User Testing for Pre-Phase 2, Search 360
Janifer Holt and Barbara DeFelice

Charge
To test the usability of the search box display format (including, terminology...where to add “help”) and the subject categories and subcategories (print copies) for pre-phase 2 Search 360.

Tools

Search 360 Basic and Advanced in our current implementation:
http://library.dartmouth.edu/search/search360/

Search360 development site:
http://wfx.webfeat.org/wfsearch/search?cid=10340
Username: dartmou01 Password: admin

CSA Illumina:
http://www-mdl.csa.com/ids70/advanced_search.php?SID=2rtbs4fj3oo10aoeha8el1r0r3&tab_collection_id=999

Methodology

User tests for 7 undergraduate students. The script for the user test is given in Appendix A. They were shown the current Search360 basic search page. They were given time to evaluate and comment on the terminology used on the current site for help (About Search360 and What Am I Searching). They were asked about their use of the pull down menus and what they thought General meant. Then they were shown the CSA Advanced Search box and the Search360 current advanced Search box and asked which they preferred. Then we went to the Search360 development site and looked at the list of subject and material type categories (see links above) and asked them what terms like Core, All, some of the subject terms and the material type terms. Notes from the user testing results are given in Appendix B.

Results

Search Box Options:

After seeing the CSA Advanced Search boxes and the current Search360 Advanced Search boxes, most students thought the Search360 one seemed easier to use but some said that they liked the options that the CSA Advanced Search offered. Two students reacted in terms of the look and color scheme for each site. More testing with students actually doing searches is needed to guide our decisions about the Advanced Search options.

Subject Categories and subcategories:

1. "General" as a name and a concept:
Students all thought General is a larger grouping than any of the others in the current implementation. Most students did not have specific suggestions for another name for a category that provides a few good resources as a place to start. They all used and liked the pull down
menu, and used it to narrow their search according to the course they were taking or the project they were doing.

*If we just offer a blank search box, people will assume they are searching all available resources.

*If we are not clear in the name of a default "good place to start not too large category", then we can't have one. What name would work? Ideas:
  a. Instead of General, the top box could say "select one" and the user would have to select one of the broad subject groupings.
  b. Rename the newly enlarged "General" to be more descriptive: "Top 15 Resources" or "Top Selected Resources".

2. We do not need to have the ALL designation on a category; the students felt that the whole category is all and anything under it is more specific.

3. "Core" as a concept was confusing to the students. Some of the students didn't like the idea that we would be selecting out of the universe for them. The students seemed to expect that we offer the whole of some universe, and they don't like the idea of someone selecting for them. But it was fine to have a narrower category of for example "Journal articles" under a subject category that was by default "everything".

4. Unclear subject categories: Library Catalogs and Reference Books. Some students would like a gloss to tell them what's in a category.

5. Students had differing opinions about what happens when you select more than one category and run a search; one thought it was an "AND" Search and would narrow their search. Others thought it would be an "OR".

6. There may be some confusion once users start combining categories more often. Some students seemed to think that one category would limit another category, for example if they checked Images and Medicine, they’d get medical images.

7. There were questions about content when we have large categories that are made up of smaller ones. The students wanted to know if they would search the same resources if if they picked a large category or if they combined several categories themselves.

Other Comments
A student asked that we have 10 results per database listed to make it easier to move around a long list of results.

One student would like a Video category, especially if we have sources for video clips and wondered if that would be under the Images category.
Recommendations

*Search Box Options:*

1. Combine “About Search 360” and “What Am I Searching” into one well placed link that is called “What Am I Searching Help”

2. Change the term General to indicate that it not searching everything. One student suggested General Selected, and since most people liked Top X#, it could be Top 15 Databases.

3. No change to Advanced Search display on Search360 at this time since although a couple of students saw the advantages of the CSA type display, the general reaction was that it offered too many options right away. (May want to do further user testing with searches later)

4. No change to the Basic Search box and pull down menus EXCEPT for renaming General when we come up with a better term.

*Subject Categories and subcategories:*

1. A subject or material type category is by default everything applicable to that category and does not need to be named “all” or equivalent.

2. Develop subcategories where applicable by material type (journals, images etc.) so students can find things medical images or art images.

3. Rename subcategories currently called Core something else, since most students had to struggle to define Core in this context. Of the options we presented, “Top Resources” or Top x#” were clearer. IF someone really wants to present a subset of resources as the best starting place, these sub-categories will be called “Top Resources”.

4. Remove the broad categories labeled “core”. These will remain as categories in Basic only but without those labels.

5. Remove the combined categories such as “Sciences & Engineering.

6. Present a way to easily show what’s in the categories.

7. Separate the material type categories from the subject categories in the display of these.

8. Subject categories should closely reflect the course structure; these mostly first and second year students look for a starting place that matches the course they are taking.

9. Develop short glosses for the category names that are unclear and yet have no good alternative names at this point, such as Library Catalogs and Reference Books.

10. Provide in context on screen search tip for searching multiple categories.

11. Develop specifications for the Images category

12. Propose a Video category
Appendix A: Script for User Test for Undergraduate Students

Welcome/ explanation to volunteer
Explain what user testing is…

Search360 allows you to find articles, images, datasets, books and other materials in diverse resources with one search. Then it guides you to the most useful, authoritative resources for your search question.

We are testing the usability of the search box display format and subject category and subcategory terminology.

Search Box Display Format:

Give them a chance to look at the Search 360 screens and the CSA Ilumina search screen:

Current search box display: (Basic features)
Drop-down subject menu
“About Search 360”
“What am I searching?”

Current search box display: (Advance features)
“About Search 360”

WebFeat Library Wiki search box display: (Basic features)
No drop-down subject menu
“About Search 360”
“What am I searching?”

WebFeat Library Wiki search box display: (Advance features)
“About Search 360”

CSA Illumina search box display:

Search Box Display Questions:

1. Is there “help” information for the search box display? If not, do we need a “help” link? Where should the “help” link be placed?

2. Is the drop-down subject menu with the search box helpful?

3. Which search box display format do you prefer, current search 360 advance search or CSA advance search? Why?
Subject Categories and Subcategories Terminology:

Give them a chance to look at the subject categories and subcategories (print copies).

Subject Categories and Subcategories Terminology Questions:

How do you interpret the category names?

Core

All

Top x# (what is a good number?)

What other names would you suggest? (Best Bets, Top Resources, etc.)
Appendix B: Notes on Undergraduate User Tests

Barbara DeFelice took notes. A copy of her notes are below:

Wednesday, February 28th
9:00am - 9:30am Student 1: ‘10 year student, studio art and pre-medical major

9:30am – 10:00am Student 2: ‘08 year student, molecular biology major

Thursday, March 1st
9:00am - 9:30am Student 3: ‘10 year student, government major w. double minor in public policy, technology and health care and film and television

10:00am - 10:30am Student 4: ‘10 year student, pre-medical major?

10:30am - 11:00am Student 5: ‘10 year student, economics and psychology major

Thursday, March 8
11:00am - 11:30am Student 6: ‘09 year student, major?

11:30am - 12:00pm Student 7: ‘10 year student, environmental studies major?

Search Box Display Questions:

1. Is there "help" information for the search box display? If not, do we need a "help" link? Where should the "help" link be placed?

(Student 1)
Is "how do I" on the left menu column the help link for Search360? Do not need a help in Basic as it's pretty clear.

Does not use "about Search360" or "what am I searching."

"About" would be a brief note about it and "what" would should the list of resources.

(Student 2)
Thinks she has used it maybe once. Basic screen looks familiar.

About is more technical like in other programs. What am I searching tells you about the categories and databases.

Pretty intuitive; because things like Google, seems intuitive that she can just type in a keyword search in General.

(Student 3)
What 360 does? About the program. Would prefer this one.

"What am I searching?" Does this describe what I am doing in my own search or in searches overall?

Is a user of Search360. For an Engineering course used Science and Engineering upon faculty request. Starts with General and if can't get what he wants, goes to another category. Assumes that everything available is there. Assumes he's searching all the available databases. Assumes others are more specific.
Once group of results is displayed looks at years since wants current. To get more specific, goes to eresources.

First year event-learned about Search360

Also took Learning at Dartmouth optional course and had a an intro to starting with Search360. So didn't need help and didn't use the options offered.

(Student 4)
Pretty self explanatory. Actually went to About and what am I searching but had never done that before. "Should have done that first" she said.

Can you look for a specific quote and then find the whole article.

Only person who went to hands on right away. Curious about how it really works.

(Student 5)
Did not select any of these. Typed in search and figured it out on his own.

(Student 6)
Has not used it? Not sure "what am I searching" Maybe tell him what the search360 system is doing or how to search the database.

If already in Search360 why would I go here? OK, after looking at it, can see how it would be useful, but need to combine both concepts, What am I searching and AboutS360.

In the interest of time, what will make the search easier and I want to get right to the search.

(Student 7)
Is a user of Search360.

Having a help button on any sort of page is usually helpful.

What... would tell me what journals search360 searches through. Not sure what About Search360 would tell her.

Used pull down menu-

General meant all the categories but she thinks General is just some of the ones we selected. Would select other categories to be more specific.

"Other terms- General Selected (someone out there selected these but it's a general sampling of the options)"

2. Is the drop-down subject menu with the search box helpful?

(Student 1)
She sticks with General but would pick some more specific grouping if doing a paper in say "science".
(Student 2)  
Did realize there was a drop down menu and used it to narrow her search to the Sciences. If she knows which subject, helps to use drop down to focus it more.

(Student 3)  
Used it to go from a very broad search (general) to a more specific by subject search. Likes options right there. Can shift focus depending on course or paper topic.

(Student 4)  
Used it; is helpful to narrow your search down. If you want to be broader, go back to general. General is assumed to include everything else in the other categories.

Likes the drop down menu. But nice to be able to opt out so you can search all of the resources at once. Don't always want to have to choose but helpful when…

Mention of eresources fair-friend told her to use it. Just type in a word.

(Student 5)  
Yes, he was searching for a class in science and engineering so used that category. It was more narrow and more topical for his class.

General is all inclusive and others are more narrow.

We asked what other term might work for a narrow set of broad, multidisciplinary databases. He asked "is it interdisciplinary?" Call it interdisciplinary if it is.

Reaction to having nothing in the pull down menu. Would assume it would searching everything. Likes the pull downs to go into narrower subject areas.

(Student 6)  
Would go here and select Arts&Humanities.

General is searching all subcategories.

(Student 7)  
Yes.

3. Which search box display format do you prefer, current search 360 advance search or CSA advance search? Why?

(Student 1)  
Familiar with CSA sort of screen but it was more like advanced due to using it in a class to find more articles. More helpful to search a bunch of words.

Showed the advanced in Express vs CSA. CSA seems confusing at first but could be more helpful because it has the OR's so it gives you more options. Not sure which one would be more helpful but the WF advanced seems easier. The other might be more helpful. (Clear tension between ease and ability to do more "in-depth" searching.

(Student 2)  
Looks familiar. Which does she prefer? Either one would be easy to use; but Search360 advanced "template" matches library site better in terms of color and banner so is more comfortable. Also simpler
and more straightforward from the initial perspective. Not hard to figure the other out but when in a hurry do not want other distractions. Self explanatory.

(Student 3)
Has not used the CSA advanced search. Doesn't know which one will get you better results.

Don't want to make your research harder than it is. Prefer Search360 More similar to ProQuest. Would only use 2 boxes anyway. Doesn't think he'd need more boxes. Reacted to the differences in terms of number of boxes not what functions might be enabled.

(Student 4)
Liked the options on the CSA interface but not the look of it and the colors of it. Prefer the colors of the Dartmouth site. Like the features of the CSA interface better.

(Student 5)
Is using Psychinfo on CSA in a current class so recognized the CSA interface. The or's between the boxes in CSA show. More keywords in the CSA version. Liked the CSA better perhaps because he has used it. Like the format and it gives you more options.

(Student 6)
Have never gone into Search360 advanced before because he goes to the reference librarian and does a basic search and pulls a few articles.

No preference between the two. CSA gives more options but can limit the search more as well. May be so specific that you wouldn't get results but CSA looks more user friendly with the color scheme and easy to navigate.

(Student 7)
"CSA too confusing, too many option boxes, selecting year seems clear, not so much information in one box on the Search360 advanced search screen."

Subject Categories and Subcategories Terminology Questions:

How do you interpret the category names?

Core

(Student 1)
Core just Engineering

(Student 2)
Looked at the Environmental studies example on Express.

Core…not sure but really relevant to that subject.

Core might be really focused.

Seems to be more objective so liked it best.

(Student 3)
Core Not sure of difference between the Core categories and the unlimited categories. Core probably means closer to your search terms or main publications in your subject area.

(Student 4)
Means the most important close to the center materials.

(Student 5)
Seems like the most useful or maybe most applicable databases. Intuitive to him. But if people didn't understand the difference, then we might need an explanation somewhere.

(Student 6)
"Why would you have Engineering and Sciences and then Sciences&Engineering?" OK to have the combination so if someone wants both they could get them with one click instead of two." Regarding options Core, all, combined etc. "Might be confusing-wouldn't know may be such as thing as too many options."

Should have Science, Engineering, and Sciences&Engineering.

"Core is very specific or advanced environmental studies" "All is all encompassing" Then Core could mean very basic. And All could be basic and advanced." "Core means the heart of something."

(Student 7)
Plus sign works great to expand.

Would be helpful to separate images and all those into a separate area. Want to search images and a subject area. Wants to search a subject area and then select a material type category.

Also wants to search images and then selecting environmental studies for example.

She wants to know what she is searching. Knows these are journal articles but what else? Library catalog-assumes searches books.

Do not need both "Sciences&Engineering" and both Science and Engineering because she assumed she can select any of these subjects.

"Don't know what Core means."

Sciences and Engineering Core does not mean anything. Are these: Some of the most commonly used or heavily referenced?

All

(Student 1)
lot broader; NOT clear that one is a subset of another!

(Student 2)
All cross over to other fields, not just that field.

When search a topic, assume searching all anyway. Core would be narrower. Presentation is the reverse from what she expected.

(Student 3)
All Fine; noted that there isn't a botany category for example. If he couldn't find what he wanted in Biological he would look in Environmental or General. Would like to see the structure of the subject
categories to reflect the courses. Ie Public Policy: Law, Education. So you can burrow down for resources in your specific area.

Sciences and Engineering vs combining them yourself-if the same results, don't need both. If different results, then it's useful.

Need to say somewhere a legend that says what Core means etc. Perhaps a hyperlinked short list of what's in what category. Advocates for this kind of assistance in context because even if someone doesn't use it, if it's needed, it should be there.

Need to build this into the interface.

(Student 4)
everything

(Student 5)
All - Just category names implies All.

(Student 6)
"All" is still useful.

(Student 7)
"Just a subject categories means all articles that have to do with Economics." "Assume if you click on a subject, it searches everything" "Wouldn't have to select journal articles to get those. Journal articles seem more specific and journal collections broader."

Top x# (what is a good number?)

(Student 1)
Clearer than Core; top 10 or top 15 would be good.

If can check mark more than one at a time do not need the combination.

(Student 2)
Too subjective; someone is going into someone else's selected resources.

(Student 3)
Thinks this is commonly understood.

(Student 4)
no comment

(Student 5)
Top Resources.

Top x number implies that you can pick your number.

Top 5 would be self explanatory as opposed to Core.

Top Databases OK, too.

(Student 6)
Recognized the term "Top x". Now understands Core, makes sense but you don't want to find a definition.

(Student 7)
No suggestion.

What other names would you suggest? (Best Bets, Top Resources, etc.)

(Student 1)
Best Bets is a good term.

Want to see more specific subject terms like Chemistry. Thinking about it in terms of classes she's taking. What's difference between Humanities and English. She thinks English people would pick humanities.

Would do general and humanities for an English paper. Use General because she would have more of a chance to find something if she didn't know what category to pick.

Subjects that list foreign languages in case you are doing a paper in French for example.

Did a search "mercury in fish populations" in the basic search box using the General category.

Find drop down useful so you can for example not search history sources for this example. Likes the display that is organized by databases because you can tell which ones to use.

(Student 2)
What other names would you suggest for a small selection of multidisciplinary databases that would imply breadth in terms of subject and a good place to start if you do not yet want to choose a subject category? Also be the default if we don't have pull down menus although most people like pull down menu.

Easier to see the categories if they were separated out. Broad ones on one side. Categories that are tools and not topics ought to be separated out from actual topics. Make columns wider so easier to read.

Laboratory resources-technical aspects of labs.

Biology and medicine would get you general information.

Statistical would be more technical-more honed, need specific statistics. A different kind of search.

Prefer separate categories where she can combine on her own. Useful to narrow down herself. But likes the option to combine them also.

If starting would select Arts and Humanities Core.

Thinks of General as everything. General implies broad.

Look for more specific collections.

Core would work for a narrowly defined category. Implies narrow to her without the subject definition.

(Student 3)
Don't mix type categories like images and patents with subject categories. BUT OK to put Images under Art as long as these are art images only.
Likes distinction between subject areas and types like patents.

Economics with subdivisions he'd like to see this.

Noted lack of public policy but government is closer.

Any program here where there are hard core research being done would have a field clearly visible on this list or that clearly connects with it. The students are used to seeing an expandable browse list in hierarchical order. Move from general to specific.

(Student 4)
Liked top resources

Noted it was not alphabetical-how did we order these.

Expecting it to all be in alphabetical order. Leave space between different sections. Does not think we need the broad cores. If you select the + and get core, that's OK. Should be a distinction between core and all probably all is implied in a category name.
Can't think of any missing categories.

Are images in a specific subject? Would need to know what images are included. Do we have video clips in a collection? Would like to see video as a category.
If wanted images in medicine would checking medicine and images do that? No, it's an OR not an AND.

If she went to medicine, would find any narrower topics? Would like to expand medicine and find more specific topics.

Likes the types categories.

Reorder Library Catalogs and Laboratory Resources.

Put Library Catalogs up with core.

Once understood definition of core thought that core categories were important to have. Wants to see her classes and projects reflected as subjects on the list.

(Student 5)
Top Resources less accurate. Likes Top Databases.

Library catalogs-just references that the library has in print format.

Images-assume it's a broad topic with all subjects included but just pictures not so much tables and graphs.

If check mark two categories, thinks it would be an OR search with distinct results for each separately.

Social Sciences Core and Social Sciences-sees these as different. Core is basic essential resources. Confusing to see it twice.

Combinations at the top are useful.

If you have a research subject that doesn't fall into a specific category, best to be able to go to a broader one.
Thought reference books was the same as library catalogs. Thinks it's physical books that you use on-campus, and it's actual reference texts but not quite sure what it means.

Have a drop down with actual listing of what's in the categories.

Sciences and Engineering not needed if we can combine them separately. Core is useful though. Thinks if you click on each individually, you will get more resources and more specific resources. If you just cross medicine and images it wouldn't work as well as Images within Medicine.

(Student 6)
+ know there's options available.

If click on Economics would get all articles, books, everything, then journal articles if you limit it to the subcategory.

After looking at Economics:
"Likes the idea of limiting to journal articles, books, etc. rather than top 10 and All. "When you are pressed for time on an assignment good to focus your search."

Economics: specifically articles to economics.

Journal collections are broader. "
Getting so many hits it can get so confusing and if it yields all the wrong hits then it's hard. Likes to narrow things. Maybe starting out OK to get ALL but like to focus."

(Search 7)
Best bets, top resources, top 10 are all clearer.

"Top 10 used."

Comments on how results were displayed. Each database is listed separately. When you get so many things in one database you can't easily get to the rest of the databases. Would like to show top 10 in each database.