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Staff Intranet - Card Sorting

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Project Cover Sheet

Project	Library Staff Intranet <i>Card Sorting</i> The Library Staff Intranet is a gateway to various library staff administrative information and tasks. It suffers from usability, findability and accessibility problems.
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Report Info	Report Author(s): Saurabh Koparkar Contact Information: lws-usability@umich.edu Report Date: August 2008; Last Revised: September 2008
Objectives	The goal of the Card Sorting was to determine staff opinions and trends about categories and labeling, and see if participants had ideas of new features and content.
Methodology	Method – Card Sorting Dates of study: August 2008
Results & Analysis	Creation of categories, frequently used web links and recommendations for changes and additions were identified.
Recommendations	<ul style="list-style-type: none">• Create appropriate categories to house links on Intranet homepage for easy navigation.• Create a ‘Quick Links’ category to help findability.• Add a footer to the Intranet.• Conduct a survey to obtain more quantitative and qualitative data and verify these recommendations.

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1 Introduction

The University of Michigan Library Staff Intranet website (<http://lib.umich.edu/staff/>) needs to be redesigned to make the web interface more usable and simple. The current Intranet homepage is a collection of web links not organized into appropriate categories with headings that can help in easy navigation and findability. During the Focus Group that was conducted, it was seen that library staff face a number of problems while using the Intranet, the main problem being the inability to find what they are looking for in the Intranet. Based on these findings and by focusing on the navigation problems, a re-design of the Intranet homepage was proposed and drafted. It was decided that this design should be tested. We also wanted to find out how the staff made their own categories from the links on the homepage and thus discover their mental models when interacting with the Intranet homepage. Using findings from this test, formal recommendations for the Intranet homepage redesign are suggested in section four of this report.

2 Methodology

A draft redesign for the Staff Intranet homepage was developed prior to conducting this test. The card sorting test was conducted to validate this redesign draft. The redesigned page contains three main aspects:

1. A division of the web links present on the current Staff Intranet homepage into groups and categories that seemed better suited to the site. There are five categories that have been proposed:

Departments and Committees

- Library Departments
- Library Committees
- Staff Directory
- Library Forum

Policies

- User Policies
- Library Gift Policy

Web Resources Management

- Web Development
- Usability in the Library
- Google Project Information

Training

- Training & Documentation
- Instructor College
- Workshop Registration

Brand Management

- Communication Resources
- Grants Resources

2. A ‘Quick Links’ section that contains frequently visited web links in the Intranet. This section will help in fast findability:

- Library Staff Directory
- RSS Feeds
- Library Tech Support
- Library Newsletter
- Documents you might want to read
- Librarians’ Forum
- Related external websites
- Meeting Rooms

3. A footer on the Intranet homepage and all Intranet pages that will allow the users to navigate out of the Intranet to other popular and important U-M websites:

- Desktop Support Services (www.lib.umich.edu/lit/dss/)
- Library Human Resources (www.lib.umich.edu/hr/)
- U-M Website Gateway (www.umich.edu)
- CTools (ctools.umich.edu)
- Wolverine Access (wolverineaccess.umich.edu)

The *Quick Links* and *Footer* sections were tested by showing the testers a table that contained web links to be included in these two sections followed by ‘yes/no’ options and a comment box for the users to express their views (see Appendix A). A Card Sorting exercise was chosen to understand how the staff thinks about grouping web links together into proper categories and labeling them. A Card Sorting activity is used to discover and understand trends among users of a web-based or non-web-based system, service or product. For this activity, the testers were shown fifteen index cards, each of which had one web link written on it. These links are present in the current Intranet homepage. The testers were asked to group the cards into categories in any way they thought was appropriate and then give those categories labels that sounded best to them.

After the card sorting, testers were shown the proposed redesign, which consists of five categories. The testers were shown these categories in a table that contained the web links to be included in these two sections followed by ‘yes/no’ options and a comment box for the users to express their views (see Appendix A).

3 Findings

The following findings are listed based on the quantitative responses as well as the comments and opinions gathered from the testers when this test was conducted.

3.1 ‘Quick Links’ Category

Library Staff Directory

All ten testers considered this web link to be part of *Quick Links*. Most testers commented that this is a frequently used web link and it would certainly help if this link were to be placed in the *Quick Links* category.

RSS Feeds

Five out of ten testers wanted this web link to be a part of *Quick Links*. Quite a few testers commented that they did not want RSS Feeds because they did not subscribe to it. One tester commented that they would like to have RSS Feeds only as a blog.

