
It's just different: Pivoting from in-person to virtual user testing

Abigail Shelton, Mikala Narlock

Publication Date

08-12-2023

License

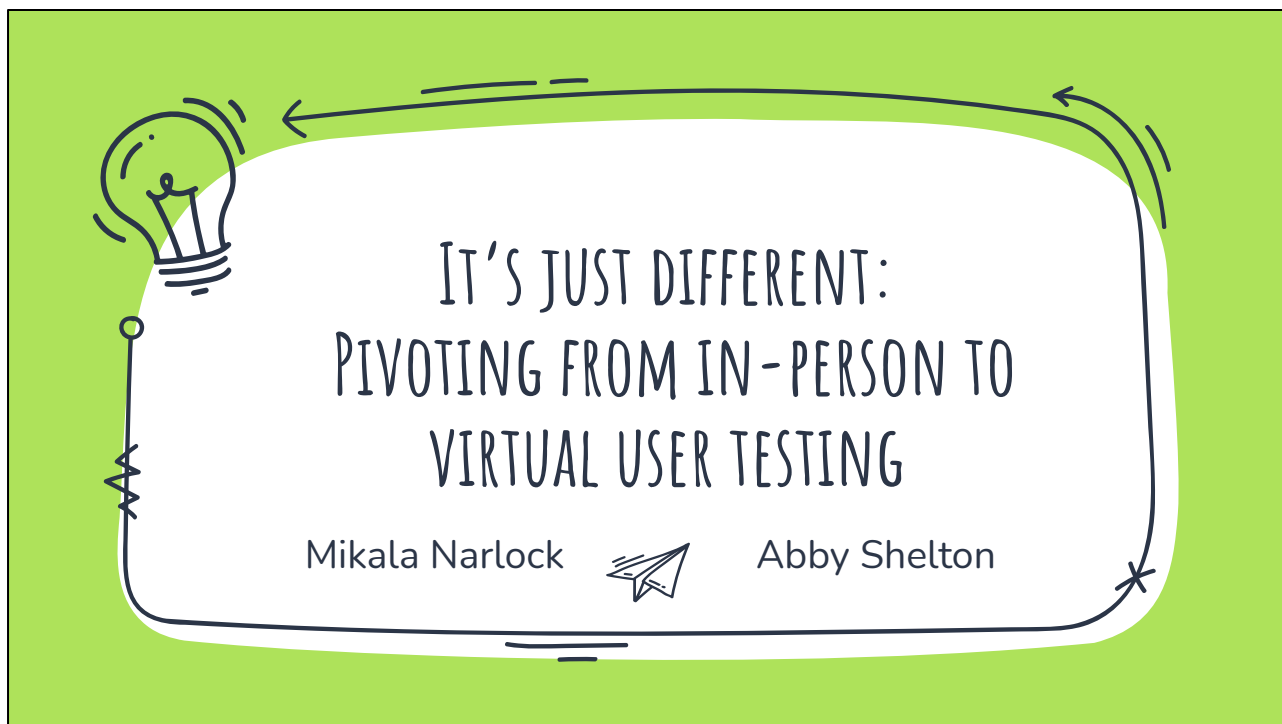
This work is made available under a CC BY 4.0 license and should only be used in accordance with that license.

Citation for this work (American Psychological Association 7th edition)

Shelton, A., & Narlock, M. (2021). *It's just different: Pivoting from in-person to virtual user testing* (Version 1). University of Notre Dame. <https://doi.org/10.7274/r0-arcx-h349>

This work was downloaded from CurateND, the University of Notre Dame's institutional repository.

For more information about this work, to report or an issue, or to preserve and share your original work, please contact the CurateND team for assistance at curate@nd.edu.



Abby

Hi everyone! Thanks for joining us today-we're excited to share with you user testing initiatives from the University of Notre Dame. I'm Abby Shelton and I work at the Library of Congress, previously at the Snite Museum of Art on campus and I'll be presenting today with my colleague from the Hesburgh Libraries-Mikala Narlock.

Today we'll be talking about how we leveraged virtual user testing over the course of the last year to continue improving our digital collections platforms at the University of Notre Dame. We'll talk about how we tested our these virtual activities in the early part of the year and then focus on a virtual event we hosted in November 2020 to celebrate Usability Day 2020 and engage our museum and library colleagues in some user testing activities to improve two critical digital platforms that the library supports-Curate ND our institutional repository, and MARBLE, our new digital collections site.

AGENDA

- X Context
- X Pre-Pandemic
- X Virtual testing
- X Usability Day activity
- X User testing results



Abby

In terms of what we'll cover in our thirty five or so minutes-we'll give some context for the digital collections ecosystem at the University of Notre Dame, we'll talk a little about how we did user testing before the pandemic, then some of the virtual testing methods we experimented with early in the pandemic, then we'll take a deeper dive into one event we held in November 2020 to celebrate Usability Day 2020 and then finish on what we've learned about conducting virtual user testing. We're aiming to leave plenty of time for questions so feel free to put them in the chat as we go along and we'll answer them at the end. You can also raise your hand and voice out your question if you'd prefer.

