

## OAC Usability Test Summary (October 2001)

### 1 Summary

Two rounds of usability tests were conducted; the first round was with four Berkeley library staff members and the second with three graduate students. All participants were asked to complete a set of tasks using the OAC (Dynaweb software) and Michigan's Bentley Archive (DLXS software). Berkeley staff members were experienced users of archives and finding aids (three out of four had considerable OAC Dynaweb experience). For the most part, they were able to complete the tasks with little difficulty. The students only had minimal experience with online archives and virtually none with the OAC. They were able to complete most of the tasks, but in varying amount of time and with varying difficulty. See Appendix A for the task sets for Round I and Round II.

Both teams discovered major usability problems with the OAC Dynaweb interface and they pointed out features that were unclear and confusing. In addition, participants identified aspects of the Michigan site that they found useful and would like to see incorporated into the Dynaweb interface.

After Round I, the Dynaweb interface was modified slightly, incorporating some of the recommended changes (see Figure 4: Revised Dynaweb Interface). However, the changes were primarily minor interface changes and did not alter the underlying functionality or the overall navigation of the site. During Round II, we found that these changes did not greatly improve the participants' ability to interact with the site. The areas where participants encountered major usability problems during Round I continued to be problematic. These areas included:

- The search engine performs an exact phrase search (most participants assumed it was a keyword search)
- It is unclear which repository is being searched; most participants thought a search would be conducted over the entire collection regardless of where they were in the hierarchy.
- The interface contains unclear labels and icons
- For the most part, participants did not notice/use the links to "Virtual Archive" and "Electronic Texts"

Summary of issues/ problems raised during Round I (roughly ordered by frequency of occurrence):

1. **Search** – All participants commented that, at times, it was unclear which collection/repository was being searched; unlike Michigan (and most other web sites) regardless of where you are on the site, your search is conducted over the entire collection/site.
2. **Search** – There was a disconnect for all participants between what they thought the search engine was doing and what it did. They were all unaware that it was an exact phrase search and not a keyword search.
3. **Search** – There are no (readily evident) advanced search features; all participants liked the fielded search option at Michigan. However, several commented that fields such as place and name could be problematic if the finding aids are not encoded to the same level.
4. **Buttons/Icons** – All participants found them unclear (the most confusing/problematic were the house icon and the print icon)
5. **Labels** – "Expanded Search" and "All Collection" were unclear to all participants
6. **Search Results** – Several participants noted that there was not enough information provided to help users choose a finding aid from the search results list (two suggested including dates of coverage; and one suggested spelling out acronyms). All participants liked the results screen at Michigan (see Figure 1); it includes a few key fields and an abstract, but they noted that it would be more helpful if the search term(s) were highlighted in the text at the initial results screen.

7. **Navigation** – In the Michigan interface, all participants liked the “outline view” (see Figure 2) (although they would have liked to have the option to collapse the TOC to the series level) and several liked the “keyword in context” view (see Figures 3) (particularly, the fact that the finding aid was collapsed, showing only the sections where the search term occurs).
8. **Search** – There is no help/guidance on the search page for entering search terms. This was particularly problematic with personal names since different results are returned when “first name last name” vs. “last name, first name” are searched; in addition, there is no indication if truncation is allowed.
9. **Navigation** – The distinction between OAC, Virtual Archive and Electronic Texts was unclear to the participants; only two chose Virtual Archive for Task #3 (finding information about Japanese Americans)-one of whom already had extensive experience with JARDA; and only two chose Electronic Texts to look for oral histories. However, three participants commented that they liked the new, descriptive labels.

Summary of issues/ problems raised during Round II (roughly ordered by frequency of occurrence):

1. **Search Input Box** – most participants, either didn’t see the search at first or it was unclear to them when they did spot it, that it was a search box (one noted that the box and button are too far apart)
2. **Search** - all participants thought the search engine conducted a keyword search (when in fact it is an exact phrase search)
3. **Home Page Icon Button** – all participants took quite a while before they spotted the home icon (for one it had to be pointed out). But when they found it, they chose that to return to the top level (this was a change made after Round I testing)
4. **Search** – two participants did not understand that you needed to return to the top level in order to conduct a new search over the entire collection
5. **Search results (OAC)** – two participants found the multiple clicks that are needed to drill down through the search results confusing (and annoying); (e.g. when you click UC Berkeley, finding aids, that goes to the left frame and you then have to click again in the right frame to get your results)
6. **Search Results (Bentley)** – Two participants found the KWIC option odd/confusing
7. **Other Buttons/Labels** – “+” confusing (added after Round I); blue navigation arrows unclear; the purpose of the book icon was unclear
8. **Labels** - “all collections” and “expand search” were unclear
9. **Full Text/Images** – Participants commented that it would have been helpful if at the top level of a finding aid there were some indication that it contained images and/or full text. (Note: the task to find a photograph was not given during Round I.)

