

Report on Articles+ (Summon 2.0) Usability Testing

May 23, 2014

Product Tested: Summon 2.0, branded Articles+. Tested the preview version of Summon 2.0 at Yale <http://yale.preview.summon.serialssolutions.com/#/> now live as <http://yale.summon.serialssolutions.com>

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Dates: Tests were run from April 28 through May 5, 2014

Locations: Robert B. Haas Family Arts Library, Anne T. and Robert M. Bass Library, Thain Family Cafe in Bass Library, and the Center for Science and Social Science Informationl, all Yale University.

Students were approached and asked if they would participate in a 30 minute test of a library interface, and were given a small gift card for their time. Tests were run by three person teams, consisting of a recruiter, facilitator, and observer. Observers recorded actions/words of participants. No software was used to record sessions. Tests were designed to test Articles+ for finding images, finding librar subject guides, relevancy of results, limiting to scholarly material and emailing a citation.

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Summary

40% of undergraduate students and all graduate students in this test did not recognize Articles+ and had not used it (Articles+, Summon 1.0 has been live since January 2014). After using it, 90% of undergraduates and 70% of graduate students reacted positively to Articles+ and stated they would use it again. Students liked that they knew they were searching library resources, which gave the results some authority beyond what Google offers. Students valued the facets as a way to narrow results, and were comfortable that Articles+ results were appropriate material collected by the library. Negatives were that the interface was viewed as difficult by some, especially hovering over results and selecting from the Topic Explorer (third pane on right in display).

All test participants were able to search on a topic of their choice, and 75% thought results were relevant or what they expected to see. 85% of participants were able to successfully use Articles+ to find images, although some pointed out they preferred how Google Images functions. In both images and topic searching participants used Content (especially Articles and Books) and Discipline facets. Despite 70% of participants using facets at some point in testing, only 15% successfully used the Peer Review limit, even for a question suited to its use. The subject librarian and associated guide recommendations displayed in the Topic Explorer were problematic because of display issues that can happen on mobile devices with small screens and when a facet has been selected. This is a problem Serials Solutions should examine and determine if they can improve how the Topic Explorer (third pane of results on the far right) is used. Guides embedded in result sets were more successfully located by participants than those in the Topic Explorer (67% versus 18% success rates).

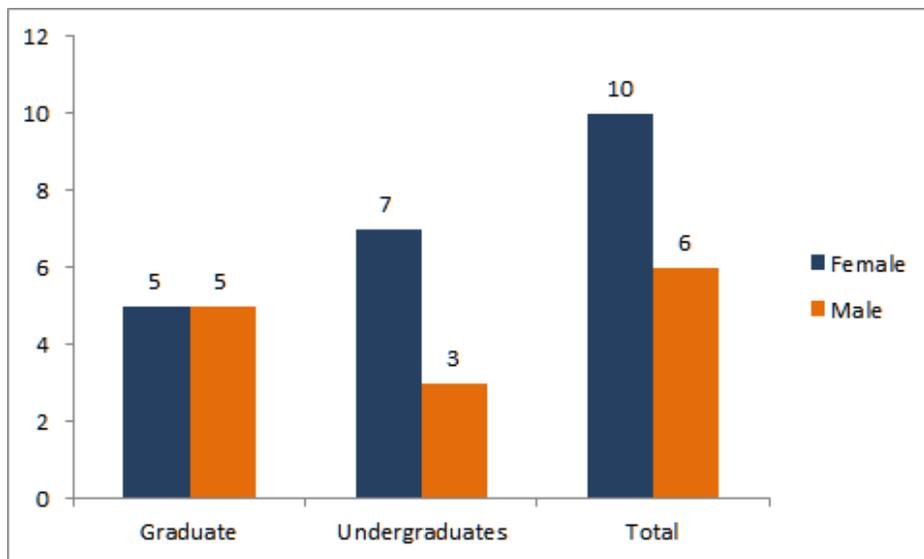
The library should promote Articles+ to undergraduates who need a general search tool, to overcome the lack of knowledge of this tool and to help them use it effectively. Exposing them early in their career, especially if Articles+ works well, may help them to develop a different relationship with the Library and Library resources as a good alternative to Google. To help librarians with promotion, we suggest that cheat sheet and instructor tips be gathered and made available to staff. More tips are discussed more under [What Library Staff Should Know](#).

Serials Solutions should address issues around display of the Topic Explorer pane. It is sometimes unavailable, which is problematic when important material is displayed there. Other issues that Serials Solutions should explore are an easier way to deselect facets, and make images more obvious in search results, especially when words such as images or photographs are included in a search. See the complete list of [Recommendations](#).

