

Discovery Team Assessment Plan

In order to assess the effectiveness of the new EBSCO Discovery System (EDS) and how access to it is integrated into our web site, we need to gather both quantitative and qualitative data.

Through usability testing of the interfaces and new data collection methods, we will gather information on the usability, accessibility, and functionality of the interfaces, as well as usage and demographic information that will help inform our decisions and priorities regarding changes and improvements.

Usability Testing

1. Homepage search tabs (integrating EDS search capability) - quick usability testing

Goal: To find out if the proposed search tab design that integrates EDS is effective, as well as what changes could be made for improvement. Only the labelling and design of the search tabs are being tested, users will not actually run any searches.

Method: Quick (guerrilla) testing of two different functional versions of the tabs (A/B) in Stata's Information Intersection & outside Hayden & Rotch, using laptops and the MediaMobile Cart. Full plan available on the UIG wiki.

Deliverables:

- Executive summary providing high-level, key findings. To be delivered to the full Discovery Team, and shared with other library staff, and potentially EBSCO reps or interested staff at other libraries/institutions.
- Report of in-depth results, providing detailed findings to specific tasks and questions, along with suggested recommendations. To be delivered to the homepage IA implementation group (Matt, Melissa, Darcy) to analyze and decide on changes to the design as indicated by the results. Will also be shared with the full Discovery Team and any other interested parties.

Date: Testing on March 11, report summary delivered on March 14

2. EDS user interface and content - staff testing

Goal: To test the EDS alpha site in order to optimize the user interface features and database content for further usability testing with the MIT user community and beta rollout of the service.

Method: Detailed testing documents were assigned to staff in Instruction & Reference Services, Information Delivery & Library Access, Liaisons for Departments, Labs & Centers, and User Experience. Specific EDS user interface features were tested, including on various mobile devices and operating systems. EDS content was tested for appropriateness for discipline-specific research.

Deliverables:

- Excel spreadsheet of testing results categorized and sorted by EDS user interface feature.
- Individual reports of EDS problem points delivered to Simplifying Discovery subgroups for follow up and resolution--primarily the EDS Implementation Team and EDS User Interface Design subgroup.

Date: Testing from March 1-29, report to be delivered in April.

3. Homepage search tabs and EDS interface - standard usability testing

Goal: To find out if the proposed search tab design and its integration into EDS is effective, and what changes could be made for improvement. The design and functionality of the EDS interface itself will also be tested and evaluated for possible changes that can be made by our staff, or forwarded as potential enhancements to EBSCO.

Method: Standard full usability testing performed by User Interface Group (UIG) members, selected library staff, and EBSCO usability staff. Tests with MIT students and library staff members will be scheduled; the testees will be given a set of tasks to perform using the interface, and also asked some open-ended questions about their experience with and opinion of the interface. Full plan available on the UIG wiki.

Deliverables:

- Executive summary providing high-level, key findings. To be delivered to the full Discovery Team, and shared with other library staff and potentially EBSCO reps or interested staff at other libraries/institutions.
- Report of in-depth results, providing detailed findings to specific tasks and questions, along with suggested recommendations. To be delivered to the homepage IA implementation group (Darcy, Matt, Melissa) and the EDS customization team (Darcy, Melissa, Millicent) to analyze and decide on changes to the design as indicated by the results. Will also be shared with the full Discovery Team and any other interested parties.

Date: Testing on May 6-10, results meeting on May 15

3. EDS interface - accessibility testing

Goal: Identify accessibility issues in the EDS interface that would cause problems for users with disabilities.

Method: Matt is working with MIT IST's Accessibility Team, whose staff can help identify problems and offer potential solutions. Some work has already been done, but Matt will approach them about doing a full review of EDS.

Deliverables:

- Periodic updates on specific issues already identified and potential solutions, to be delivered to EBSCO staff.
- Final full report on any issues found during the full review, to be delivered to EBSCO staff and the full Discovery Team.

Date: Current and ongoing through June 2013

Data Collection

1. Homepage search tabs - web analytics

Goal: Gather data about the use of specific tabs and radio buttons as well as search behavior (including the content and frequency of search terms), in order to evaluate usage and appropriateness of choices. Gather information about the demographics of users.

Method: Use hooks within the code of the homepage to gather data via Google Analytics.

Deliverables:

- Report on range of possible metrics that can be tracked, with decisions on which we will track for now, and which could be developed in the future. This should also include how often the reports tracking these metrics should be run and who they should be delivered to. This report will be delivered to the full Discovery Team for approval, and shared with library staff.
- Ongoing reports generated as part of the recommendations above.

Date: Current and ongoing

2. EDS interface - web analytics

Goal: Gather data about the use of specific features as well as search behavior (including the content and frequency of search terms), in order to evaluate usage and appropriateness of choices. Gather information about the demographics of users.

Method: Use hooks within the footer code of in EDS to gather data via Google Analytics.

Deliverables:

- Report on range of possible metrics that can be tracked, with decisions on which we will track for now, and which could be developed in the future. This should also include how often the reports tracking these metrics should be run and who they should be delivered to. This report will be delivered to the full Discovery Team for approval, and shared with library staff.
- Ongoing reports generated as part of the recommendations above.

Date: March 2013 and ongoing

Possible future assessment activities

1. Homepage search tabs - snap survey

Gather information about the demographics of users, as well as some brief feedback about the new design/search tool. Pop-up “snap” survey of 1-2 questions that appears based on certain criteria in the session.

2. Automated A/B testing of the homepage

Matt has developed a possible framework for automated A/B testing of the homepage.

3. Remote usability testing by EBSCO UX staff

EBSCO UX staff could perform remote usability testing of EDS with MIT users.