OneSearch: A New UI and A Revised Timeline

Summary: OneSearch is a shared catalog that searches library holdings at Western Washington University and at 37 neighboring academic libraries in the Pacific Northwest. Students, staff, and faculty affiliated with any of these institutions may borrow a wide variety of materials. In order to provide the Western community with the best possible research experience, Western Libraries' OneSearch Management Team (a working group of library professionals with expertise in discovery, resource sharing, and delivery services) will upgrade the catalog interface during the Winter 2018-2019 Intersession. This upgrade will enhance the overall user-friendliness of the catalog.

Western Libraries is part of the [Orbis Cascade Alliance](#), a consortium of 38 academic libraries throughout the Pacific Northwest, all of whom use the Primo product by the vendor Ex Libris. The vendor released a catalog interface with data-supported enhancements to functionality and user experience in 2017. After an initial review of the catalog interface in May 2017 (view our findings [here](#) in the presentation titled, "Doubling our Fun: Evaluating Two Primo UIs for Optimal User Experience"), the OneSearch Management Team decided to initiate a migration to the new OneSearch interface during the Winter 2018-2019 Intersession. Further testing was conducted throughout the Winter and Spring 2018 Quarters in order to create a user-centric catalog for the Western community.

Would you like to know more?

- **Migration**: Learn more about [the overall migration here](#).
- **Visit the New Catalog**: Access the new catalog interface [here](#).
- **Feedback**: Provide feedback about the new catalog [here](#).
- **User Testing Activities**: Please see Appendices A, B, and C for an overview of the user testing activities conducted in the new catalog UI.

Migration Timeline:

A. Communication & Outreach (Fall 2018): The OneSearch Management Team will continue to communicate updates to the University community and to publish updates to this [website](#).

B. Research and Academic Support (Fall 2018): The OneSearch Management Team will partner with library-based colleagues to update instructional materials and online learning objects in preparation for the rest of the 2018-2019 academic year.

C. Migration (Winter 2018-2019 Intersession): The OneSearch Management Team will publicize when the new interface is live to the University community.

D. Communication & Outreach (Winter 2019): The OneSearch Management Team will continue to communicate updates to the University community and to publish updates to this [website](#).

Appendix A: Snapshot of User Testing Activities

In preparation for the catalog migration during Winter 2018-2019 Intersession, the Usability & Design Working Group and the OneSearch Management Team partnered to conduct a series of user testing activities on the new catalog user interface (UI). What follows is a description of the methodologies employed and an overview of participant data.

Methodologies Employed

Methodology Type	Description & Intended Outcome(s)
Card Sort	A card sort is a two-part usability activity during which participants group similar types of information together, and then name those categories. This common usability methodology is often used in site design and/or organization. *Intended outcomes?* By completing the card sort, participants were able to tell the Libraries how to organize the presentation of post-search results filters menu.
Survey	Participants completed a brief survey at the end of the user study. The questions within the survey are as follows: • How often do you use the catalog? • When do you use OneSearch for your academic work? • Are there any advantages to using OneSearch? • Are there any disadvantages to using OneSearch? *Intended outcomes?* Participants were invited to provide direct feedback about the catalog interface, desired and expected functionality, and how they use the catalog.
User Testing & Observation	User testing is an activity during which an observer and a facilitator (commonly call a UX or usability team) ask a participant to complete a series of tasks within an online / web environment. Please see Appendix B for the tasks and results used *Intended outcomes?* Conducting user testing within a web environment tells the UX team if participants find the website is navigable, intuitive, and user-friendly.

Participant Data: Between the user testing conducted in May 2017 and Spring 2018 Quarter, the Libraries had 64 participants test the new catalog interface. Here is a breakdown of that participant data. Of these participants, fifteen were transfer students.

Participant Type	Number
Freshmen	4
Sophomores	12
Juniors	24
Seniors	11
Unknown*	13
Total**	64

*Participant data was not completed.

** Despite on-going recruitment efforts, the Usability & Design Working Group (UDWG) were only able to recruit one faculty member, one staff member, and one graduate student to participate in these testing activities. Effective recruitment remains a high priority and a future goal of the UDWG.

Appendix B: User Testing Scripts and Results

The Usability & Design Working Group (UDWG) conducted four studies across several different interfaces within the new catalog. Please see below for a brief list of the user testing tasks and a depiction of the results; additionally, the legend below the usability team observed and described task completion difficulty.