THE PRODUCTS

CurateND

- Institutional repository; focused on scholarly and research outputs
- Built and maintained by Hesburgh Libraries
- Launched in 2014; rebranded in 2019

Marble

- Digital collections
- Snite Museum of Art & Hesburgh Libraries
- Supported by The Andrew W. Mellon Foundation
- Launches: July 21 2021



Mikala-CurateND is the institutional repository for the University of Notre Dame, primarily focused on collecting and preserving the scholarly and research outputs of the faculty and staff. In particular, we like to recruit gray literature and other 'at risk' scholarly content. Curate is built and maintained by hesburgh libraries, and is based on early Samvera code. Initially launched in 2014, rebranded and redefined the scope in 2019.

Abby-MARBLE

MARBLE or the Museums, Archives, Rare Books, and Library Exploration platform is our new digital collections website and the cloud-based infrastructure that sits behind it. This project is a collaboration between the Snite Museum of Art and the Hesburgh Libraries-which includes a rare books and special collections department as well as the university archives. Library, archival, and museum collections are all represented in the platform. The Andrew W. Mellon Foundation supported the development over the course of a three-year grant period and the site will launch later in the July of 2021.

PRE-COVID 19



- In-person user testing
 - Drop-in -- Short task
 - Drop-in -- Long task
 - Observational
 - User interviews
- Ad hoc staff testing



Abby

- Before the pandemic created the need to work from home, we conducted user testing about once a semester-sometimes with students, sometimes with faculty members, and sometimes with colleagues from the library and art museum.
- We recruited students through placing advertisements in the weekly campus e-newsletter, emailing student workers, and using the art museum's student newsletter. We offered a mix of incentives based on the type of testing-we offered donuts for our flash testing and small amounts of cash for our one-on-one observational and interview sessions. The funds came from the Mellon grant that helped support our digital collections platform project.
- Employed a mix of tactics-before the pandemic-we hosted flash sessions in the library lobby-1/ week for 4 weeks-where we offered a favorite brand of donut in exchange for either a short task (commenting on print-outs of homepage layouts, answered 1-2 questions about research habits) or a longer task (interacting with the live prototype website and filling out a survey). We had huge success with this-reaching over 175 participants-among them undergrad and grad students, faculty, and even staff.
- We also hosted more traditional observational or interview user sessions-where we recruited student and faculty participants for 45-60 minute sessions with an interview script where we watched them completing certain tasks on the live website.
- And finally, we did a lot of ad hoc staff testing. Whenever we launched a new feature or were mocking up a new layout, we had a pool of staff members we

- could go to for quick feedback-whether it was emailing out PDFs of a new layout or popping over the cubicle wall to ask for a second opinion.

FALL 2020 TESTING-- ALPHA VIRTUAL TESTING

- October to November 2020
- 15 students; some student workers, some external participants
- Recruited through weekly university-wide newsletter
- Students offered incentives for participation
- Option for virtual zoom session follow-up



5

Mikala

During the Fall of 2020, we dipped our toe into the proverbial LibWizard pond by conducting virtual user testing with students. Between October and November, we had 15 students run through a testing module designed to capture their thoughts on the in-progress site. These students were a mix of student workers, who needed virtual work assignments, as well as external participants who were recruited through a university-wide weekly newsletter. Students were also offered the opportunity to participate in a virtual zoom session follow-up.

With this testing, we started with a straightforward module, and slowly added more questions and contents as both the site continued to develop and we grew more familiar with the software.

Incentive cards-- paid via electronic; \$10 for completing the assessment

USABILITY DAY 2020

- Usability Day 2020
- 14 colleagues, mix of librarians and museum staff
- Recruited through internal all-staff emails and Library staff newsletter



Mikala

Usability day 2020 was a collaboration with HL User Experience Interest Group, a group that hosts regular user experience days. This was an entirely virtual experiment; 14 colleagues joined us in this testing from the Snite Museum of Art and Hesburgh Libraries. Participants were recruited through few all-staff emails and a little addition to the weekly HL newsletter; intentionally left the testing small: this was the first time we had hosted a day like this, wanted to iron on the process before we opened it up.