Library Tech Support

All ten testers wanted this web link to be included in *Quick Links*. One tester commented that having this link in *Quick Links* would be very helpful because they were never able to find Library Tech Support in the current Intranet. Another tester commented that they needed to use this link frequently.

Library Newsletter

Five out of ten testers felt that this web link could be included in *Quick Links*. The testers who did not want Library Newsletter to be included in *Quick Links* said that they received the newsletter via e-mail. A few testers who wanted this link to be included commented that they frequently visited the newsletter section.

Documents you might want to read

Five out of ten testers wanted this link in *Quick Links*. A recurring comment about this web link was that this section was too vague and needed to be more specific regarding what documents would be included. A few testers commented that the web link label needed to be changed. One tester considered this section important and hence thought that it should be included in *Quick Links*.

Librarians' Forum

Five out of ten testers thought that this section should be a part of *Quick Links*. One tester did not want this section to be included because they did not know what the section meant. Another tester wanted action items to be included in this section. A tester wanted to include this section because they were not a part of the Forum and therefore wanted to obtain information about the Forum's activities through a link in *Quick Links*.

Related external websites

Only two out of ten testers wanted this section to be a part of *Quick Links*. A majority of the testers said that they would use the Google search engine to find other library websites and relevant information instead.

Meeting Rooms

Seven out of ten testers felt that this section should be included in *Quick Links*. Most of the testers commented that meeting rooms would be easiest to find if they were placed in *Quick Links*.

Additional Sections

When the testers were asked if they would like to include any other sections in *Quick Links*, they suggested a few common sections such as Library Organization Charts, Library Human Resources website, Library News, and Library Training and Documentation links.

3.2 ‘Footer’ Category

Desktop Support Systems

Seven out of ten testers thought that this web link should be included in the footer. One tester was pleased with the inclusion of this web link in the footer because this link was described as very hard to locate in the current Intranet.

Library Human Resources

Seven out of ten testers wanted this web link to be included in the footer. A few testers commented that navigating from the Intranet to the Library Human Resources website would be a lot easier if this web link were to be present in the footer.

U-M Website Gateway

Eight out of ten testers thought that this web link would be appropriate in the footer. The testers who did not want to include this link in the footer thought that the U-M homepage URL could be easily typed in the browser and therefore a link in the footer was unnecessary.

CTools

Only two out of ten testers felt that this link should be included in the footer. Out of these two testers, one said that they never required using CTools. The other tester said that CTools was just not needed for librarians.

Wolverine Access

Eight out of ten testers wanted to include this web link in the footer. The reason for not including this link in the footer was that these two testers did not frequently visit this link and they preferred to access it directly.

Other Suggested Links

When the testers were asked if they would like to include other sections in the footer, they suggested U-M Library Gateway (lib.umich.edu), Comments & Suggestions Form, and the U-M Directory (directory.umich.edu).

3.3 Creation of Categories

The ten testers were given fifteen cards, each of them bearing names of web links present on the Intranet homepage (see Appendix A). The testers had to arrange the cards in categories and label the categories. The following findings were gathered after performing the Card Sorting exercise.

- Almost all the testers were able to make a category by grouping together the links *Library Departments*, *Library Committees* and *Staff Directory*. The headings given for this category were different but somewhat synonymous with each other, such as ‘About the Library’, ‘Library Directories’, ‘Contact Information’, ‘Directories’, ‘Departments and Committees’.
- Most testers found it difficult to put *Google Project Information* in a suitable category. Some testers felt that this section should be put under the category ‘News’ or ‘Others’. One tester put this web link under a category called ‘Web Systems and Digitization’ and this category also included the link *Web Development*. One tester included this web link under ‘Documentation and

Resources’ along with *Training & Documentation*, *Web Development* and *Grants Resources*.

