

User Experience Report: Vega Discover

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Summary

Six patrons participated in a remote usability study from six member libraries: Algonquin, Cary, Des Plaines, Fox River Valley, Lake Villa, and Niles-Maine. Kathleen Weiss, UX Specialist collected responses with help from Gary M. Christopherson, Linda Conn, Jason Katsion, John Lavalie, Elizabeth Munoz, and Sarah Muskivitch. The study covered searching and account functionality using the Vega Discover library catalog.

CCS is participating in the Vega Partnership Program. This is an opportunity to codevelop a new library catalog built for library consortia called Vega Discover. This program offers libraries a simple way to try a pre-release version of Vega Discover and test drive new features. The feedback provided by CCS and library patrons will help Innovative identify and fix issues, and make the library catalog even better.

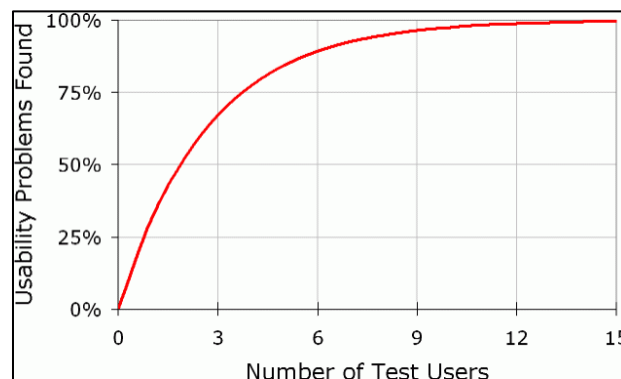
Research Method

Remote Usability Testing

Remote usability testing is conducted virtually using a videoconferencing software like Zoom. Users are given tasks to complete via chat and told to “think out loud.” A facilitator sends tasks over chat and assists the user as needed while a notetaker records user observations regarding usability. A debriefing session allows the facilitator and notetaker to record multiple instances of usability problems. The entire session last about an hour allowing for a 30 minutes of usability testing and 30 minutes for a debrief.

Participants

Six libraries signed up to participate in the Vega Partnership Program: Algonquin, Cary, Des Plaines, Fox River Valley, Lake Villa, and Niles-Maine. Each library recruited participants for remote usability testing using a participant screener. The screener was linked in the library catalog banner and email hold notices. Six distinct libraries allowed for a mix of six participants. Nielsen-Norman recommends usability testing five users to identify 80% of issues.⁽¹⁾



(1) Source: Nielsen Norman Group: <https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/>

Research Goals

Search Functionality research goals were developed using the Functional Requirements for Bibliographic Records (FRBR). FRBR is a conceptual model of the bibliographic universe created within the International Federation of Library Associations and Institutions (IFLA). User tasks are related to traditional objectives for library catalogs. FRBR addresses “user tasks” - things a user wants to do relative to the bibliographic universe such as find, identify, select, and obtain library materials. [2]

Account Functionality research goals are the tasks most often completed using the library catalog not related to searching.

The research goals for this study are listed below and grouped by Search Functionality and Account Functionality.

Search Functionality

1. See whether patrons can find (search for) library materials
2. See if patrons can select their desired format for library material
3. See if patrons can identify the availability of library material
4. See whether patrons can obtain library material by determining its location (shelf location or equivalent) in the library or placing a hold

Account Functionality:

5. Determine whether a patron can sign in/out of the catalog
6. Determine whether a patron can review their account settings and contact information
7. Determine whether a patron can place and manage (cancel, pause) holds
8. Determine whether a patron can determine an item due date
9. Determine whether a patron can renew items
10. Determine whether a patron can navigate to pay fines or fees

Success Rate

The user success rate represents the percentage of participants that were able to successfully complete the test task. Tasks with lower success rates indicate usability problems may exist. Success rates are useful for benchmarking but there is no accepted standard success rate demonstrating mastery of a task by users.

(2) Source: Library of Congress, International Federation of Library Associations and Institutions (IFLA): <https://www.loc.gov/catdir/cpsd/frbeng.pdf>

Search Functionality

Search Functionality Tasks	Participants	Yes	No	Partial	Success Rate
<i>First Task: Show me how you would find and obtain a title about a topic of your choosing.</i>					
Did the user successfully search for the title?	6	4	0	2	67%
Did the user successfully determine whether the title was available?	6	3	2	1	50%
Did the user successfully locate the title?	6	2	1	3	33%
Did the user successfully place the title on hold?	6	6	0	0	100%
<i>Second Task: You are staying in this weekend. Show me how you would find and obtain a movie or television show to watch.</i>					
Did the user successfully search for the title?	6	6	0	0	100%
Did the user successfully determine whether the title was available?	6	3	1	2	50%
Did the user successfully locate the title?	6	2	3	1	33%
Did the user successfully place the title on hold?	6	4	2	0	67%

Account Functionality

Account Functionality Tasks	Participants	Yes	No	Partial	Success Rate
Was the user successful at logging into their account?	6	5	0	1	83%
Did the user successfully review their account settings and contact information?	6	6	0	0	100%
Did the user successfully navigate to where they can manage their holds?	6	6	0	0	100%
Did the user successfully determine their book's due date?	6	6	0	0	100%
Did the user successfully renew their book?	6	6	0	0	100%
Did the user successfully navigate to where they might pay a fee?	6	6	0	0	100%

Lower Success Rates

Shelf Location and Call Number

Patrons were less successful at determining availability as well as finding the shelf location and call number. Patrons had to be prompted to look for availability, shelf location, and call number. Seeking out this information was not naturally a part of obtaining library materials from home using the library catalog. This behavior may be different when patrons are searching in-person at an OPAC in the library building where the physical location of library materials is more important.

Patrons rely on mental models of the library layout and place holds with little regard for availability, shelf location, and call number. Availability, shelf location, and call number are secondary to seeing the desired title in the catalog and placing a hold. This is supported patrons as they describe their information seeking process:

When a Fox River Valley patron was prompted to determine an item's location she said, "it would in Fiction under the author's last name." After her second search stated, "I typically place holds on the items I am looking for and then collect them from the holds shelf rather than looking for them by call number."

When a Cary Area patron searched for her desired title, she placed a hold rather than consulting availability and shelf location. For the second search, the patron said, "I do not care if the item is available to pick up today.... I just place a hold and wait until I receive the hold notification."

When a Lake Villa patron looked for his desired title, he did not utilize the shelf location until specifically asked to do so. He said he knew where the item would be located within the library. He was able to find the shelf location and call number using the catalog when asked specifically to do so. In his second search, the patron looked for "The Lorax" and upon seeing a large number of copies said, he would "just go to the children's section to get it."

When a Niles-Maine patron looked for her desired title, it was not available at the library, but she placed a hold. When prompted about the shelf location and call number, she remarked that "[I] can't locate it [the title] if it's not there."

