

E4: User Test Evaluation Report:

The Center for Jewish History's search site: www.search.cjh.org

Team members:

J.D. Arden

Rachel O'Neill

Elizabeth Willse

Pratt Institute

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Executive Summary

This report provides an evaluation of the Center of Jewish History's main research site: www.search.cjh.org. Our team's evaluation is based on a method of supervised User Testing conducted in April and May of 2014. Our user participant group (the Participants) numbered six individuals, all potential patrons of the Center for Jewish History, living in the New York Metropolitan area.

The purpose of the testing was to assess the layout, functionality and user appeal of the website through observation and analysis of how understandable and productive an online search routine would be for a typical user of the site. Testing was conducted under controlled circumstances with each Participant's search experience audio-recorded. The Participants completed the testing on a desktop computer or iPad device.

Testing consisted of a short demographic pre-test questionnaire; a realistic series of search query tasks and questions were conveyed to Participants via an interview scenario with Participants encouraged to "think out loud" as they completed each task; finally a post-test questionnaire was conducted to assess the satisfaction of each Participant and an Affect grid to gauge each Participant's emotional response to the User test was completed. Testing averaged 25-minutes duration. Some participants were given a small gift at the end of completing the test by way of compensation for their time.

From the data collected as well as our observations during the testing, our team concluded there existed a low but distinct level of dissatisfaction and confusion regarding the aesthetics and certain functional aspects of the site. Based on these findings our team has made several recommendations for the interface:

- small changes to the conformity of the page banner layouts
- adopting a consistency to new tab redirection
- minor adjustments to content organization.

In making these relatively minor adjustments and tweaks, our team is confident that www.search.cjh.org will become a better, more user-friendly site.

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INTRODUCTION

The Center for Jewish History (CJH) is a cultural heritage and research institution composed of a partnership between five organizations: American Jewish Historical Society, American Sephardi Federation, Leo Baeck Institute, Yeshiva University Museum and the YIVO Institute for Jewish Research. The research resources in its collection include 500,000 volumes and 100 million documents (in 23 languages and 52 alphabet systems), which can be accessed onsite in the Lillian Goldman Reading Room. The collection can be searched online through the main CJH page at www.cjh.org or through the dedicated search portal at <http://search.cjh.org/> . This report focuses on the search portal interface. People who are most likely to access CJH resources on this interface range from academic professionals conducting scholarly research, to the general public interested in historical, cultural or genealogical research. Making the interface as comprehensive and easy to navigate as possible to all potential users is vitally important, and was highlighted to the team by the Center for Jewish History from the outset.

Our team conducted the evaluation of the search interface by employing a User Test methodology focusing on gathering and assessing User feedback from six participants, none of whom were familiar with the CJH search interface but all of whom are active internet users.

Methodology

Preparation and Testing:

Our team received the following brief from the client, the Center for Jewish History (CJH), regarding which aspects of the www.search.cjh.org website to focus on in a User Test:

1. The single search homepage, especially organization and terminology of all hyperlinked text
2. The search scope and search facets for refining results
3. The display of catalog records and terminology used to describe links within results (in links and details tabs)
4. Some "extended" features like sharing/sending records, E-Shelf and Reviews/Tags

After receiving the brief, our team set out to prepare an evaluation of the site incorporating established User testing methods.

As background, a User Test is a structured interview, focusing on tasks performed by a participant who represents the profile of a site's ideal or potential user, observed and at times guided by the usability evaluator (Kuniavsky, 2003). By recording and analyzing participant feedback after a user test, evaluators can study the successes, misunderstandings, and opinions the participants expressed during the test, to determine whether potential users understand and access the site the way the designers envisioned or intended.

The key attributes of the User Test are that it involves actual users as experimental subjects (for the purposes of this report, we are calling users participants), and the testing is conducted in a controlled setting, often a laboratory but any quiet environment such as a private office or unoccupied classroom or even a domestic setting is

acceptable. The User Test method is both an efficient and economical method of establishing how users interact with and feel about an interface.

In order to carry out a comprehensive User Test of the interface: www.search.cjh.org the following preparations were undertaken prior to conducting the actual User Test interview:

Based on the areas of focus requested by CJH, a set of questions and tasks were developed to test participants use of and reaction to the interface. These involved:

1. Establishing how participants felt about the overall design of the interface by asking them to describe their initial reaction to the interface using a “thinking out loud” method of evaluation.
2. Asking participants to comment on whether they felt they understood what the purpose of the interface was.
3. Asking participants to move around the interface and click on specified hyper-linked text.
4. Asking participants to comment on what happened when they clicked on specified hyper-linked text, and was it what they expected.
5. Asking participants to comment on how easy (or not) it was to navigate back to the original interface.
6. Asking participants to conduct a search of a particular subject and think out loud about the ease of completing this task.
7. Asking participants to narrow their search findings based on three specific criteria and think out loud about the ease of completing this task.

8. Asking participants to confirm the details of the top finding in their search by listing the author, call number and repository and think out loud about the ease of this task.

9. Asking participants to email themselves the information of the top finding from their search and think out loud about the ease of this task.

In order to obtain both qualitative and quantitative data it was decided that after each question participants would be asked to rate the ease and satisfaction in completing the task/question on a scale of 1-5. Also, at the end of the User Test participants were asked to complete a post-test questionnaire describing the level of ease with which they felt each task was completed.

Finally, in order to help evaluate how the participants were feeling about the interface as a whole, it was decided to ask the participants to complete an Affect grid to evaluate their emotional response to the interface after question five and again at the completion of the User Test.

Having determined the scope and nature of the User Test tasks and questions, a pilot study was conducted with one of our team acting as a participant to test the flow of how the User Test might unfold. After the pilot study, a script of the User Test was created and is presented in the Appendix of supplementary materials (appendix A).

Each member of our team recruited and interviewed two participants. The User Test tasks were run across several different browsers and computer systems including a desktop with a large screen, a PC laptop, and an iPad using one of the following browsers: Google Chrome, Safari or Mozilla Firefox. In order to fully capture responses, each User Test was recorded using the voice memo device of an iPhone. In addition, two of the participants were also recorded using an iPhone camera. For the four User Tests not visually recorded, a second moderator from our team sat in on the User Test interview to take notes of participant behavior, body language and comments.

For the purposes of this evaluation report, six participants were recruited to be part of the User Test, four were recruited through Pratt Institute's School of Library Information

Science and two participants were recruited from our team's social networks. Prior to each User Test participants were asked to complete a pre-test questionnaire that had been created in Google Forms to establish the demographics of each participants (form included in Appendix A). Participants were also required to sign a letter of consent prior to the user Test being conducted (copy included in Appendix A). Four of the Participants were given a small gift of a chocolate bar on completing the User test as compensation for their time.

Findings and Recommendations

The quantitative data we collected, based on the ratings Participants gave in response to specific questions about the tasks incorporated into the first part of the interview scenario, and then carried through into a post User test questionnaire, do not indicate any levels of great concern about using the interface. All Participants rated the completion of tasks as easy/moderately easy in the post User test questionnaire and during the interview, the graded responses to whether the action required was easy or clear to complete remained in the easy-neutral range.

However, observing Participants as they undertook each task and listening carefully to the Participant audio recordings, and in two instances viewing a visual recording of Participants as they undertook the tasks, reveals a different picture in terms of the ease and satisfaction Participants experienced when using the interface. It is this qualitative data that our team has drawn upon in making recommendations aimed at improving the interfaces usability.

Homepage - appearance, organization and terminology of hyperlinked text

In terms of responses to the request that Participants regard the homepage and express their first impressions of this page focusing on the visual appeal and organization of this page the following responses were typical:

- “It’s busy! A lot of different lines of text are all over the place. The text next to the CJH logo is small and hard to read.” (Note: the Participant was referring to the names of partner sites listed next to CJH’s name.)
- “It’s not a very attractive site. There’s lots of text! I’m overwhelmed by all the links there are.”
- “The site feels a bit text-heavy. “
- “My only criticism of the main search page is nothing stands out. If it’s trying to lead me to something, nothing stands out.”