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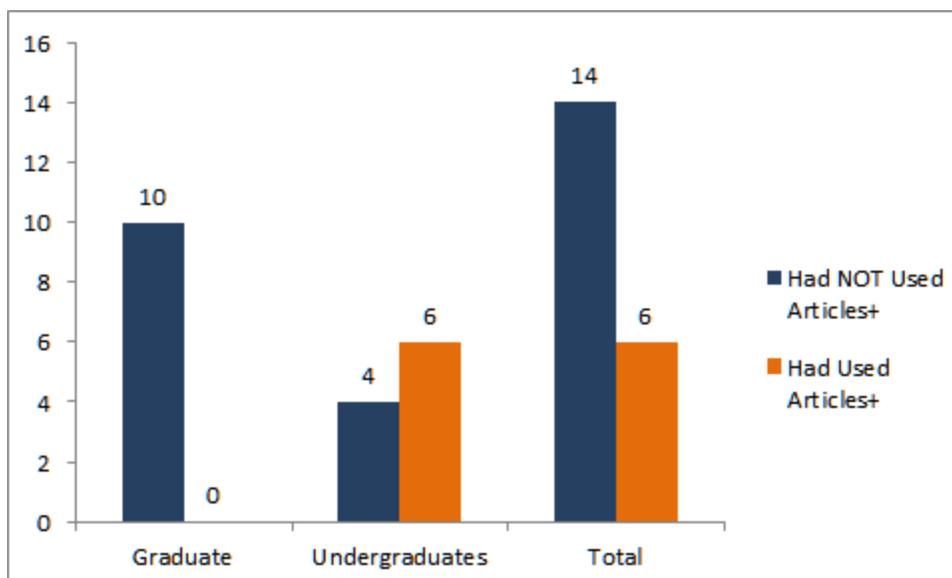
Test Participants



Participants were ten graduate students, post docs and staff, and ten undergraduates, with majors/departments Early Modern European History, English (2), Astronomy(2), Environmental Science(2), Management, Geology and Geophysics,

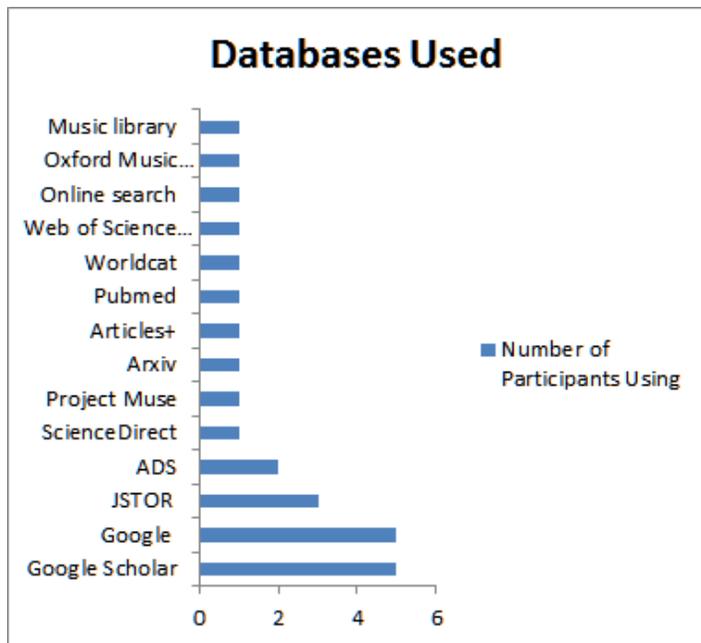
Physics (2), Political Science (2), History of Science, Music, Biology (2), Spanish, Literature and undeclared.

Prior Use of Articles+



When asked if they had used Articles+ in the past, 30.0% (6), answered Yes. No graduate students reported using Articles+.

Databases Used for Research



Participants reported the research databases they typically use.

Test Question Results

Brief Summary

Question	Success Rate
Image Search	85% (17 of 20)
Topic search perceived relevancy	75% (15 of 20)
Limit to scholarly articles	15% (3 of 20)
Email a citation	60% (12 of 20)
Find a subject guide (in the Topic Explorer pane, recommended resource)	18.2% (2 of 11)
Find a subject guide within results	66.7% (6 of 9)

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Question 1 Image Search

To start, I'd like you to imagine you are preparing a class presentation for which you need several very high-quality images of the **Notre Dame Cathedral in Paris**, and use Search Articles+ to find one or more images for that purpose. Do you see anything in the list of results you might use?

Success Rate 85% (17 participants) Success defined as a participant executing a search and finding the horizontal group of images in the list of results.

Participants used a variety of methods after searching. 20% (4) included the term images in the search, 25% (5) used Advanced Search, 35% (7) used the Content Type facet for Image and 20%(4) used the Discipline facet Visual Arts.