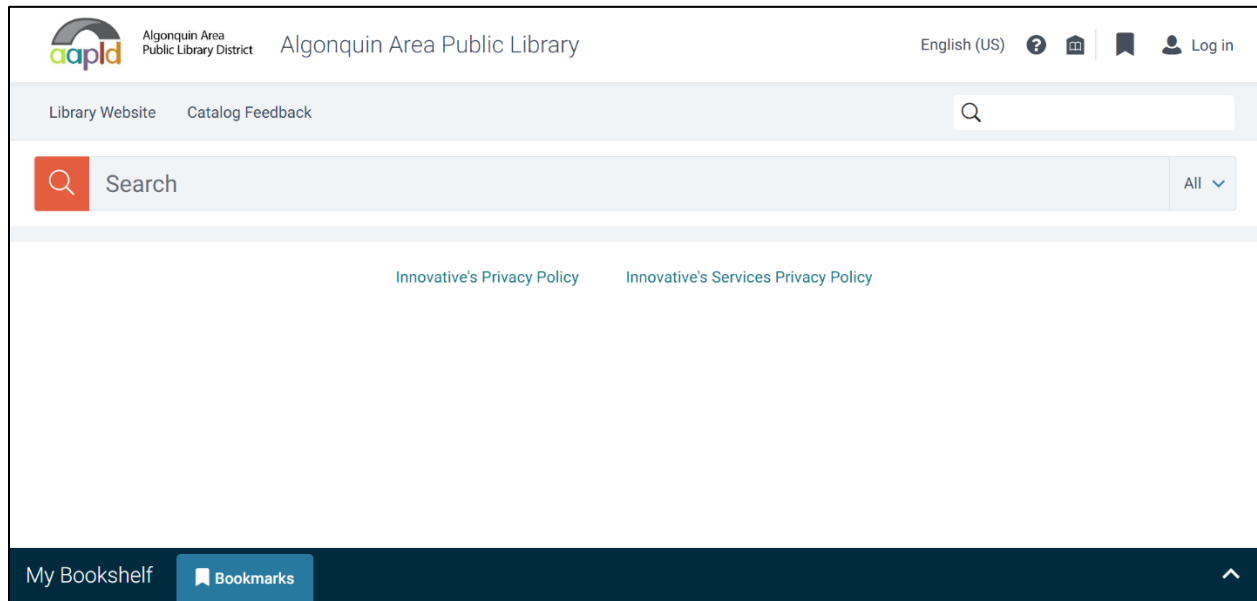
Placing Holds

Patrons also scored lower on placing holds in the second search task. Two patrons said that this was because of the way the second task was phrased. Users were tasked with obtaining a movie or television show to watch over the weekend. Two patrons said they would not bother placing a hold. Instead, the patrons said they would go directly to the library to get the item due to the perceived urgency of the task.

Vega Discover Interface

Vega Discover Home Page

The Vega Discover home page is the main page of the library catalog. It is used to search the library catalog.



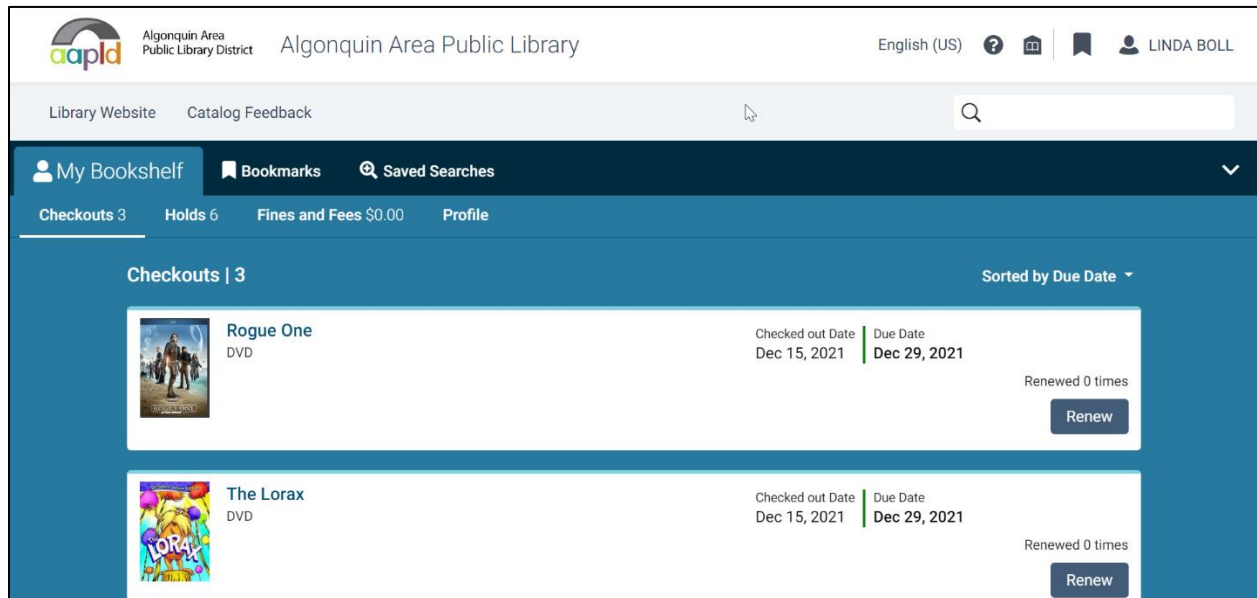
My Account Window

The My Account window lists summary information about a patron's checkouts, holds, fines, and fees. It also lists a patron's home library and account expiration date. A patron must sign in to use the My Account window.



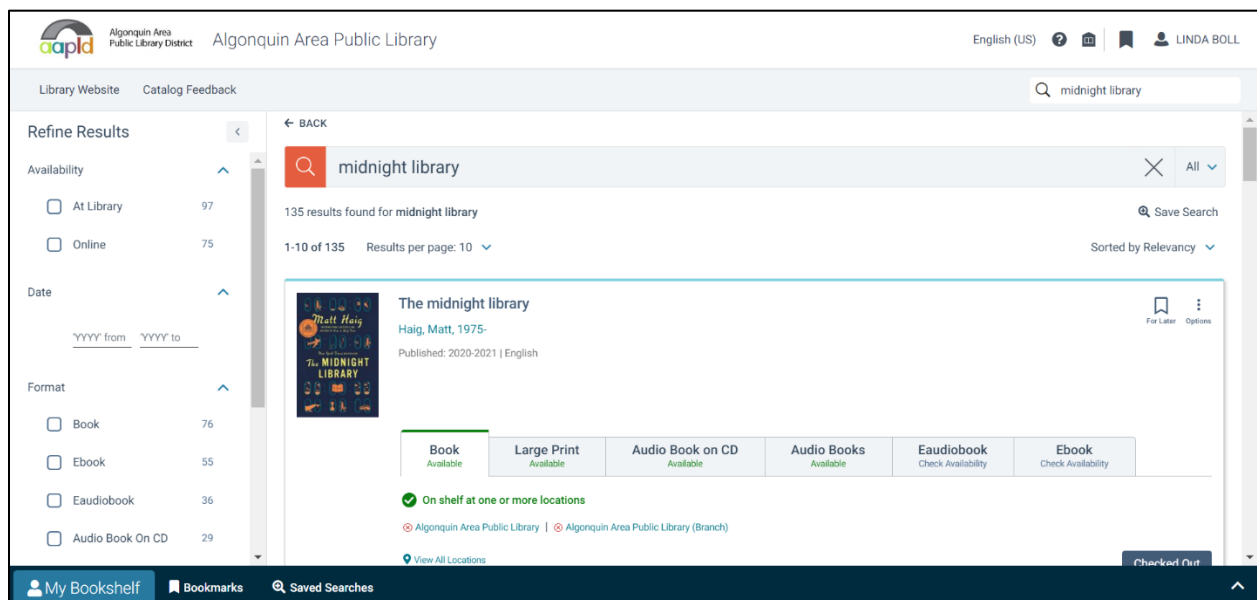
My Bookshelf

A patron can save search queries, resource records, person records, and concept records to My Bookshelf for later use. A patron can create and edit lists to organize their saved items. If a patron signs in, they can view their account information, saved lists, checkouts, holds, fines, and fees.



Search Results Page

The Search Results page displays resources that match a patron's search criteria. A patron can use the Search Results page to evaluate the relevance of resources for their needs. A patron may also refine search criteria using the filters in the left pane. Search results may be sorted by relevancy, date: oldest, and date: newest. A patron can search by All, Author, Concept, and Title.



Findings and Recommendations

Below are the findings and resulting recommendations from the study. All recommendations are prioritized as High, Medium, and Low.