- Almost all the testers put *User Policies* and *Library Gift Policy* in one category even if the category was given a different heading and contained other different web links.
- Testers were confused about the suitable placement of the section *Usability in the Library*. The testers managed to group it under some category, although none of them were quite appropriate.
- *Instructor College*, *Workshop Registration* and *Training & Documentation* were generally grouped together by most testers. A few testers also included *Web Development* with the three sections mentioned above. It is important to note that many testers did not know what *Instructor College* meant and had to have its function explained. The category names given to these groups were ‘Learning & Training’, ‘Staff Development’, ‘Training & Documentation’, ‘Professional Development Resources’, ‘Working in the Library’ and ‘Documentation & Resources’.
- The testers were confused about how to group the *Librarians’ Forum*. A few testers put this section under a ‘Library Departments & Committees’ category. Other testers placed this section under an ‘Others’ or ‘Miscellaneous’ category.
- A majority of the testers had to have the meaning and function of *Communication Resources* and *Grants Resources* explained to them. Most testers put *Communication Resources* under a category variously called ‘Policies’ or ‘Policies & Procedures’. The remaining testers placed *Communication Resources* under some random categories. Most testers grouped *Communication Resources* and *Grants Resources* together. A few testers placed *Grants Resources* under the categories ‘Learning & Training’, ‘Documentation & Resources’ and ‘Staff Information’. These categories did not contain *Communication Resources*.
- The link *Meeting Rooms* was placed in different categories by different testers. Some of these categories were ‘Miscellaneous’, ‘Departments & Committees’, ‘Working in the Library’, ‘Training and Documentation’, among others. No consensus could be derived regarding the placement of *Meeting Rooms*.
- Most of the testers built categories that contained web links that were related to each other in some way and were therefore “sound” categories. Some categories contained web links that were not at all related to each other. A few testers simply put unrelated links in one category and called the category ‘Others’ or ‘Miscellaneous’.

3.4 Validation of the Proposed Categories

In this section of the test, the testers were presented the five categories that had been proposed as a part of the Intranet homepage (see Appendix A). The following findings were obtained from the testers’ responses.

- Almost all of the testers were unanimous in their opinions about the proposed categories. All testers agreed with the five categories (see Appendix A) and

suggested minor changes to a few web links. No tester considered any category to be completely illogical.

- A common theme that was observed was about not including *Librarians' Forum* in 'Departments & Committees' because some testers did not consider the *Librarians' Forum* a committee.
- A few testers felt that *Meeting Rooms* should not be included in the 'Training' category because meeting rooms are reserved for non-training purposes in addition to training sessions.
- Quite a few testers did not agree with the category heading 'Brand Management' because it sounded non-academic and alien. These testers explained that branding was unfamiliar territory for academic librarians and therefore it should be avoided. One tester suggested replacing this heading with 'Marketing & Development' because the tester thought that this heading retained the academic nature of the libraries and also introduced the departure from academia by using the word marketing.
- One tester felt that *Google Project Information* should not be included in any category and be independent. Another tester did not want *Grants Resources* to be included in 'Brand Management'.

4 Recommendations

1. A *Quick Links* category should be included in the Intranet homepage and possibly on every page of the Intranet. The links in this category should be chosen from the proposed re-design that was being tested, with the possible addition of *Organization Charts* and *News* links. *Library Staff Directory*, *Library Tech Support* and *Meeting Rooms* should definitely be included in the actual redesign.
2. The Intranet should have a footer on the homepage and also on all other web pages. The footer should contain all the five web links which have been proposed in the redesign being tested, with the possible inclusion of the Library website (lib.umich.edu) as well.
3. Based on the findings from the Card Sorting exercise and comments on our proposed categories, the Intranet homepage should be divided into four categories as shown below:

Departments and Committees

- Library Departments
- Library Committees
- Staff Directory
- Librarians' Forum

Policies & Procedures

- User Policies

- Library Gift Policy
- Communication Resources
- Grants Resources

Web Resources Management

- Web Development
- Usability in the Library
- Google Project Information

Training & Professional Development

- Training & Documentation
- Instructor College
- Workshop Registration

4. To obtain more quantitative and qualitative data about the validation of the proposed redesign, an Internet based survey should be conducted.

5 Conclusion

This test, conducted to validate the re-design draft of the University of Michigan Library Staff Intranet and also discover staff opinions about the information architecture of the homepage using the Card Sorting method, was an exercise that produced significant findings. These findings led to important recommendations about the redesign approach. The recommendations would certainly be worth exploring and implementing if the Intranet homepage needs to be made more simple and usable for the Staff. A web-based survey should be conducted to gather more solid data about the Staff's needs and expectations from the usability aspect of the Intranet.

