Usability Report Cover Sheet

Project	• Overall Project: Instruction Request Form • Project Title: User Test
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Introduction

The Instruction Menu allows faculty and Graduate Student Instructors to request library instruction sessions and to tailor those sessions to their particular needs.

http://lib.umich.edu/instruction-and-workshops/menu.php

The goals for this user test were to determine whether:
• The instruction request form provides users the information they need/want;
• The design is navigable and terminology is clear.

Sneak a peek at our fresh, new website! GO

MLibrary UNIVERSITY OF MICHIGAN

Search Mirlyn: Library Catalog for Enter keywords Go

About Us | MLibraries | MLibrary Services | Information for | Resources | Help | Ask a Librarian | Tag This Page

Course Customization Form

Below is a list of the things we can teach in a library instruction session. Choose a Popular Combo, or hand-select the concepts you'd like us to teach from the a la carte menu below. You can also select a Popular Combo and then customize what's included in the a la carte menu. **The time included for each topic is approximate.**

If you're not sure what would be right for your class or group and you'd like to talk to a librarian first, fill out this basic information and the appropriate person will get in touch with you.

Popular Combos

○ Introduction to Library Resources Combo
○ Finding and Using Articles Combo
○ The Research Process Combo
● None

A la carte

(Expand | Collapse) all lesson descriptions

☑ **Introduction & Conclusion (Required)** Approx. 10 minutes	**Your Menu Items**
Mirlyn Library Catalog	10 Introduction & Conclusion (Required)
☐ **Mirlyn Library Catalog Basics** Approx. 10 minutes read more >	**Total time:** Approx. 10 minutes (automatically calculated by your choices)
☐ **Mirlyn Library Catalog Advanced** Approx. 20 minutes read more >	
Search Tools	
☐ **Search Tools Basics** Approx. 10 minutes read more >	
☐ **Search Tools Intermediate** Approx. 20 minutes read more >	
☐ **Search Tools Advanced** Approx. 30 minutes read more >	

Specific Databases

☐ **Searching Databases Basics** Approx. 20 minutes for the first, 5 minutes for each additional read more >	# of databases? 1 If you have a preference, which ones?
☐ **Searching Databases Advanced** Approx. 35 minutes for the first, 15 minutes for each additional read more >	# of databases? 1 If you have a preference, which ones?
☐ **Specialized Database Instruction** Approx. 40 minutes read more >	Which database?

Critical Evaluation of Sources

☐ **Popular vs. Scholarly Journals**
 Approx. 5 minutes read more >
☐ **Popular vs. Scholarly Journals, Interactive**
 Approx. 15 minutes read more >
☐ **Evaluating Websites**
 Approx. 10 minutes read more >

Plagiarism

☐ **Introduction to Plagiarism**
 Approx. 5 minutes read more >
☐ **Avoiding Plagiarism**
 Approx. 50 minutes read more >

Library Tour

☐ **Tour of the Library (Hatcher / Shapiro)**
 Approx. 15 minutes read more >

RefWorks

☐ **RefWorks Basics**
 Approx. 20 minutes read more >
☐ **RefWorks Advanced**
 Approx. 50 minutes read more >
☐ **RefWorks Specialized**
 Approx. 110 minutes read more >

Keeping Current with Research

☐ **Keeping Current with Research Basics**
 Approx. 10 minutes read more >
☐ **Keeping Current with Research Interm**
 Approx. 20 minutes read more >
☐ **Keeping Current with Research Advanced**
 Approx. 40 minutes read more >

Citations

☐ **Citation Searching Basics**
 Approx. 10 minutes read more >
☐ **Citation Searching Advanced**
 Approx. 40 minutes read more >
☐ **Citation Styles**
 Approx. 20 minutes read more >

Other Comments, Questions or Requests:

[Continue] [Reset]

About Library Instruction | **Individual Session Signup** | Request a Class/Group Session

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Test Description & Methodology

Test Description
Participants were asked to:
• From the Library Gateway, find the instruction form;
• Pick an appropriate set of topics for a first writing assignment for that faculty member's freshman class;
• Tailor that session to a specific time constraint; and
• Submit the request.

Although the library will be launching a new web interface in August, we decided to run the test on the current web site because the new interface was not yet completely implemented and was not linked from the new site sufficiently to provide helpful information. The tool itself functions identically on both the current and new sites, so questions specific to the form are actionable in either case.

Methodology
• Test method: Formal Usability Test
• Number of participants: 5 – 1 faculty lecturer, 4 Graduate Student Instructors
• Method(s) of participant recruitment: solicited through email to departments and to personal contacts of the task force's members. Participants were offered $10 in "Blue Bucks" as an incentive.
• Participants signed a consent form before the test began.
• Two members of the Usability Task Force conducted each test; one interacted with the test participant, the other took notes. (The complete test is available in the appendix.)

Results

Pre-Test Questions

Question 1: Experience requesting library instruction
• Three out of five participants had previously requested a session.

Questions 2 and 3: Amount of information needed at time of request
• All of the participants who had previously requested a session felt they had a "general idea" of what they would like covered in a session
• Four of five participants would like to view a list of topics that can be covered in the session; one participant said that it would depend on how open-ended the topics were. This participant expressed concern that very specific topics might discourage requests from instructors teaching "outside-the-box" research classes.

Tasks

Task 1: Finding the Instruction Request Form
• Three of five participants navigated to the form by looking under Library Services on the gateway page, selecting Workshops & Tutorials, and then clicking Customize a session for your class.
• Two of five participants made their way to the form through the link underneath Information For...Faculty & Staff. Once on this page, participants clicked on Request a library instruction session for your students.
• No one attempted to use the search box to find the form.

- One participant wondered why the service was not listed on the library gateway page.

Task 2: Understanding form terminology – "Read More" and "Expand/Collapse"
- All of the participants quickly found the "Read More" links under each concept title.
- No one clicked on the "Expand/Collapse all lesson descriptions" link; the one participant who noted the Expand/Collapse feature quickly disregarded it because they were unclear what it would do.
- One participant discussed going back to the previous page and looking for an email address of a librarian to ask more specific questions.

Task 3A - 3C: Popular Combos
- The one participant who indicated they might use a preset "Combo" thought the Introductory Combo might be appropriate if they could customize it to include plagiarism. But they were confused at this point as to where the instruction would be held- in their classroom by a librarian or would it be online?
- The other participants did not note the combos.
- The participant who picked a combo said that they had used the combo previously when requesting a session, but that they had decided to call and talk to someone in person the second time because they wanted to customize the session even more.
- One participant felt that the "Read More" distracted them from seeing the combos, and another wanted to customize the session even further and felt the combos were too rigid. The term "Introductory" was unclear and they weren't sure if this would be appropriate for a research paper, so they weren't sure which combo would be most appropriate for their needs. The desire to customize was expressed by all of the participants.

Task 4: Time estimation and course customization
- Four out of five participants quickly picked up on the time tally on the right hand side of the screen. One participant wondered if the Intro/Conclusion was really mandatory, but all of them easily customized the time to fit the task.

Task 5: Requesting specific databases
- All of the participants easily found the box to request a specific database. Participants suggested that the page could include a list of databases, a link to Search Tools, or a drop-down menu to select from because there are so many possibilities.

Task 6: Submitting a request
- One participant was confused by the fact that there were two comment fields – one on each page of the form.
- One participant said they might not be sure about the date and times – which are required fields – at the time of request.
- The Course Number field caused confusion as several participants attempted to enter letters to denote the department, but the field would only accept numbers.
- One participant wanted to return to the previous page to adjust something and when they returned the contact information form was blank and they had to re-enter in their information.

Post-Test Questions

Question 1: Are any parts of this interface unclear?
- One participant felt that the form showed them various instruction options that they were unaware of, but finding the form serendipitously – learning it exists – was the biggest obstacle.
- When filling out the final contact form, one participant was not sure if they should put their own name or their instructor's.

- One participant also liked that "Read More" opened within the page, rather than opening up another window.
- One participant noted that they would never have noticed the "Combos" without being alerted to them.
- One participant felt that the offerings should be organized by duration from shortest to longest – such as appetizers and main courses on a menu – within each topic category.

Question 2: Do the terms make sense?
- All of the participants felt that terms were clear, but one participant noted that "A La Carte" could be confusing. This would be particularly confusing if the user had not taken note of the "Combos".

Question 3: Does this menu provide too much, too little, or just the right amount of information to help you select instruction appropriate to your class?
- All of the participants felt that enough information was provided by the menu. One participant did feel that they might have specific questions that could only be answered by a person, but noted the comments section would provide an outlet for those concerns.

Question 4: Where would you expect these instruction sessions to be held?
- All of the participants who had previously requested instruction assumed the session would be held in the library. One participant who had not previously requested instruction assumed it would be held at the library.

Question 5: Is there any way this tool could be improved?
- Allow users to request a specific instructor.
- Provide biographies and information about the instructors.
- Provide better explanations about the combos. What are they and why/when should I choose one of them?
- Point users to the time estimation in the instructions at the top of the course customization screen.
- Add a drop-down menu of databases or a link to Search Tools.

Accessibility Review
The Library Instruction site was reviewed for its accessibility to users with diverse needs. We looked at two areas, as outlined below. Our brief review found several opportunities for improvements.

Hidden Content
- Hidden content via the "Read More" link seems to be adequately available to screen readers but wouldn't work for users with JavaScript disabled. Alternative CSS-based techniques are available that offer the same functionality and would work for more users.

Basic Web Standards
- Some of the form elements have orphaned or missing form labels which could cause some problems for screen reader users.
- Headings are not used properly, which could inhibit use for screen reader users.

Recommendations

Course Customization Page
Major recommendations for the course customization page are depicted in the image below. A complete list of recommendations appears below the image. Refer to item numbers for full descriptions of the recommendations depicted in the image.
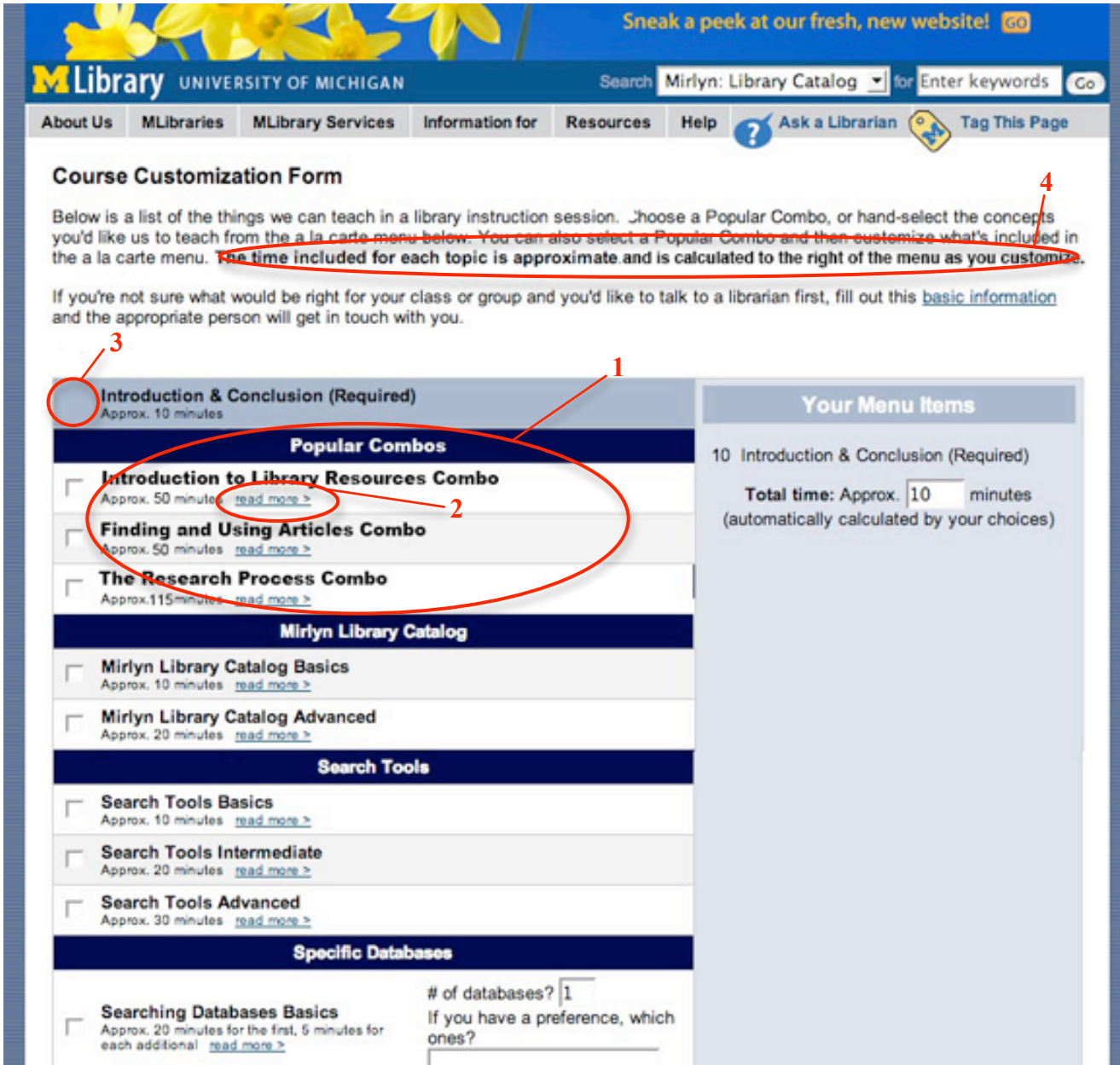
1. Add Popular Combos to the table of menu items.
   - Three of five participants did not notice the popular combos. After being alerted to the popular combos, one participant explicitly noted that they should be incorporated into the same table as the other menu items. Since the combos are similar in nature and function to the other menu items, this design would make sense and help prevent users from overlooking the combos. Alternatively, these items could be listed in a separate table but with the same style or included in the same table but with different background colors to set them apart.

2. Create Read More links for the Popular Combos. Describe when and for whom the combos are appropriate.

3. Eliminate the check box for Introduction & Conclusion since the section is required.

4. Use consistent terminology throughout the menu.
   - While participants noted no confusion with page terminology, the task force noticed inconsistencies. It is recommended that only one of the following terms should be used: concepts, topics, or lessons. Similarly, both pages of the form should be titled consistently.

5. In the Specific Databases menu items, set the database preference fields to auto-complete, similar to this example from Search Tools:
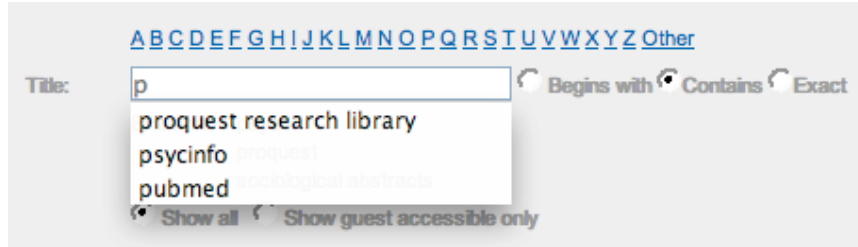
6. Create separate menu section headings for "Citation Searching" and "Citing Sources."
   - One participant noted that Citation Styles differed conceptually from other items under the Citation Searching heading. Clustering the Citation Styles menu item with RefWorks menu items under this new heading would create conceptually consistent categories.
   - One participant also noted that the Citation Searching menu items were not listed in increasing order in terms of the time required, as were items in all other categories. Moving Citation Styles to the top of a new "Citing Sources" category would allow all items to be listed in increasing order by length of time required.

