of recruiting locations*. The task group drew one of its focus groups from University of Illinois students only to discover that most of them had never used the "All ILCSO Libraries" catalog because the University's own collection meets their needs.
- *Cash is the best incentive to recruiting*. We offered participants a relatively modest fee for participating, but this was without a doubt the reason that so many people volunteered.
- *Recruiting via a secure web form is the most efficient method*, because it allows test coordinators to avoid playing phone or email tag. Voice messages (especially from cell phones) can be garbled, and forms can more effectively preserve potential participants' personal information. Adequate protection of confidentiality is required. Personal data stored electronically must be purged when no longer needed for test-scheduling purposes.
- *Distribute recruitment materials widely to avoid skewing applicant pool.*
- *Consider the placement of recruitment materials*. Placing a poster at eye level rather than lower down can change response rate.
- *Take into account any campus procedures when designing signage*. In one case signs had to be approved through the Dean of Students' office and the two-color signs meant that they each had to be hand stamped instead reproduced after stamping the original, which would be the normal process.
- Unlike testing situations, which are one-on-one, *focus groups have a higher no-show rate*. Expect some people to not show up and overbook by 2, but be willing to pay those should they, in fact, have to be turned away. Don't tell them you are overbooking.

2. Questions

As in the case of the usability tests, designing the questions is one of the most difficult parts of the process. It is crucial to think carefully about exactly what aspect of the interface is to be tested and how best to get at that information.

Focus group questions, however, allow for greater flexibility. The precise wording and order won't necessarily be maintained during the session, so these don't need to be major considerations in the composition of the questions either. This is not to say that a well-ordered set of questions that flow naturally from idea to idea isn't worth developing, but rather that, depending upon the group dynamic, it may not be what actually happens in the session.

Again, after a group discussion, writing the original drafts of the questions is best handled by an individual, who understands the likelihood of potentially radical revision. The group can then undertake to edit the results.

2a. Questions: Lessons Learned

- *Have more questions than necessary*, but prioritize them so that the moderator knows what to focus on.
- *Creative questions can produce interesting results*. One of the moderators suggested asking people to describe ILLINET Online as a person and assign it adjectives accordingly.

3. Focus Group Session

All three of the focus group sessions held by the WVUSTF offered interesting insights into what participants thought about the WebVoyáge interface. Although various members of the WVUSTF had previously moderated focus groups, we opted to go with professional moderators for these sessions and were pleased with the results. A WVUSTF member provided the groups with live interaction with the system so that they could see the screens under discussion or move to other screens that came up as part of the conversation. They had also been provided with photocopies of the key screens for those who had a poorer view or in case the internet connection failed. The WVUSTF member did not, however, interact with the group to any extent. One or more members of the WVUSTF also viewed each session through a one-way mirror and took notes on the comments made by the group. Each session was also recorded for transcription later.

3a. Focus Group Session: Lessons Learned

- *Professional moderators and services are good investments*. All of those involved closely with the focus group projects thought that the services provided by the moderators were valuable. They offered suggestions for questions, strategies to get at certain ideas, and in one case even wrote up her perceptions of the focus group. Perhaps most valuable, the focus group members recognized that the moderator was not an "insider" and thus felt more comfortable expressing negative opinions or admitting their own shortcomings than others might.
- *Set aside time to go over the details* of the interface and the questions with the moderator so that the moderator can make the questions flow sensibly and transition the group easily from topic to topic.
- *Provide refreshments for the group*. Cookies and drinks help make the conversation flow.
- *Provide folded table tents for each person* (first name only) so that the moderator can easily refer to each person by name.
- *Provide a live internet connection and projection of web screens if at all possible.* Although we were prepared for the connection to fail, it was extremely valuable to have a live connection for the group to interact with. It certainly brought the subject of the timeout into focus. It's best if the screen can be projected so that all in the room can see it easily.
- *Have a backup strategy in case your live connection fails*. In our case these proved helpful to those who couldn't view the monitor as well.

- *Check the recording equipment for vocal levels during conversation.* One of our sessions has not yet been transcribed because the sound level was poor.
- *Multiple observers are better*. Each observer will notice different elements of the group dynamics or interpret them differently. If you have recording problems, their notes will be the only record you have so the more impressions the better. The computer "docent" will not be able to record any impressions, nor will the moderator, except after the fact, so it is important to have observers available who are able to record their impressions.
- *Consider the value of forming either a special focus group of a particular type of participant or of recruiting intensively for those.* Because focus groups involve revealing yourself in front of people you've never met, it can be hard to get people of very divergent backgrounds to interact well together (faculty and students, for example). If they must be combined in a single group, then using a professional moderator would be even more important because their experience would be invaluable in drawing all the parties into the conversation.

RECOMMENDATIONS ON PROCESS

Overall, in terms of both the usability studies and the focus groups, some general recommendations can be made.

