

## **Presentation Notes for Lightning Talk: Keeping it ReAL (Research in Academic Libraries)**

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## **Card sorting and user scenarios: Usability testing of SFU's Scholarly Publishing and Open Access Webpages**

### **SLIDE 1 (title)**

- Usability testing conducted by Digital Scholarship librarians at various stages of redesign project for SFU's Scholarly Publishing and Open Access webpages.
- Purpose of webpage redesign: Ensure webpages reflect the current landscape of the growing and changing area of scholarly publishing
- Address the nuances of choices researchers have to make when publishing their work
  - deciding where to publish
  - whether to make their work OA
  - how best to make their research visible
  - how to measure and track the visibility and impact through impact metrics and other measures.

### **SLIDE 2 (screenshot)**

- Homepage and page structure that resulted from this project.
- We wanted to make the structure, language and content accessible and discoverable for a wide-range of users - different language used by librarians and researchers, information needed to support complex decisions - make sure info is clear and user-friendly
- While we hope and intend that the pages will be used by researchers, we were aware that librarians primarily use the pages and may pass information along to researchers in their department areas. We therefore focused most of our user testing on librarians at SFU Library.

### **SLIDE 3 (card sorting)**

- Card sorting - did this before starting on pages
- Set of cards, each with a term related to scholarly publishing - same set given to each group of 2 librarians

- Groups asked to put the cards in logical categories and give each category a name - open card sort
- Participants were encouraged to make notes on cards to suggest alternative wording;
- to discard cards they felt were irrelevant;
- to add cards where a concept was missing;
- We gave users the cards in a random order and asked them to place each card in a group as soon as they encountered it, rather than waiting to see what else would turn up
- We moderated the card-sort by taking notes on the discussions the groups had when choosing where to place the cards.
- At this point we weren't looking at the order of items within the groups - just which items went together, and what the categories would be called.

#### **SLIDE 4 (spreadsheet)**

- Organizing qualitative data from card sort
- Each group had different card arrangements, but there were some trends and similarities across the groups
- Started by documenting all 4 suggested structures into different sheets in excel, then consolidated them into one, then tidied the results into a "draft prototype" by eliminating any redundancies or repetitions and either choosing the most popular location for an item, or making a logical decision for its placement based on the discussion. Made a note of any unresolved comments where one or more group had a suggestion for eliminating or renaming a card.
- Had a final feedback session where we presented this prototype to the group to get additional feedback on the structure and to resolve many of the comments about discarding, etc.

#### **SLIDE 5 (user scenarios)**

- Drafted pages, then conducted a usability-lab study with scenarios to test the resulting content.
- Started with general user goals: What we wanted users to be able to do on our site (Nielsen)
- Tried to develop realistic and actionable tasks, and "avoid giving clues or describing the steps" so you can learn whether labels, languages and navigation are meaningful and useful.
- We asked users to work in pairs to answer the scenario questions using information from the webpages. Users wrote down their observations on the steps they took to look for the information, how easy and logical it was to find, as well as the effectiveness of the information in adequately answering the question.

- Observed the scenario testing in addition to asking for written feedback on how users found the information and what difficulties they encountered along the way. Found that observations gave us more info than the written feedback - some groups didn't report the difficulties they had or the "journey" they went on before eventually finding the needed information.

**What was unique about our approach:**

- No "one way" to do usability testing – could have done electronic card sort, wireframing, etc
- Librarians look here for info for other people, not themselves – scenarios reflect this
- Asked for content feedback at same time as navigation testing, tricky when site isn't being used to "do" something (buy a ticket) because info is all that counts
- Had to make choices about open / closed card sort, paper vs electronic, how scenarios are phrased, how info was gathered (observation and written comments), how to consolidate card sorting feedback and create a prototype with conflicting feedback