The screenshot displays the Yale University Library search interface. The search query is "notre dame cathedral paris". The results are sorted by relevance, showing 160,379 results. The left sidebar contains filters for "REFINE YOUR SEARCH", "CONTENT TYPE", "DISCIPLINE", "PUBLICATION DATE", "SUBJECT TERMS", and "LANGUAGE". The "CONTENT TYPE" facet is expanded, showing "Image" with 4 results. The "DISCIPLINE" facet is also expanded, showing "visual arts" with 1 result. The search results list includes items such as "Notre Dame Cathedral, Paris" (Brochure series of architectural illustration), "Notre Dame de Paris Cathedral" (The Hutchinson Encyclopedia), and "Notre Dame Cathedral, Paris France" (Archives of Otolaryngology-Head & Neck Surgery). A blue oval highlights a horizontal group of image thumbnails in the search results, with the text "Image results for 'notre dame cathedral paris'" overlaid. Blue arrows point from the "Image" content type facet and the "visual arts" discipline facet to the search results area.

Before noticing the images in search results, more than half of the participants used facets to narrow the search results.

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Question 2 Topic Search

Have you recently looked for articles on a topic for a class assignment or research? What was that topic? Where did you look for articles?

I would like you to go to Search Articles+ and look for some articles on your topic.

Suggestions if you don't have a topic

- CEO compensation
- effects of climate change on developing nations
- flash trading
- graphene batteries
- attention deficit disorder

Participants searched a range of topics of their choice.

2a. Please take a moment to look at the list of results. Do they look appropriate to your topic?

Success: 75% (15) thought results looked appropriate or relevant.

2b. Let's assume you need scholarly articles only for a class paper. Can you find a way to get rid of any popular material and news items?

Success: 15% (3) Success was defined as the selection of the Peer Review facet. 70% (14) chose instead to use a Content Type facet for Journal Articles and/or Dissertations.

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The screenshot shows the Yale University Library search interface. At the top, the search bar contains the text "Mutualism and parasitism" and a "Search" button. Below the search bar, the results are displayed as "10,047 results sorted by relevance". A checkbox option "Add results beyond your library's collection" is visible. The left sidebar is divided into three sections: "REFINE YOUR SEARCH", "CONTENT TYPE", and "DISCIPLINE". In the "REFINE YOUR SEARCH" section, "Any" is selected, and "Peer-Review" is circled in blue. In the "CONTENT TYPE" section, "Any" is selected, and "Dissertation/Thesis" is highlighted with a blue arrow. The "DISCIPLINE" section shows "Any" selected, with "biology", "ecology", and "zoology" listed below. The main results pane shows "Database Recommendations" for "Zoological Record" and "Environment Complete". A search result for "Mutualism and parasitism: the yin and yang of plant symbioses" by Paszkowski, Uta is displayed, including a thumbnail image, the title, author, and a brief abstract. A "Citation Online" link is visible at the bottom of the result.

Most participants ignored the Peer-Review limit on the upper left and instead chose facets for Content Types Journal Articles and/or Dissertations.

2c. In your work, have you ever needed to send a citation to yourself? We'd like to see if you can use this interface to do that. Show me how you would select a result and email it to yourself or a colleague.

Success Rate: 60% (12) Success was hovering over a record so that the email option displayed in the right pane and then selected Email.

Some participants could not complete this task because of display problems with the third, rightmost display pane. In some cases previous selections of a facet "more" option caused the third pane to not be available, and other times the pane did not display because of the screen resolution. In addition some participants found it difficult to hover over a record and view the options.

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Yale UNIVERSITY LIBRARY cancer clinical trials Search

1,408,043 results sorted by Add results beyond your library's collection
[relevance](#)

REFINE YOUR SEARCH

- ✓ Any
 - Full Text Online
 - Peer-Review

CONTENT TYPE

- ✓ Any
 - Journal Article
 - Newspaper Article
 - Book / eBook
 - Newsletter
 - Dissertation/The...
 - More...

DISCIPLINE

- ✓ Any
 - medicine
 - pharmacy, therap...
 - biology
 - public health
 - anatomy & physio...
 - More...