6 Appendix A: Intranet Redesign and Card Sorting Test Script

1. Would you like to see the following section links in the ‘*Quick Links*’ category?

<i>Links</i>	<i>Yes/No</i>	<i>Comments</i>
Library Staff Directory		
RSS Feeds		
Library Tech Support		
Library Newsletter		
Documents you might want to read		
Librarians’ Forum		
Related external websites		
Meeting rooms		

2. What else would you like to see in a "Quick Links" category?

3. Card Sorting Exercise

4. Are the category headings for the links shown below appropriate?

<i>Links</i>	<i>Category Name</i>	<i>Yes/No</i>	<i>Suggestions?</i>
Library Departments	Departments and Committees		
Library Committees			
Staff Directory			
Library Forum			

<i>Links</i>	<i>Category Name</i>	<i>Yes/No</i>	<i>Suggestions?</i>
User Policies	Policies		
Library Gift Policy			

<i>Links</i>	<i>Category Name</i>	<i>Yes/No</i>	<i>Suggestions?</i>
Web Development	Web Resources Management		
Usability in the Library			
Google Project Information			

<i>Links</i>	<i>Category Name</i>	<i>Yes/No</i>	<i>Suggestions?</i>
Training & Documentation	Training		
Instructor College			
Workshop Registration			
Meeting Rooms			

<i>Links</i>	<i>Category Name</i>	<i>Yes/No</i>	<i>Suggestions?</i>
Communication Resources	Brand Management		
Grants Resources			

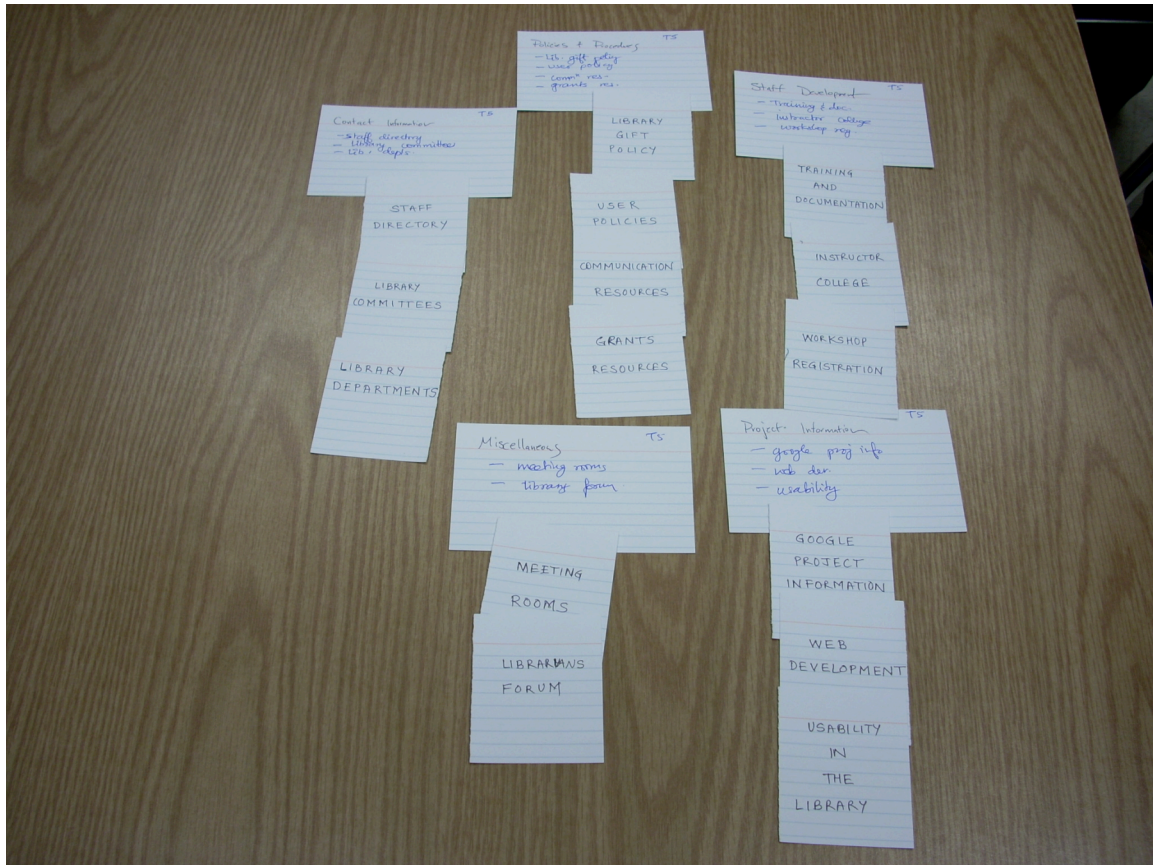
5. Would the following links be appropriate in the Footer of the Intranet home page?

Links	Yes/No	Comments
DSS		
Library Human Resources		
U-M Website Gateway		
CTools		
Wolverine Access		

Please suggest any other links that you would like to see in the Footer of the Intranet Home page.

7 Appendix B: Card Sorting Screenshots

Example 1:



Web Systems | Staff Intranet – Card Sorting

Example 2:

