Primo usability testing
La Trobe University

Simon Huggard. Deputy Director, Research & Collections, La Trobe University Library

ANZREG in July 2016 – Alma / Primo Best Practice Day
Background

• Changed from Summon and Millennium OPAC

• Went live with Primo in January 2015

• Changes to university structure

• Change to Library way of working (less f2f training – more online/self-help)

• Need to simplify access for users

• Implementation problems/issues after we went live
Issues to be studied

• Major concerns:
  • Relevance of search results are not clear, or are inaccurate
  • Too many clicks to get to full text
  • Requesting of items is difficult, including interlibrary loans
  • International students struggled to find & cite relevant resources
  • Ability to pre-limit searches to a campus (and remember preferences) are important

• What we did:
  • Study carried out by professional usability company (Smplicit)
  • Study undertaken in December 2015
<table>
<thead>
<tr>
<th>Participant 1: (male)</th>
<th>Participant 7: (female)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postgraduate</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>PhD, IT Systems</td>
<td>Bachelor of Animal &amp; Veterinary Biosciences</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant 2: (female)</th>
<th>Participant 8: (female)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postgraduate</td>
<td>Undergraduate, International</td>
</tr>
<tr>
<td>Master of Dietetic Practice</td>
<td>Bachelor of Biomedical Science</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant 4: (female)</th>
<th>Participant 9: (female)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postgraduate, International</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Masters of Business Information Management &amp; Systems</td>
<td>Bachelor of Commerce / Law</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant 5: (female)</th>
<th>Participant 10: (male)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postgraduate</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Speech Pathology</td>
<td>Electronic Engineering</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Participant 6: (male)</th>
<th>Participant 12: (male)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>Postgraduate</td>
</tr>
<tr>
<td>Bachelor of Science</td>
<td>Diploma of Primary Education</td>
</tr>
</tbody>
</table>

Note: Participants 3 and 11 did not attend testing session

ANZREG in July: Alma / Primo Best Practice Day
Summary of outcomes

**Good**
- Catalogue Search
- Journals
- Databases
- Search Items Home Page
- Search Filters: Date
- My Account Login & Records

**Minor Problem**
- Overall look and feel: Aesthetics & Functionality
- Display of Search Items: Look and Feel
- Resource Type

**Serious Problem**
- Display of Search Items: Abstracts
- Relevance of Search Items
- Advanced Search
- Refine Search: Subjects
- Search and Place an Item on Hold

- Add additional functionality to enhance the site such as advanced filters
- Proactively contact students via email re: overdue items / fines

- Simplify design with a focus on ‘search’
- Reduce the # of clicks to obtain search data

- Design the site more inline with other popular (retail) websites e.g. add to cart and recommendations
- Simplify and reduce the # of pages /clicks to borrow items

ANZREG in July: Alma / Primo Best Practice Day
Home page

- Home page too busy – should be more like Google
- International students struggled with some of the language and could benefit from some descriptions of key words
- Students expected basic functions such as ‘add to cart’ and ‘recommendations’
- Repetitive – with menus repeated on the left and under the search section

"Too much showing on the page - focus on search facility, not all the rest on page. It's very busy"

"You don't need to see it twice"

"The simpler the site is in terms of clutter, the better"

Recommendations …
- Simplify the design of the site to focus on ‘search’
- Maintain consistent look and feel
- Explore more engaging use of fonts and colours to keep the site clean and fresh
- Simplify the design of the site to focus on ‘search’
- Remove duplication of menu items and unused options

ANZREG in July: Alma / Primo Best Practice Day
Overall, students were able to use this page to conduct their research.

Students liked the tabs for quick access to journals and databases.

Students would like the website to remember previous searches so they can access them next time they log in.

Overall, students were able to easily search for journal articles.

Recommendations:
- Maintain the overall structure of this page in terms of tabs.
- Build in some functionality such as auto correct and remember previous searches.
- Simplify the databases page by removing / clarifying items such as Alumni access.

"The search tabs work well and are very easy and quick to use."

"If you spell something wrong, it should come up with 'did you mean'"

"I searched for 'Gastroscopy Insertion' and nothing came up with is not a good sign as it is my topic."

"Journals are easy to search - the actual section and toolbar and very good."

"The search tabs work well and are very easy and quick to use."

"If you spell something wrong, it should come up with 'did you mean'"

"I searched for 'Gastroscopy Insertion' and nothing came up with is not a good sign as it is my topic."

"Journals are easy to search - the actual section and toolbar and very good."