CONTENT TYPE

Archival Material	1
Book / eBook	231,752
Book Chapter	9,315
Book Review	14,969
Conference Proce...	2,343
Data Set	22
Dissertation/The...	32,495
Electronic Resou...	2
Government Docum...	7
Journal / eJournal	23
Journal Article	745,968
Magazine Article	12,074
Market Research	48
Newsletter	36,899
Newspaper Article	344,715
Paper	18
Photograph	2
Presentation	12
Publication	125
Reference	4,061
Report	9,610
Standard	4
Technical Report	4
Trade Publicatio...	2,085
Web Resource	335

Database Recommendations

Cancer clinical trials
eJournal: [Full Text Online](#)

Endpoints in cancer clinical trials
by Fiteni, F; Westeel, V; Pivot, X; more...
Journal of visceral surgery, 02/2014, Volume 151, Issue 1
... In the treatment of cancer, endpoints can be classified into two categories: "patient-centered clinical endpoints" including overall survival (OS...
Journal Article: [Full Text Online](#)

Cancer Clinical Trials
Cancer Sourcebook for Women, 2010
Reference: [Available Online](#)

When a facet is expanded, the third pane is not available until the facet is closed.

Question 3 Find a Subject Guide (Libguide)

Please show me how you would find some basic, background information about the discipline of ethnomusicology. Take a minute to look at the display of results. Do you see anything on the page that you might consult if you needed to find resources at the Yale Library?

Success Rate 18.2% (2 of 11) Success was finding the subject guide recommended by Articles, displayed in the Topic Explorer, the third or right-side display panel.

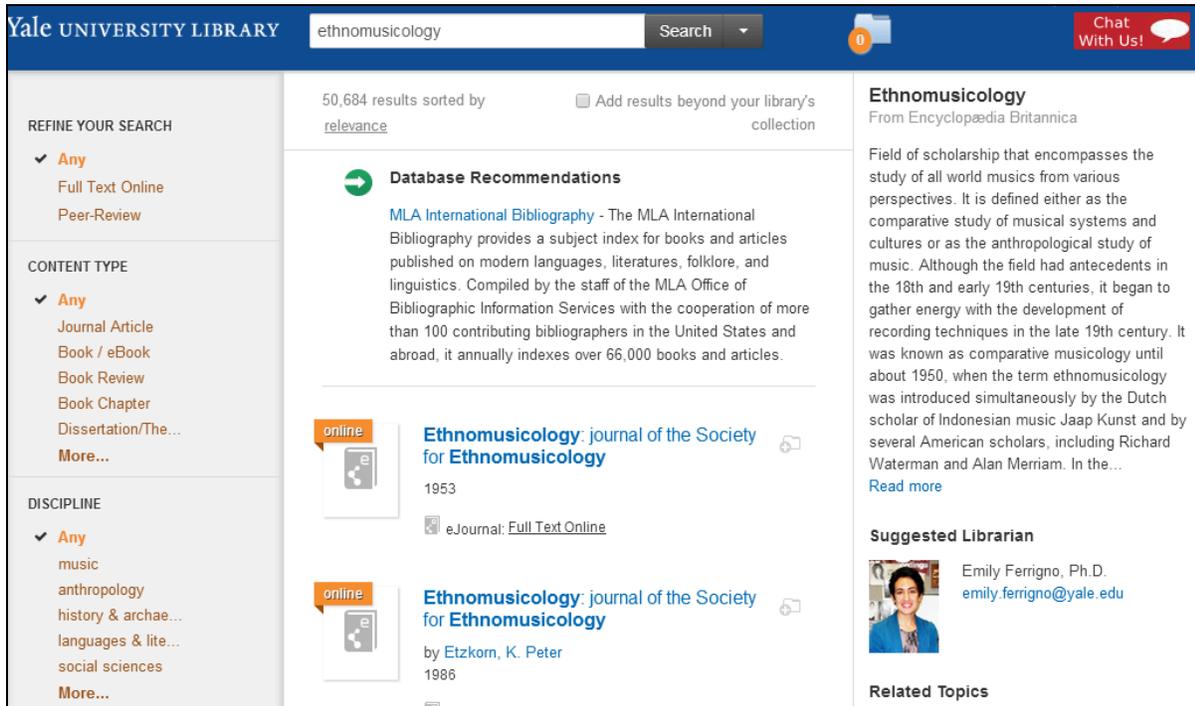
A variation was asked substituting colonial Mexico for ethnomusicology.

Success Rate 66.7% (6 of 9) Success was discovering and selecting the guide for Colonial Mexico embedded in the list of results.