## 2 Purpose

Gather comparative data that will inform functionality and design decisions regarding the replacement of the OAC interface.

## 3 Methodology

During Round I, four Berkeley library staff were observed while performing a set of tasks using the OAC and Michigan’s Bentley Archive (transcript of each session are available on request). Due to system-wide network problems the day of the test, we experienced slow connections to the Internet, particularly with the OAC. For this reason, we were not able to complete all the tasks. However, we used the downtime to debrief –asking the participants to discuss specific features and give us general feedback about the interfaces.

During Round II, three graduate students from San Francisco State University were observed while performing a set of tasks using the OAC and Michigan’s Bentley Archive (transcript of each session are available on request).

Prior to the test, each participant was asked to fill out a demographic questionnaire (available on request).<sup>1</sup> An experimenter and an observer were present at each one-hour test session. The experimenter conducted the test and the observer recorded the participants' "click trail" and any comments about the system. Each task was given to the participants in writing to ensure that, for each participant, the task was described in the same way. While the participants were completing the tasks the experimenter encouraged them to "think out loud" (verbalize their thoughts as they completed each task).

A potential problem when testing two interfaces with one participant is the "learning transfer" effect; that is, participants can potentially learn how to use the second interface more effectively based on having used the first one. In our tests, we limited this effect by alternating the order of the interfaces the participants tested.

### 3.1 Users Profile

#### Round I

All participants were archivists; therefore all had extensive experience with primary source materials. For three of the participants, their area of study/interest was Arts and Humanities; one was Science /Engineering. When asked how often they used finding aids online, three responded "6-10 times/month" and one responded "more than 10 times/month." Only one of the four participants did not have extensive experience with the OAC finding aids. All four said that they were "very comfortable" accessing information on the Internet.

#### Round II

All participants were graduate students. For two of the participants, their area of study/interest was Social Sciences and one Arts and Humanities. Two had used archival collections before. None of the participants had used the OAC extensively (only one had looked at it for the first time a few days prior to the test). Two participants said that they were "very comfortable" accessing information on the Internet and one was "somewhat comfortable."

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<sup>1</sup> The questionnaire change slighted during Round II; a question regarding specific usage of OAC was added.

Figure 1: Michigan – Search Results

**Bentley Historical Library Finding Aids**

[simple search](#) | [boolean search](#) | [help](#) | [home](#)

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**Search Results**

1 to 23 of 23 records

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- 1 **Title: Gardner Ackley Papers 1942-1987**  
**Creator:** Ackley, Gardner.  
**Extent:** 26 linear feet  
**Abstract:** Professor of economics, University of Michigan, and government official. Correspondence, speeches, and memos, relating to Ackley's work as presidential adviser and member of President's Council of Economic Advisers during the Kennedy and Johnson administrations; reports and other papers, 1944-1945, concerning his work with U. S. Office of Price Administration; papers, 1950-1953, concerning his career as assistant director of U. S. Office of Price Stabilization; and miscellaneous research notes and University of Michigan course materials.  
[Keywords in Context](#) | [Outline View](#) | [Full Text \(File size: 162K bytes\)](#)
  
- 2 **Title: Robert D. Aldrich Collection 1783-1983**  
**Creator:** Aldrich, Robert D., 1920-1983.  
**Extent:** 17 linear ft., 28 oversize volumes, and 1 oversize folder  
**Abstract:** Papers and photographs collected by Robert D. Aldrich relating to the history, people and institutions of Concord village in Jackson County, Michigan; include correspondence, diaries, account books and other papers of Concord residents; records of Concord social organizations, businesses, schools, and church and governmental bodies.  
[Keywords in Context](#) | [Outline View](#) | [Full Text \(File size: 105K bytes\)](#)
  
- 3 **Title: Alvin M. Bentley Papers 1935-1969 (bulk 1950-1968)**  
**Creator:** Bentley, Alvin M. (Alvin Morell), 1918-1969.  
**Extent:** 104 linear ft. and 5 oversize volumes  
**Abstract:** Republican congressman from Michigan's Eighth District, 1952-1960, candidate for U.S. Senate, 1960; member U.S. Foreign Service, 1942-1950, delegate to 1962 state constitutional convention; University of Michigan regent and philanthropist. Papers include diaries, correspondence photographs and other material his political career and other varied interests.  
[Keywords in Context](#) | [Outline View](#) | [Full Text \(File size: 304K bytes\)](#)
  