In both cases, careful attention to the **question design** is important, although the particulars of the questions are different in each case. The intent of the questions must be carefully thought out, the wording considered, and the order of questions studied. Care must also be taken to avoid undue repetition of tasks. Debriefing questions for the usability studies should be developed and reviewed at the same time, paying close attention to repetition and length. Pre-testing and external review of the questions would be helpful. In addition, all test coordinators need to be coached about any possible "gray" areas in relation to the questions or test procedure so that all of the test coordinators are conducting testing in the same way. This is not a concern with focus groups.

Recruiting success for both usability studies and focus groups depends largely upon the incentives offered. Financial incentives make recruiting students a simple process. Getting participation from faculty and staff members will require determining the proper incentives to motivate them. Our success in this area was minimal, but future researchers who set out deliberately to target these groups might be more successful. In any case, initial contacts would be best handled through web forms to ensure participant privacy and reduce the time necessary for the team coordinator to select and schedule participants. Personal data stored electronically must be purged when no longer needed for test-scheduling purposes.

Equipment and facility selection is important. All team members need to be thoroughly comfortable with the equipment, all equipment needs to be carefully vetted to make sure it meets the necessary specifications and is working properly, and everything needs to be rechecked immediately prior to use in order to avoid any problems during a test or group session. Testing equipment in situ is important, as is checking sound levels under actual conditions, to avoid subsequent discovery that speakers' voices are too faint to understand.

In the case of focus groups, the use of **professional moderators and facilities** are strongly recommended. Their training and experience and their neutral position in relation to the interface result in very productive group sessions.

Observers offer crucial context to both focus group and usability test success, but more so to the former. In both cases, however, observers offer something that neither the software nor the tape can: interpretation of the emotional and intellectual response of the test participant or group members. The moderator or test coordinator will not be in a position to offer this analysis, but observers are free to record these kinds of judgments. If it is possible to have multiple observers, especially at focus group sessions where the only record is an audio recording, that's even better.

There was a recommendation that future testing involve a **fewer number of institutions and a fewer number of participants.** The WVUSTF members realized that they collected more data than they can analyze within the year.

CARLI members involved in future usability studies should consider asking that the **test coordinators from each institution be involved with the analysis of the test data.** This would make sense given that if they witnessed each test, they could add more information or explain what they may have meant by a comment. This may make being a test site a less attractive option, but if the number of test participants is decreased, it might be possible. This recommendation is also a result of the WVUSTF members feeling overwhelmed with too much data.

APPENDIX A: USABILITY TESTING PROCEDURES AND CHECKLIST

1. Recruitment

Advertising:
You may advertise the usability study using flyers provided or via the web. Your web announcement should include the same information as that contained on the flyer. You should NOT use a web form to collect information about participants.

Screening Potential Participants:
All potential participants should be asked the screening questions via the phone.

Selecting and Scheduling Potential Participants
The final participant group should meet the following criteria (as closely as possible) as defined by WVUSTF:

- 6 undergraduates, 2 graduates, 1 faculty, 1 (non-library) staff
  - Major: Collected for information only; avoid all the same major
  - Age groups: no quotas, but keep as widely representative as possible
  - Familiarity with libraries: Avoid more than 2 participants on either extreme
  - Gender: Should be as close to 50/50 as possible
  - Computer skills: no quotas; each institution can decide when there is a good mix

Once a participant has been selected, s/he should be assigned a number that includes a suffix representing your institution (ex. 2COL). This number will be used on documentation related to this participant (but not identifying the participant) throughout the remainder of the process.

Mark this number on the lower portion of the screening questionnaire (the part that contains the demographic information) and detach this from the upper portion (containing personal information); the personal information portion should be destroyed.

The participant should be marked on the scheduling sheet and identified by his/her first name and assigned participant number.

NOTE: The scheduling sheet should be destroyed once all testing is completed.

2. Testing

See: **WebVoyáge Usability Testing Checklist** (attached at end of this document)
See: **Test Administrator Training Notes** (attached at end of this document)

Tips: Make sure copies of all relevant documents and the checklist are located in a central location for your test administrator/observers.

3. After the Test

Observers and test administrator should follow the instructions as outlined on the **WebVoyáge Usability Testing Checklist.**

Be sure to destroy the scheduling list.

The Liaison should return the following documents/information to WVUSTF in person (at a meeting):

1. ***Testing Materials.*** PLEASE BUNDLE AND LABEL these following items together for each participant using the participant number. Each item should be labeled with the participant number.

    - Original copies of the observer comment forms (handwritten). USE: wvustf_observer_comment_template.doc

    - Typed copies of final observer comment forms for each participant, including top 5 problems identified. USE: wvustf_observer_comment_final.doc

    - Original copies of the debriefing form and answers (handwritten). USE: wvustf_debrief_qns.doc

    - Typed copies of the answers to the debriefing questions. USE: wvustf_debriefing_final.doc

    - A burned CD of the Camtasia capture for each participant (be sure to fill out the demographic label and insert it into the jewel case)

    - Copies of the demographic info collected for each participant.