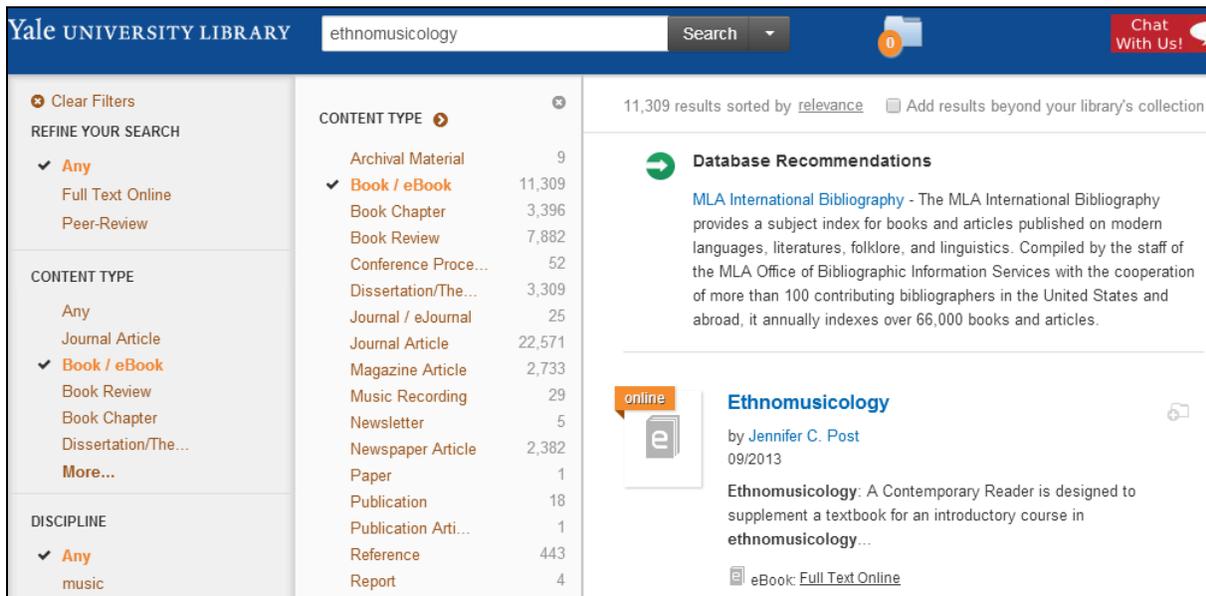
The ethnomusicology guide recommendation appeared in the third panel as a recommendation, whereas the Colonial Mexico guide was integrated in results. In this case display in the third pane caused the same issues as discovered in question 2, in that sometimes the third pane was not available.

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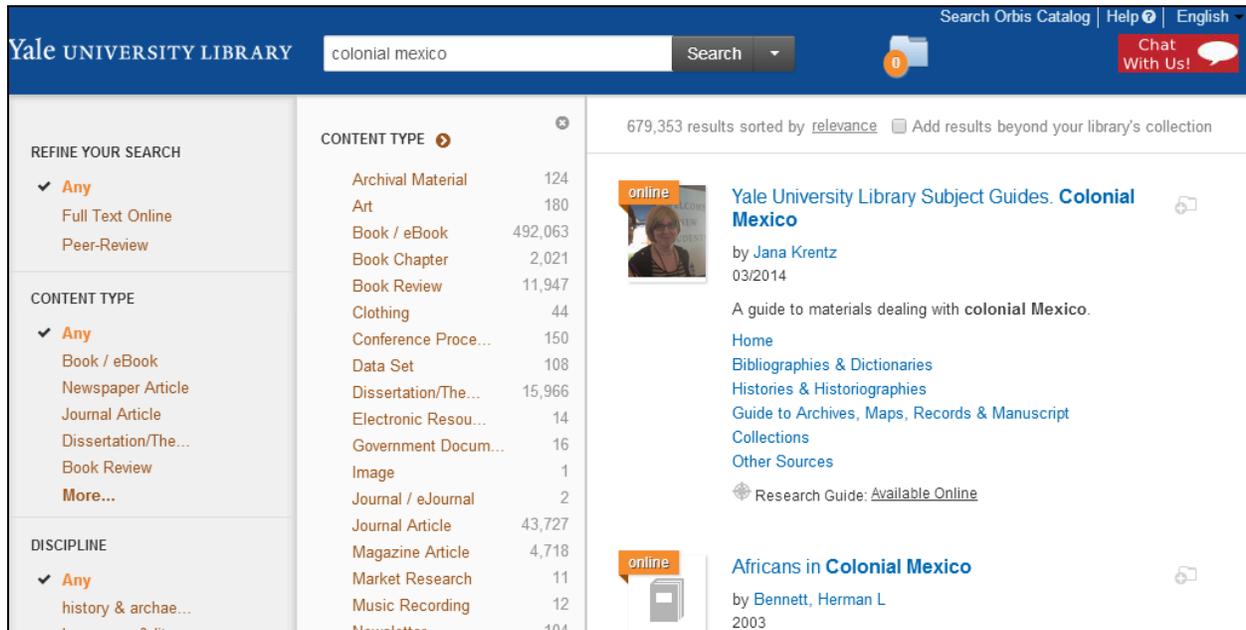
In this image, the Yale University Library subject guide is recommended in the right display pane.