ANZREG in July: Alma / Primo Best Practice Day
Search results: Minor issues

- Prefer download/request item directly from this page
- Filter lists are too long
- ‘Full Text’ and ‘Peer Reviewed’ filters were very well used by students
- Lots of text shown – different hierarchies of text could improve the display
- Many students didn’t find listing the Dewey Decimal # helpful – but would have preferred details / map/ subject area in library to help them locate the item
- eBooks are listed as books which students found confusing

Recommendations.....

- Add ebooks as a resource type
- Allow for ‘Get It’ directly from this page
- Improve hierarchy of information
- Add in a map/description where the book is available in the library (e.g. hover over)
- Reduce the number of listings shown (allow students to select how many they wish to see)
- Allow for multiple selection of items (bookmark)
Search results: Major issues

- Subjects - more like keywords – not useful
- Narrow search by discipline if possible
- Abstract needed to be shown in the search items to help them find the items they need easier
- Overall, students felt finding relevant items was somewhat of a trial and error
- None of the students used the ‘Sort by Relevance’ option to help refine the search
- Students struggled to find the latest editions of books – few noticed the ‘view all versions’ option

Recommendations……
- Include abstracts for all resources on the listings page without the need to click through
- Improve visibility of functionality such as ‘sorted by’ and ‘view all versions’
- Review default algorithms – latest publication date could be the default as students seemed to use date as a proxy for relevance
Search and Place Holds

- Used Actions tab to try to borrow the item
- Not clear that they needed to sign in before placing an item on hold – no clear prompt
- Shouldn’t be separate tabs for Get It and Details
- Students tried clicking on all text on this page to try and find a way to borrow the book
- “Other locations” - confusing – all campuses should be listed
- Hold form very confusing

Recommendations.....
- Add in ‘Request’ button on page next to each item (or alternatively directly from search listing)
- Use campus codes
- Remove the drop down menu if there is only one option
- Should be able to request items directly from the search page (not this page)
- Pre-populate information based on search where available

"A bit ridiculous, 10 minutes to find a request button"

"I wish Request was somewhere visible"

"Requesting to borrow a book was unintuitive"

"You can request the item to be sent to your campus, but more explanation is needed what this means"

"There are too many drop down menus - would lose interest"
My Account Login

- Students felt the login was easy to access on the homepage
- Students would prefer the input of login details directly on the homepage rather than having to click on ‘Login’ and being directed to another screen
- Students found the site easier to use once logged in – when students needed to login to complete the process was unclear (no prompt)

Recommendations …..
- Enable students to be able to enter login details directly from homepage (input data on homepage)
- Include prompts / clarify when students need to login to progress to next step

"Very easy to find because it was on the main page which is very good, it’s the extra pages / steps which are a pain"

"You could enter the login details already on the page – don’t need to click through"

"The login is easy to access on the home page"
New Search interface

- Prefer the look & feel of the new site
- Simpler, cleaner & more logical in the way it is laid out
- Use of different fonts and colours made the site easier to use
- Liked the resource covers being displayed
- Like that the filters were kept more compact but could be expanded to show more options
- Noticed and liked the ‘sort by relevance’ function

"The new site looks more modern"

"A big improvement over LAT"

"A lot more user friendly"

"Everything is just there, you don’t have to hunt for it"

"Everything is a different colour – LAT is all black and white – really dull"

"Looks a lot more thought out than LAT"

"The blue looks more academic than the orange"

ANZREG in July: Alma / Primo Best Practice Day
MY ONLINE EXPERIENCE
CONDUCTING RESEARCH
FOR MY UNI STUDIES

websites I use:

- Usually start in La Trobe Library
  - Google Scholar
  - Google Books
- Browsing my planned reading list as books
- Government and organisational body
  - Listen: position statements, reports, articles etc.

always start [here]!

really beautiful, handy

Agreement actions:
- easy to navigate
- I like how it's not super densely packed
- mobile friendly
- you can search by phrase
- spelling suggestions
- really useful

What's missing...

A TROBE
IVERSITY
Summary and next steps

- SUS score of 49.1.
- 56 items identified in the study (47 relating to Primo)
- Sorted into categories – Fixable; In new interface; Investigate; Can’t do (24 fixable; 16 in new interface)
- Some issues fixed this year already
- Decision to move to new interface
- Working on resourcing and project management
- Keen to re-test new UI when it has gone live with our users (2017)
Thanks.
Questions, Issues, Comments?

Simon Huggard
Deputy Director, Research and Collections
Library | La Trobe University | Bundoora 3086 Australia
T: 03 9479 5173 | M: 0425 774 260
E: s.huggard@latrobe.edu.au