2. ***Consent forms***
   These should be placed in a SEPARATE envelope to be delivered to ILCSO. Label the envelope "*Institution Name* Consent Forms"; separating the consent forms from the testing materials will ensure confidentiality for the participant.

3. ***Payment Receipts***
   Place these in a SEPARATE envelope to be delivered to ILCSO. Label the envelope "*Institution Name* Receipts".

4. ***Test Site Specs***
   USE test_site_specs_form.doc.

Usability Test Checklist

BEFORE

Bring the following items:

- Big Questions **
  (Based on your specific questions, each institution should create a "deck" of questions, one question per page, to be distributed to the participant after the question is read. The participant should NOT be given all of the questions at once.)
- Consent Form
- Observer Comment Form**
- Test Administrator Script**
- Test Questions**
- Debriefing Questions
- Watch or other timing device
- Payment Coupons

**These items require institutional customization.

Tip: I would advise keeping copies of all of the usability materials in a box or central location for your test administrators and observers.

Set up the Test Site

- The participant will be using INSERT COMPUTER NAME HERE.

- The screen resolution should be set to _______.
  (NOTE: It doesn't matter what the resolution is, just ensure that you always set the screen resolution to the same thing for each test.)

- Launch Internet Explorer and make sure that the computer is set to the LIBRARY CATALOG home page. NOTE: You may want to wait until the test starts to open the Library Catalog page so that you don't time out. However, the participant should BEGIN THE TEST ON THE OPENING LIBRARY CATALOG SEARCH page. (QUICK SEARCH)

- Set up the microphone, test.

- Turn on the projector

- CUE UP CAMTASIA (IMPORTANT: See Camtasia Settings Directions)

DURING

Test Administrator

NOTE: If a participant does not show up immediately notify ____________. We will need to contact another volunteer and reschedule.

- Greet the participant
- Read the test script and set the stage
- Have the participant sign the consent form.
- Read questions aloud
- Distribute corresponding written scenarios one-by-one **after** reading the question.
- Remind the participant to think aloud.
- Do not give the participant the correct answer even after they have completed the task. If the participant would like to review his or her answers or the correct answers, save this for the debriefing portion of the test. Providing him or her with the answer right after the task may influence future answers.
- As you go along, make notes of things/issues you wish follow-up with the test administrator in the debriefing portion.
- Do not move forward until the participant has verbalized that he/she is finished. If necessary, prompt the participant to verbalize this. Do not assume that a participant is finished even if you see that s/he has found the correct page.
- After 5 minutes on a scenario, you should prompt the participant to move to the next scenario.

Observer

- Include the participant's number at the top of the observer comment sheet.
- Fill out answers to questions
- Record the start time and stop time (including seconds) for each task (or time-elapsed depending on how you are timing).
- Be sure to note if anything unusual happens (especially extenuating circumstances, e.g., the computer crashes, etc.)

Debrief the participant [Test Administrator]:

- Ask the participant the debriefing questions.
- Be sure to show screens that are referenced (ex. Guided Search Screen) as you debrief the participant.
- Ask the participant if s/he has any questions for you.
- Review any questions or other things that you noted while administering the test.

Compensating the participant

1) Hand the participant the payment coupon.
2) Direct the participant to the service point where s/he will be given payment.
3) Explain that while the participant will need to provide the person at the service point his/her name, address, and (optionally) Social Security number, this information will in no way be connected with the participant's test performance. Test data will remain anonymous.

Thank the participant for participating in the study.

AFTER

- Briefly review each Camtasia session to ensure that the session was recorded. NOTE that each session should be burned onto an individual CD, labeled with the participant number, and placed in a jewel case with the demographic label insert filled out. For more information on transferring files to CDs, see Camtasia directions.

- Meet with the test administrator directly afterwards to gather and record any of his/her additional comments or observations.

- Return all test-related items to their appropriate place for the next person to use.

- [Observer] Type your notes out as soon as possible (including responses to debriefing questions). You may not be able to understand them in a few days.

- Enter your notes into the wvustf_observer_comment_final.doc

- Enter the answers to the debriefing questions to the wvustf_debriefing_final.doc

- Within a day, meet with the test administrator to create a list of the top 5 or so problems you observed. In addition, you may wish to discuss, make notes/suggestions about the actual process of the usability testing.

- Add these to the final observer comment form.