In this case a facet list has been expanded, removing the display pane where the guide had been recommended.

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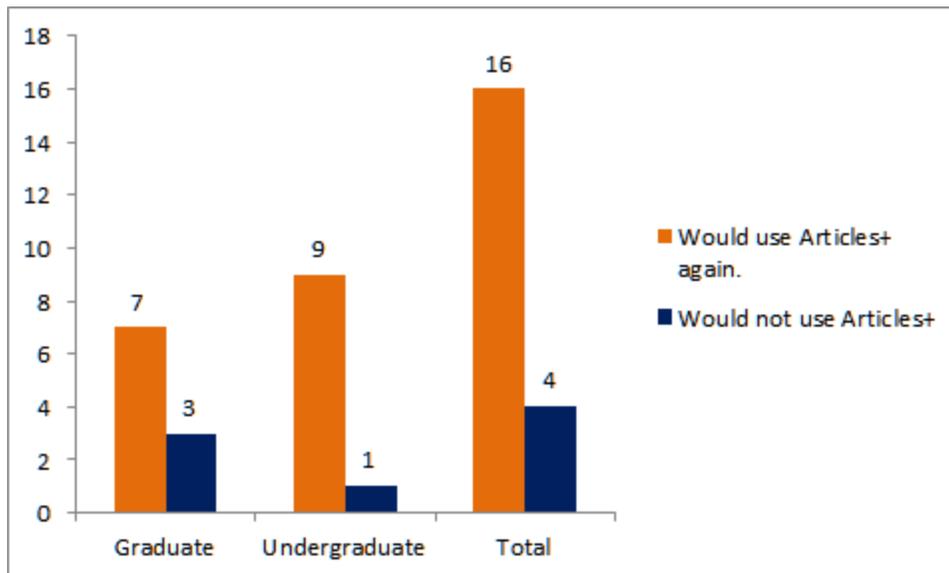
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The guide for Colonial Mexico is displayed in the results, so the expanded facet causes no problem with display.

Debriefing

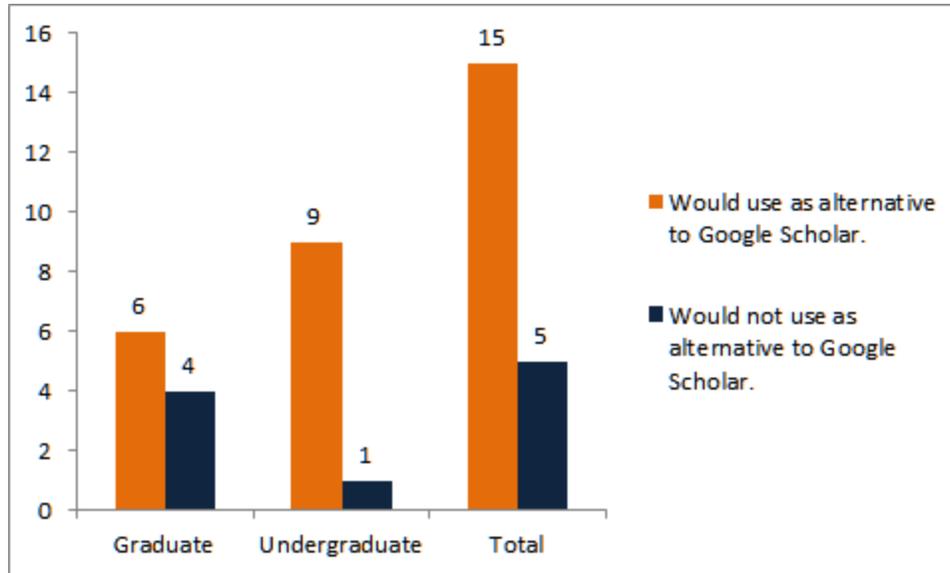
After using Articles+ in the test, participants were asked if they would use Articles+ again for their work, and if they considered it a possible alternative to using Google. Overall attitudes toward Articles+ were positive, although more so among the undergraduates.



80% indicated they would use Articles+ again, with 90% of undergraduates saying they would use it again.

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75% of participants viewed Articles+ as a possible alternative to Google or Google Scholar, with 90% of undergraduates viewing it that way, but only 60% of graduate students.

What Was Successful

- Students naturally and easily used facets, especially content type and disciplines.
- Students liked that they could search for things they know the library owns. Results were perceived as “library approved” and that was a positive for Articles+ over Google.
- It was easy to get results, and most students were satisfied with the relevance of results.
- Articles+ appeals to undergraduates, and they voiced enthusiasm for using it.
- Students said they wished they had known about Articles+.

