<div align="center">**User Experience Advisory Group Agenda**
December 5, 2019
9:30 a.m. – 12:00 p.m.</div>

Location: CCS / 3355 N. Arlington Heights Road /Arlington Heights, IL 60004-7706

Attended by: M. Bero (Lincolnwood), M. Beach (Highland Park), J. Katsion (Fox River Valley), J. Lavalie (Des Plaines), S. Quish (Winnetka), M. Russell (Lake Forest), E. Steffensen (Huntley), K. Weiss (CCS), D. Wischmeyer (CCS)

User experience Advisory Group members scheduled a supplemental meeting for Wednesday January 15, 2020 to discuss the Round 3 User Experience Report recommendations.

K. Weiss (CCS) presented the recommendations from usability testing on hold statuses, notifications, and PAC searching. K. Weiss explained that there are three types of recommendations:

- **Require** indicates a recommendation be adopted by all member libraries.
- **Suggest** indicates a recommendation as a best practice that member libraries may opt to adopt.
- **Explore** indicates a recommendation that may be possible in the future given further research and development.

A voice vote was taken for each recommendation.

Hold Statuses recommendations were presented, discussed, and voted on.

Recommendation: Rename Active "Not Ready" or "Requested" to indicate that the hold has been placed but is not yet available. Staff thought "Requested" was more positive than "Not Ready". Some staff thought that "Not Ready" was unclear. K. Weiss updated the recommendation to read: **Recommendation: Rename Active "Requested" to indicate that the hold has been placed but is not available.** The recommendation passed with 7 in favor and 0 against.

Recommendation: Rename Pending "Locating". The status of Located was correctly identified by over 70% of participants and is the next step in the holds process. Locating better describes what is happening to the library material. The recommendation passed with 7 in favor and 0 against.

Recommendation: Use Pause/Resume instead of Suspended to simplify language and avoid jargon. The recommendation passed with 7 in favor and 0 against.

Recommendation: Rename Expired "Unable to Fill" to follow the status of Unfillable which was correctly identified by over 70% of participants. Many participants indicated Expired and Unclaimed were the same status. K. Weiss (CCS) explained that patrons often thought "Expired" meant that they did not pick up their hold on time. E. Steffensen (Huntley) recommended "Unable to Fill – Expired" be used instead of "Unable to Fill". K. Weiss (CCS) said she would find out how many characters could be used in a hold status. The recommendation passed with 7 in favor and 0 against.

Recommendation: Allow patrons to switch hold pickup locations from PAC after a hold has been placed. D. Wischmeyer (CCS) explained that patrons would not be able to change the pickup location once an item was shipped or available for pickup. The recommendation passed with 7 in favor and 0 against.

Notifications recommendations were presented, discussed, and voted on.

Recommendation: Adopt the variant message text message notifications when library materials are automatically renewed. The variant text message begins with the word "some". K. Weiss (CCS) explained that the inclusion of the word "some" clarifies that not all materials are always renewed as part of an automatic renewal. The recommendation passed with 7 in favor and 0 against.

PAC searching recommendations were presented, discussed, and voted on.

Recommendation: Require addition of "Catalog Home" and "Library Home" buttons to the menu. Staff discussed whether this recommendation should be required or suggested. D. Wischmeyer (CCS) said that governing board pressed a desire to move towards standardization during the migration. K. Weiss (CCS) said that good design to improves patron experience. J. Lavalie (Des Plaines) disagreed with required standardization. The recommendation passed with 6 in favor and 1 against.
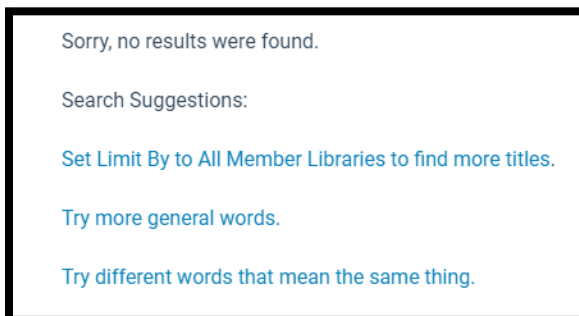
Recommendation: Require that Search By default to Any Field, Title, Author, Series, and Subject. Remove options for General, Notes, Publisher, Genre, ISBN, and ISSN. K. Weiss (CCS) explained that patrons thought "Search By" would include formats during usability testing. Patrons also questioned when they would search by notes, ISBN, or ISSN. E. Steffensen (Huntley) said that library staffers something search by notes. J. Lavalie (Des Plaines) explained that staff and patrons would still be able to search by notes using the advanced search options. K. Weiss (CCS) said that the users for the PAC are patrons not staff. Library staff are the users for Leap.

Two library staffers expressed concerns about whether patrons could access advanced search via the Communico app to access the "Search By" options being removed. These staff requested that this recommendation be set to "suggest" rather than "require". Communico is a library app used to overlay the catalog. Further investigation revealed that Communico does not accept Search By customization, so this recommendation does not impact available options. The recommendation passed with 5 in favor and 2 against.

Recommendation: Require that Limit By default to All Member Libraries.

K. Weiss (CCS) explained that many patrons begin their PAC searches with All Member Libraries despite most libraries practice of setting their local collection as the default. K. Weiss (CCS) mentioned that defaulting to All Member Libraries also keeps predictive search from generating options that produce zero hits. The recommendation failed with 2 in favor and 5 against. Four staff said they would endorse this recommendation if it was "suggested" rather than "required".

Recommendation: Require the following Search Tips are added when a search delivers no results. K. Weiss (CCS) explained that linked help would allow patrons to act on help tips. The recommendation passed with 6 in favor and 1 against.

> Sorry, no results were found.
>
> Search Suggestions:
>
> Set Limit By to All Member Libraries to find more titles.
>
> Try more general words.
>
> Try different words that mean the same thing.

Recommendation: Require limiting the summary statement to 115 characters. K. Weiss (CCS) explained multiplying the average number of words in the summary statement first sentence (23) and the average number of characters in an English language word (5) gives us 115 as an ideal character limit. M. Bero (Lincolnwood) suggested that we use 140 characters to include part of the second sentence. K. Weiss (CCS) said that this would take the summary to three lines. Staff suggested adopting 130 characters to keep the summary to two lines and include part of the second sentence. The recommendation was updated to: **Require limiting the summary statement to 130 characters.** The recommendation passed with 6 in favor and 1 against.

Recommendation: Require removal of the 856 field from brief display for serial records. K. Weiss (CCS) explained that the 856 field contains a link out to the publisher's website for print magazines. For example, in the brief display for the magazine, *Cosmopolitan* this link takes patrons to the magazine's website. The link was not used during usability testing and takes patrons out of the PAC. The recommendation passed with 6 in favor and 2 against. SCRAP will review the recommendation to see if there are any cataloging concerns.

Recommendation: Suggest that the library logo displayed in the PowerPAC link to the catalog home page. The recommendation passed with 7 in favor and 0 against.

Recommendation: Suggest that libraries add Book and Blu-Ray/DVD Material Types to the Limit By drop down. Staff discussed that there while Blu-Ray/DVD and Books are the most popular material types, they ought to be included at a minimum. The recommendation was updated to: **Suggest that libraries at minimum add Book and Blu-Ray/DVD Material Types to the Limit By drop down.** The recommendation passed with 7 in favor and 0 against.

Recommendation: Suggest that libraries adopt additional scss to emphasize the format and call number fields as well as the availability statement. K. Weiss (CCS) explained that patrons are primarily looking at title, format, call number and availability for information. Increasing the size of these fields will help patrons find valuable information. K. Weiss (CCS) demoed side-by-side comparisons on the training PAC with modifications against the current scss. Increasing the size of certain fields emphasizes the parts of the display that patrons need. M. Bero (Lincolnwood) suggested that the author field be made larger to match the title field. The recommendation passed with 7 in favor and 0 against.

Recommendation: Explore options to default display more results in the Hit List. M. Bero (Lincolnwood) cautioned against increasing the number or displayed results as this could impact load time. Staff suggested that we increase the number of results defaults to 20 and explore effects on load times. The recommendation passed with 7 in favor and 0 against.

Recommendation: Explore options to remove the More Info button as patrons access full display by clicking on the title. K. Weiss (CCS) explained that patrons are not using the Find It button to determine availability of library materials. In usability testing patrons self-reported usage shows one-third of patrons used the "Find It: button. However, actual behavior indicates the button is not used as widely to determine availability. The recommendation was updated: to: **Explore options to remove the More Info button as patrons access full display by clicking on the title, with additional usability testing to determine how patrons use.** The recommendation passed with 7 in favor and 0 against.

Recommendation: Explore design options for Find It, More Info, and Place Hold buttons. M. Beach (Highland Park) explained patrons frequently looked at the call number, but do not select the Find It button to determine if materials are checked out/available. Patrons then go to the shelf and cannot find the item. D. Wischmeyer (CCS) noted that the call number will still display even if all copies are checked out. K. Weiss (CCS) noted that round 3 testing, Northbrook patrons overwhelmingly use the Find It button, while Morton Grove and Crystal Lake patrons are split. Northbrook has the Find It button listed underneath the summary statement instead of to the right. Northbrook's Find It button is a different color, so it stands out. CCS will explore options for changing the color of the Find It button as well as the icon that appears on the button. The recommendation passed with 7 in favor and 0 against.

Explore redesigning format icons. K Weiss (CCS) explained that patrons primarily looked at the Format field in the hit list to determine type of material. When patrons looked at items out in round 3 usability testing, they had difficulty determining format based on the format icon alone. The recommendation passed with 7 in favor and 0 against.

Future usability projects were discussed.

K. Weiss (CCS) presented the following topics for future usability testing:

- Current practice has graphic novels that share the same title cataloged on single records as well as on multivolume records. CCS will perform testing with children and adults to determine if a single record or multivolume record layout is easiest for patrons to use to find, locate, and request materials.
- Many libraries use their PAC to promote library databases as well as other resources. Libraries also use the Feature It tool to promote record sets and databases within search results. CCS will measure the effectiveness of PAC promotional tools as well as usage of the PAC home screen buttons. J. Lavalie (Des Plaines) also asked that CCS measure whether open or closed dashboard are more effective.

The User Experience Advisory Group also asked that the following be considered for future usability testing:

- J. King (Niles-Maine) asked that CCS examine the default sort options for the hit list and potentially eliminate unnecessary sort options.
- CCS will determine the best display and design for the Find It, More Info, and Place Hold buttons.