Test Administrator Training Notes
highlights from chapters 8 and 9 in Rubin's *Handbook of Usability Testing*

Guidelines for Monitoring the Test

- Monitor the session impartially
    - Take the attitude that you have no vested interest in the results one way or the other
    - React to "mistakes" in exactly the same way as you do to correct behavior
    - Never make participants feel stupid or inadequate
- Be aware of the effects of your voice and body language
    - Moving closer to a person indicates acceptance and moving away indicates rejection
    - Raising the pitch of your voice signals agreement, lowering the pitch the opposite
- Treat each new participant as an individual
    - Make an effort to "clear the slate" psychologically prior to beginning a session
    - Leave time between testing sessions
- Don't "rescue" participants when they struggle **[I see this one as our biggest challenge]**
    - When they struggle, encourage them to verbalize their feelings
- If you make a mistake, continue on
- Make sure the participants are really finished with a task before going on to the next one
    - Have the participant signal when they are finished
- Use humor to keep the session relaxed

"Thinking Aloud" Technique

- Demonstrate the technique first—show them what it's like to think aloud
- Do not force the technique if you encounter strong resistance
- Acknowledge that you are listening to a participant's comments by periodically repeating comments back and following up

Probe and Interact with the Participant as Appropriate

- Key to understand the "why" behind the performance
- Tips:
    - Don't show surprise
    - Focus on what the participants expect to happen
    - Act as a mirror to reflect back what the participants are saying and help them to express their thoughts in a useful way
    - Do not always act direct questions—make sure to ask neutral questions
    - Limit the interruptions to short discussions
    - Probe in response to both verbal or nonverbal cues from participants
    - Look for opportunities to understand the rationale for a particular behavior or preference
    - Handle one issue at a time
    - Don't problem solve

Assist the Participants Only as a Last Resort

- When to Assist
    - A participant is very lost or confused
    - When a participant is exceptionally frustrated and may give up
    - When there is a technical error—such as a database crashing
- How to Assist
    - Never blame the participant, even indirectly
    - Clarify the concerns of the participants
    - Provide gradually more revealing hints to get a participant past an obstacle, rather than revealing everything at once
    - Be ware of the task to come and the effect your comments could have on the performance of the participants

Debriefing Guidelines

- Never make the participants feel defensive about their actions or opinions
- Do not react to the participant's answers one way or another
- Gather your thoughts before beginning
- Begin by letting the participant say whatever is on his or her mind
- Begin your questions from general high-level issues
- Move to specific issues—working from the data collection form
- Focus on understanding problems and difficulties, *not* on problem solving
- Finish your entire line of questioning before opening up the floor to discussion by observers

Advanced Debriefing Techniques

- "Replay the Test" technique
    - If you flagged something on your data collection form, describe the participant's action to them and ask them to visualize what happened them and have them elaborate
- "What would you do if" technique
    - Asking the participants what they would have done hypothetically may have nothing to do with what they really would have done

APPENDIX B: USABILITY TESTING PRE-SCREENING QUESTIONNAIRE

PLEASE NOTE:
Thank you for your interest in participating in the library catalog usability testing. Before we select volunteers, we need to ask you a few questions. We need this basic demographic information to ensure a variety of participants. As soon as we select participants, we will remove your name and phone number from the demographic information and assign you a participant number. If you are selected to participate, you will attend a single testing session that will last approximately 30-90 minutes. Upon completion of the questions, you will receive $20.

First Name **Phone Number**

-- *remove here* --

PARTICIPANT # _________

Status

___ Undergraduates ___ Graduate ___ Faculty/Staff ___ Other (Please specify: ___________)

Major/Department/College ____

Age

___ 17 – 24 ___ 25 – 35 ___ 35 – 45 ___ 45 +

Familiarity with Libraries

- Ever worked in a library? ___ Yes___ No
- How many library research sessions have you attended? ___ 0 ___ 1-2 ___ 3+
- How often do you come to the Library? At least once a …

___ day ___ week ___ month ___ semester ___ never

Gender

___ Male ___ Female

How would you rate your computer abilities?

___ Extremely Poor ___ Below Average ___ Average ___ Above Average ___ Extremely Good

What times are you available?

Monday	Tuesday	Wednesday	Thursday	Friday
_________	__________	___________	___________	___________

APPENDIX C: USABILITY TESTING CONSENT FORM

Dear _______________:

We are librarians here at [insert library and institution name]. We are participating in a statewide project to perform formal usability testing on the ILCSO library catalog. This library catalog is utilized by 65 libraries around the state.

We're testing the library catalog to see what it's like for people to use it, so we need to know what you honestly think. We are testing the library catalog, not you.

I'm going to give you several tasks for which someone might use the library catalog. You'll use the library catalog to accomplish them. Some questions may be simple; others a bit more difficult. The entire process will take 30 to 90 minutes.

You will be staying in this room and using this computer. Your actions will be projected upon the computer screen. Your cursor movements and comments will be recorded by software. We will be watching your actions, listening to your comments and taking notes. We will not be commenting on your skills but simply recording your steps and your comments, as well as how long it takes you to complete the question.