What Was Less Successful

- Most students didn’t know about Articles+.
- Students who were already familiar with search tools were less receptive to a new search tool such as Articles+.
- Image thumbnails were not consistently placed or visible in search results.
- The scholarly articles/peer-reviewed facet failed to work for students. It is unclear if wording played a role in this.
- Students expected the Yale University Library logo in the header to return them to the main search screen, but it took them to the library’s home page.

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- The far-right display pane disappeared during testing for a variety of reasons, compromising usability of the interface.
- There was some trouble getting to local experts because of the far-right display pane issue. It was better when the librarian/Libguide displayed within results.
- Students were not aware what was in Articles+, and specifically did not know that Orbis material was not in Articles+. The Yale University Library logo on the search entry screen seemed to signify that everything in the library was searched, a la Google.
- Top-ranked results were sometimes too old to be considered useful or relevant.
- Icons were confusing (e.g. folder icon).
- Some students wanted an Advanced Search and could not find it.

What Library Staff Should Know

- Articles+ is not a well known resource, and needs to be promoted. We should explain it as being one part of the larger search environment, which includes everything from Google to specialized research databases.
- Facets are sticky. Users should be warned that any facets/limits selected stay in effect throughout a search.
- Articles+ offers citation and email functionality which can enhance use of this search tool.
- Metadata can change how material is discovered. Summon discipline metadata can and should be added to Libguides.
- Facets are available for Peer Review and Scholarly Material in Articles+. These limits are defined by Serials Solutions:

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Search Result Refinements

Available filters include the below options. Filters and facets are enabled/disabled in the [Settings](#) page in the Summon Administration Console:

Refinement	Effect on Search Results
Full Text Online	The search results will display only items in which the patron has online access to the full-text.
Scholarly & Peer-Review	The search results will display only those articles from scholarly publications, including peer-review, which is based on whether Ulrich's determines a journal is scholarly .
Peer-Review	The search results will display only content verified as reviewed by peers in the profession, determined to be of academic quality, and suitable for publication, based on the same peer-reviewed standards as Ulrich's for journals and abstracts.
Library Catalog	The search will only display those results in your library catalog.
Items at my institution	The search will only display those results available at your institution, rather than from other libraries in your consortium. Available to those libraries with a Union Catalog .
Add results beyond your library's collection	This performs an open search of the entire Summon index (excluding other libraries' catalogs and private, institutional, A&I databases). A patron can then see what is indexed on the breadth of a given topic, and perform an interlibrary loan (ILL) for items to which your library does not have full-text access. The checkbox for this filter displays above the search results.

- Material indexed in Articles+ includes images from Artstor, articles from journals, articles from popular magazines, news items (but not today's news), books from HathiTrust and Ebrary. Orbis records are not searched in Articles+.
- Screen resolution can be an issue. Check resolution on a monitor before you teach a class. You may need to adjust the resolution to see the third pane of information. Users of smart phones may not see the right pane either, depending in screen size.
- When the right pane is not available, a small plus sign is displayed near a record, which will display email and citation options when selected.

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- When not on campus and not using VPN you can search SOME but not all of the Articles+ index. This material requires authentication to display:

Provider	Database Name	Database ID
ARTstor	ARTstor	AKX
Elsevier	Scopus	BKL
Informit	A+ Education	KAE
	A+ Education (Selective Full Text)	KAS
	AGIS Plus Text	KGA
	AGIS Plus Text (Selective Full Text)	KGS
	Australian Public Affairs Full Text	KPA
	Australian Public Affairs Full Text (Selective Full Text)	KPS
	TVNews	1IJ
National Institute of Informatics Databases	JAIRO: Japanese Institutional Repositories Online (English)	ODX
	JAIRO: Japanese Institutional Repositories Online (Japanese)	ODU
ProQuest	Dissertations and Thesis A&I	EU9
Thomson Reuters	Web of Science	EGQ
	Arts & Humanities Citation Index	AKT
	Science Citation Index Expanded	DTL
	Social Sciences Citation Index	DVR
(various providers)	ERIC	(various)
	MLA International Bibliography	(various)