- A **High** priority recommendation indicates essential functionality is failing or not present. These recommendations are hard blocks to adoption of Vega Discover by CCS.
- A **Medium** priority recommendation indicates some desired functionality is missing or a user interface change is desired. These recommendations should be developed and integrated into Vega Discover before full adoption of the product by CCS, but may arrive later in development.
- A **Low** priority recommendation is a desirable change to the Vega Discover functionality or user interface, but not essential to adoption of Vega Discover by CCS.

Recommendation #1: Clicking the library logo should reload the Vega Discover homepage.

Priority: Medium

All six patrons used the My Account window to access their checkouts, holds, fines and fees, and profile under My Bookshelf. Patrons attempted to leave My Bookshelf by clicking the library logo in the upper left corner. The page would not reload. Nothing would happen and users became very frustrated saying:

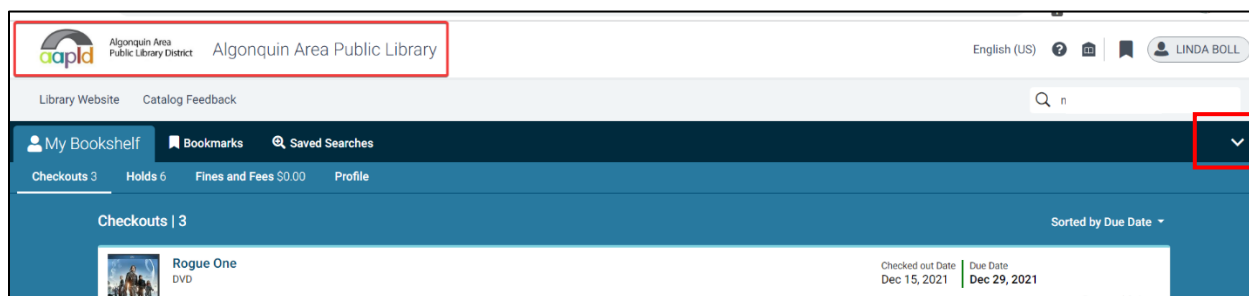
“Is something wrong with my internet? The page is not reloading.”

“This was frustrating, and I would expect the library logo to consistently refresh the design [the webpage].”

“Functionality to click on the logo to go to the home page should work everywhere. Consistency is important. I would spend more time searching than in my account [My Bookshelf] so getting back to search easily is important.”

Two patrons took notice of the arrow icon that minimizes My Bookshelf. For all other users, the facilitator had to intervene and point out the carrot that minimizes My Bookshelf.

Clicking the library logo in the upper left corner ought to reload the Vega Discover home page in all circumstances, even when My Bookshelf is open. Currently, patrons must select the down arrow icon in the upper-right section of the page to minimize My Bookshelf before they can reload the Vega Discover home screen.

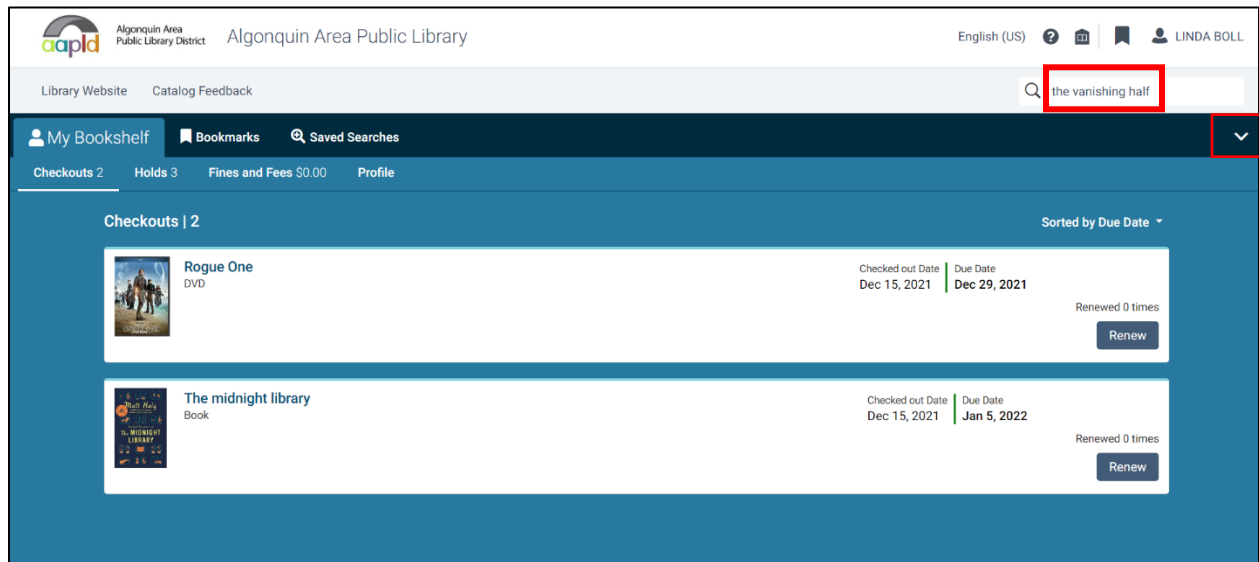


The library logo does not refresh the page when My Bookshelf is open. A user must click the arrow before reloading the catalog.

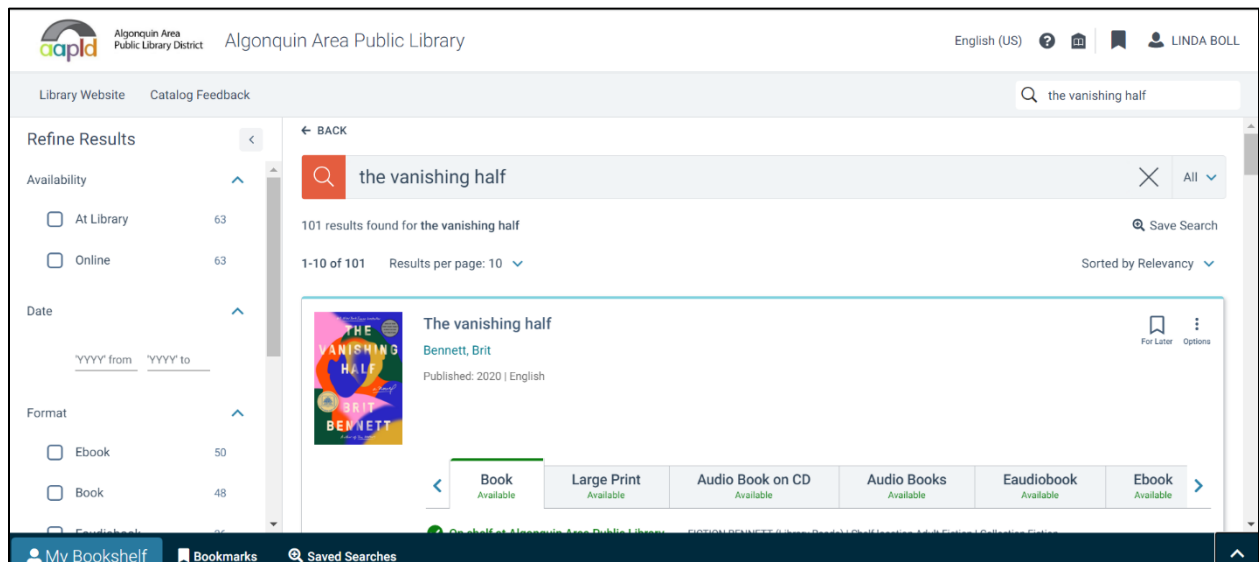
Recommendation #2: Initiating a search via the secondary search box ought to minimize My Bookshelf.