Several Participants expressed confusion at the array of blue hyperlinks on the main page. Especially if the browser view was less than 100%, the links become condensed and illegible. The area of the screen and a Participant comment about this concern is shown below:

The screenshot shows the website header with the Center for Jewish History logo and partner institutions: AMERICAN JEWISH HISTORICAL SOCIETY, AMERICAN SEPHARDI FEDERATION, LEO BAECK INSTITUTE, YESHIVA UNIVERSITY MUSEUM, and YIVO INSTITUTE FOR JEWISH RESEARCH. Navigation links include Guest, e-Shelf, My Account, Sign in, New Search, Find Databases, Find E-Journals, and Help. A search bar is present with 'Center for Jewish History Collections' selected and a 'Search' button. Below the search bar, there are sections for 'What is the Center for Jewish History?' and 'Your Visit to the Lillian Goldman Reading Room'. A video player is embedded, showing a portrait and historical documents. A yellow circle highlights the 'Further Research Portals' section, which includes links for Family History Databases, The Center on Flickr, and Center Library/Archives Catalog. A text box with a yellow border contains the following feedback: "User feedback: 'I feel that all of the links should be reorganized into some kind of main navigation, something like categories and drop down boxes, to make them cleaner, hidden, but still accessible'".

Making the search site homepage less text and hyperlink heavy is recommended and the suggestion of including heading categories:

Additional Information; Center Partners; Further Research Portals

And then either hyperlink these headings or create drop down boxes to the current hyperlinked options would significantly help in giving the homepage a cleaner more streamlined appearance and not make the page seem quite so overwhelming to visitors and perhaps also encourage further exploration of the site's many services and resources.

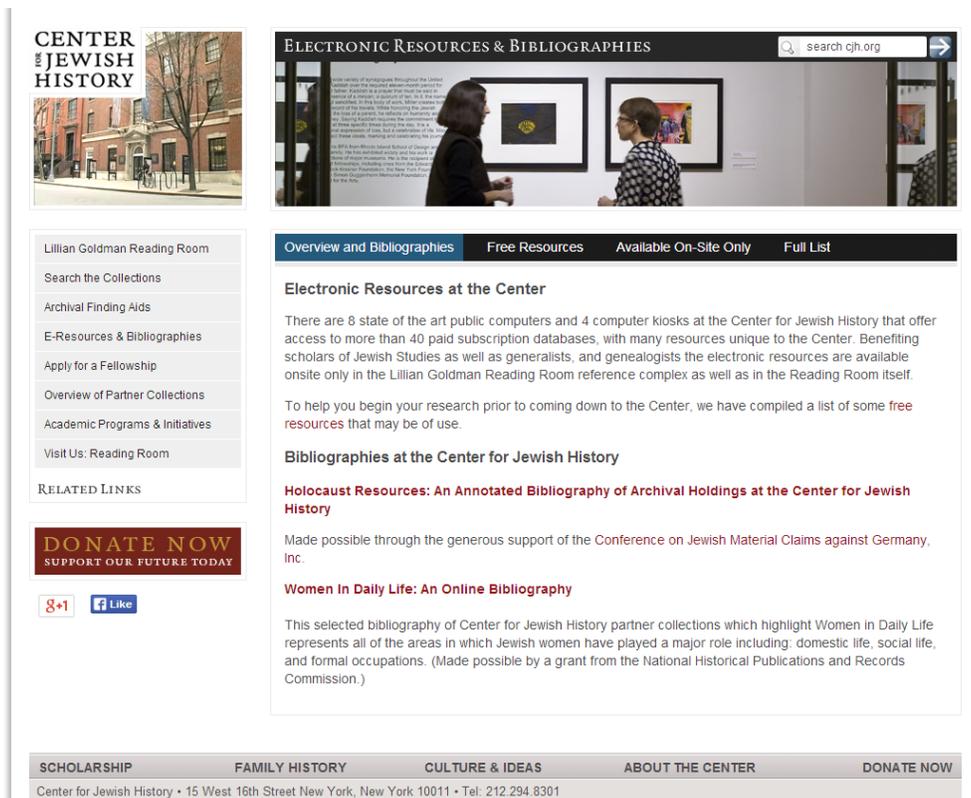
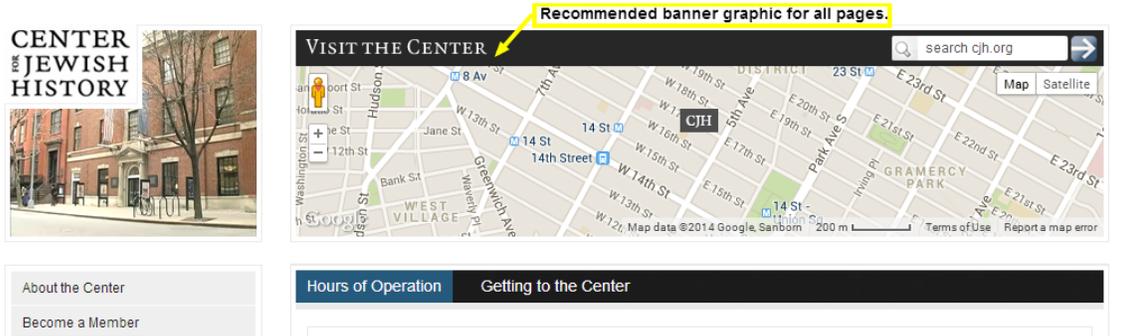
Participants expressed no grave concerns or frustrations regarding the terminology of the hyperlinked text other than the sheer number of options, however, in testing how easily Participants might find using the hyperlinked text we asked them to click on two hyperlinks: "Visiting the center" and " E-Resources & Bibliographies" and then navigate their way back to the homepage.

