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>> BENJAMIN MURPHY: It looks like we are at 2 o'clock so we will go ahead and get going here. The event is being recorded and will be available on YouTube following the conclusion of the conference. We would like to encourage everyone to use the chat window to post questions. The facilitators will be collecting your questions along the way and posing them to the presenters at the end of the session. We also request that you keep yourself muted for this session. I don't think this is a roundtable. It is not. So we would ask that you keep yourself muted for this session. And we would like to introduce the presenters for this session, Terran McCanna, Tiffany Little, and Elaine Hardy, who are all from Georgia PINES. They will be talking about the OPAC Usability Study Results. With that, I will turn it over to them.

>> ELAINE HARDY: Thank you, Benjamin, can everybody hear me okay? I do want to warn you as I'm sure many of you are I am at home. I have a lot of cats, and they all just

recently came through talking to me so we may be interrupted, just so you know. I want to thank everybody for coming today and as Terran mentioned in keynote, we really regret we were unable to host everyone in Atlanta this year, especially since 2020 is a 20 anniversary of the PINES consortium. We were looking forward to celebrating that with everybody but we have everything zero we can virtually share the Usability study and are grateful to everyone who is responsibility for that, including [indiscernible].

Sorry, I accidentally muted myself. For some time now, PINES staff at discussed the possibility of a Usability study with Evergreen and the [inaudible -- off microphone]. This year we were able to facilitate an initial, small-scale Usability study by the school of engineering and Mercer. I'm going to provide an little background on this study and Terran will discuss the study and its findings than Tiffany will discuss future steps. As library catalogs have evolved, the paper ones only available in-house, to computerized only available in-house, to web-based ones available wherever the users have been, we have the technology to access them, usability has become more important given that so the user access with no library indication to the databases. The question is how do we enable enhanced discovery when we are physically distance from the research? How do we ensure that our ILF [sounds like] exists rather than enters? And present library data and system functionality in a way that benefits rather than frustrates users? The best way to gather answers to these questions is to ask the users about their experiences, navigating our OPACs and to make positive changes. However, we are not always able to be objectively the wants to gather that information, to ask people those questions and harvest the answers. We often have to depend on outside vendors which can be kind of impossible [sounds like]. Since 2006 or so, PINES has done an annual user satisfaction survey. This is not scientific or is it reflective of [indiscernible]. We posted on OPAC is responsible for the user to click through and answer the question. But, those responses have been help in formulating policies and cutting development, even though they are an incomplete snapshot of the user experiences. More controlled empirical surveys and usability studies have always been on our wish list to provide more information it's making improvements to the design of the online catalog to enhance user navigation.

In addition to usability studies with general users and nonusers, remember your nonusers also important, because gathering information from nonusers can help make your catalog more accessible to those people who don't use them. PINES has also been interested in auditing accessibility for users with [indiscernible] that might require accessible technology. We just recently last year, although it seems like much longer ago than that now, were able to use a grant to fund a web accessibility evaluation Evergreen center [indiscernible] Georgia institution of technology. You just heard John Rempel talk about that at the keynote. The audit was an overview of web accessibility and degree of conformity to those Web Content Accessibility Guidelines and the AA success criteria. We've done an OPAC one earlier, this one was for circulation staff functionality and detailed code testing. It determined that Evergreen was fairly accessible. It had some cop the predominant issues with the lack of labels on form fields and unexpected sounds accompanying actions. I think anytime you had your speakers up too loud and you encounter the red alert noise, you probably are sympathetic to that, particularly if you've been in a public setting when that has happened to you.

We released the final report to Evergreen community and Tiffany created launchpad bugs. The report is at that link and it includes links to the launchpad book report. And last year's conference, several of us attended a session to revamp the [indiscernible] of research reports out by the Georgia Department of transportation to one of the professors was from Mercer University school of engineering department of technical communications and she discussed the usability aspects of the projects. After the discussion we discussed with her the possibility of eight user study of the PINES OPAC. She in turn got us in touch with Doctor paperwork who is [indiscernible] and teaches courses in usability studies and testing. Mercer University is a private university with its main campus in Macon, which is located in the middle of the estate if you hours south of Atlanta and satellite campuses throughout Georgia including one neighboring our offices in Atlanta. Fortunately, the School of Engineering is in Macon and not in the campus next door. So we did webinars and did travel down there to see the student presentations. The department of technical communications the provides opportunities for students to