The most important thing to us is to understand how you expect the library catalog to look and act. As you proceed with the tasks, talk aloud as much as possible. Tell me what you are thinking as you look at a page and try to use it, even if the comment seem trivial or negative. This may seem a little unnatural, but it is invaluable to us to hear what you're thinking. At points, I may prompt you to keep thinking aloud.

It is okay to ask questions during the session. However, we may not be able to answer them. If we think the answer will give you more information than the general web participant will have, we will not be able to answer your question until after the test is complete.

You'll need to tell me when you feel you've completed the task; you may also stop the task at any time if you're frustrated. Once you have completed the task, please stop and wait for further instructions.

As a volunteer in this study, your participation will be anonymous and voluntary. If you choose not to participate or to withdraw from the study at any time, there will be no penalty. However, you must complete all the tasks to receive payment.

Although there may be no direct benefit to you, the possible benefit of your participation is that the library catalog will be easier to use for all patrons.

If you have any questions concerning the research study, please call [name] at (XXX) YYY-ZZZZ, or email at [email address]…[insert additional names and contact information as appropriate]

Sincerely,
[name of IRB person(s)]

I give consent to participate in the above study.

___________________________________   _______________________
Signature   Date

If you have any questions about your rights as a subject/participant in this research, or if you feel you have been placed at risk, you can contact the [official title of IRB office] at [institution name] at (XXX) YYY-ZZZZ.

APPENDIX D: USABILITY TEST SCRIPT

Hi, [Name of Participant]. My name is ________ and I will be walking you through our usability test today.

We're testing the library catalog to see what it's like for people to use it, so we need to know what you honestly think. We are testing the library catalog, not you.

I'm going to give you several tasks for which someone might use the library catalog. You'll use the library catalog to accomplish them. Some questions may be simple; others a bit more difficult. The entire process will take 30 to 90 minutes.

You will be staying in this room and using this computer. Your actions will be projected upon the computer screen. Your cursor movements (and comments) will be recorded by software. We will be watching your actions, listening to your comments and taking notes. We will not be commenting on your skills but simply recording your steps and your comments, as well as how long it takes you to complete the question.

The most important thing to us is to understand how you expect the library catalog to look and act. As you proceed with the tasks, talk aloud as much as possible. Tell me what you are thinking as you look at a page and try to use it, even if the comment seems trivial or negative. This may seem a little unnatural, but it is invaluable to us to hear what you're thinking. At points, I may prompt you to keep thinking aloud.

It is okay to ask questions during the session. However, we may not be able to answer them. If we think the answer will give you more information than the general web participant will have, we will explain that we are not able to answer your question until after the test is over.

You'll need to tell me when you feel you've completed the task; you may also stop the task at any time if you're frustrated. Once you have completed the task, please stop and wait for further instructions.

I will be timing how long it takes you to complete each task. Just remember that this is not a race or contest, and you may take as little or long as you need.

____________will also be observing and taking notes.

Just so you know:
As a volunteer in this study, your participation will be anonymous.

Your participation in this study is voluntary. If you choose not to participate or to withdraw from the study at any time, there will be no penalty. However, you must complete all the tasks to receive payment.

As a participant, your well-being is important to us. If you need a break, just tell us.

Do you have any questions?

We will have you start at the library home page. Please locate the link to the library catalog and begin the first task. I'd like to remind you again to try to think aloud while you're working on this task, which is……

APPENDIX E: USABILITY TEST QUESTIONS

BACKGROUND QUESTIONS

1. What is your status?

___ Freshman ___ Sophomore ___ Junior ___ Senior
___ Graduate ___ Staff ___ Faculty
___ Other (Please specify: ____________)

2. How would you rate your computer-using skills?

___ Extremely poor ___ Below average ___ Average
___ Above average ___ Extremely good

3. How often have you used the library's online catalog before today?
___ At least once a day ___At least once a week___ At least once a month
___ At least once a Semester ___ Never

****
Scenario #1

You need to read [insert book title] for a literature class.

Does the Library own a copy of the book?

You'd like to take the book home with you today. Can you check it out?

What information would you use to locate this item in the library?

Institution-specific directions: Please choose a title that's available at your institution for which there is a single record. In other words, if the participant conducts a title search, s/he will end up directly in the record. The title should also have an initial article.

EXAMPLE OF WHAT WE MEAN: Search for "The Amazing Adventures of Kavalier and Clay" in Columbia College's Library Catalog.

****
Scenario #2

You're working on a paper for your History class on the impeachment of President Clinton.

Find two items that you could use for your paper.

Since you don't have the time right now to find these items on the shelf, email these records to yourself so you can go to the shelf later with the information you need. (Use the e-mail address supplied to you by the test administrator.)

Institution-specific directions: You must supply the participant with a valid email address for this purpose. It may be your own, or a "dummy" address. The participant should not use his/her own address, for confidentiality's sake.