At several different points in completing this task, Participants expressed confusion, uncertainty and frustration with the manner and frequency with which new tabs opened. Difficulty understanding and navigating back from newly opened tabs caused Participants to express frustration and impacted the scores they marked on the Affect grid at the halfway point of the interview scenario.

Participant responses included:

- "A new tab just opened. This looks like an entirely different website!"
- "I'm lucky I noticed that a new window popped up. I don't see how to go back from the Visitor Center. If I hadn't seen the new window pop up, I'd be confused."
- "It's weird that so many tabs popped up!"
- "Can I voice my annoyance that I now have three tabs open?" and "This site has some surprises."

Below is the screen-shot of the “Visit the Center” and “Electronic Resources & Bibliographies” pages:



The change in graphic on the masthead, combined with the opening of multiple windows/tabs confused and / or frustrated all the Participants and most wondered out loud if they were still on the same CJH site or had gone to another site completely.

It is recommended that the homepage show a clearer visual / graphic relationship between the Search homepage and other parts of the CJH site.

CENTER FOR JEWISH HISTORY AMERICAN JEWISH HISTORICAL SOCIETY
 AMERICAN SEPHARDI FEDERATION
 LEO BAECK INSTITUTE
 YESHIVA UNIVERSITY MUSEUM
 YIVO INSTITUTE FOR JEWISH RESEARCH

Guest ☆ e-Shelf My Account Sign in

New Search | Find Databases | Find E-Journals | Help

Center for Jewish History Collections Search Advanced Search

What is the Center for Jewish History?
 The Center for Jewish History is the home of five preeminent Jewish institutions dedicated to history, culture and art. It unites under one roof collections that bring together centuries of Jewish life.

Your Visit to the Lillian Goldman Reading Room
 In the heart of the Center for Jewish History is the Lillian Goldman Reading Room, the gateway to the research collections of the five partners. Designed to combine the ambience of traditional libraries with state-of-the-art convenience, each workstation has internet connectivity with wireless access also available.