Legend

4 Incomplete: Did not complete task (despite multiple attempts).
3 Hard: Completes task on third or fourth try; verbally articulated difficulty.
2 Medium: Completes task on first or second try; observed difficulty.
1 Easy: Completes task with little perceived concentration or verbally articulated difficulty.
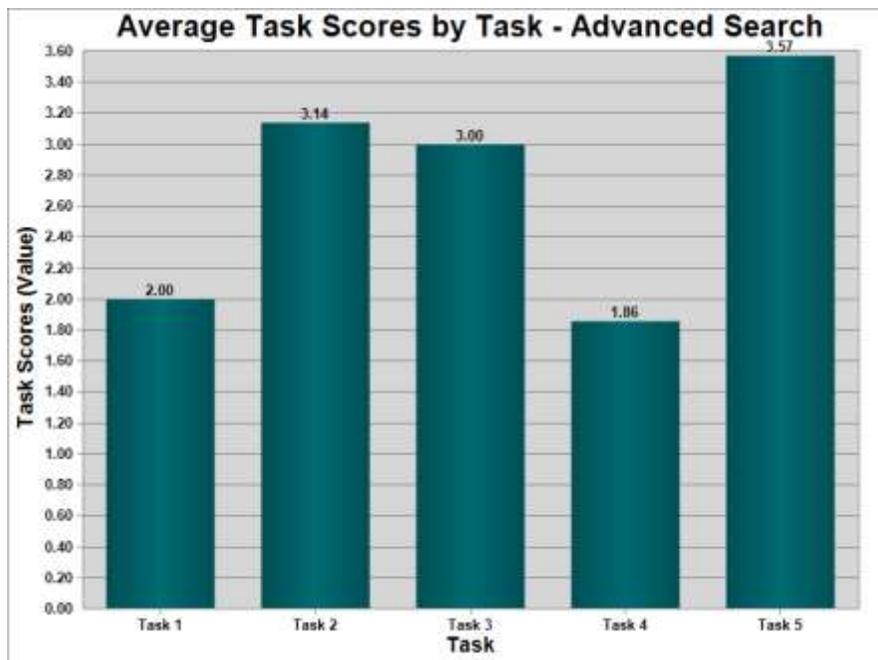
Basic Search Study – Tasks and Associated (Average) Difficulty Level

1. Conduct a search for this title, *Black Elk Speaks*.
2. How would you determine the text's availability?
3. Please demonstrate how you would find a copy of *Black Elk Speaks* at Western Libraries.
4. Please demonstrate how you would find the newest materials about *Black Elk Speaks*.
5. How would you e-mail the item to yourself?
6. How would you do that save *Black Elk Speaks* within the catalog?

Average Task Scores by Task - Basic Search
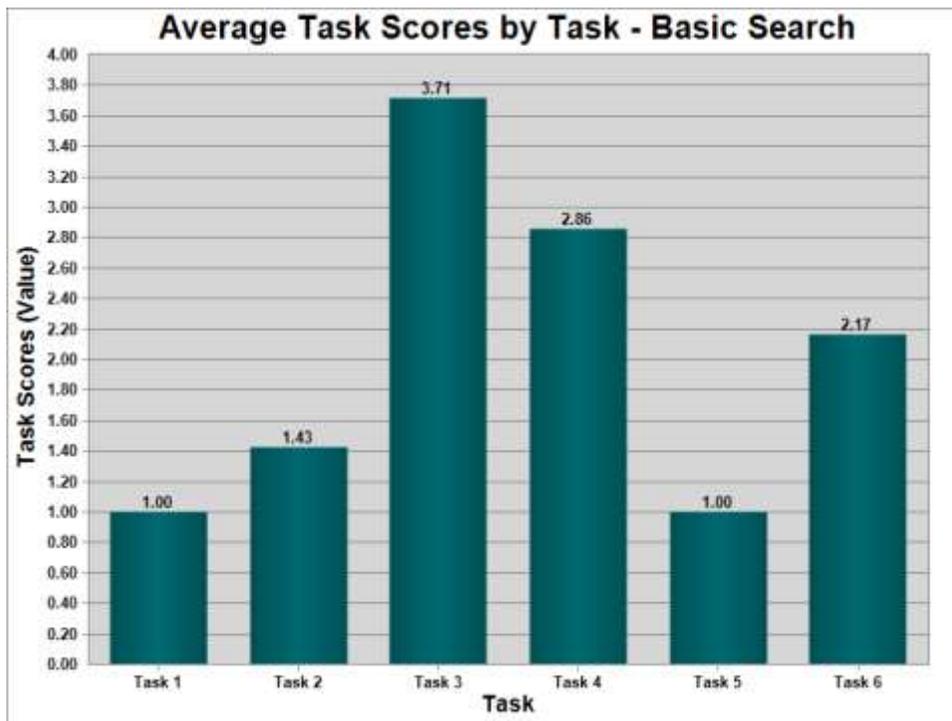
Advanced Search Study – Tasks and Associated (Average) Difficulty Level