design and implement real-world studies to enhance products and services to private corporations and federal and state agencies. And discussions with Dr. Brewer we agreed that initial study of PINES OPAC would be a good [indiscernible]. The study we wanted to look at the experiences of different age groups of library users and nonusers. The class was divided into five groups to develop and administer a study based on age, use of OPAC and the two apps. Terran set up test accounts on the live server for the project and discussions so that we can answer student questions directly. Dr. Brewer set up a webinar with the class so we could introduce PINES, ourselves, our expectations for the project and process to answer initial questions s

These are the five groups. The initial outcomes PINES proposed were to identify confusing terminology and screens, to generate ideas on how to make them less confusing, identify processes that have too many steps and could be streamlined, identify problems users may have using the catalog and identify additional tasks that patrons would like to do within the catalog. The task force of the participants -- and I went to point out that both this and the processes, given the limited time that they had for the test, but all these tasks all of those processes were looked at because of that. So they were not in-corporated into the study. But, isn't clear what the catalog is for? Can you find your closest library? Can you log in? Can you tell whether your local library has a book? Search for materials on a topic? Just see which library has workbook if yours doesn't, where it has. Is it currently available? If it's not there, can you place a hold on it? Then also things about navigating the library pain, particularly if you can renew, what is confusing, can you update your password? Things like that.

At the end of the project, we traveled to Macon to perform the usability lab [sounds like] which was in transition from the digital to current digital is the best way to put it. We also had a presentation of the study findings but each of the student groups looked at each of those groups. Now we are going to turn it over to Terran to discuss the study and its findings.

>> TERRAN McCANNA: Let me wrest control of the screen away. Let's see. Zoom keeps giving me pop-ups over little things I need to read. I have kind of compiled and summarize the five different sets of results here. Because a lot of the different age groups at the same feedback on particular topics or areas and pages.

First of all, the general reaction from all of the different age groups to the OPAC was positive. They liked the clean, simple design. That everything was clearly labeled. This like the ability to check the account status and the ability to place holds. The users that used to be search filters really liked them, but not everyone noticed that they were even there or understood what they were for. The college age group was the biggest user of those because they're so used to using on my research databases with filters.

The age 65 and up group in particular really loved the convenience. Many of the users, since we specifically asked for users that were not regular PINES users so we can get feedback from people who were not familiar with the catalog in the app already, a lot of the 65 and up age group were not actually aware that they could access the catalog or manage their account online and those that were library users thought that they would have to visit the library were to call to place to renew items. That is more of the market-ing and promotional type of thing rather than a usability, but they did love the conve-nience of it. As I mentioned before, the college age group was the only one that really used the advanced search options at all. They really liked those. Going through some of the areas where they had some levels of confusion, the polls placement page, most groups found this page confusing. There are a lot of fields there they are not really bro-ken up visually in an understandable way. A lot of users were either using a tablet or a monitor with a large screen or low screen resolution so the entire form did not appear on one page. Because of that they were overwhelmed with all the fields and the layout and did not realize they had to scroll down to click submit to delete the holds. some sug-gestions for that page are to rethink the layout of it to make better use of space and consider dividing it visually into different steps, where you want to pick the item up, how you want to get notified, etc. That is, I think, something that is very doable, but we can discuss as a community to make that process a little more streamlined and clear.

The next issue is a library list, PINES has 53 regional library systems and about 300 branches. And I know a lot of other consortiums have a very large number, as well. The longer that list is the more confusing it is, a lot of users don't necessarily understand that libraries are broken up into regional systems. If they do, they don't necessarily know what the original system name is, they don't necessarily even know what the branch name is. Some of them, since they didn't understand the branch selection at a branch selected but didn't really understand that they were searching the entire consortium. Some suggestions on things we could possibly do to resolve that, if they do know the name of the branch or the system it would be nice to be able to type in the start of that name or a portion of that name so that they could filter it to the library looking for. Also, adding some visual emphasis on screen to make it more obvious that their searching a particular library or system, rather than the entire consortium. And another suggestion was, if they are searching only a particular branch or system and not getting any results or many results, then make it a little more obvious rather than just a text alerts that they could expand the search location to possibly get better results, maybe highlighting the library location dropdown.

Integrating geolocation and mapping also be really helpful. A lot of users, well, pretty much all the users even the older users, really expected to see an option, use my location sort of option, so that they could filter their results by their region. The Evergreen community development initiative is actually funding a project to sort copies by distance, so that they can choose their location and then have it sort all of the available copies by distance from them. But it would also be useful to have that, sorry, there's a bug in my face [LAUGHS], it would also be useful to have that kind of location-centric capability right at the basic search level before they do their search.

So, PINES, they looked at the PINES specific OPAC rather than the master OPAC and we do have a library locator map on our site. It's pretty rudimentary. You have to type it as a code and it zooms in and shows you the library is a. That is I think kind of a start in the right direction. That's not integrated directly with Evergreen. But if we can build on

that idea and integrate something like that on a more sophisticated level, I think that would be really useful. They want to be able to just go to the map and see where all the libraries are in. They also want to be able to click a button to say start here, use my location. They also want to be able to type in a library name rather than just a location to search the map for that. Also, when they are viewing the map they want to be able to see all of the library addresses in text to the map like they would in Google. The other thing is that they wanted to be able to save, once they selected a library, they wanted to be able to set that as their preferred search library which right now can only be done by going into my account settings.

The next piece they were a little confused by was the renewal process. Many of them were looking for a renewal button on the same line as the book. Many of them overlooked the reader selected titles dropdown, entirely, we didn't really understand that they had to select or check the checkboxes and then click that button. Because they were ignoring that part, they were looking down here, many of them clicked on the title expecting that to take them to a renewal option which it did not, of course, it takes them to the item details page. Even there, they expected to be able to renew from the item detail page if they had it checked out. Because they're used to seeing that type of functionality in common e-book apps. So a few suggestions for that, it should be, should be able to add a Renew button next to each item that has renewals available. Somebody also suggested adding the book cover next to each item. Then, also adding the renew function from the item detail page if they have it checked out.

Another problem area was the pop-ups. This was one that took all of us at PINES by surprise because we're so used to using the browser all day long, every day. We've never really noticed the usability issues of the pop-ups, ourselves. But what happens is that the default browser pop-up appears very high on the screen. This is a screenshot from Chrome which is worse than it is in Firefox, but I wanted to show the worst example. The pop-up appears very high and is not visually distinguished from the background and the text is also very small. So all user groups had trouble noticing that the pop-up was even there. But the older user groups or the users that had bifocals, not only did

they not notice it was there, but because it was above the line of their bifocal, that made it even more difficult and they had a really hard time reading at that high it's because the text was so small. If we could customize those pop-ups rather than using the browser default, so that they're pushed down to the middle of the page and are visually stronger, that would help a lot of people.

Another suggestion was we wanted to be able to see somewhere either in the My Account section or maybe on the footer of the page with a login the contact information for their own library. Right now it just shows the, what their home library is in the My Account page. But I think it should be fairly straightforward to pull in the link to the library's location and their address and hours and everything either into the footer or the My Account page or both.

One group, the high school age group, also were looking for ways, they were looking for the common share button that's standard on a lot of sites because they wanted to be able to share baskets [sounds like] or [indiscernible] or lists by clicking a button on whatever page they were on. The college age group, actually, requested that we added the standard up and down arrows to all the columns that are sortable. Again, that's something I didn't really even notice wasn't there before, but should be pretty easy to add.

Switching over to the app results, oops, again, the overall reaction was very positive. They left the clean, simple layout. The iconography is very easy to understand and intuitive to everyone. They like to easy it was for it to do all the basic tasks like placing holds, renewing items, checking due dates. We had some similar reactions to the basic search that we usually do in the OPAC. Which, the user groups didn't actually, that refute the OPAC in this study didn't [indiscernible] much in the [indiscernible] but they did in the app which I thought was interesting. They wanted things like auto complete, search suggestions, spellcheck, things that we all want, that all of our users. There are some projects to try to get those things going in the works [indiscernible] off. The app in particular, they complained about the lack of location both in the OPAC and in the app.