Reading Room Hours
 Sunday from 11am - 4pm (YIVO Archives closed)
 Monday 9:30am - 7:30pm (YIVO Archives close at 5:00pm)
 Tuesday to Thursday 9:30am - 5:30pm (YIVO Archives close at 5:00pm)
 Friday 9:30am - 1:30pm (YIVO Archives closed)

Please note: The Lillian Goldman Reading Room and Ackman and Ziff Genealogy Institute will be closed for renovations from Wednesday, April 9 through Wednesday, May 7. The Lillian Goldman Reading Room will reopen on May 8th, and the Ackman & Ziff Genealogy Institute will reopen on May 12th. Requests for materials are unavailable at this time.

Holiday Hours | Paging Info | Recovery Tips for Books & Archival Materials

Additional Information
 Visiting the Center
 Reading Room General Info
 Ackman & Ziff Genealogy Institute
 How to Reserve Items for Your Visit
 Ask a Librarian at the Center

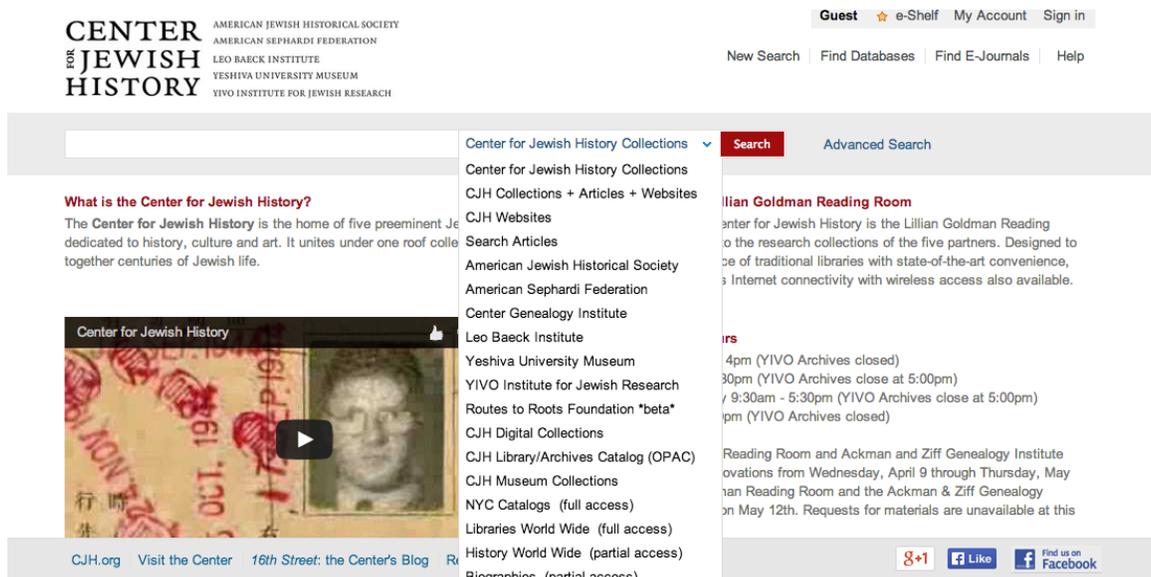
Center Partners
 American Jewish Historical Society
 American Sephardi Federation
 Leo Baeck Institute
 Yeshiva University Museum
 YIVO Institute for Jewish Research

Further Research Portals
 Family History Databases | The Center on Flickr | Center Library/Archives Catalog

Search Scope and search facets for refining results

While one of the Participants experienced difficulty in locating the Search box and function as a search portal for the library collection was clear to all, the majority of Participants expressed confusion about the way the drop-down menu for the Search could be used to modify search results. Responses included:

- “I’m still not sure what I’m searching here. I’m searching all of the collections? What specific part of the collection is this?”
- “I’m wondering whether the Center for Jewish History includes all of these things. Or do I search collections individually using the drop-down?”
- “I’m not sure what the drop-down menus lead to, or what’s in the different collections.”
- “Gosh, there are a lot of different options in this menu, and I’m not sure what they are, so I’m just going to type “Russia” into the box and hit search.” (*note: “Russia” was the search term Participants were asked to search for*).



- Screen shot showing the current drop box of collection search options.