THE ACTIVITY

- X Used LibWizard assessment application
- X Split screen module with testing activities on left side, interactive website on the right side
- X Two breakout rooms
- X Participants could choose to participate in either room
- X Schedule:
 - X Overview, 5-10 minutes
 - X Breakout rooms, 20-30 minutes
 - X Group wrap-up, 5-10 minutes



Abby

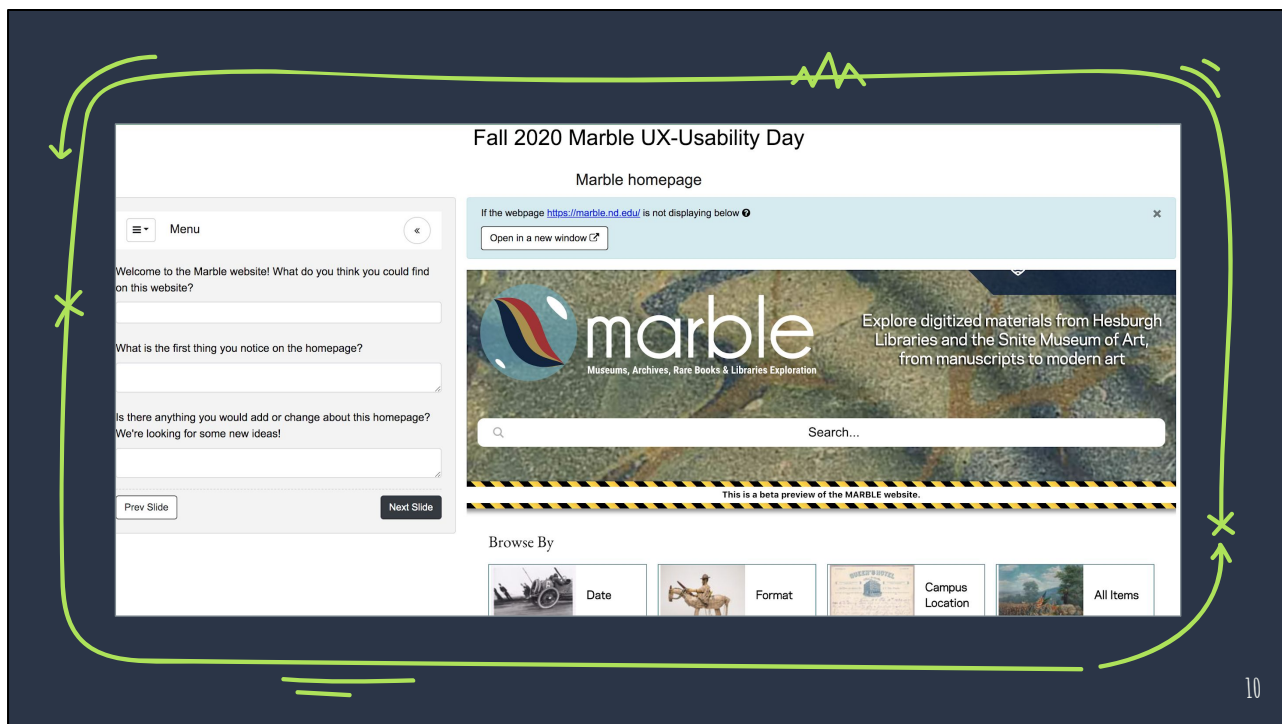
For the event and activity, we used the LibWizard application. LibWizard is a SpringShare product used for quizzes, tutorials, or other types of forms. We had never used it for usability testing before but one of our colleagues suggested it as a way to organize and capture feedback in a virtual space. So we were game to try!

We used the assessment module which allowed us to set up a split-screen tutorial with testing instructions and space for user-supplied responses on the left side and a fully interactive, live version of the websites we were testing on the right side of the screen. Users also had the option to click on the embedded URL and the application would pull up the website in a new window. Mikala and I built out an assessment module for Curate ND and MARBLE, each with its own types of tasks and questions.

During the event, we created two breakout rooms-one for testing Curate and one for MARBLE. Participants could choose between the two or stay in the main room to test the platforms. Once in the breakout room, where Mikala and I provided participants with a link to the appropriate testing module and then our colleagues had about 20-25 minutes of mostly silent work time to go through the module. We were there to answer questions or to check in on time. Our intention was to have 5-10 minutes at the end to talk to the group in the breakout room about their experience. Mikala was able to do that with her group-my group ran out of time.

At the end we wrapped up back in the main room with the entire group. We asked for

general reflections from the Curate group and then from MARBLE as well as their reflections on how using LibWizard was. After the event we sent an email to our participants and to the entire library and museum with links to the testing modules, inviting those who weren't able to attend to test the site and thanking those who did participate.