****
Scenario #3

You are taking a literature class and need to find a book of poems by Sylvia Plath.
See if the Library owns a book that you can check out. If not, find one at another institution.

Institution-specific directions: Please choose a poet whose works are available in your local catalog. (If you don't happen to have any available titles containing Sylvia Plath poems, choose another poet.)

****
Scenario # 4

You need a copy of the book [insert title here].

Is there a copy at your library that you can check out? If not, locate a copy at another institution.

You'd like to have the book sent here. How would you utilize the library catalog to borrow the book?

Institution Specific Directions:
Please choose a BOOK title that your library does not own, but that is held by other ILCSO institutions. (Do not choose a title that is lost, missing, etc. There should not be a record in your catalog for the title that you choose.)

The title that you choose should have multiple records in the universal catalog. The title should also be an item that can be requested.

EXAMPLE OF WHAT WE MEAN: Search for "breakfast of champions" in the Columbia College Chicago library. We do not currently have a record for this item, so ideally the participant clicks on the Repeat Search In All ILCSO libraries link and then is taken to a screen with a multiple listing of titles. For this question, it is best not to choose something with an inordinate amount of results (Shakespeare, etc.). Choose a title with manageable results in the UC.

****
Scenario #5

You are writing a paper on the AIDS epidemic in Africa. Since AIDS research frequently changes, you would like to focus your research to the last five years.

Does the library own any books that you could use for your research?

****
Scenario #6

A professor suggested you refer to [title] for your research paper in [appropriate class].

Determine if your library has a copy available for your use.

Determine if another library has a copy available that you can check out.

Institution-specific directions: Choose a book title for which you have a single record, but that has been checked out, is lost, or is missing.

EXAMPLE OF WHAT WE MEAN: Search for "the ticket that exploded" in Columbia College Chicago catalog. Our copy is lost, so ideally the participant clicks on "Which other ILCSO libraries own this title" to see that ISU also owns a copy.

****
Scenario #7

You forgot that your books are due tomorrow, but you aren't finished with your research, and you don't have time to go to the library to renew them.

How would you utilize the library catalog to renew your items online?

Institution-specific directions: For this exercise, the institution will need to create a dummy patron account with items charged out for participant confidentiality purposes. The charged items will need to be refreshed between tests, so that they remain renewable.

****
Scenario #8

For your sociology class, you have been assigned a book, but you left your syllabus at home and the only thing you can remember is that the title has the word "grace" in it and it's by a man named Kozol.

Using the Guided Search Screen, determine if your library owns a copy of this book.

****
Scenario #9

You're in Urbana-Champaign for the weekend visiting friends and remembered that you need to read the book "Fathers and Sons" for a class next week. You want to check to see if "Fathers and Sons" is available at University of Illinois Urbana-Champaign so you can get started.

Using the library catalog, how would you check to see if they own it?

****
Scenario #10

This question should test the MORE LIMITS feature. Because effective limit options are specific to each institution, you will have to design the question based on your collection. Once again, the main goal of this task is to determine if the student knows how to use the MORE LIMITS feature.

EXAMPLE QUESTION (based on Columbia College's catalog):
For your "Poetry in Translation" class, you are required to read a poem in a language other than English. You decide to read a French poem. If you search for "poetry", you get too many results. Is there a way to focus your search on poetry only written in French?

****

OPTIONAL QUESTIONS
NOTE: Institutions that use these library catalog features may choose to test the following tasks (Scenario #11 and 12)

****
Scenario #11

[Insert instructor's name] has put items on reserve for the class [insert course name].

Find them.

Institution Specific Directions: Choose an instructor and course at your institution for which there are reserve holdings.

****
Scenario #12

Your instructor has requested that you read an article in the [insert issue] of [insert periodical title].

Does the library own a copy?

Institution Specific Directions:
Choose a periodical title for which you have a single record. If you have access to electronic copies of periodicals (and if the participant still might realistically retrieve just one bibliographic record with title search), you should choose one of those titles.

****

END OF USABILITY TEST

That completes this study. If you don't mind, we'd like to ask you a few follow-up questions.

APPENDIX F: USABILITY TESTING OBSERVER COMMENT FORM

****

Scenario #1: You need to read [insert book title] for a literature class.
Does the Library own a copy of the book? You'd like to take the book home with you today. Can you check it out? What information would you use to locate this item in the library?

Intended action:
Quick Search – Title Browse – amazing adventures of kavalier and clay

Things to NOTE:

1) Does the participant omit the initial article?
2) Does the participant choose "start of title" search or just hit "enter" (going with the default search)?
3) Does the participant understand the status message?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #2: You're working on a paper for your History class on the impeachment of President Clinton. Find two items that you could use for your paper. Since you don't have the time right now to find these items on the shelf, email these records to yourself so you can go to the shelf later with the information you need. (Use the e-mail address supplied to you by the test administrator.)