It is recommended that the search scope be made clearer. This might be done by setting a default search collection next to the search dialog box and move the current drop down box of collection search options be part of the “advanced search” option.

None of the Participants expressed concern or confusion regarding the search facets for refining results and the only comment worth consideration in terms of modifying this aspect of the site was:

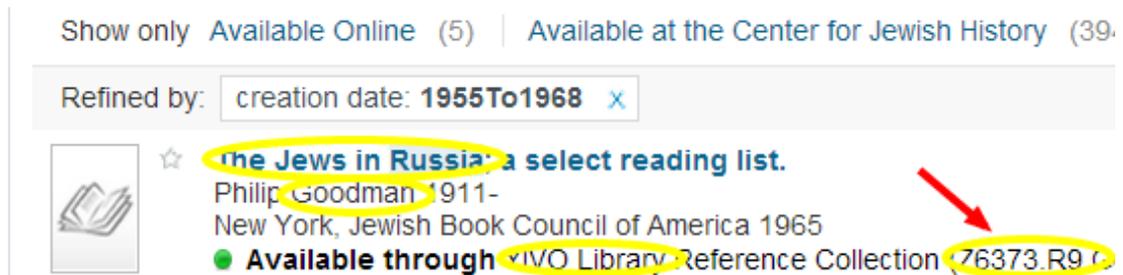
- “Refining options seems straightforward enough, though I have to do a lot of scrolling down and searching on the left of the page to find all the options.”

The display of catalog records and terminology used to describe links within results

On the whole this did not prove to be an area of concern for most Participants. Although, on finding information in the Results/Records, one Participant did remark:

- “it was easy but I had to pause, to look at the search results list. I think for other people it's going to be maybe more frustrating without a library or library science background”.

Another Participant was unable to identify the call number and repository from the first page of catalog results. This information is clearly identified after clicking on the title of the item (in this case a book), however, some users may not progress that far and thus will probably use the call-slip system incorrectly. It is advisable to reiterate the “call number” label on the first page of results.



Testing “Extended” Features - “Send to” function of catalog record results

In the final task of capturing the information sought in the catalog, there was some hesitation as to the quickest way to send an email message of the necessary information. Participant feedback included:

- “There’s a tiny little market that says ‘Send to. These icons are very small. I think this envelope means email?”
- “I would have expected this to be a more vivid, visible color, or to say something like Share, the way other websites do.”

Although the mail icon is easily recognizable, how and where to input one’s email address was less clear. It might be helpful to eliminate the blank space and lines to the

left of the icons in the “Send to” drop-down box as seen below:

Center for Jewish History Collections [Search](#) [Advanced Search](#)

(Z6373.R9 G6 1965)

[More](#)

[Send to](#)

Links
> This item in the

User feedback recommendation:
The lines and blank space to the left of the icon options may be confusing, and should be eliminated if possible, to guide users to click directly on the icons themselves.

1965-66.

Result 1 [Next](#)

Conclusion

The Center for Jewish History provides important cultural and historical resources to academics and those conducting research for personal reasons. This evaluation report of a User Test conducted to assess the Center for Jewish History's search portal located at www.search.cjh.org, focused on the functionality and layout, as well as the overall user appeal of the website through observation of first-time users' responses to a series of tasks on the site.

Overall, the responses of the six participants reflected some level of mild dissatisfaction and occasional frustration with the experience of using the site to access research resources. To address these concerns, our team recommends changes to the site such as minor adjustments to content organization, adopting a more cohesive banner design and layout across site pages, and adopting a consistency to new window and tab redirection. Implementing these recommendations will likely improve the ease with which researchers either on site or accessing CJH resources remotely are able to begin and refine searches for the information that meets their needs, as well as improve the overall experience of working with the CJH and its materials.

References

Barnum, C. M. (2011). *Usability testing essentials: Ready, set-- test*. Burlington, MA: Morgan Kaufmann Publishers.

Kuniavsky, M. (2003). *Observing the user experience: A practitioner's guide to user research*. San Francisco, Calif: Morgan Kaufmann Publishers.

Appendix A

Appendix A – Supplementary Materials:

Preparations made prior to each User Test

Moderator Script

Participant Consent Form

Affect grid

Center for Jewish History search site - User Test Moderator Script:

Before each user session:

1. Arrive at least 15-minutes early for at the pre-arranged testing room with fully charged recording device (iPhone or voice recorder).
2. Make sure CJH search website is properly loaded for the first scenario.
www.search.cjh.org
3. Have the pre-prepared Google form survey opened in background ready for post-test questionnaire.
4. Organize all printed materials: moderator script, consent form (a copy of the consent form will have been emailed to the user for review, along with a link to the pre-test questionnaire that the user will have been instructed to complete prior to meeting).
5. Ensure there is a note taking device ready for the monitor moderator to record observations during the user test.
6. Have copies of print out of AFFECT grid printed out and a pencil /pen for the user.

Moderator Script:

Introduction: Welcome! Thank you for agreeing to participate in this user study. As you know from our email confirming your participation, we are going to be asking you to look at the Center for Jewish History search website today and your feedback will provide our team with valuable information for the improvement of the site.

I'm going to be recording your responses (*if there is a second, monitor/moderator present, introduce them to the user and explain that they will also be taking notes during the user test*) and reviewing the data gathered today which may then be used in an academic paper or in a report.

Explain how the test will work:

The test will take approximately 30-minutes and I should be clear that this is not a test of you and your abilities to navigate the website but a test of the CJH search site itself. I'll be asking for your opinion of the website and giving you a few tasks to complete. Also, throughout the test I'd like you to "think aloud" while looking at the website, talking about your thoughts and opinions as you complete each task. At the end of the first part of the test and again at the end of the whole test I'm going to ask you to mark on a grid how you feel about the site and the tasks I've asked you to complete. There will also be a brief on-line questionnaire at the end of the test.

Before we start, do you have any questions about what we are going to do today? or about the consent form and pre-test questionnaire we emailed to you? *If yes - answer questions. If not, ask the user to sign the consent form.*

The User test:

Okay, let's get started.

Part 1: First of all I'd like you to take a look at the site's homepage: www.search.cjh.org.

This site is the search site for the Center of Jewish History, looking at the site can you tell me what your first impressions are?

What are your first impressions of the overall appearance of the site?

On a scale of 1-5 (1 being least attractive and 5 being most attractive) please rate how visually appealing you think the site is:

1 2 3 4 5

Is it clear to you what the options are for using the site as a research tool?

On a scale of 1-5 (1 being not obvious at all and 5 being very clear) please rate how simple the site is to understand.

1 2 3 4 5

Remind the user that: this is not a test of your understanding or familiarity with this sort of site but what your thoughts are about the way this particular site is laid out.

Okay, I'd like you to check out some of the site's features:

Please find and click on the link "Visiting the Center," and then navigate back to the main page.

(encourage thinking out loud here).

once completed: from the description of the link, did the link go to the page you were expecting?

yes / no

How easy was it to navigate back to the home/main page?

On a scale of 1-5 (1 being not easy at all and 5 being very easy) please rate how simple it was to get back to the homepage.

1 2 3 4 5

Next up, please find and click on the link “E-Resources and Bibliographies” and then navigate back to the main page:

once completed: from the description of the link, did the link go to the page you were expecting?

yes / no

How easy was it to navigate back to the home/main page?

On a scale of 1-5 (1 being not easy at all and 5 being very easy) please rate how simple it was to get back to the homepage.

1 2 3 4 5

Please mark on this AFFECT GRID how you felt while completing the above tasks. Can you explain why you chose this spot on the AFFECT GRID?

Great! This is wonderful feedback! Now let’s move on to the next part of the test:

Part 2: Task a: I’d like you to use the site to find out information on a specific subject: “Russia” is the subject.

How do you think you would go about finding out more about “Russia” on the site?

Is it clear how you would look for information on Russia?

(encourage thinking out loud here)

Give the user up to 3 minutes max to find the search bar and enter the search phrase "Russia". If the user doesn't find the search box help them and reassure them this is okay.