But in the app, they really assumed that the app knew the location where it was and were confused that it did not. They also wished that it would save the search criteria between the searches, especially for the search location. And that's actually something that Ken Cox, the developer and I, have talked about. So I think we will bump that up whenever we get some more funding available so they don't have to go back to select the library or the system every single time they do the search. Again, the library list is very long. Just for fun, I ScreenCapt about three branches to see how many pages there would be an there are 12 full pages of libraries that they have to go through to find their branch they are looking for.

If you other suggestions, again, they want geolocation. Whether it's automatic or just to allow app to use my location, some kind of setting they can control. They want to be able to save the search location and other search criteria between searches. They would like to be able to set the search location from there default search location from there rather than having to go to the My Account settings. And also possibly at search suggestions of some type at some point. On the Search Details page, they expected to see the locations of the books on this page. They didn't really, most of them did not understand what copy info was for. A suggestion for that would be to move the Copy Info to this page so they could scroll to it instead of clicking on the button and possibly also, right now the Copy Info just shows the copies within their search location. So possibly, add, if they are not searching all of the consortium, to add a button site showing copies at other locations, as well.

Lists, lists are a feature only available in the android app, not the iOS app, yeah. You can add an item to a list very easily if the list already exists. But it's very complicated to create a list. So they wished for that to be more streamlined. And of course, to add it to iOS as well, at some point. They also really wanted to be able to pay their fines through the out. And the college age students and particular wanted to be able to filter the search results by publication date and genre. Right now -- and I'm not sure if this is available on the generic app or if it's just on the PINES customization -- but we link out to the full catalog in several places were to the My Account and screens for the func-

tionality that's not available natively into the app. Whenever we link out, they want to be notified that they're leaving the app and going to the catalog so that they understand, because some of them had trouble getting back because they didn't understand that actually left. Also on the renewal page on the iOS app, they found the renew button hard to distinguish from the other buttons on the page.

A lot of the user group members also requested some sort of in-app tutorials, something simple and mobile friendly, but possibly popping up in something like if you simple screen tips when opening the app for the first time we you can swipe through or cancel [sounds like] them and also make them available for the menu. That is my part of the session, so I will turn it over to Tiffany.

>> TIFFANY LITTLE: Now it is my turn to see if I can share my screen. Oops. Okay. So going forward, after we have all of this feedback from the students and their presentations and the people who participated in these studies, now that we have, all that together, we will be adding it to Launchpad and Creating the list of bugs the same way we did with the accessibility study. Probably they will fall either into the usability bucket for tax or accessibility. Because some of them were usability things and some of them are accessibility, like where the pop-ups show on the screen, that was an issue for people who wear bifocals. So we will be going through and adding all of this to launchpad. For what we have gleaned from this round of testing. But actually, that group at Mercer, there is obviously a new class every semester and, when we spoke with Pam, they do this same project every semester or every year. So they always need someone to test on. Now, they often test on like government departments. But they said they would be willing to work with us, again. So that would be really useful for us, because we can take what they've given us now and make improvements and then test, again. So we can do an iterative development. So we can test on those essay groups to see if it's better. Then, we also didn't really focus on sort of that middle group demographic. So be dead high school, college, then we did the over 65 group. But we didn't really get that big, and between group. So that would also be a future thing we could test on there and see if they also have the same concerns that the other groups dead or if they have a com-

pletely different set of expectations and concerns and needs son. This will be our two going forward, adding to launchpad some things that we already can fix and some of those are wish list, like the map integration. And some of those will be bugs that pop up. And then just testing over again, as far as Pam and her students will have us, so that we can keep that ball rolling forward and keep testing. So this would be our steps going forward.

Then, we also have the slides from the student presentations that the students did. So you can click on this link and you will actually be able to see the presentations the students did. And, does anybody have any questions? My portion is really short and sweet.

>> TERRAN McCANNA: Just reviewing the chat, Stewart asked if the code for the app is available. It is publicly available, I will follow end [sounds like] open-source protocols. I'm sure Ken would be delighted if someone else other than him was contributing to the code so that we were not all relying on him in his spare time to work on this. And Ken has posted the location in GitHub where that code lives. That anyone else have any questions? I wanted to notice if you're not watching chat, I wanted to point out that Ken will be hosting one of the breakout rooms in the virtual happy hour, I think it's tomorrow. Is that tomorrow, and?

>> Yeah, tomorrow, 5:15 PM, all are welcome.

>> TERRAN McCANNA: So if anyone has any questions whether you are using the app already or if you're just interested in using it. Our power users in PINES apps absolutely love it. It's being used in all age groups that are comfortable with smartphones and even a lot of staff prefer using it for their own goals and everything, the search especially is incredibly fast. So we are very delighted with it.

>> TIFFANY LITTLE: I wanted to add, I did not add it on my slide but if you're interested in something like this, going through the University, for Mercer it was the Engineering department. But I also did some googling. You can look at your local university for Hu-

man Computer Interaction classes or courses and a lot of them do this same thing. So if you're interested in having your branded Evergreen looked at or even just your website, or whatever. They may or may not do it. I'm not putting anyone on the spot. But if you wanted to see if that was a possibility then, that might be a key keyword.

>> ELAINE HARDY: To and asked about the survey questions. The students have questions for each one of their study groups. So than into their presentation some. And they also have, some of them have a couple videos of people's reactions. But they talk about their set up for their study and the things that they asked for each individuals in one of those sessions.

>> TERRAN McCANNA: It was really fun to go see their lab. It's all high-tech and they have the i-tracker camera with access to. They record the people so that they visually and audio-ally -- I don't think it's a word -- so they can take notes and they have a facilitator in the room and the students are watching through the one-way glass so they can all pay attention to how the users in the user group are reacting to the screens. It's really cool. If anybody else gets a chance to do something like that, I really recommend it.

>> ELAINE HARDY: Some of them they did remotely, so they were filming through the computer at home. This particular part of the study was free because it was a student thing. I have a feeling that if we advanced to more advanced studies, that we may have to cough up money. There is a possibility for that free, as well. Oh, you wanted to see the survey on the OPAC we perform annually?

>> TERRAN McCANNA: The questions are actually on the handout, the results. It has the exact wording of the questions.

>> ELAINE HARDY: We don't have the free text, we don't put the free text answers on-line, because some of that has sensitive patron information [PHONE RINGING] and of course my phone rings, too.

>> TERRAN McCANNA: That's fine, I will post the link to where all of our user surveys get published if I can remember where I put it. There it is. So that has all of our user survey results going back to 2006. And we do try to keep the questions the same from year to year. So that we can more reliably see the progress of the reactions of people from year to year to gauge whether the overall approval rating goes up or down. The only thing that we've added I think as we have added some major new features, we might ask an additional question about that. Like I know we added the app question in whatever year we rolled that out. [LAUGHS] Does anybody else have any questions? I see Ken has.

>> I just had one comment. It's interesting, all of this data is super interesting, so thank you for that and thank you for sharing. One thing that you mentioned is that the redo button was a little bit hard to use in the OPAC that there is not a direct connection between the item checked out and the renew action. When the app started, I did that because I thought it was the most obvious thing. That I got feedback saying hey, I have 27 items checked out for my four children, I want to renew them all at once, so can you add checkboxes?

>> TERRAN McCANNA: Yeah, I wouldn't want to take away the current option, because there are people, especially like homeschoolers and people that just read about that do have 50 items checked out, which is our max, at all times. Before people who don't have that many checked out being able to do one at a time is also nice. They want everything. The want it both ways. [LAUGHS] Nicole, yes. I believe Ken could talk to it more. But there is a general Hemlock app that I think Ken could add a connection to your library system from. But if you want to customized version, Ken can do that, as well. And the code is open source. So if anybody else understands the app development or you have access to another developer, they could also customize it for you.

Tiffany and Elaine, did you have anything else you want to say?

>> ELAINE HARDY: I just think it was a very good experience for us to both interact with these students, they were very professional and very, very good to interact with.

And it was very, very interesting to see the results of the survey, of the study. Because anything about it, we're all-powerful users. We know where everything is. We know how to navigate things. So we don't always see those blocks. I think we all in PINES, for instance, where our massive list libraries is going to be a barrier to a lot of people. But just hearing some of the other things was surprising, because we know how to use the software. So it's extremely helpful to get that other perspective from people that don't know how to use our software.

>> TIFFANY LITTLE: I was going to say the same thing. It was really interesting, because when they were giving their presentations, we are scribbling down notes and I was like I never even thought of that. Because just like Elaine says, we are kind of like the power users or we work on our computer all day long, so we're familiar with the browser or the app or whatever. So I never thought of a certain thing that way. So it was fascinating and we took tons of notes. It was a really great experience.