- 4 **Title: James J. Blanchard Papers 1982-1991**  
**Creator:** Blanchard James, J. (1942- )  
**Extent:** 268 linear ft. and 9 oversize volumes, including 5.5 linear ft. of Photographs, 144 videocassettes, 91 sound tape reels and 1784 sound cassettes.  
**Abstract:** Blanchard was Democratic governor of Michigan from 1983 to 1991. The collection is arranged mainly by unit or functional responsibility within the governor's office. These series are chief of staff/executive assistants, correspondence office, government relations, issues development, legal department, operators, personnel, press office, Upper Peninsula office, Washington office, Lansing residence, and political and campaign files. The files document the Blanchard administration's efforts in areas of education, job creation, the state's economy, environmental protection, and the rebuilding of Michigan's infrastructure.  
[Keywords in Context](#) | [Outline View](#) | [Full Text \(File size: 539K bytes\)](#)

Figure 2: Michigan – Outline View

**Bentley Historical Library Finding Aids**

[simple search](#) | [boolean search](#) | [help](#) | [home](#)

[keywords in context](#) | [outline view](#) | [full document text](#) | [return to search results](#)

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**Gardner Ackley Papers 1942-1987**

- ▶ Summary Information
- Administrative and User Rights
- Biography
- Collection Scope and Content Note
- Controlled Access Terms
- Contents List
  - [Office of Price Administration/Office of Price Stabilization](#)
  - [Office of Price Administration Studies, etc.](#)
  - [Office of Price Administration Subject files](#)
  - [Office of Price Stabilization](#)
- Presidents Council of Economic Advisers
- Topical Files
- Speeches and Presentations
- Television Appearances
- Radio Interviews
- Meetings of the Cabinet
  - [Government Meetings Primarily Regarding Domestic Considerations](#)
  - [Government and Other Meetings Regarding International Considerations](#)
  - [Meetings with non-Governmental persons or groups](#)
- Memos
- Congressional Correspondence
- State Governors Correspondence: with
- New Media Articles and Interviews, Invitations, and Miscellaneous
- University of Michigan Files
  - [1930s-1950s](#)
  - [1960s-1980s](#)
- Professional Correspondence
- Meetings and Conferences
- Speeches, Journal Articles, and Letters to the Editor

### Summary Information

**Creator:** Ackley, Gardner.  
**Title:** Gardner Ackley Papers  
**Inclusive Dates:** 1942-1987  
**Extent:** 26 linear feet

**Abstract:**  
Professor of economics, University of Michigan, and government official. Correspondence, speeches, and memos, relating to Ackley's work as presidential adviser and member of President's Council of Economic Advisers during the Kennedy and Johnson administrations; reports and other papers, 1944-1945, concerning his work with U. S. Office of Price Administration; papers, 1950-1953, concerning his career as assistant director of U. S. Office of Price Stabilization; and miscellaneous research notes and University of Michigan course materials.

**Call No.:** 85576 Aa 2  
**Storage:** Offsite storage; prior notification required for access.

**Repository:**  
Bentley Historical Library, University of Michigan  
1150 Beal Ave.  
Ann Arbor, MI 48109-2113 Phone: 734-764-3482  
Fax: 734-936-1333  
e-mail: [bentley.ref@umich.edu](mailto:bentley.ref@umich.edu)  
Home Page: <http://www.umich.edu/~bhl>

Go to a [printable version of this finding aid](#)



Figure 3: Michigan - Keyword in Context

**Bentley Historical Library Finding Aids**

simple search | boolean search | help | home

[keywords in context](#) | [outline view](#) | [full document text](#) | [return to search results](#)