Priority: Medium

When a patron enters a search query into the secondary search box while My Bookshelf is open the search results are not visible until My Bookshelf is minimized. This causes confusion and frustration as users are uncertain whether the secondary search box is working. Initiating a search via the secondary search box ought to minimize my Bookshelf so the patron can view search results.



A search for "the vanishing half" has been entered into the secondary search box, but the search results are not visible.



A user can view the search results only after minimizing My Bookshelf.

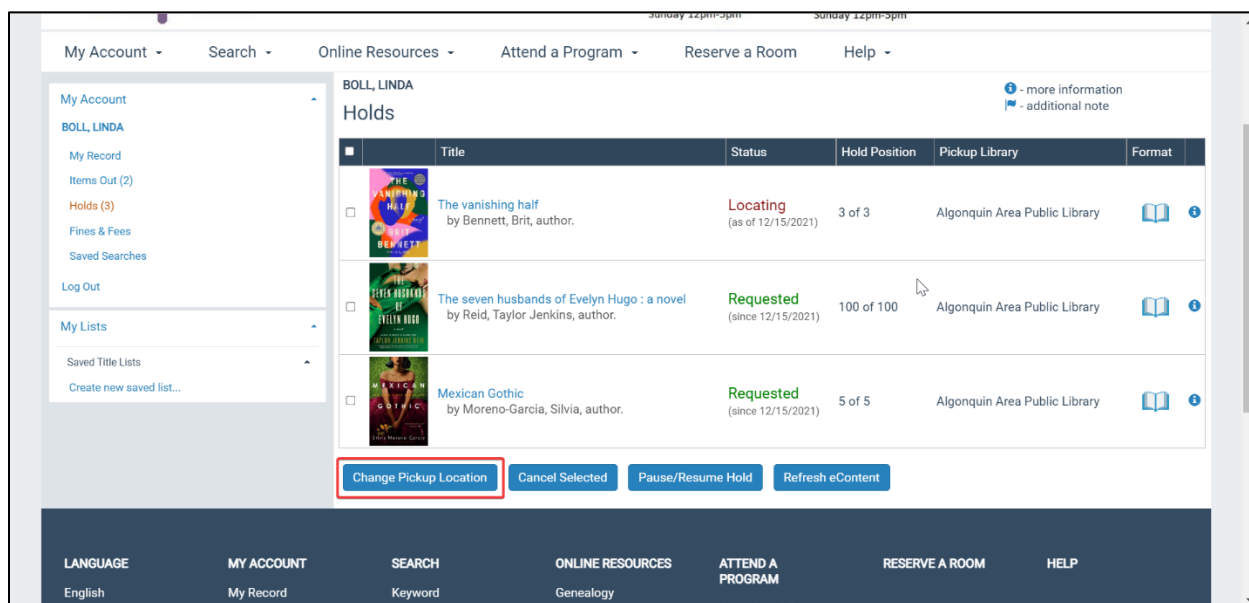
Recommendation #3: Add Change Pickup Location functionality to Holds page.

Priority: Medium

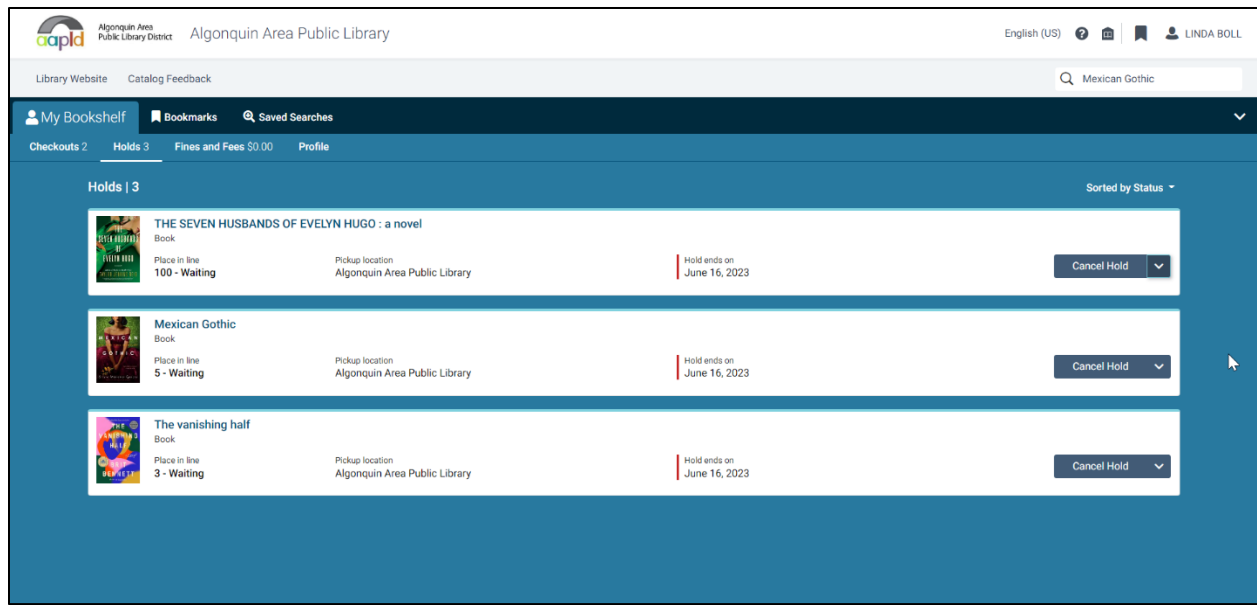
Patrons value the ability to change their hold pickup location. Two patrons commented that this was feature was missing. Notably both comments came from patrons with home libraries featuring multiple branches. Both users stated that the changing hold pickup location to library branch closest to their home was important. Patrons from libraries without multiple branches (Cary Area, Des Plaines, Lake Villa, and Niles-Maine) did not mention this missing features.

When asked what features that might be missing from Vega a Fox River Valley patron said, “In the current library catalog, I can change pickup location, but I don’t see that option here [in Vega Discover]. I would have to cancel and resubmit my hold.”

When visiting the Holds page for the first time an Algonquin patron said, “There is no hold pickup location option.”



The current library catalog, PowerPAC features a prominent Change Pickup Location button.



Vega Discover does not feature an option to change pickup location.

Recommendation #4: The Vega Discover home page ought to feature curated collections (such as showcases, record sets, carousels) to increase browsability.

Priority: Medium

Patrons noted a lack of options to encourage browsing on the Vega Discover homepage. Patrons explained that they value options to browse, enjoy curated content – especially staff picks and new library materials. They want cover art featured prominently as part of showcases or carousels.

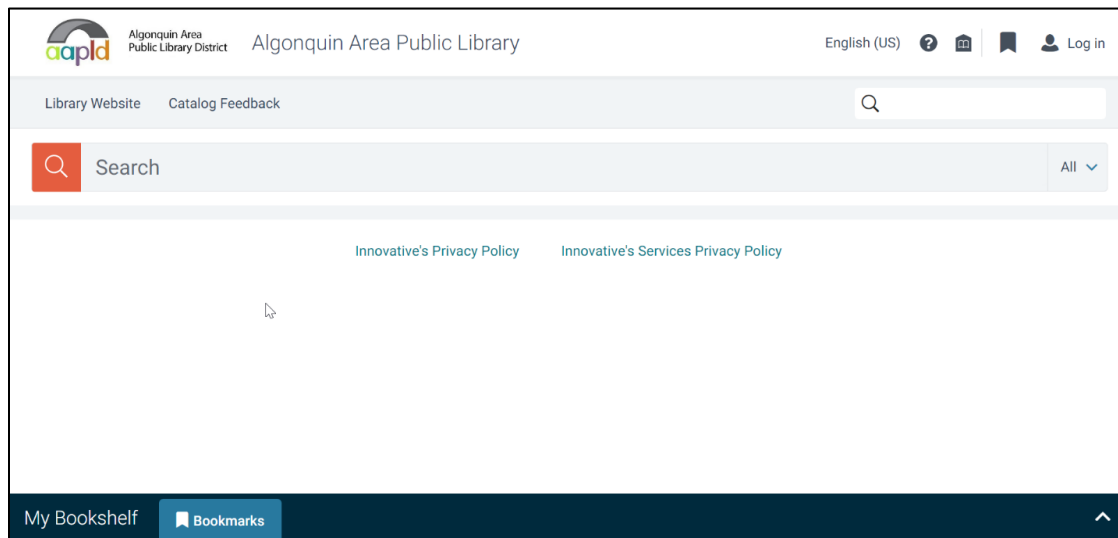
A Niles-Maine patron expected that a new catalog should include enhanced browsing capabilities and title curation. The patron mentioned that she likes the way Amazon and Netflix curate movies. She can easily find topics like “Dramas,” “Comedy,” and “Family titles”. She would like to see something similar for book titles too. As a biography reader she wishes she could see all the new biographies in once place and then with subdivided categories.