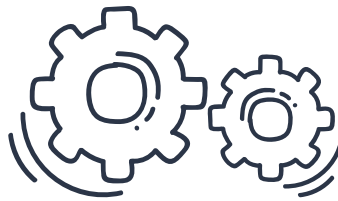
Abby

- When participants entered their respective breakout rooms, they were provided with a link to the LibWizard app, which looked like this when they opened the link.
 - https://nd.libwizard.com/f/demo_usability_testing
- You'll see that the testing tasks are on the left side of the screen and an interactive view of the website was on the right side. Participants would complete each task and then move to the next section which would have a similar appearance-but perhaps with a different web page displayed.
- Some of the tasks we asked participants to complete were:
 - On the Marble site, we asked our colleagues to comment on the layout of the homepage and anything they might add, subtract, or change about it. We also focused pretty heavily on the search functionality of the site since the search index was under active development at that point. Participants completed different types of searches-for general keywords, for geographic terms, for artists or author names and we asked them what they found after completing those searches and whether it was expected.
 - On the Curate ND side, we also included search related tasks-asking participants to find an item, examine it's page and suggest and additions or changes. A big area of focus was the deposit workflow and pages. For this section, Mikala provided screenshots (so that participants would accidentally submit a blank deposit) and took colleagues through the steps of submitting work to the repository. They

- were then asked to reflect on the several deposit pages and suggest changes or additions.
- What we learned from these tasks:

WHAT WE LEARNED: VIRTUAL TESTING

- X Technical requirements and work-arounds
- X Run through your own testing module before hosting the session
- X Questions that build on one another
- X Timing!
- X Have a facilitator
- X Send a follow-up!



Mikala--

t we wanted to quickly share some lessons learned about LibWizard and the testing activity.

1-- LibWizard has some technical requirements that not all sites meet! In the previous slide, Abby showed how the testing module for MARBLE had the questions on one side and the live marble site on the other. CurateND, due to some additional security protections, cannot be displayed and interacted with in this way. So, instead of forcing testers to have curate in one window and the questions in the other, we ended up having to create some workarounds the screen shots and PDFs.

This applies to all virtual testing though-- Knowing the technology you want to use as well as it's limitations and how to build around it are critical -- you want the experience to be as seamless as possible for the user so they can focus on testing.

2- Run through your testing before hand! When we were creating the tests, we were often very focused on one question or a set of questions, meaning we occasionally lost the arch of the testing. We also moved questions around before the testing, which sometimes broke up the ordering and confused users. Similarly, exercise caution when questions build on one another-- for curate I had a whole series of questions related to download that were confusing when there was no download button; Users felt left in the lurch when there were multiple questions they just couldn't answer.

3- time yourself! Our testing modules were too short and too long. If we did it again,

I'd like to try and get them to the same length so users could choose to do both, if they wanted, or have time to chat with us.

4- I doubt this will be a surprise in the world of zoom meeting, but having a facilitator who could send people to breakout rooms, keep us on time, and handle any technical questions was incredibly helpful.

5- Virtual testing means more people can join! By sending out the links after the fact, folks who couldn't attend the session for whatever reason were able to do the exercises asynchronously and still provide feedback

WHAT WE'VE DONE SINCE & FUTURE PLANS

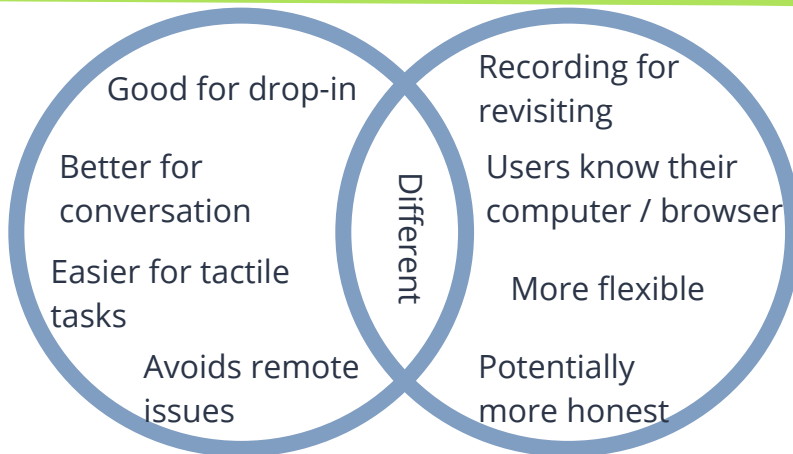
- ✕ Virtual Testing
- ✕ Zoom
- ✕ Card Sorting
- ✕ LibWizard
- ✕ More Virtual Testing
- ✕ And In-Person
- ✕ Walk-up
- ✕ Scheduled UX time



[Mikala]

- Virtual testing (remote via zoom)
- Virtual card sorting (Alpha tested with internal colleagues)
- Other libwizard options (e.g., select a picture, rate this, etc)
- Plans for virtual testing (and training) and future testing

IN PERSON V. VIRTUAL



IT'S JUST
DIFFERENT.



THANKS!

- x Abby Shelton, Digital Collections Specialist (Librarian), Library of Congress, abshelton@loc.gov
- x Mikala Narlock, Digital Collections Strategy Librarian, Hesburgh Libraries, mnarlock@nd.edu