Part 2: Task b: Next up try I'm going to ask you to limit the search by selecting the "language" as English, the "format" as book, and the "dates" as the 1960's.

Do you see how to do that?

If user is taking longer than 3 minutes to complete task suggest: Do you think you might have to scroll down the page?

Part 2: Task c: Take a look at top/ number one search result on the list.

Can you tell me the author, the call number and repository /location of that item?

Part 2: Task d: Now I'd like you to select the option to email this information to yourself by clicking on the search result. (follow-up: on the blue-linked text of the item itself, not the number 1.)

How clear is it what you have to do next on the screen?

What icon indicates email to you?

Well done! that was the final task for the test.

What I'd like you to do now is fill in this brief post-test questionnaire and please think out loud as you do this.

How do you feel now?

Please mark on this AFFECT GRID how you felt while completing the above tasks. Can you explain why you chose this spot on the AFFECT GRID?

Participant Consent Form

The purpose of this usability study is to evaluate the design of the Center of Jewish History search site. We are interested in determining if people can accomplish common tasks and easily find information using this site. The session will not 'test' you or your ability, rather the session will test the site to provide information on areas that might be improved. Please be advised that there are no risks associated with participation in this session.

During this session, you will be asked to complete some tasks using the website and fill out a post-user satisfaction questionnaire. As you complete the tasks, members of the J.D.ER3 group will observe and take notes. In addition, the session will be recorded for future review. The session will last no longer than 30-minutes.

If for any reason you are uncomfortable during the session and do not want to complete a task, you may say so and we will move on to the next task. In addition, if you do not want to continue, you may end the session and leave at any time.

Approximately six people will participate in this study. Results from all sessions will be included in a usability report to be presented to Craig MacDonald. Your name will not be included in the report nor will your name be associated with any session data collected.

If you wish to speak with someone about your participation in this study, or if you feel you were not treated as described above, please contact the User Experience Group manager at 646-379-8168.

I, _____, have read and fully understand the extent of the study and any risks involved. All of my questions, if any, have been answered to my satisfaction. My signature below acknowledges my understanding of the information provided in this form and indicates my willingness to participate in this user testing session. I have been given a blank copy of this consent form for my records.

Signature: _____

Date: _____

Appendix B – Quantitative Data

Pre-User Test Questionnaire

Timestamp	Please indicate your age group:	Are you a resident of New York City or the Tri-state metropolitan area	What is your occupation	How often do you use online research tools / websites	Are you familiar with the Center for Jewish History search website: search.cjh.org
4/26/2014 12:33:02	26-40	Yes	Consulting	Daily	No
4/29/2014 18:06:55	26-40	Yes	Paralegal	Regularly (more than 10 times per week)	No
4/27/2014 10:19:02	51+	Yes	Manager Human Resources	Daily	No
4/28/2014 19:19:35	18-25	Yes	Bookseller	Daily	No
5/1/2014 16:04:24	26-40	Yes	Graduate student	Daily	No
5/4/2014 14:00:49	41-50	Yes	Library Student	Daily	No

–

Post User Test Questionnaire

Timestamp	Task A: using search bar to find "Russia"	Task B: Limiting the search: (i): select English as "language"	Task B: Limiting the search: (ii): select Book as the "format"	Task B: Limiting the search (iii): select the date as "1960's"	Task C: Search results: finding the author name, call number and repository	Task D: emailing search results to self
4/29/2014 20:46:34	Moderately easy	Easy	Easy	Easy	Easy	Easy
4/26/2014 15:43:17	Moderately easy	Easy	Easy	Easy	Moderately Easy	Easy
4/27/2014 13:32:42	Easy	Easy	Easy	Easy	Easy	Easy
5/1/2014 19:05:49	Easy	Easy	Easy	Moderately Difficult	Easy	Moderately Difficult
5/1/2014 19:35:11	Easy	Easy	Easy	Moderately Easy	Neutral	Easy
5/4/2014 14:59:41	Moderately easy	Moderately Easy	Moderately Easy	Moderately Easy	Easy	Moderately Difficult