Freie Universität Berlin

Testing the new Library Portal | Primo (FU Berlin)

A combined approach of expert and user evaluation for assessing its usability

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Agenda

- Overview of our Primo
- Method of the usability study
- Examples of the results from the usability study
- Next steps
- Conclusion

Primo Implementation FU Berlin

- Part of the KOBV consortium (Berlin-Brandenburg, Germany)
- Version 3.0.2
- Layout: conforms to university's corporate design; a lot of local modifications in the default installation
- Tab FU Catalogue plus:
  - Books: Aleph-Catalogue, SFX, Scanned Card Catalogues
  - Article: National Licenses metadata, Online content, Inst. Repository
- Primo-Central
- Metalib via Primo in a separate tab
- A beta version; problem with (complex Aleph 18) Opac via Primo

The Study: Usability of Primo FU

- This study is a Master thesis for the postgraduate Master of Library Science (Melanie and Heike)
- Combination of (expert) heuristic evaluation and user testing
- Heuristic evaluation: detailed testing of Primo's features; preparation of the user tests by the authors
- 20 testers: students and staff, no librarians, nobody had previous knowledge of Primo
- "Thinking Aloud" method: testers were asked to solve scenario based searching tasks while thinking aloud
- Aim: to learn which features testers were able to find and use
- One participant per session, each session lasting about 1.5 hours
- Each session documented on video for additional checks
- Humboldt University's Primo was used as a reference (same consortium, comparable source)

Scenario-Based Approach

- There were six scenarios which were aimed to encompass all major types of:
  - Queries
  - Materials (books, articles, etc)
  - Features (facets, rss, export, etc)))
- During the tests the tasks increased in difficulty and complexity
- The main aim was not to generate certain results, but rather to get an insight into the testers' strategies and Primo's usability
- 10% of the tasks were designed to be unsolvable
- Example:

  "Your professor suggested, that you regularly consult the journal *American Anthropologist.*

  > Find the electronic version of the journal

  > ……."

SOME RESULTS

The Good Things

- (Our) Primo is easy to use for beginners
- Facets, RSS and Recommender are useful after some experience
- FRBR are useful
- Beginners find book covers helpful
- Enthusiasm for searching in all materials with one search
- Very positive response about direct links to full text

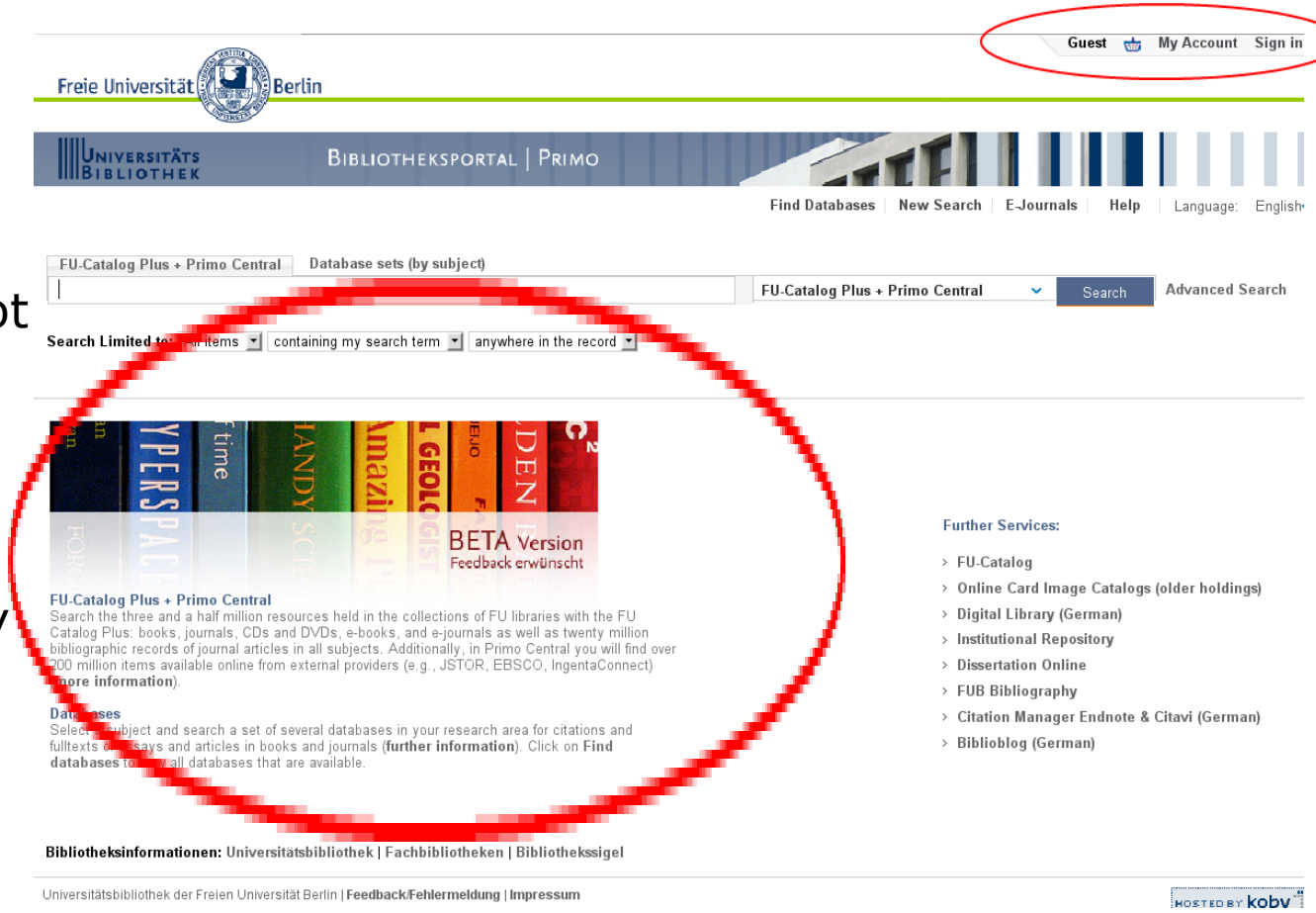
Transparency of Contents and Results

- Users are unaware of the contents of the two different tabs
- Users are unaware of the scope of their respective searches
- Inconsistent naming and colouring of the availability status of items
- Inconsistent attributes in detail tab (from different sources) bring additional confusion

Problems with Design

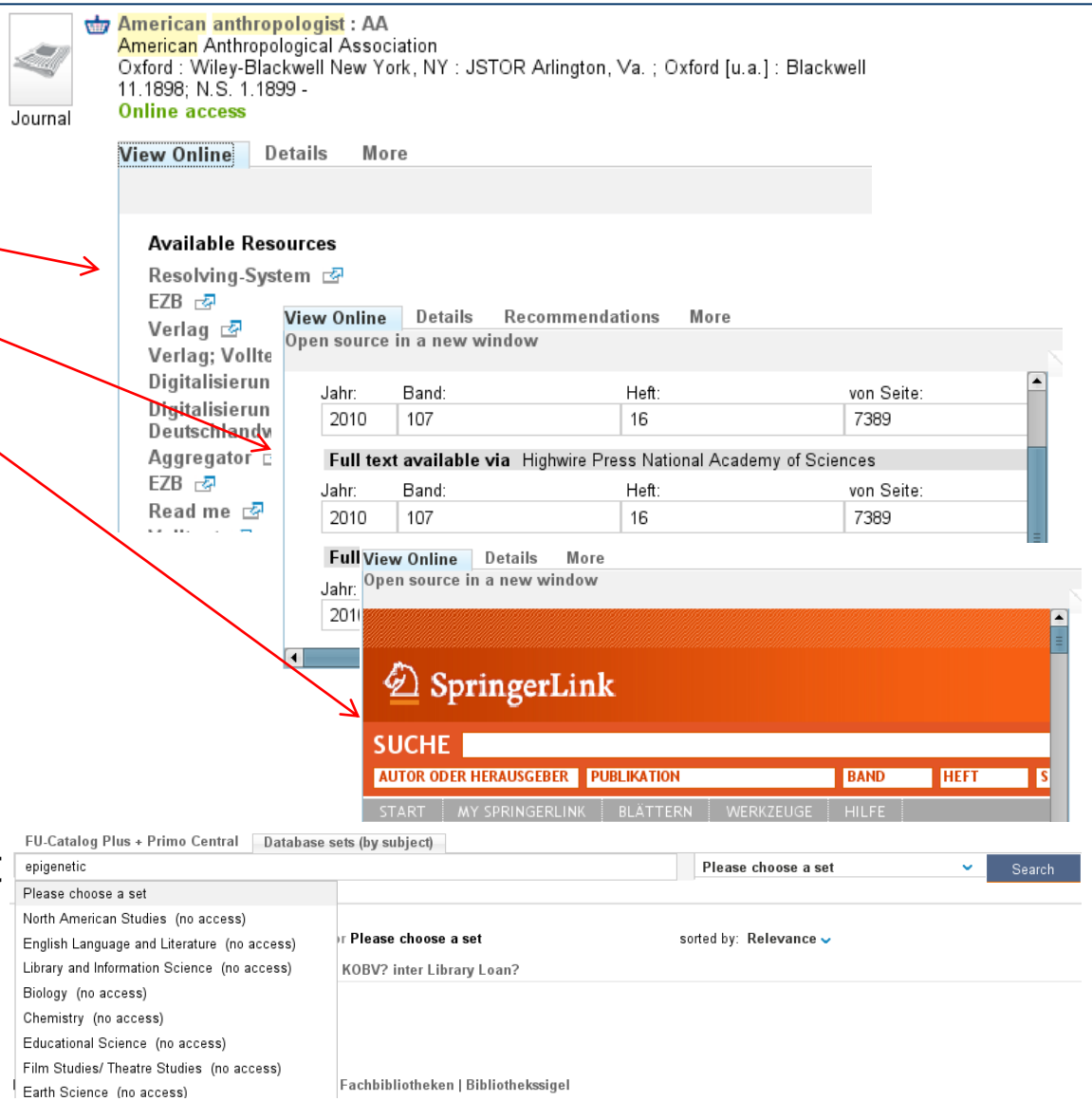
- Access to the user account (which is crucial!) is not obvious in the upper right corner

- Too much text (and possibly graphics) on the front page
- Information is not understandable due to:
  - Font size and colouring
  - Inconsistency
  - Placement



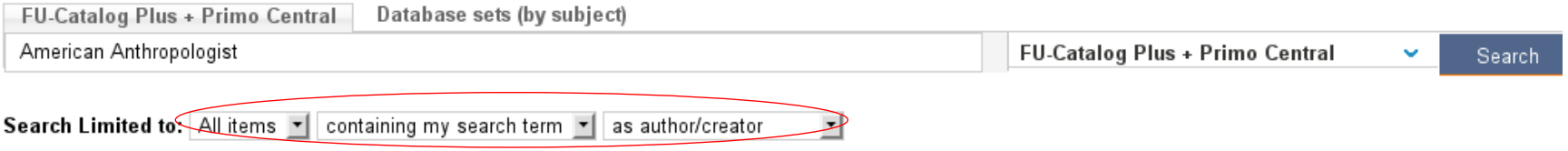
Too Complex

- Depending on source and situation you may find in tab ‘View Online’:
  - List of links
  - SFX-Menu for different targets
  - Direct link to full text
- Inconsistent and specialised terminology
- Scattered information (HU persistent navigation as an alternative)
- In the Metalib tab users need to select a quickset before searching



Simple and Advanced Search

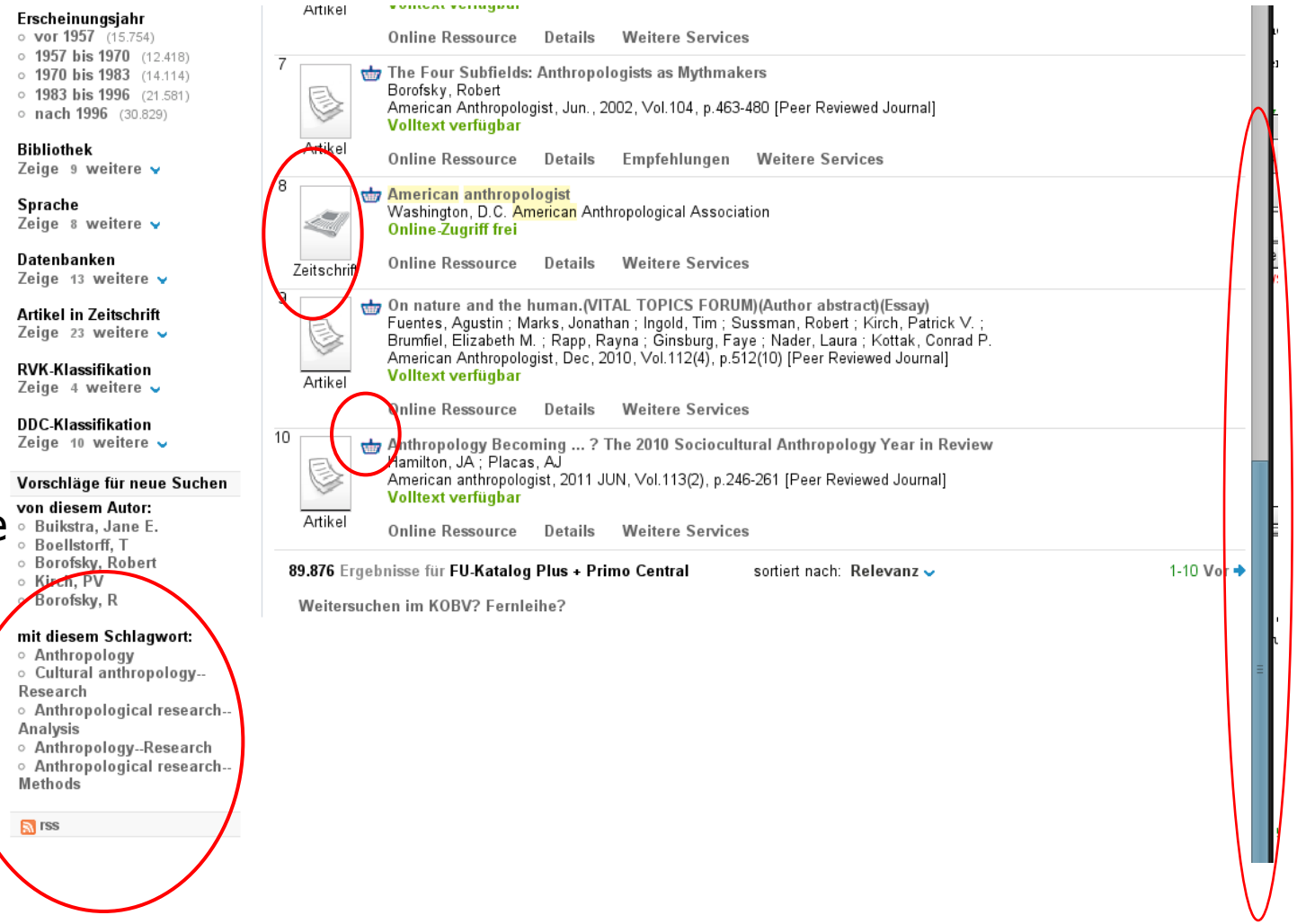
- Testers had problems with the dropdown lists in the Simple Search, due to:
  - Inconsistencies in the lists
  - New search includes the old additional selection



Testers were much more comfortable with using the Google-like approach in the Simple Search and complete dropdown menu in the Advanced Search, as used in Primus Humboldt University

Usability of New Features

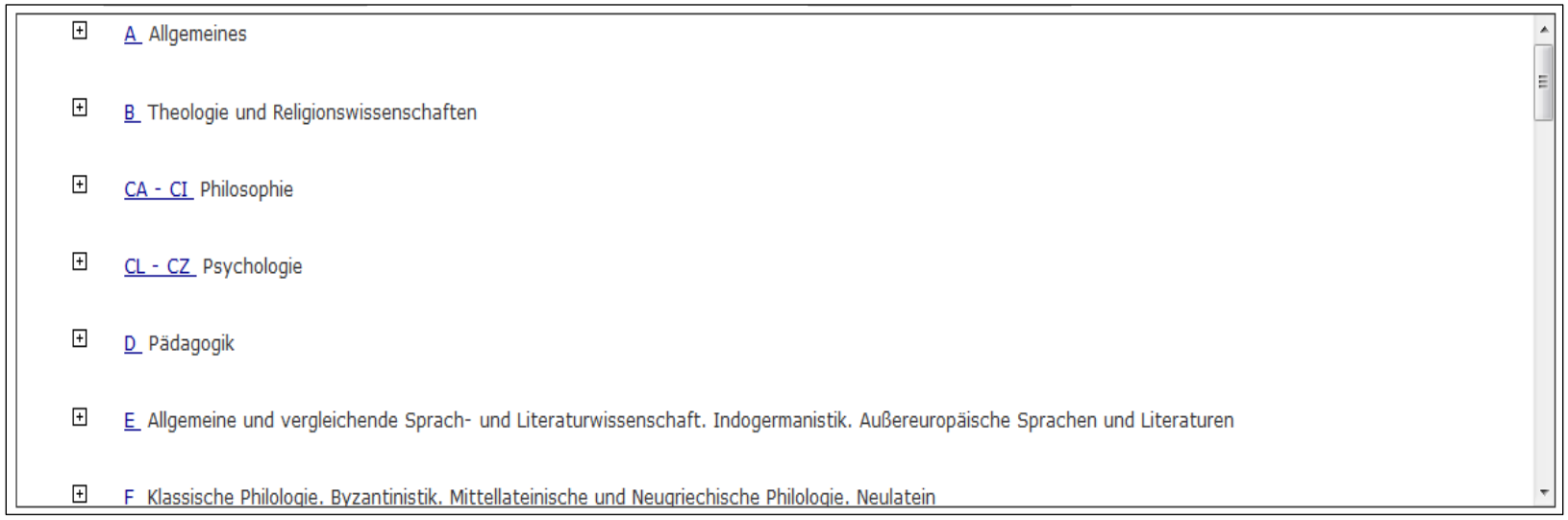
- The symbols for the *different kinds of* material do not differ enough to be easily distinguishable
- Basket is not under-standable as a symbol to select items of an own list



- Invisibility of new features is particularly problematic

Features Lacking

- Context-sensitive with mouse over help (i.e.: In the MetaLib tab: “select a quickset before searching”) just in some cases – need more
- System status indicator
- Contact information
- Personalisation
- Browsing: with Thesaurus (DDC, RVK(German classification)...) – there is a project with ÖBV about RVK browsing



And Now…

- Operationalization of problems:
- We start to bring all issues in a bug-tracking system (Redmine) About 200 expected issues
- We need to deduplicate, evaluate and qualify the issues (involving the technical staff)
- Possibilities:

  - Improve our beta version

  - Create the new productive version considered to all issues (Aleph20/Primo 4??)
- English short version with method, scenarios?

Conclusion

- In this usability study we show, that primo has a high potential
  - 93 % of test scenarios sucessfully solved
  - Easy learning of the system
  - Positive response for the new features
- The method and design of this usability study was very effective in uncovering usability problems, particularly from the user-perspective.
- The method and design of this usability study can be used by other sites for their own checks