1. You need to conduct a search but the simple search box doesn't offer enough options. What are your other search options?
2. Your latest research focuses upon the economic aspects of deforestation on indigenous peoples. Please show me how you would conduct a search with three search terms.
3. Reviewing your results, you're interested in finding which encyclopedias may have an entry on the economic aspects of deforestation on indigenous peoples. Please show me how you would find those results.
4. You've found a copy of your desired text. Is it available?
5. You're found a copy of your desired text, and you're interested in viewing the table of contents. How would you do that?


Journals Search Study – Tasks and Associated (Average) Difficulty Level

1. Please find the Journals interface. What do you expect this function to do?
2. You're looking for a journal: *Communication Theory*. How would you conduct that search?
3. Reviewing your results, you think the first result is the journal you're searching for so you click on that link. You're presented with a pop-up box of access options. Which option provides the greatest range of available volumes?
4. You click on the access option that gives you the greatest range of volumes. You want to find the earliest publication possible by *Communication Theory*. How would you find that information?
5. You return to the catalog, now looking for other materials from the same publisher of *Communication Theory*. Please describe how you would do that.

Average Task Scores by Task - Journal Search
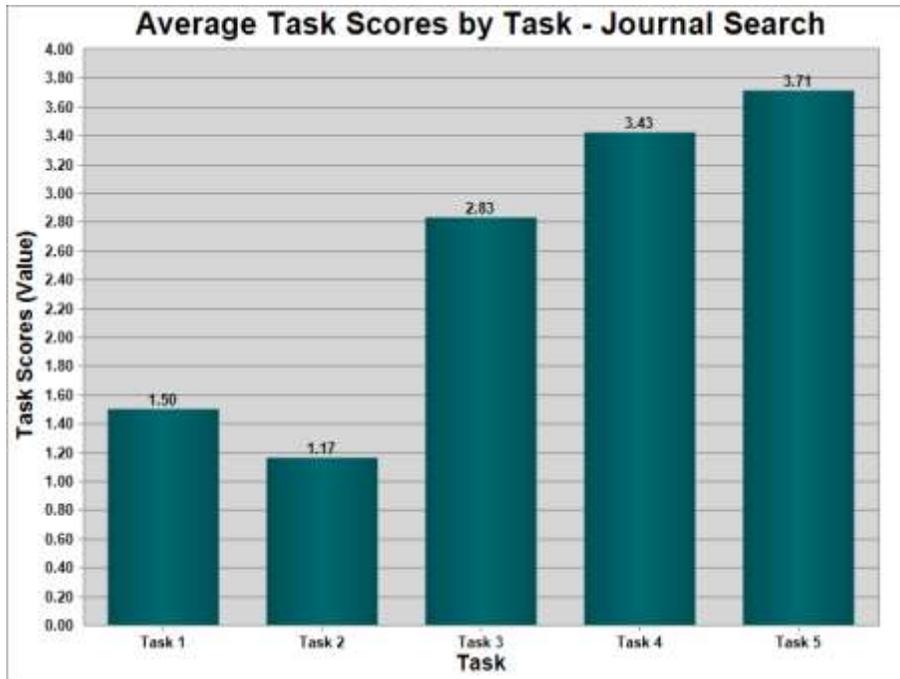
Browse Search Study – Tasks and Associated (Average) Difficulty Level

1. Please find the Browse interface. What do you expect this function to do?
2. In the Browse search box, please conduct a search for this call number: LB2395 .C655 1999. What is the title and who is the author of the first result?
3. Do you see anything in this record that provides a summary of the contents of the item?
4. How would you request this item for pick up from Western Libraries?

