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# SFX Label & Options Menu - Guerilla Test of SFX Menu: Proposed New Design

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# Project Cover Sheet

Project	<b>SFX Label &amp; Options Menu</b> <i>Guerilla Test of SFX Menu: Proposed New Design</i> SFX is a tool provided by the University Library that creates shortcuts to the full-text of online articles, as well as links to other Library services. When searching in many of the University Library databases, there will be an SFX button or link that connects to a menu of options.
Committee & Members	Usability Working Group Kat Hagedorn (chair), Suzanne Chapman, Karen Downing, Anne Karle-Zenith, Shana Kimball, Jennifer Nardine, Gurpreet Rana, Robert Tolliver Cora Bledsoe (student intern), Tonya McCarley (student intern)
Report Info	Report Author(s): Cora Bledsoe, Tonya McCarley Contact Information: <a href="mailto:ul-usability@umich.edu">ul-usability@umich.edu</a> Report Date: December 2006; Last Revised: December 2006 Date Submitted to PARC: not submitted
Objectives	The objectives were to test new features included in the proposed design mockups for the SFX Options Menu. The goal of testing was to assess users' preferences regarding possible new features and their placement in the window.
Methodology	Method – Informal “Guerilla” User Test 12 participants Dates of study: December 2006
Results & Analysis	Results were mixed. Users responded positively to the “Save this Citation” feature; functionality and placement of the feature was inconclusive. Users will not click on an expandable button without information about its content.

## Recommendations

- Users would like to see the Save the Citation information at the top of the screen or immediately after the Mirlyn section.
- Users are not often familiar with EndNote or RefWorks, and would like information about these applications. They would also like to save their citation as plaintext, and perhaps have a MyCitationShelf to hold all the citations they're saving.
- The expandable drop-down needs to have a fuller title explaining exactly what's under it, and should be a boxed section like the other sections. Help should definitely be added to the title.
- Further testing needs to occur, along with analyzing the search logs, to see if the expandable section should be done away with and all options should be made available at once.
- The layout of the SFX Options Menu might be better occupying more horizontal space, rather than the vertical, linear nature of its current form.

## Introduction

An informal “guerilla” usability test was conducted during the week of December 4-8, 2006 on the new features proposed for the SFX Options Menu. The goal of testing was to assess users’ preferences regarding possible new features and their placement in the window.

## Methodology

The test was divided into two tasks. Six users were tested for each task, totaling 12 participants. The first part of the test examined the placement of the newly proposed feature “Save this Citation.” Users were presented with two SFX Options Menu mock-up pages in which the “Save this Citation” box was located above the database resource box (Option 1) and below the Delivery Options box (Option 2). The second task of the test introduced Option 3 which included a drop-down box feature in which “Save this Citation,” “Web Searches,” and “Help” were all placed in a box that had to be expanded in order to be viewed. The heading on this box was labeled “More Information and Services.” Option 4 contained the same expanded box with the drop-down feature that included Delivery Options. The primary difference between Options 3 and 4 was that Delivery Options was placed within the expandable box in Option 4.

Individuals were approached in the Shapiro Undergraduate Library and the Hatcher Graduate Library. Each participant was asked his or her affiliation with the University. *See Appendix A for the entire script.*

## Results

### *Task 1: placement of the newly proposed feature “Save this Citation”*

For the first task, 1 staff member, 2 graduate students, and 3 undergraduates participated. The group was split on their preference for the location of the “Save this Citation” box. The research-oriented individuals (3) preferred the “Save this Citation” box to be below the Database results, stating the results were more important to them. The remaining three users preferred the “Save this Citation” box to be listed immediately after the “Source” box. In terms of the functionality of this new feature, users understood the concept of being able to save the citation, but 4 out of 6 were not familiar with EndNote or RefWorks.

**Option 1**

**Option 2**

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- Chadwyck PAO  
Year: 2006 Volume: 121 Issue: 4 Start Page: 69  
Available from 1938 until 1995
- OCLC Wilson Select Plus  
Year: 2006 Volume: 121 Issue: 4 Start Page: 69  
Available from 1998 volume: 105 issue:1
- ProQuest Research Library  
Year: 2006 Volume: 121 Issue: 4 Start Page: 69  
Available from 1986
- GaleGroup InfoTrac Expanded Academic ASAP  
Year: 2006 Volume: 121 Issue: 4 Start Page: 69  
Available from 1992

**Search library catalogs for this item:**

- Mirlvn Ann Arbor

**Delivery options:**

- Request Delivery Service (Interlibrary Loan, etc.)

**Save this Citation:**

- Save citation into EndNote
- Save citation into RefWorks
- Show a citation and link to this menu

**Web Searches:**

- Search for related information in Google Scholar

Search: Commentary Magazine

**Help:**

- SFX Frequently Asked Questions
- About Delivery Options
- Questions or Comments? Ask Us!

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*Task 2: expandable section containing “More Information & Services”*

Six undergraduate students participated in the second task. Three out of 6 users stated they were unfamiliar with SFX. Four out of 6 users would not expand the drop-down feature. One user stated he would not click on the expandable drop-down section without knowing what was included in that section. In addition, he stated if the drop-down was below the fold (off the immediately visible screen space), “laziness prevents me from using it.” Another user stated, “It’s on the bottom of the page, it must not be important.” Three out of 6 users said they would use the “Save this Citation” once they knew it was in the expanded drop-down; they would prefer this feature to be outside of the drop-down box.

