Alliance User Testing Toolkit

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Agenda

- Background
- How to get to it
- Highlights
- Future

Background

Discovery & User Experience (DUX) Team

The Discovery and User Experience Team provides broad oversight and **leadership** for the development and use of discovery systems and services. As experts for the consortium, the team determines policies and procedures and continually assesses **discovery systems** and interfaces to achieve improved services.

Brief overview of charge

- Ensures that our patrons are able to **discover** all items locally as well as consortially
- Advocates for the **user experience**
- Supports **Reference & Instruction community**

Full info here https://www.orbiscascade.org/dux/

Groups

- Accessibility Group
- Primo Enhancement Project Group
- Primo Release Testing Standing Group
- Discovery Training Coordination Standing Group
- User Testing Toolkit Project Group

History of the User Testing Toolkit

- End of 2017 through final report May 2018
- Goals of the toolkit:
    - Provide user testing **resources** for application across **multiple** systems/interfaces/areas.
    - Acknowledge **varying** skill sets, staffing considerations, and time.
    - **Empower** members to perform usability testing at their respective institutions.
    - Allow colleagues to select testing that might work best for their **situation**.

How to get to the toolkit

https://www.orbiscascade.org/discovery-documentation/

Instructions: Look for the User Testing Toolkit link in the list of documentation

Highlights

1. User Testing FAQ/Resources
2. Sample User Testing Documentation
3. User Testing Overview for Librarians and Archivists: A Guide

User Testing FAQ and Resources

This page provides **general** resources for user testing. Set up as **collapsible FAQs**, this format allows users to easily scan topics and select what is of interest to them. **Each topic includes 1-3 resources** that were curated by team members.

- ❏ What is User Experience (UX)?
- ❏ What are some good general websites about UX?
- ❏ **Are there any good videos about UX?**
- ❏ **How can I conduct a user test?**
- ❏ How do I create a testing objective?
- ❏ How do I create testing goals?
- ❏ How do I know what is the best test to use?
- ❏ How do I make a task and scenario question?
- ❏ How do I measure a task question outcome?
- ❏ Where can I find templates for testing questions?
- ❏ How many participants do I need for valid results?
- ❏ How should I recruit?
- ❏ How should I share and communicate results?
- ❏ What are ethical considerations for user testing?
- ❏ What are some recommended UX Communities?

FAQ Collapsed View Example: User selects FAQ question links to view resources

Note: Links listed are examples and do not function.

❑ **Are there any good videos about UX?**

[Rocket Surgery Made Easy by Steve Krug: Usability Demo](#)

Author Steve Krug's demo test as a companion piece to his latest book, Rocket Surgery Made Easy: The Do-It-Yourself Guide to Finding and Fixing Usability Problems. The main purpose for creating this video is to demonstrate how easy and simple usability testing can be. 25 minutes.

❑ **How can I conduct a user test?**

[5 Steps to Usability Testing](#) (Yale University)

If you want a usable site, you have to test. Learn how to conduct a usability test in 5 steps.

[How to Conduct Usability Testing from Start to Finish](#) (UX Mastery)

FAQ Open View Example: Selected FAQ links opened to show resources

Sample User Testing Documentation

These pages gather **sample** user testing **documentation** used by institutions in the Orbis Cascade Alliance and generic **templates** found in other user testing resources.

- Agreement Forms

- Case Studies and Stories

- Observation

- Planning

- Questionnaires and Surveys

- Recruitment

- Reporting on Results

- Scripts

- Tasks

Several Alliance libraries volunteered PDFs for us to include in our sample documents.

User Testing Overview for Librarians and Archivists

A Guide to Performing User Tests in your Library

This **guide** is for librarians and archivists who want to understand **what goes into user testing coordination and implementation**. This user testing documentation is meant to act as a living **reference guide** for Orbis Cascade Alliance institutional partners. It supports how to perform user testing with any type of library and archives patron in order to understand what success and challenges they have with different kinds of interactive digital systems like online library catalogs, digital collections repositories, library websites, and finding aid repositories.

These five components described in detail

1. **Design a User Testing Study**

2. **The User Testing Team**

3. **Working with Test Participants**

4. **Coordinating and Performing a User Testing Study**

5. **Analysis and Celebration of Results**

Design a User Testing Study

- [What are you trying to figure out? Come up with research question(s)](#).
- [Measurable Goals](#)
- [User Testing Methodologies](#)
- [Task Scenarios](#)
- [Test Participants Needed](#)
- [Make a Timeline](#)

The User Testing Team

- Coordinator

- Facilitator

- Notetaker/Observer

- Results Analyzer

- Users/Test Participants

Roles & Responsibilies

Working with Test Participants

- **Pointers for Proctors (more examples in toolkit)**
  - Help test participants understand that they are helping us
  - Subjective metrics are great! Capture them
- **Respectful Interactions & Understanding Participants**
  - About Users: Overview
  - Inclusive design toolkit by the Government of Ontario

Coordinating and Performing a User Testing Study

- [Pointers for Proctors](#)
- [Respectful Interactions & Understanding Participants](#)
- [What are the basic resources needed to do user testing?](#)
- [Running a user test](#)

Analysis and Celebration of Results

- Organize quantitative and qualitative data
- Consider completing two levels of reports:
    - Quick, initial analysis
    - In-depth analysis.
- Tips for writing effective user testing reports

Future

Ongoing

- Ideally incorporating more directly into the OCA DUX team documentation webpages and move off of Confluence
- Add additional resources
- Maintenance

Ongoing (Continued)

- New Accessibility Toolkit created by the Accessibility Group
  - Definitions/FAQ, policies, testing/audits, and network of colleagues doing this work.
  - Giving an **update** at the the DUX/Systems Joint Virtual Meeting, **July 29**, 2020.

We want to hear from you.

Feedback

I would love to hear your suggestions.

Email me: hrobbeloth@pugetsound.edu

Start a conversation on the open DUX discussion list:
dux-discussion@orbiscascade.org

> -you may need to ask Elizabeth Duell (eduell@orbiscascade.org) if you are not already in the interest group.

Thanks.