A Fox River Valley patron said, “The curation and browsing capabilities are lacking.” She also commented on the “...the absence of the ‘preview of books’ [also known as content carousels in PowerPAC].” She noted the library branding and links to the library website, but wanted “visuals to make it more inviting.” When asked what she would change about Vega Discover she said, “I think right away, the visuals. It’s kind of boring. I know books are fun and exciting. I love looking at all the covers and things like that to get me excited about the book and it’s [Vega Discover] just plain.”

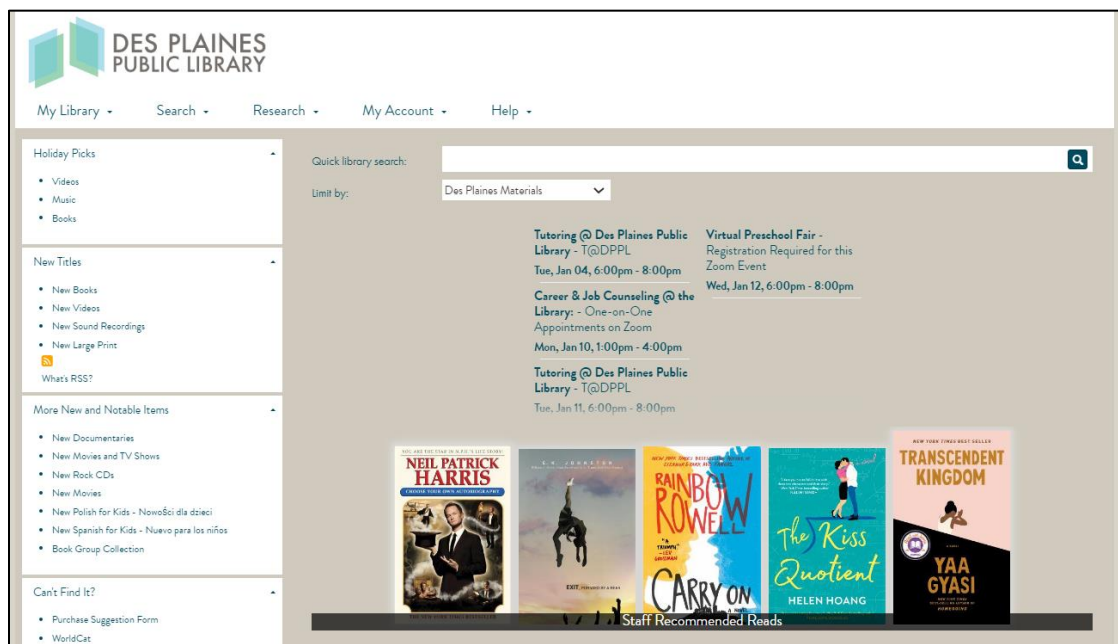
At first, the Lake Villa patron said that the blank search screen was “very simple, not overwhelming, and exactly what he wanted.” He specifically said as someone on the autism spectrum, it is helpful to have a cleaner interface. At the close of his usability test session, he

said, “[I] do like seeing staff recommendation [and] what’s new on the home page. I prefer to see a one sentence blurb about why it’s [the title] is worth reading.”

A Des Plaines patron said, “I don’t know if this is just because this [Vega Discover] is a test environment but it’s all blank. I do use the Recommended Reads [a PowerPAC staff curated carousel] because I don’t know where to start and that opens up a rabbit hole of possibilities...it’s helpful. Having something there to start would be a good thing.”



The Vega Discover home page does not feature any options to browse collections via carousels or showcases.



The current library catalog, PowerPAC for the Des Plaines Public Library features a carousel with staff recommendations for browsing.

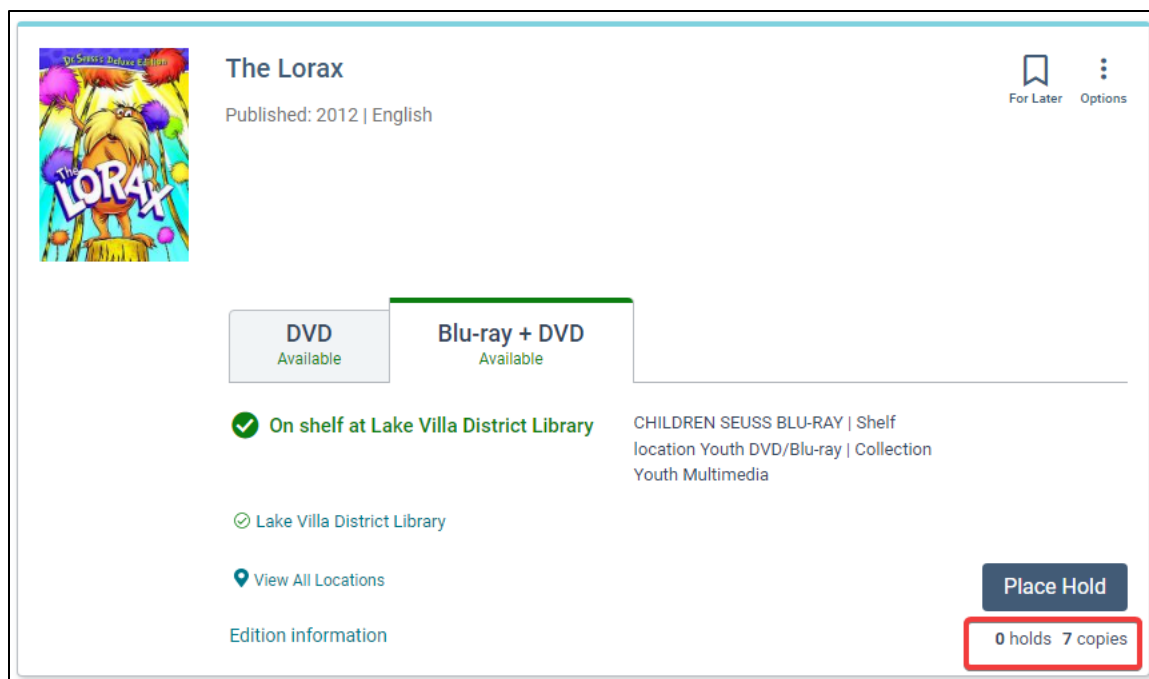
Recommendation #5: For number of copies listed on resource card, include local availability and system-wide availability.