### Option 3 – closed

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Year:  Volume:  Issue:  Start Page:   
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- [ProQuest Research Library](#)  
Year:  Volume:  Issue:  Start Page:   
Available from 1986
- [GaleGroup InfoTrac Expanded Academic ASAP](#)  
Year:  Volume:  Issue:  Start Page:   
Available from 1992


**Search library catalogs for this item:**

- [Mirllyn Ann Arbor](#)


**Delivery options:**

- [Request Delivery Service \(Interlibrary Loan, etc.\)](#)

**More Information and Services** **[+]**

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### Option 3 - expanded

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Year:  Volume:  Issue:  Start Page:   
Available from 1986
- [GaleGroup InfoTrac Expanded Academic ASAP](#)  
Year:  Volume:  Issue:  Start Page:   
Available from 1992

**Search library catalogs for this item:**

- [Mirllyn Ann Arbor](#)

**Delivery options:**

- [Request Delivery Service \(Interlibrary Loan, etc.\)](#)

**More Information and Services [-]**

**Save this Citation:**

- [Save citation into EndNote](#)
- [Save citation into RefWorks](#)
- [Show a citation and link to this menu](#)


**Web Searches:**

- [Search for related information in Google Scholar](#)

Search:

**Help:**

- [SFX Frequently Asked Questions](#)
- [About Delivery Options](#)
- [Questions or Comments? Ask Us!](#)

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### Option 4 – closed

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Year: [2006] Volume: [121] Issue: [4] Start Page: [69]  
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**Search library catalogs for this item:**

- [Mirllyn Ann Arbor](#)



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### Option 4 - expanded

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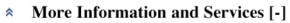
Source: Commentary [0010-2601] yr:2006 vol:121 iss:4 pg:69

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**Delivery options:**

- [Request Delivery Service \(Interlibrary Loan, etc.\)](#)

**Save this Citation:**

- [Save citation into EndNote](#)
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**Web Searches:**

- [Search for related information in Google Scholar](#)

Search:

**Help:**

- [SFX Frequently Asked Questions](#)
- [About Delivery Options](#)
- [Questions or Comments? Ask Us!](#)

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## Recommendations

Based on the above results, we recommend the following:

- “Save this Citation” should be located at the top of the SFX Options Menu or immediately after Mirlyn.
- If services cannot be named explicitly beforehand, an expandable drop-down should not be used. For example, this feature could be labeled “Click here for more information regarding: Delivery Options, Save this Citation, Web Search, and Help”.
- If the expandable list is implemented, it should be enclosed in a box. In its current state, it appears as if the drop-down is part of the page footer. User attention is not drawn to the drop-down; making this change would make them more likely to click it.
- Users were not familiar with EndNote or RefWorks. An icon placed next to each application in “Save this Citation” would provide information to the user.
- A third option to “Save this Citation” should be offered to users to save in the format of their choice (for those who chose not to use EndNote or RefWorks). We suggest “MyCitations” to complement the existing “MyShelf” in Mirlyn and Search Tools. The ability to choose the format (APA, MLA, Chicago, etc.) would also be beneficial. A plain text option would also be useful for those who are unfamiliar with any citation reference software.
- Re-examine the need for the third option currently presented in the “Save this Citation” box. It currently reads: “Show a citation and link to this menu.” Users do not understand what this means or why they would want to use it.
- While the results from this test were conclusive in many ways, a focus group is highly recommended to gather further opinions. The participants selected should have knowledge of SFX. They would be more informed and being able to bounce ideas off each other would generate more and varied feedback. Analyzing search logs will also show which options need to be most visible, i.e., not included in the drop-down.

Finally, we feel that the current linear layout of the SFX Options Menu does not utilize the space of the screen real estate effectively. If there are not constraints regarding placement of the features in the SFX Options Menu, we recommend a layout that will occupy more horizontal space. This will eliminate the need to use an expandable drop-down section, which “hides” features from the user.



## **Appendix A: Script for Usability Test of Proposed SFX Options Menu**

### **Greeting the participant**

Good afternoon. My name is Tonya and I am a student working with the Library Usability Group. Would you be willing to participate in a brief study of a library website page? This study will only take five minutes. (yes or no)

### **Pre-test procedures**

*The following introduction will be read to all participants before starting the test session.*

Thank you for participating in this study. Today, we will be looking at possible new features of the SFX menu page. We are interested in your opinion. Your feedback is greatly appreciated, because it helps us understand how to improve this feature in the future.

I do want you to remember a few things as we begin the study:

- I want to emphasize that we are not testing you or your abilities – we are testing the menu. We are here to learn from your experience.
- We are interested in your feedback.
- I want you to feel free to comment about anything, such as the content, the terminology or name of things on the screen, the graphics, the colors, and the layout.
- Finally, you should know that you can let me know if you begin to feel uncomfortable during this study and wish to stop. You may leave at any time.

Do you have any questions before we begin?

### **Introduction**

During the next five minutes we would like you to do one activity. First, however I would like you to tell me what your affiliation is with the University.

## Task Completion

### Task 1a *Compare 1 and 2*

1. Have you used SFX before?
2. *Show 2*. Do you use the information in the Source box? If so, how? Is there any additional information you would like to see in this box?
3. Please look at this menu page. “Save the Citation” is a possible new feature.
4. Is the information here enough for you?
5. Is there any additional information you would require?
6. Would you use this feature?

### Task 1b *Show 1 and 2*

7. Which location do you prefer?

### Task 2 *Compare 3 and 4*

1. Have you used SFX before?

Please look at these SFX menus. An expansion section has been added. The Delivery options can either be within the drop down section or before.

2. Which do you prefer?
3. Why?
4. Do you feel you would know to look in the expanded section for more information if it was closed?

### Task 3 *Compare 1 and 4 (or 2 and 3)*

Please look at this SFX menu without the expanded section.

5. Do you prefer the SFX menu with or without the expandable section?
6. Why?