Intended action:
Will vary according to institution. Goal is for the participant to locate 2 relevant books about the impeachment of Clinton and EMAIL these two items to her/him self.

Participants may take several different routes here:
Impeachment clinton (anyword anywhere)
Impeachment and clinton (boolean), etc.

Things to Note:
1)What type of search does the participant use?
2) Does the participant know how to mark records?
3) Does the participant know to scroll to the bottom of the page to email records?
4) Does the participant experience any other difficulties in emailing the records?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario # 3:
You are taking a literature class and need to find a book of poems by Sylvia Plath. See if the Library owns a book that you can check out.

Intended action:
Plath sylvia – browse author search
participant identifies one book that fits the above criteria and is available.

Things to Note:
1) What type of search does the participant do?
2) If s/he does an author search, do they reverse the name as indicated by the directions?
3) Do they understand the status labels?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****
Scenario #4: You need a copy of the book [insert title here]. Is there a copy at your library that you can check out? If not, locate a copy at another institution. You'd like to have the book sent here. How would you utilize the library catalog to borrow the book?

Intended action:
title of book – start of title search – no results – participant clicks on "repeat search in all ilcso libraries"— clicks into an individual record -- uses request button -- successfully requests an item using the "dummy patron id" that s/he is given

Things to Note:
1) Is the participant able to move from the local catalog to the universal catalog?
2) Does the participant use the "Repeat Search in All ILCSO Libraries" link to move to the universal catalog or the ILCSO button?
3) Is the participant confused by the multiple records once in the UC?
4) Does the participant notice the request button?
5) Does the participant find anything confusing about the request process? (especially on the page that requests additional information)

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****
Scenario #5
You are writing a paper on the AIDS epidemic in Africa. Since AIDS research frequently changes, you would like to focus your research to the last five years. Does the library own any books that you could use for your research?

Intended action:
Participant may take several routes (including "anyword anywhere", "boolean", etc.)
Intention is for participant to use the Quick Limit of "Last 5 years".

Things to Note:
1) What type of search does the participant do?
2) Does the participant use the quick limits or some other means to identify items within the last 5 years?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #6:
A professor suggested you refer to [insert title] for your research paper in [insert appropriate class] .Determine if your library has a copy available for your use. Determine if another library has a copy available that you can check out.

Intended Action:
title – start of title – which other ilcso libraries owns this title – from the record in UC, participant determines if a copy exists with the status of “AVAILABLE”.

NOTE: Student is not expected to request this item.

Things to Note:
1) Does the participant understand the status in the local catalog that makes the item unavailable?
2) Does the participant click on the “Which Other ILCSO Libraries Own this Title?” link to move to the UC?
3) Does the participant understand how to identify if a copy is available from the multiple institutions holding the copy (from within the single record)?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #7: You forgot that your books are due tomorrow, but you aren’t finished with your research, and you don’t have time to go to the library to renew them. How would you utilize the library catalog to renew your items online?

Intended action:
participant clicks on my account – enters dummy patron info – checkmarks items to renew them

Things to Note:
1) Does the participant know where to go to renew items?
2) Does the participant experience any confusion in the process of renewing items?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #8: For your sociology class, you have been assigned a book, but you left your syllabus at home and the only thing you can remember is that the title has the word “grace” in it and it’s by a man named Kozol. Using the Guided Search Screen, determine if your library owns a copy of this book.

Intended action:
Participant clicks on “guided search” tab – participant enters grace (title words) – participant enters kozol (author words)—participant locates a copy – based on the status, participant determines if the copy is available for check out.

Things to Note:
1) Does the participant go with the default search options on the guided search screen or make selections in the search by pull down menu?
2) Does the participant find any part of the guided search screen confusing?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #9: You’re in Urbana-Champaign for the weekend visiting friends and remembered that you need to read the book “Fathers and Sons” for a class next week. You want to check to see if “Fathers and Sons” is available at University of Illinois Urbana-Champaign so you can get started.
Using the library catalog, how would you check to see if they own it?

Intended Action:
From local catalog, participant clicks on “ILCSO”—Chooses UI at Urbana Champaign—fathers and sons—browse title search—sees that U of I owns a copy.

Things to Note:
Does the participant know how to move from the local catalog to U of I’s catalog?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****

Scenario #10: This question should test the MORE LIMITS feature. Because effective limit options are specific to each institution, you will have to design the question based on your collection. Once again, the main goal of this task is to determine if the student knows how to use the MORE LIMITS feature. [insert question here]

Intended Action:
Participant goes to Guided Keyword Search Screen” – clicks on “more limits” – selects “french”—enters “poetry” as a search term” – identifies a poem written in French.

Things to Note:
1) Does the participant know to go to the Guided screen/More Limits for additional limiting options?
2) Does the participant apply the “More Limits” before or after entering search terms?