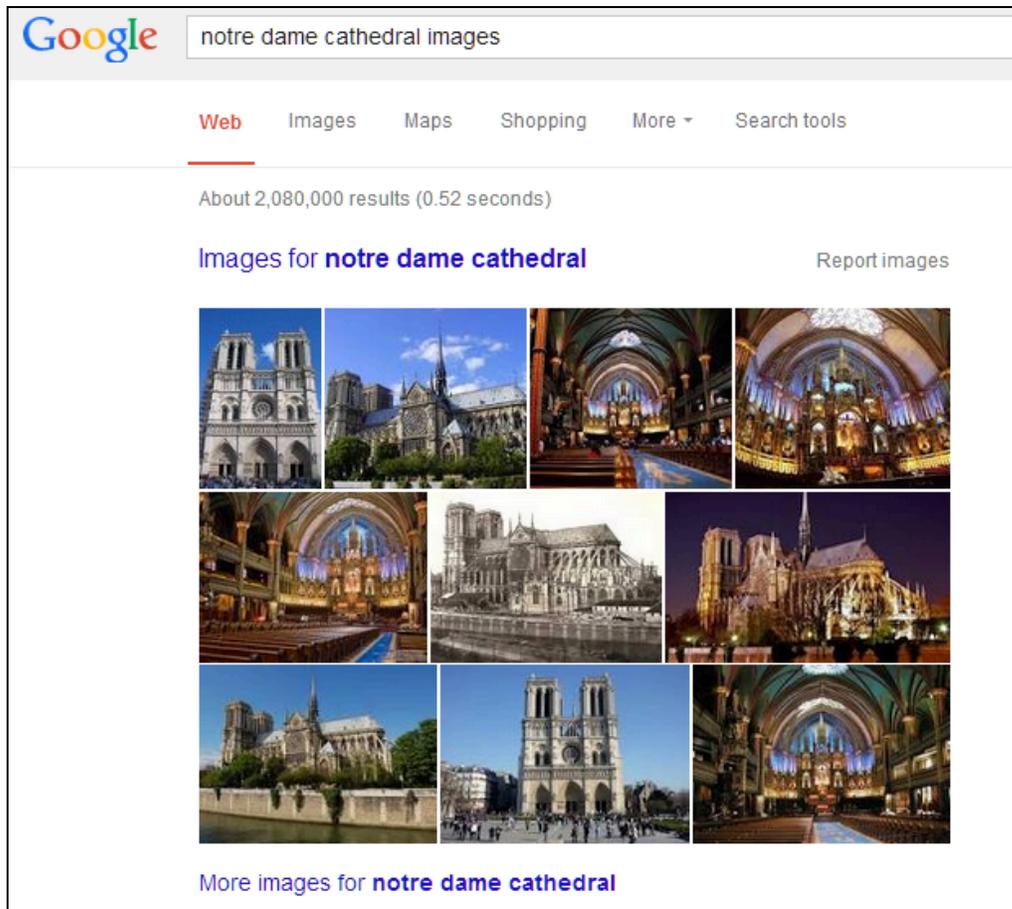
Recommendations

- Serials Solutions--Switch suggested librarian with encyclopedia article abstract (in the Topic Explorer right pane)
- Serials Solutions--Address issues of the right pane disappearing (with loss of functionality) when the screen is too small or a facet is expanded.
- Serials Solutions--Facets are sticky (remain in effect from search to search). It should be very obvious when limits are in effect. One suggestion would be to include a fairly prominent limit selection breadcrumb, making it simple to deselect one or more limit. Alternative would be one prominent Clear Limits option.

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- Serials Solutions--When a term such as images is in the search the row of images should be at the very top of search results.
- Serials Solutions--Users wanted an easy option to search only images. Consider providing tabbed search results for News and Images, similar to Google use of horizontal options for search results.



In Google results including the term images causes the result display to change so that images are more prominent. In addition options at the top of results let users search search results by Images and News.

- Serials Solutions--make Advanced Search more prominent for power users.
- Use instruction to increase knowledge of Articles+. Provide one-on-one instruction tailored to research needs.
- In instrustion discuss:
 - Limits for peer reviewed and/or scholarly material.
 - Images in Articles+ and the ArtStor database.
 - Facets and how they work.

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- How authentication or lack of authentication affects search results.
- Material covered in Articles+--journal articles, newspapers, reference works, ebrary and HathiTrust (but not all ebooks), images.
- How the right information pane in search results works.
- Create a reference cheat sheet for librarians who will present or teach about Articles+.
- Exclude outside Libguides currently displayed in results.
- Make subject guides more findable with added metadata.
- Make the link to Articles+ more prominent on the library's home page and elsewhere. Articles+ search can be embedded in Libguides.
- Add some information to the entry page to indicate what is searched and what is excluded.
- Add text in search box "Search journals, dissertations, newspapers, and more..."
- Provide a more prominent link to search Orbis in the Articles+ interface, especially since Orbis records are not searchable through Articles+.
- Add an obvious link in the header back to the Articles+ entry page.
- Do an additional round of testing in the fall 2014. Record sessions so that others in the library can view them.