Priority: Medium

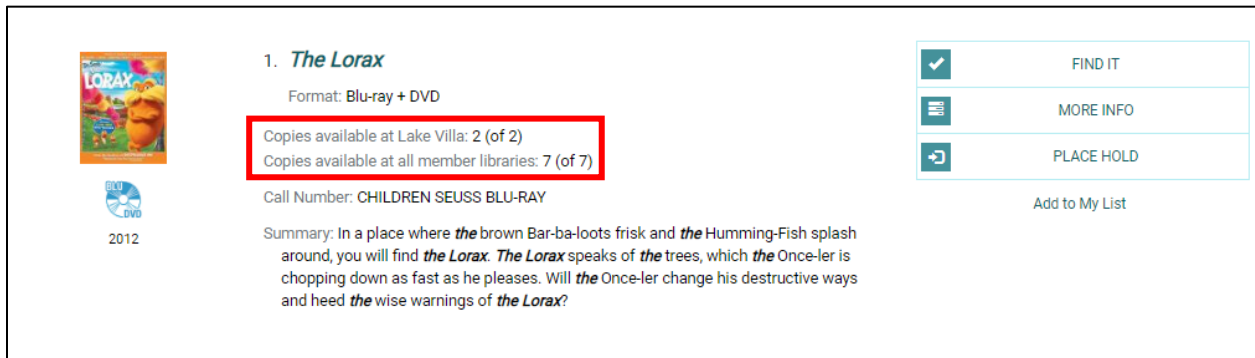
A Lake Villa patron searched for the film, *The Lorax* and noted that seven copies were available. He said that if seven copies were available at the library, he would not bother placing a hold when he could run over and grab it. He said, “there’s not going to be a rush on seven copies of a movie from 2012”. However, there are seven copies system wide (at all CCS libraries) and two copies at the Lake Villa Library of this movie, so the language used here was misleading.

A Niles-Maine patron noted, “On the current catalog [PowerPAC], I can see how many copies are available and if we have it at NMDL [Niles-Maine District Library].”

While the number of copies format on the resource cards works well for a stand-alone or branch library system, it may be beneficial to list both the local and member library availability on the resource card. See a mockup of what this change could look like below.



Vega Discover does not indicate whether this availability statement is at the system level or local level.



1. **The Lorax**

Format: Blu-ray + DVD

Copies available at Lake Villa: 2 (of 2)

Copies available at all member libraries: 7 (of 7)

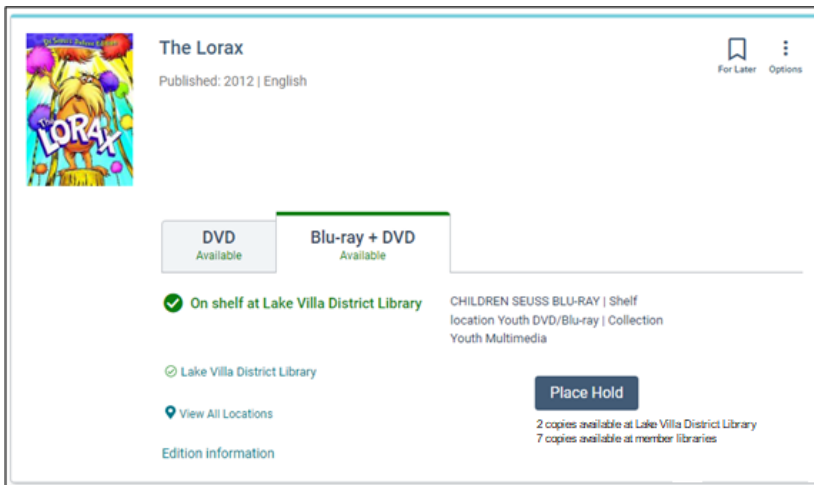
Call Number: CHILDREN SEUSS BLU-RAY

Summary: In a place where **the** brown Bar-ba-loots frisk and **the** Humming-Fish splash around, you will find **the Lorax**. **The Lorax** speaks of **the** trees, which **the** Once-ler is chopping down as fast as he pleases. Will **the** Once-ler change his destructive ways and heed **the** wise warnings of **the Lorax**?

2012

Find It, More Info, Place Hold, Add to My List

The current library catalog, PowerPAC clearly indicates the local and system level availability.



The Lorax

Published: 2012 | English

DVD Available

Blu-ray + DVD Available

On shelf at Lake Villa District Library

Lake Villa District Library

View All Locations

Place Hold

2 copies available at Lake Villa District Library
7 copies available at member libraries

A mockup of a Vega Discover resource card with an availability statement for system level and local level.

Recommendation #6: Add option to suppress or hide materials, agents, and concepts from Content and Persons filters.

Priority: Medium

A Niles-Maine patron noted that the Persons filter contains options like Hoopla Digital, Overdrive, and Cloud Library:

“Persons [the filter] does not make sense. Hoopla Digital is not a person. When I click the Persons filter, I expect to see a list of people not formats or providers.”

Notably Innovative already has an option to suppress materials, agents, and concept to be hidden from Showcases. Adding the same functionality to suppress materials, agents, and concepts from filters would allow the Persons filter to be more useful and less frustrating for patrons.

Niles-Maine District Library

English (US) ? [Icons] Log in

Library Website Catalog Feedback

Search Miss Dior : a story of courage and

Refine Results

Persons

- ☐ Hoopla Digital 36
- ☐ Baker & Taylor Axi... 21
- ☐ Common Core, Inc. 21
- ☐ CloudLibrary 19
- ☐ Jossey-Bass Inc 18

All persons (2158)

Miss Dior : a story of courage and couture

989 results found for Miss Dior : a story of courage and couture

1-10 of 989 Results per page: 10 Sorted by Relevancy

Miss Dior : a story of courage and couture

Picardie, Justine

Published: 2021 | English

My Bookshelf Bookmarks

The Persons filter in Vega Discover lists many eBook providers as "Persons."

Settings

Home page

Localization settings

Configuration

Manage translations

Docking framework

MARC extraction

INN-Reach system

Link resolver

Third-party connections

Material Type Settings

Facet administration

Showcases

Showcase display

Suppressed Items

Suppressed Items | 5

Suppressed materials, agents, and concepts are hidden from all showcases

URL of item to hide

ADD

Material, agent, concept to hide	ID
Baker & Taylor Axis 360	
cloudLibrary	
hoopla digital	
Overdrive Inc	
Scholastic Inc	

Item Status Mapping

Innovative already offers the option to suppress materials, agents, and concepts from showcases. This type of functionality would be useful if applied to filters too.

Recommendation #7

Set the session timeout to 30 minutes for catalog sessions conducted from home. OPAC stations in the library may be set to a shorter session timeout to protect patron data and privacy given the public environment.

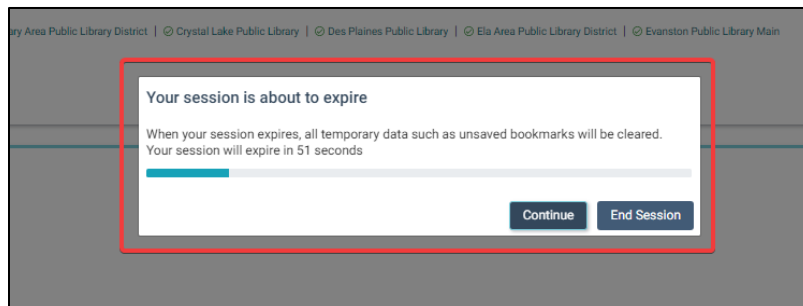
Priority: Low

During usability testing two patrons grew frustrated when the catalog attempted to timeout their sessions.

Open Web Application Security Project (OWASP) recommends application builders to implement short idle time outs (2-5 minutes) for applications that handle high-risk data, like financial information. It considers that longer idle time outs (15-30 minutes) are acceptable for low-risk applications.⁽³⁾

The National Institute of Standards and Technology, U.S. Department of Commerce (NIST) recommends that application builders make their users re-authenticate every 12 hours and terminate sessions after 30 minutes of inactivity.⁽⁴⁾

Balancing security and user experience is key to retaining patrons. A tedious authentication process can exhaust library patrons and discourage them from using the library catalog.



