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
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.
The symbols for the different kinds of material do not differ enough to be easily distinguishable.

Basket is not understandable 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 successfully 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