Average Task Scores by Task - Browse Search
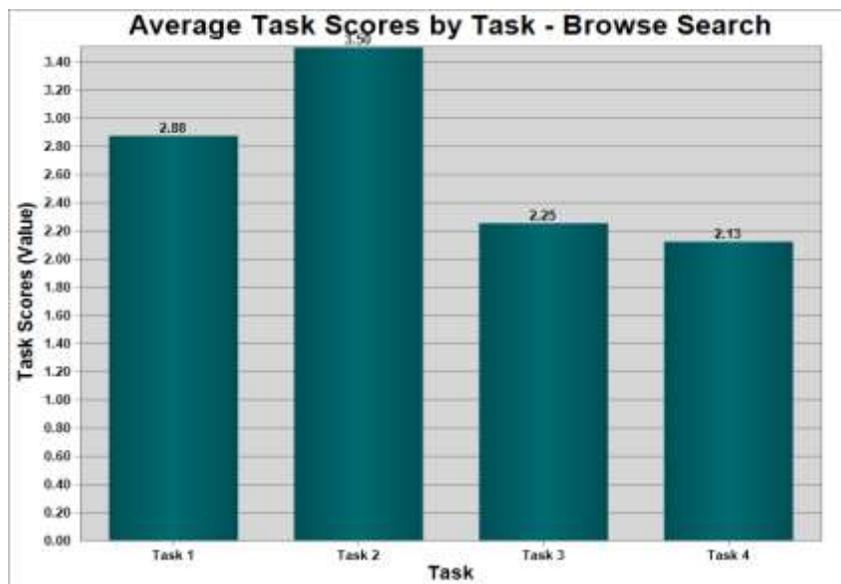
Appendix C: Recommendations

Card Sort Recommendations: Based upon the results of the card sort, the OneSearch Management Team should adopt these changes with regards to the post-search results filter menu within the Libraries' catalog.

- *MESH Genres*: We will change the label MESH Genres to Medical Subjects. Ninety percent of participants didn't know what that label meant. Changing the name to Medical Subjects should be more intuitive.

- *Classification LCC*: We should change the label Classification LCC to Call Number. Eighty percent of participants didn't know what that label meant. Most people know what a call number is.

- *Author / Creator / Composer*: At least two participants indicated verbally that they felt that author, creator, and composer were the same thing.

- *Library / Availability / Physical Location / Digital Held By*: One participant indicated verbally that, to her, these were all interchangeable. We should consider grouping similar post-search filters together, and adding subheadings.

- *Suggested Order of Post-Search Filters (In Order from Most to Least Important)*: Availability; Format; Subject; Date; Genre; Author/Creator; Composer; Director; Language; Library; Physical Location; Classification LCC; Rights Statement; and Digitally Held By.

Survey Recommendations: Based upon the qualitative survey results, the OneSearch Management Team should adopt these changes within the Libraries' catalog:

- **Authentication**: Make the sign-in button larger and more visible on the homepage and within the catalog.
- **Information Overload**: Reduce the number of fields within an item record in order to minimize the amount of information that's presented to the user. Explore other methods for allowing users to control the amount of information presented to them.
- **Labels**: "Easier" (more intuitive) labeling of links and functions within the catalog.

User Testing Results: While the Usability & Design Working Group is still evaluating the user testing results, there are a few early recommendations to adopt for each of the following interfaces:

Interface	Recommendations?
Basic Search	a. **Pushpin Icon:** Many users didn't understand what the pushpin icon was supposed to indicate, and thus were unsuccessful in that task. The OneSearch Management Team should consider using a different icon and/or a command. b. **Search Scopes**: Many users didn't seem to recognize and/or use the search scopes. They used other methods to identify resource availability and access options. While this is not strictly a catalog or

	discovery issue, this does suggest that improved messaging (e.g., through a LibAnswers FAQ) could be helpful.
Advanced Search	a. **Use of Advanced Search**: Unless explicitly prompted, most users do not use the Advanced Search interface to conduct searches. This suggests that improved messaging about the use of Advanced Search (how, and when during the research process) could be useful to our patrons. b. **Seeing the Search Results**: The Advanced Search section is so large that many users could not find the results unless prompted. The OneSearch Management Team should consider shrinking the overall size of the Advanced Search section and/or adding a label that indicates results are present "below the fold." c. **Seeing the Post-Search Results Filters Menu**: Many users did not see the post-search results filters menu where it is currently located. The OneSearch Management Team should consider relocating the menu to the left, as it is a common Eurocentric web convention to do so.
Journals Search	a. **Volume vs. Issue**: Many users didn't understand the difference between journal issues and volumes. While this is not strictly a catalog or discovery issue, this does suggest that improved messaging (e.g., through a LibAnswers FAQ) could be helpful.
Browse Search	a. **Pre-Search Filters**: Many users didn't see the pre-search filter options within the Browse Search interface. While this is not strictly a catalog or discovery issue, this does suggest that improved messaging (e.g., through a LibAnswers FAQ) could be helpful.