>> ELAINE HARDY: I was reminded from archaeology days the adage that we used to go where the data takes you. It's really, really important to look at your data and go where it takes you, because it could take you into unexpected places. One of the things that they mentioned about the clicking on a button and ending up at a totally different place and not knowing how to get back. Those kind of things are just, they are self-evident to us. But it's clear that it's not self-evident to everybody that uses it.

>> TERRAN McCANNA: Even though I did have a lot of slides there on problem areas, they were actually all pretty happy with it for the most part. There were just certain clunky things that we could consider streamlining. Chris Burton had mentioned in chat he is working on revamping the OPAC to make it more user-friendly and accessible and responsive. So he's interested in taking some of these suggestions and integrating those, as well. I think the pop-ups, especially, that's one that should be pretty easy, presumably, for the browsers to [indiscernible] pop-ups and that would make a huge difference for a lot of people. And the whole placement, too. I always thought it was clunky, but I've never sat down and looked at it to see where we could make it better.

>> ELAINE HARDY: One of the things we were talking the other day is we need to have an authority file. The library names. Because so many of them, people may know their local library is the local County library, but it is actually named for someone that they've never even heard off. So they can't find their library in the list.

>> TERRAN McCANNA: Chris, our slides will be available, we will get them posted to the presentation site, I believe. And also linked on the last page of the presentation is a link to the original student presentations. So you'll have both of those. There is actually only four of the five student presentations there. One of them doesn't look like we ever got. So I've asked the instructor to look for that. She's out of town right now. Hopefully by next week she with the other one, as well. It's the android app one. So we did have a lot of notes on it, but we did not have the actual student slides. And we expect the slides will be linked from the conference webpage.

>> ELAINE HARDY: I think, Lynn, there was a question for you in chat. We were curious to know how you will not process has been.

>> I just sent the message, it's been great. We are currently in the beta test phase. Everybody who is beta testing the app is loving it. There have been a couple of things that yes, we would love to have some certain things. But for the most part everybody who has tested the app so far has loved it. Hopefully by the end of the month, we are rolling it out, Ken, right?

>> Whatever you're ready.

>> Oh. But one of the things that everybody has asked about is putting self-check in there, how we could integrate self-check into the app. I know there was another consortium that was also looking at adding self-check into the app.

>> TERRAN McCANNA: That's such an interesting idea and I would love to know more about how libraries plan to use it. I have a feeling libraries would resist it, just because they think people are going to walk out the door with everything. Not that there's a lot stopping them right now, anyway. But I'm very curious about how that will work. One other thing I want to mentioned is Ken is working on pulling the library information to the app, as well. Right now there will be library info button on the main screen right now we are testing in PINES right now. So they can click on that and see the info was at their home library, the hours and address and phone number and email and stuff to make it easier for them. Then it will default to their home library. It has a dropdown, too, so they can select a different library if they want to see that libraries hours and contact info. Just so you know, Ken, everyone who has tested it so far left that. Problems, yet.

>> That's great. I didn't really realize that there were 12 pages of library branches. That's a lot.

>> TERRAN McCANNA: Yeah. Once the project that the ECDI [sounds like] is funding right now, to be able to sort copies by the closest location is there, that will start pulling at the library the library coordinates in. So at least that information will be in the data-base that will be associated with the libraries. That's a crucial piece of data that we'll need in order to move forward.

>> Very cool.

>> TERRAN McCANNA: Okay, does anybody else have any questions?

Jennifer Pringle says that they are looking at options self-check options too to help avoid having to clean the subject computers every day, which is a very good point. Okay, if there's no other questions, then I think we can wrap this up and everybody can take a little break before the next session starts.

>> BENJAMIN MURPHY: So we are going to keep this session alive, I will put up a slide. Coming up next at 3 o'clock we will have the Student Success Working Group with Jane Sandberg. That's what we will be doing next. We will pause everything for just a little while.

>> TERRAN McCANNA: Goodbye, Ken. Thank you, Benjamin.

>> MULTIPLE VOICES: Goodbye, thank you. Thank you all.
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Captioning sponsored by Equinox Open Library Initiative, and provided by CaptionAccess