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Primo Usability Testing at SUNY New Paltz

SUNYLA Lightning Talk
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Thank you. Glad to be here! I'm Jen Rutner, I work on the Reference and Education Team at the SUNY New Paltz Library.

The Team

Anne Deutsch, Instruction Coordinator

Yvonne Kestry, Tech Team

Kristy Lee, Head of Tech

Stephen Macaluso, Assessment Librarian

Jennifer Rutner, Research and Education Team

First, I want to thank the team that came together to work on the Primo Usability project. Particularly Anne, Kristy, and Yvonne, who implemented the changes and dealt with all of the technical aspects of this process. I served as the project manager, and also conducted the usability studies with students. I have a background and training in conducting usability testing in a library setting.

The Process

1. Literature review
2. Benchmarking
3. Group brainstorm
4. Translate our questions to **information needs**
5. Prioritize our information needs (what *can* we change?)
6. Identify measurable or observable interactions
7. Develop tasks related to our information needs
8. **Conduct usability tests**
9. Analyze results
10. Propose changes
11. Implement changes

I don't want to get into the process of how we did this project, but would be happy to answer questions at the end. The one thing I do want to say is that I've found that it's important to focus an inquiry on questions that staff have about an interface and how our users will interact with that interface.

The Priorities

Terminology

- Search scopes: "Everything," "Sojourner Truth Library Catalog," "Articles," "Course Reserves," "SUNY Catalog"
- ILL, "SUNY Resource Sharing"
- "Available online," "Full Text Availability," "View online"
- "Sign in"

Functionality

- **Advanced search screen**: Search box, related menus
- **Results screen**: Limits
- **Item records**: accessing full text, "Send To" icons,
- **Universal functions**: Help tab, "Sign in"

We settled on a set of priorities that we were interested in, many of them focused on terminology and labeling. Overall, we wanted to know if functionality was meeting expectations for our users, and if the interface is easy enough to learn, so users can navigate a task that they may not have done before.

The Tests

- Six student participants were recruited.
- One participant works at the Library.
- Recruited students in the Student Union Building, reserved a table.
- Each participant received a $5 Starbucks gift card.
- Sessions took about 20 minutes.
- We had some technical difficulties recording the sessions, so only have screen recordings for four of the six sessions.

Participant profiles:

1. Male, 3rd year, Computer Science
2. Male, 2nd year, Business, transfer student
3. Female, 2nd year, Digital Media Production
4. Male, 2nd year, Biology
5. Female, 1st year, Communication Disorders
6. Male, graduate student, English

We were able to recruit six student participants for the testing, and we reserved table in the Student Union Building to conduct the sessions. I feel pretty good about the diversity of the participants, overall.

Results

The good part!

The Results: Advanced Search

One of the main things we were interested in is the "search scopes" ie. the buckets of "stuff" that people can search in. Overall, participants accurately described or guessed at what these different buckets hold, including "SUNY Catalog." "Everything" posed a problem as participants each had a different description of what this might include. We've changed this to "Books, articles, and more" which other libraries have used.

A quick note that we have added a scope, and now our default is "online resources," since all library services went remote in March.

"Course reserves means nothing to me."

The biggest surprise for me was participants descriptions of course reserves. Several simply did not know what this meant. Some made an accurate guess. One participant knew what reserves is, because they work in the Library.

Results:
Results Page - Facets

Material Type
All items

Language
Any language

Start Date:
Day ▼ Month ▼ Year

End Date:
Day ▼ Month ▼ Year

BEFORE

🔍 SEARCH

Material Type
All items

Language
Any language

Publication Date: From
Day ▼ Month ▼ Year

To
Day ▼ Month ▼ Year

AFTER

🔍 SEARCH

Ideal

Publication Date ^
From   to
☐   417   2020   Refine

Overall, the results screen didn't present significant barriers to access. All participants were able to navigate the results screen, and explore and choose appropriate materials based on the information presented.

We were particularly interested in facets, and the ease of using the facets. Several participants successfully navigated the facets, and some even combined multiple facets.

The date limits didn't work as participants expected. On the advanced search screen, multiple participants tried to use the data limits, but were confused by the presentation. However, once on the

results screen, participants were able to find and use the date limit there, which seemed to meet their expectations.

We've made some changes to the date range limit on the Advanced Search screen, but it's still not ideal.

The Results:
Item Record

ARTICLE / multiple sources exist. see all
Libraries: A Call to Build the Action Agenda
Scheeder, Donna ; Witt, Steve
IFLA Journal, June 2016, Vol.42(2), pp.83-84
PEER REVIEWED

Available Online

TOP
SEND TO
DETAILS
VIEW FULL TEXT
LINKS
CITATIONS

Send to

PERMALINK   CITATION   EMAIL   PRINT   REPORT ISSUE

Details

Title	Libraries: A Call to Build the Action Agenda
Creator	Scheeder, Donna >
	Witt, Steve >
Publication	IFLA Journal, June 2016, Vol.42(2), pp.83-84
Subject	Library & Information Science >
Identifier	ISSN: 0340-0352
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View Full Text

Select a Database to View this Item

Sage Humanities and Social Sciences
Available from 1999.

Free E- Journals
Available from 1998 volume: 24 issue: 2.

Sign in for full access   My Library Account

AFTER

From the Item Record screen, we observed a number of barriers to access. The majority of participants were able to click through to access a full text PDF of an article. Only two participants were able to complete placing a request for a book, from the item record.

Sign in was the biggest barrier to successful access to materials from the item record.