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****
OPTIONAL
Scenario #11: [Insert Instructor's Name] has put items on reserve for the class [instruct class].

Intended Action:
Participant clicks on "Course Reserves tab" – Participant searches either by instructor or class and identifies items

Things to Note:

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

****
OPTIONAL
Scenario #12:
Your instructor has requested that you read an article in the [insert issue] of [insert periodical title]. Does the library own a copy?

Intended Action:

Things to Note:

Indicate what the participant did:

Did the participant find the answer? ___ yes ___ no

Describe issues/problems/additional observations:

APPENDIX G: USABILITY TESTING DEBRIEFING QUESTIONS

WebVoyáge Usability Testing

Institution: Test Participant #:

Date: Administrator: Observer:

Thanks for your participation in the test. We want to ask you the following questions before you leave. Your answers will be very important to us. [Note to administrator.: Read these questions aloud. As you name each catalog screen, pull it up on the display for the participant to see. Remind the participant what the 1-5 scale means, as often as necessary.]

1. When you use this interface which page would you use first?
___ Quick Search page ___Guided Keyword Search Page

Answer the following four sets of questions on the following scale:

1 2 3 4 5
Strongly Disagree Strongly Agree

2. Quick Search Page

2a. This page is clear, straightforward and easy to understand.
1 2 3 4 5

2b. Please comment on why you gave this score

2c. When you want to find books in the library's collection, you will definitely want to use this page for searching.
1 2 3 4 5

2d. Please comment on why you chose this score.

2e. What changes would you make to this page if you could?

3. Guided Keyword Search Page

3a. This page is clear, straightforward and easy to understand.
1 2 3 4 5
3b. Please comment on why you chose this score.

3c. When you want to find books in the library's collection, you will definitely want to use this page for searching.
1 2 3 4 5

3d. Please comment on why you chose this score.

3e. What changes would you make to this page if you could?

4. Title List Page

4a. This page is clear, straightforward and easy to understand.
1 2 3 4 5

4b. Please comment on why you chose this score.

4c. What changes would you make to this page if you could?

5. Single-record Full View Page

5a. This page is clear, straightforward and easy to understand.
1 2 3 4 5

5b. Please comment on why you gave this score.

5c. When you want to find library materials, you will definitely want to use this page instead of a page with less information about the particular item on it.
1 2 3 4 5

5d. What changes would you make to this page if you could?

6. Overall Impression

6a. This online library catalog is clear, straightforward and easy to understand.
1 2 3 4 5

6b. Please comment on why you chose this score.

6c. This online catalog will be very important in helping me find library materials.
1 2 3 4 5

6d. Please comment on why you chose this score.

6e. What other changes do you think should be made to the interface which you have not already mentioned?

APPENDIX H: FOCUS GROUP QUESTIONS

Focus groups will use the ILLINET Online universal catalog as the object of discussion. Locations for the focus groups should be able to provide either an internet connection for live access to the internet or have a projector or overhead system that will enable screenshots of particular pages to be shown to the group.

After a general introduction, begin the session by showing the group the opening search page. Ask people for a general impression of the page.

Do they typically begin a search from this screen or do they switch to the Guided Keyword Search? Why do they make the choice they do?

On this screen do they typically select a search or use the default Any Word Anywhere?

Do they ever use the Prolific Author/Composer search? What would they expect it to be used for? Who would they consider a “prolific” author?

Do they ever use the Quick Limits box? The More Limits button? What do they think these do? Is there a better label that could be used (“Narrow Your Search”)?

Do they find the navigation bar easy to understand? Should the links be highlighted or distinguished more? Other things that would make it more user-friendly? What do they think the ILCSO Libraries link does? What do they think it means? Is there a better label that could be used?

Do they ever use the on-screen help? Have they ever noticed it?

Switch to the Guided Keyword Search screen. Ask people for a general impression of this page.

How many people use this screen frequently? Do people think that this page or the previous page would make a better start page for the catalog.

Do people limit their keyword searches to search within particular fields (demonstrate what this means – the drop-down box)?

What do people think the radio buttons (And, Or, Not) mean in relation to the drop-down All of These, Any of These, As a Phrase? Do they create combinations using the different boxes?

Does the More Limits button make sense on this page in the absence of a Quick Limits drop down?

Do they ever use the on-screen help? Have they ever noticed it?

Switch to an individual record screen.

What do people think the “More Like This” button means? What would they expect to happen?

Show the login screen. Ask if any of the users have had problems logging in. If so, what do they think caused the problem? Did they feel that the feedback from the system was clear enough to help them resolve the problem?

Show an account screen. Ask for general impressions. Do users feel the screen is easy to understand?

Ask users if they have ever had the system time them out and log them off the system. Ask if they understand why this happens. How long do they think it is before the timeout happens? Do they consider this timeout system beneficial or a nuisance? Is the time interval before automatic logoff about right, too long or too short?