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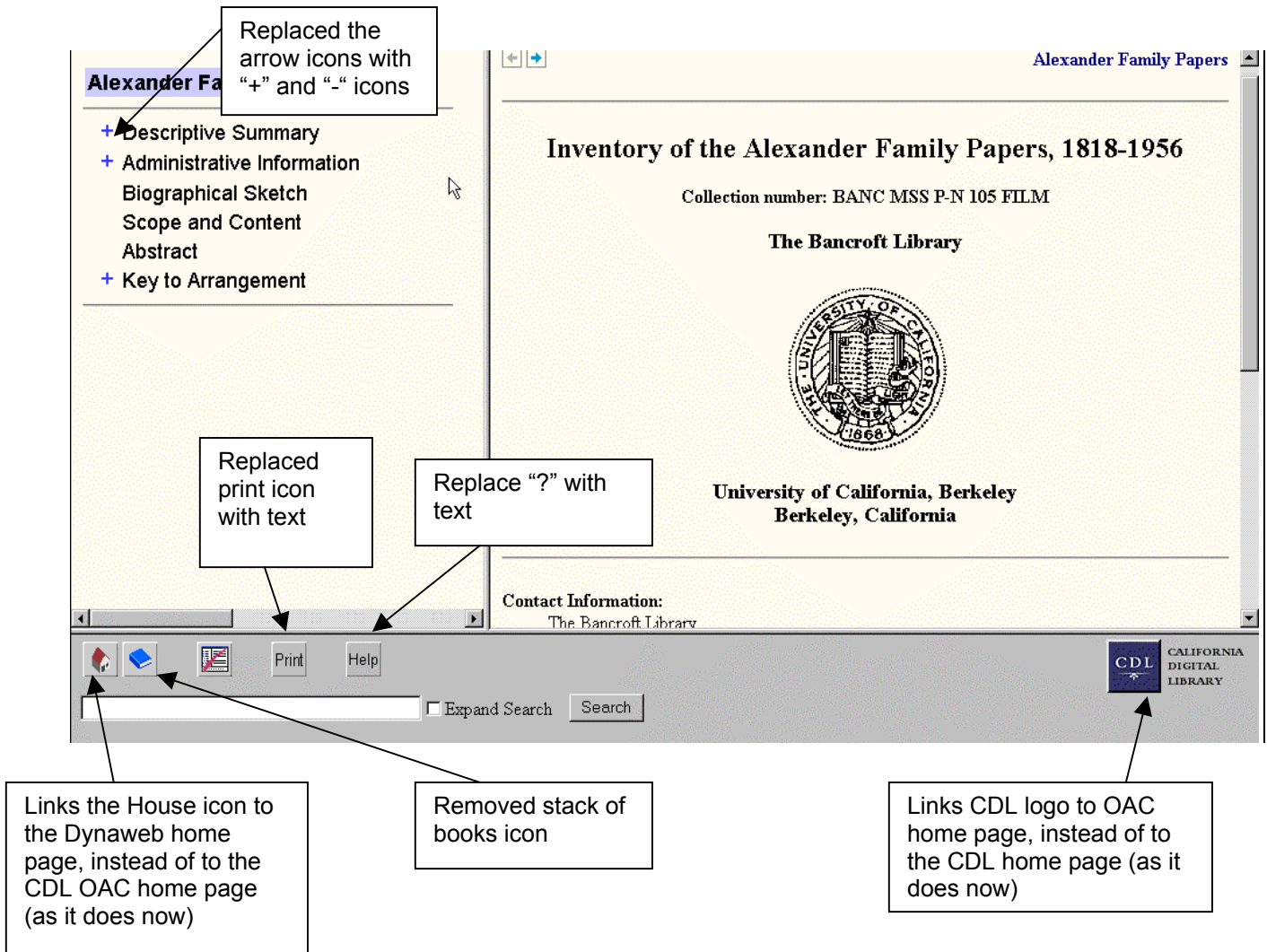
**Gardner Ackley Papers 1942-1987**

[Contents List](#)

- Series: [President's Council of Economic Advisers](#)
  - Subseries: [Speeches and Presentations](#)
    - 8 Conference on Money and **Banking**, Columbia University. "Current Issues in Economic Policy"
    - 8 Vermont-New Hampshire School of **Banking**, Hanover, New Hampshire. "Our National Economy: Present Situation and Outlook"
- Series: [Speeches, Journal Articles, and Letters to the Editor](#)
  - 27 Statement before the Committee on **Banking**, Housing and Urban Affairs of the United States Senate
  - Review of William Fellner, ed., Contemporary Economic Problems in Journal of Money, Credit, and **Banking** February 1979
  - 27 Statement before Senate **Banking** Committee March 10, 1980

Search Terms  
highlighted in bold red

Figure 4: OAC – Revised Dynaweb Interface (available at: http://akkri.ucop.edu/dynaweb/ead)





## Appendix A – Usability Tasks

### Round I

#### OAC – Tasks

1. Find the Hans Hofmann papers
2. Locate at least 2 collections/papers containing records about the experience of Japanese Americans in World War II
3. Find instructions/guidelines for the correct way to cite the Louisa M. Sweetland Papers
4. Find Paul S. Taylor's Oral History

#### Michigan – Tasks

1. Find the Buell Family Papers
2. Locate at least 2 collections that contain records related to banking
3. Find instructions/guidelines for the correct way to cite the James J. Blanchard Papers
4. Find the box number for a letter from Sinclair Lewis

### Round II

#### OAC – Tasks

1. Find the Hans Hofmann papers
2. Locate at least 2 collections/papers containing records about the experience of Japanese Americans in World War II
3. Find the box number for a letter from Hans Suess to Carl Sagan
4. You are doing research on the California Gold Rush era, find a photograph from that period.

#### Michigan – Tasks

1. Find the Buell Family Papers
2. Locate at least 2 collections that contain records related to banking
3. Find the box number for a letter from Sinclair Lewis