Participants really wanted to avoid clicking on that "sign in" button. One participants noted that they "want to avoid opening another screen"

We did observe participants thoroughly exploring

the entire screen, and reviewing each option. Some even spent multiple minutes trying different strategies, which they may not do if they weren't sitting next to a Librarian.

We've been able to change some of the language on the screen, and we hope this helps. It's definitely still not ideal.

Results: SUNY Resource Sharing

- Sign in was a barrier to access.
- Institution list was distracting.
- Most participants did not successfully submit a request.
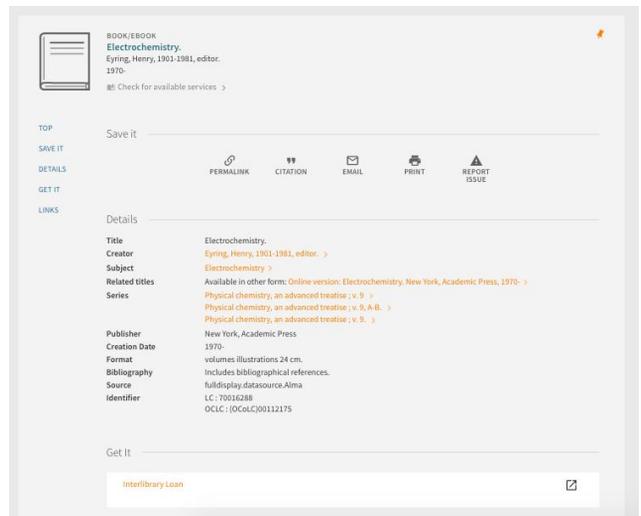
Placing a SUNY Resource Share request was the task that presented the most challenges for participants. Each participant started on the same record, and was asked how they would get a physical copy of this item. (We have turned this feature off while it is currently unavailable, which is why I don't have an accurate screen shot.)

Two participants were successful in placing requests, but one had a "cheat" as the previous student was still signed into their account. This removed the the need to navigate the sign-in step of the process.

The auto-sign feature we've implemented should

help reduce barriers to access.

"I don't want to sign in."

I think we can all relate to this.

The Results: Sign In
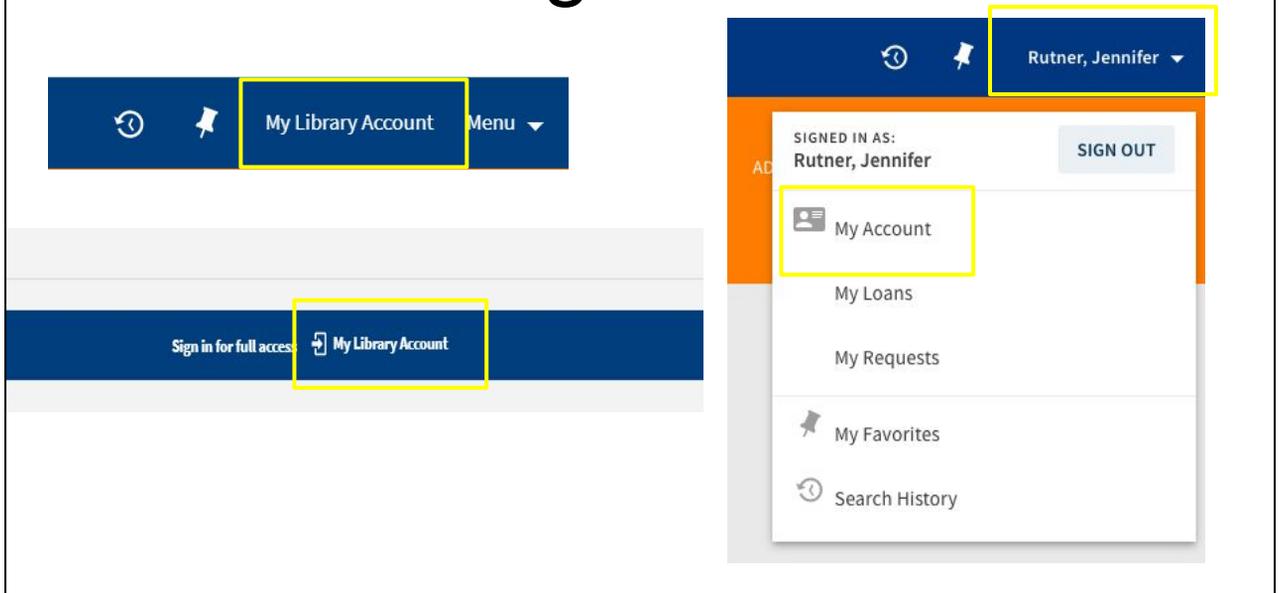
"Sign in" was a significant barrier for a number of participants. Both in the menu, and in the item records. We have changed "sign in" to "My library account" which we hope provides more clarity on why people would want to take the step of signing in.

"Library Card" terminology, in the My library account menu, was also confusing for participants once they had signed in. Some said "I thought I didn't need a library card? I thought my ID was my library card."

We were also able to turn on a feature that "picks up" a student's sign in to their My New Paltz account, and carries that login information into

Primo, so they are ALREADY logged into Primo. This removes a barrier to accessing full text, which is awesome.

The Results: Help

BEFORE

AFTER

Finally, asked how participants would get help with using this interface. We got a wide variety of responses, which we now know to expect. Some said they would go to the library to ask for help, though they had never done that before. Some of the participants said they would click our Help tab, which we had just installed. While the tab didn't do exactly what students expected--open up a live chat with someone at the library, like a typical ecommerce website-- the Help tab offered a "good enough" solution, and most were satisfied with that. We did redesign the chat tab, so it wouldn't be misleading.

Thank you

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Access the full "analysis worksheet" [here](.).

I look forward to your questions!