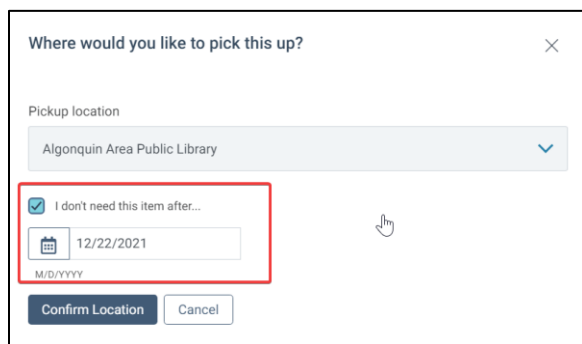
A session timeout warning appears in Vega Discover with less than 30 minutes of inactivity.

- (2) Source: Open Web Application Security Project, https://owasp.org/www-community/Session_Timeout
- (3) Source: The National Institute of Standards and Technology, U.S. Department of Commerce (NIST), NIST Special Publication 800-63B, Digital Identity Guidelines: <https://pages.nist.gov/800-63-3/sp800-63b.html>

Recommendation #8: Rephrase the “I don't need this item after...” box to clarify its purpose to patrons.

Priority: Low

When placing holds in Vega Discover a patron can optionally select a box that says, “I don't need this item after...” and enter the date that they no longer need the title. If the hold is not filled by the date they enter, the system removes the hold request.



After placing a hold and selecting a pickup location, patrons can optionally enter the date that they no longer need the title.

Patrons were confused about the option and when to use it:

On the first try of placing a hold an Algonquin patron remarked he did not know what the “I don't need this item after...” box did. When asked directly he said he could understand the reason it was there, but he did not know when he might use it unless he was going on vacation or too many books were coming in at once.

While placing a hold, a Fox River Valley patron said, “I wouldn't use this because I would want the item right away.” She guessed that the box would allow others to jump in front of her in the line if they needed the title sooner. She said, “If someone else needs the book more urgently, they can have it first [using this option].”

Three other patrons did not know what the box “I don't need this item after....” option would be used for.

Rephrasing this option to say “[] Cancel my hold if it is not filled by:” would clarify its purpose to patrons. Below is a mockup of what that would look like in Vega Discover.



A mockup featuring revised language that says "Cancel my hold if it is not filled:" instead of "I don't need this item after..."

User Interface Feedback

Dynamic Filters

Four of the six users noted the lack of dynamic filters when working with search results. All four users noticed the “Apply” button that displays when filters are selected, but this was not immediate.

Comments included:

A Des Plaines patron commented, “I would expect filters to be dynamic like you see on sites like Amazon. That’s a little bit weird.”

An Algonquin patron noted, “I expected dynamic filtering like in the current catalog [PowerPAC].”

A Lake Villa patron said, “Having to click on it [the filter] and then apply is weird. This does not match other sites where filters are applied automatically.”

The lack of dynamic filters creates an interruption in the design pattern patrons are used to using. However, in usability testing each patron was able to learn the new design pattern after performing two search tasks. Lack of dynamic searching will challenge patrons to learn a new design pattern, but will also present an opportunity to apply more than filter at a time.

Location Drawer & Resource Page

The Location drawer lists the shelf location, call number, availability, and descriptive characteristics of titles at each library. The Resource page provides a description of a resource including shelf location, call number, availability, and descriptive characters of a title on this page. The Resource page is the equivalent of the Full Display page in the current catalog, PowerPAC.

Two patrons interacted with the Location drawer and Resource page as part of their natural search behavior. In all other circumstances, patrons only interacted with the Location drawer and Resource page when explicitly prompted to attempt to locate the physical location of a title in the library.

The Location drawer and Resource page are helpful tools for identifying shelf location, call number, availability, and descriptive characters. However, any information that is essential for a patron to find, identify, select, and obtain library materials should be included in the Resource card or it is at risk of being overlooked.

Patron	Used Location drawer	Used Resource page
Algonquin	Yes	Yes
Cary	Yes	Yes
Des Plaines	No	No
Fox River Valley	No	Yes
Lake Villa	No	No
Niles-Maine	Yes	No

Patron Feedback

Patrons were asked to share open ended feedback regarding their first impression, desired features, overall rating, and how Vega Discover compared with PowerPAC.

First Impressions

All six patrons immediately noticed the large search bar and its prominent location. “Plain” and “simple” were the most common words used to describe the Vega Discover home page. The sentiment was split between three patrons praising the simple design and three patrons desiring to see some more inviting visuals.

Combining the plain and simple Vega Discover home page with one or two showcases to support browsing and curated titles would be an ideal arrangement.

Feedback from each patron is below regarding their first impression of the Vega Discover home page:

A Fox River Valley patron said, “I don't see much...just a big search bar. As far as the visual appeal, that's all I see. Visuals are missing. It would be nice to have some previews of books or like a welcome. I see the library logo at the top and webpage linked. It would be nice have some more colors or something inviting.”

An Algonquin patron said, “It's fine. I don't know how it's going work out. It's easy enough to read. It's fine. It's good. It different. It's fine. There's not as many words. I notice some stuff down at the bottom.

A Cary patron said, “It looks fine to me. It's plain and simple. The search is the most prominent feature.”

A Lake Villa patron said, “It's very simple. I like how simple it is. Being on the autism spectrum if there's too much here it can be very overwhelming. It's just a blank page with a search bar. That's what I would personally want. The search bar is front and center.”

A Niles-Maine patron said, “This is very simple. There's just a plain page. It's not really exciting. My first impression is it's kind of ‘meh.’ I notice the orange box and the big search so I can just start typing so that's easy and good.”

A Des Plaines patron said, “It's very clean but also plain. The big search box is the first thing I notice.”

Desired Changes & Features

Patrons were asked: If you could wave a magic wand and change one thing about this catalog, what would it be? Five of their requested changes are represented as recommendation requests in the Findings and Recommendations section of this document. Patron feedback for this question is summarized below:

- The Vega Discover home page ought to feature the option to include showcases or carousels to increase browsability. Patrons preferred showcases and carousels of staff picks and new library materials.
- The Holds page should offer change pickup location functionality.

- Clicking the library logo should reload the Vega Discover homepage.
- The session timeout is too short.
- The Persons filters should only contain people.
- The concepts filter should list the number of available concepts rather than the number of records available.
- There should be an option to request a purchase for the library collection.
- Vega Discover should have an option to request interlibrary loan materials from any library outside of CCS member libraries.
- There should be less dead white space between resource cards to minimize scrolling.
- The Location filter should appear more prominently.

Overall Patron Rating

Patrons were asked to rank their experience with the catalog on a scale from 1 to 5 (1 being poor - 5 being great). Their rating and comments are included below:

Library	Rating	Comments
Algonquin	5	"Easy enough, no issues with it"
Cary	4.5	No comments
Des Plaines	5	No comments
Fox River Valley	4	"The reason I wouldn't give it a five is because of little things like the visual appeal and the option to change pickup location."
Lake Villa	4	"Easy to narrow down search results and a clean interface." Patron disliked that library logo did not always refresh the page. Patron desired dynamic filters.
Niles-Maine	2*	"I am used to the current catalog; it seems better than this. I would not advocate that the library buys this software at all. Search results were not relevant."

*Notably the title that this patron selected for her search task was not yet available in the training database for her library, so it was very difficult for the patron to find and obtain.

Vega Discover Compared to PowerPAC

Patrons were asked how the new catalog, Vega Discover compared to their experience with the current library catalog, PowerPAC.

Overall patrons agreed that it would take time to adjust to a new library catalog. They agreed that the look of Vega Discover is more modern looking than PowerPAC.

Patrons liked the application of "Concepts" as a replacement term for "Subjects" as seen in PowerPAC.