7. Provide a link to Search Tools in the Specific Databases menu section.

8. Link to library instructional staff profiles at the top of the course customization page to provide users with information on who provides the instruction.

9. Add a note in the course customization page instructions, alerting users to the time calculation to the right of the menu.

Contact Information Page

1. Summarize selections from the course customization page at the top of the contact information page.
   - Allow users to review their course customization selections by adding a summary of selections – similar to a list of items in a virtual shopping cart – to the top of the subsequent page.

2. Eliminate the Instructor's Name and Email fields and add a field – "Your Role (e.g. Course Instructor, Course GSI)" – beneath "Contact Email."
   - The Instructor Name and Email fields caused confusion for all participants who were GSIs. Elimination of the fields would reduce confusion while allowing users to enter all necessary information.

3. Change the course number field to allow letters.

- Currently, the course number field allows no characters other than numbers, which may present problems for users whose courses include letters, e.g. 111a.

4. Carry text over from the comments field on the course customization page to the comments field on the contact information page.
   - This addition will allow users to review and change any notes they entered during the first stage of the request process.

General

1. Use consistent design and color scheme on both the course customization and contact information pages.

2. Clarify in the first follow-up email where the instruction session is to take place.

3. Edit the code to improve accessibility.

Lessons Learned

What Went Well
- The test participants seemed to be involved and dedicated to making the most of the test time and provided good feedback.

What Didn't Go Well
- Recruiting test participants -- especially at the end of the term during finals and graduation – presented a challenge. We eventually built up a fair number of participants but along the way, we had to deal with cancellations and no-shows.

If we were to run test again, what would we do differently?
- It would be helpful to conduct testing with faculty and GSIs at a time of year when they are more likely to be available.

Possible effect of test problems on findings?
- No great effect on the overall findings.

Appendix: User Test Script

Pre-test procedure

The University Library offers instruction on using library resources and conducting research on request of faculty for individual courses. These instruction sessions may be requested through a web site.

The purpose of this test is to evaluate the process through which faculty request a library instruction session. During the test, we will ask you questions and ask you to perform certain tasks. We are not evaluating you in any way. We want to understand how we can improve this online request form. Your responses will remain completely anonymous.

We need you to sign a consent form for our Institutional Review Board records.

Do you have any questions before we begin?

Begin Test

Have the participant complete the questionnaire.

Start the user at the current web site: http://www.lib.umich.edu/

Task 1:
Tell the user, "You would like to show your students to learn how to use the library and its resources. Where would you go on the library web site to request such a session? Please 'think out loud' as you go."

Record where users navigate and which search terms are used, if any. Give a hint if the user can't find it.

Task 2:
Provide a brief description/intro to the form at this point and also explain what we mean by "lesson titles" or list an example.

Moderator: Get the user to http://www.lib.umich.edu/instruct/menu.php and ask them to read the instructions.

Tell the user, "You're not sure what the concept titles (for example, "Introduction & Conclusion") mean. How would you find more information about the concepts? Please continue to 'think out loud' as you go."

Task 3A:
Tell the user, "Your freshman class will be writing its first research paper. You would like to prepare them with some basic instruction about using library resources. Using this form, how would you request what you want?"

Task 3B:
If the user picks a combo, ask why.

Task 3C:
If the user doesn't pick a combo, ask if they noticed the "Introduction to Library Resources" combo; if they did, why didn't they select it?

Task 4:
Moderator: If user does not select the "Introduction to Library Resources" combo, ask the user to select it.

Tell the user, "You only want to devote no more than 40 minutes to instruction in this particular class session. Tailor your selections to the time you have set aside for this purpose."

Task 5:
Tell the user, "You want your students to learn a database appropriate to your class. Please request that particular database."

Task 6:
Tell the user, "Now, please submit your request."

General Questions
1.   Are any parts of this interface unclear?
2.   Do the terms make sense?
3.   Does this menu provide too much, too little, or just the right amount of information to help you select instruction appropriate to your class? Follow up if too much or too little -- what should be changed?
4.   Where would you expect these instruction sessions to be held?
5.   Is there any way this tool could be improved?