Patrons said that some of the search results for genres like "fiction" or "crime fiction" as well as concepts did not always elicit relevant search results. Innovative will be making changes to the way search works in Vega Discover in the months after usability testing. CCS will revisit search result relevancy with a second round of user testing in Spring 2022.

The features patrons want to keep the are a part of PowerPAC included visuals like carousels that enable quickly browsing curate content such as staff picks and new library materials. Patrons also like and do want to lose predictive search.

Further User Research Opportunities

At the time of this report, further research is needed on the Availability and Locations filters in Vega Discover to determine whether these filters work effectively with patrons.

Availability offers the option to filter by “At Library” and “Online.” “At Library” filters to physical materials. “Online” filters to digital materials. “Locations” offers the option to filter to a specific library location.

Usability testing did not force or encourage patrons to engage with the Availability and Locations filters. As a library consortium, it essential that we better understand how patrons engage with these filters before making a recommendation about their use.

Appendix

This section includes the Moderator Script and Notetaker Rubric used to conduct remote usability testing.

Moderator Script

Hello [_____]. My name is Kathleen and I’ll be running this session with you today. How are you doing today?

What do you typically like to borrow from the library?

Did you bring your chosen title and subject to search? *[If not give patron a moment to consider a title they would like to search and title as well as a subject]*

[Introduce observers. If more than one, use the script below.]

[_____] and [_____] are some of my colleagues who will be watching what we do today.

First of all, thanks for agreeing to participate. We should be here for about an hour today. If you do not mind, I’m going to read the next couple of things from my script to make sure I cover everything.

The library is testing out a new catalog and we want to find out what works for library patrons. This is not a test of you. There are no right or wrong answers. You cannot do anything wrong here. Instead, you are helping us to test the new catalog. So, please be honest – you will not hurt our feelings. A few people from the team will be watching a copy of your screen during the session. They are muted so they do not disturb us.

If there are any questions that you don’t want to answer, again, just let me know. Do you have any questions before we begin? *[Answer any questions]*

There’s one thing you can do that will really help me as we go through the session today, and that is **I’d like you to think out loud**. By that, I mean while you are working with the catalog, I want you to tell me what you

are thinking as you go along. For instance, if anything acts differently than you expected, or if you are trying to work out what to do next, say those things out loud.

I'm going to be giving you things to do with your computer. I'm going to put each question into the chat. The first thing I'd like you to do is read this out loud. Then go ahead and do what it says. I'd like you to go as far as you would as if you were working on your own. **When you are done, say "I'm done" or "I would stop here."**

Do you have any questions before we begin? *[Answer any questions]*

Before we begin, I'd like to give you a short orientation to Zoom. You may use this regularly already, but I want to make sure you are comfortable navigating around. Some things to note:

There is a green share screen button at the bottom of your screen you will use to share your screen. Chat can be accessed using the chat icon at the bottom of the screen.

Let 's try all three options.

Before we start, I want to be sure our technology is working as expected. I am going to send you a message over chat. Please confirm you can read that message. *[Send patron message that says "Hello" and confirm patron can read the message and troubleshoot if needed]* *[Answer any questions]*

I'm going to start by sending a library card number and password you can use for the duration of our session today via the chat feature. Please confirm you see this information.
[Send library card number and password]

I will also chat you a link to the new library catalog. *[Send link via chat]*

Please navigate to the new library catalog using the link I chatted you. When you are there, I'll ask you share your screen in Zoom.

Next, I will ask you to share your screen so I can follow along while you use the new catalog. *[Confirm patron is sharing screen and troubleshoot if needed]*

I'm going to press record so we can look back at this session if needed. *[Press record]*

Let's get started: So the first thing I'd like to ask you is **What is your first impression of the library catalog in front of you?** *[record response]*

Thank you for sharing that. Next we will move to testing out some tasks in the catalog.

I'm going to put each task into the chat. The first thing I'd like you to do is read this out loud and then go ahead and do what it says. *[chat first task to participant]*

[After first task] Please reset your webpage to the home page.

[During tasks, if necessary] Please remember to think aloud

Search Functionality:

- Show me how you would log into your account using the library catalog.

- Find a title about a topic of your choosing. Show me how you would search for the title.
 - Is this title available right now?
 - Where would you find this title in the library?
 - Show me how you would place a hold on this title.
- You are staying in this weekend. Show me how you would search for a movie or television show to watch.
 - Is this title available right now?
 - Where would you find this title in the library?
 - Show me how you would place a hold on this title.

Account Functionality:

- Show me where you would go to review your account settings and contact information
- Show me where you would go to manage your holds
- When is your book due back to the library?
- Show me how you would renew a book
- Show me where you would go to pay a fee

Post Session Interview Questions

- If you could wave a magic wand and change one thing about this catalog, what would it be?
- On a scale from 1 to 5 (1 being poor - 5 being great) how do you rank your experience with the new catalog?
- How does the new catalog you just tested out compare to the current library catalog?

[After all tasks] Thank you. Your feedback has been very helpful. Do you have any questions for me about what you just worked with?

If you don't mind, I'm just going to check with the team members who were watching to see if they had any questions *[Observers should personally chat questions to host or unmute their microphones]*

OK, we're finished. I will be sending over your gratuity soon.

Do you have any questions for me? *[Answer any questions]*

Thank you so much for your help today. It's been incredibly helpful.

Thanks once again. If you're ready, we'll hang up. *[hang up]*

Notetaker Rubric

Participant:

Library:

Notetaker:

First Impression

Task 1

What is your first impression of the library catalog?

Record participant response here:

Search Functionality

Task 2

Show me how you would log in to your account using the library catalog

Record path, quotes, and comments here:

- Was the user successful at logging into their account? (Circle one)
 - Yes, No, Partial
 - For partial success, explain here:

Task 3

Show me how you would find and obtain a title about a topic of your choosing.

Record path, quotes, and comments here:

- Did the user successfully search for the title? (Circle one)
 - Yes, No, Partial
 - For partial success, explain here:
- Did the user successfully determine whether the title was available? (Circle one)
 - Yes, No, Partial
 - For partial success, explain here:
- Did the user successfully locate the title? (Circle one)
 - Yes, No, Partial
 - For partial success, explain here:
- Did the user successfully place the title on hold? (Circle one)
 - Yes, No, Partial
 - For partial success, explain here:

Task 4

You are staying in this weekend. Show me how you would find and obtain a movie or television show to watch.

Record path, quotes, and comments here:

- Did the user successfully search for the title? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:
- Did the user successfully determine whether the title was available? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:
- Did the user successfully locate the title? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:
- Did the user successfully place the title on hold? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Account Functionality

Task 5

Show me where you would go to review your account settings and contact information.

Record path, quotes, and comments here:

- Did the user successfully review their account settings and contact information? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Task 6

Show me where you would go to manage your holds

Record path, quotes, and comments here:

- Did the user successfully navigate to where they can manage their holds? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Task 7

When is your book due back to the library?

Record path, quotes, and comments here:

- Did the user successfully determine their book's due date? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Task 8

Show me how you would renew a book

Record path, quotes, and comments here:

- Did the user successfully renew their book? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Task 9

Show me where you would go to pay a fee

Record path, quotes, and comments here:

- Did the user successfully navigate to where they might pay a fee? (Circle one)
 - Yes, No, Partial
 - For partial success explain here:

Post Session Interview Questions

Task 10

If you could wave a magic wand and change one thing about this catalog, what would it be?

Record path, quotes, and comments here:

Task 11

On a scale from 1 to 5 (1 being poor - 5 being great) how do you rank your experience with the new catalog?

User Rating (circle one): 1, 2, 3, 4, 5

Record participant response here:

Task 12

How does the new catalog you just tested out compare to the current library catalog?

Record participant response here: