Assessment as User Engagement:
Using User Testing and Assessment to Build Investment in the Library's Intranet

Elizabeth Edwards
University of Chicago, USA

Abstract

In 2012, the University of Chicago Library charged a group with the task of developing an understanding of staff communication needs with an eye to improving the library's intranet. A series of interviews resulted in the development of specifications for a new intranet while also highlighting a number of organizational and technological challenges. Applying user experience methods to exploring these challenges resulted in better information for site development while also engaging staff from across the library in the improvement of the intranet.

The Problem

In 2012, the University of Chicago Library charged a group with the task of defining and describing the current uses of the library's intranet, Staffweb, so that the site could be improved to better meet its central functions: disseminating information from university and library human resources, as well as about the library itself, to library employees. At the time, the site was perceived as meeting these needs; however, it was also widely perceived as stale or out of date, a perception reinforced by a homepage that saw infrequent updates.

In order to define and describe uses and requirements for the intranet, a series of interviews were conducted with library staff from units that made heavy use of the intranet, or who were otherwise understood to be major stakeholders for the site. While developing the script for these interviews, it became clear that, while it was important to understand how the intranet was being used within the library, it was also crucial to explore the challenges that resulted in patterns of non-use.

Three major themes emerged from the analysis of interviews conducted with about 20% of library staff over a period of two months: issues of content, technology, and culture. The issues contained within these themes were often closely related; for example, content may have become stale because staff were unable to update it using the content management system that was widely perceived as difficult and cumbersome. Regularly encountering stale content resulted in lack of trust in the currency of the site, which made it easier over time for staff to ignore or forget about the intranet.

These themes and interconnected issues created two significant challenges: how can the library develop requirements for improving the intranet when users do not currently find the site useful? And, how can the library facilitate user engagement with the intranet throughout this process in order to ensure that a new site is successful? It was clear that in order for a new intranet to be both useful and used, a deep understanding of the needs, perceptions, and experiences of its potential users must be central to the design process.

User Experience

According to SPEC Kit 322: Library User Experience, user experience in libraries "is interpreted to include a wide range of activities... including but not limited to assessment, user engagement, library design, outreach, and marketing."[1] User Experience, or UX, draws its theoretical framework from the fields of human factors and ergonomics, and often applies social science methods to exploring and improving the interaction between individuals and systems, interfaces, or things. UX methods include task-based testing, focus groups, interviews, card sorting, and participatory design.[2] In web and systems development, these methods are often applied to measure the ease of use of a specific system or interface; however, they can also be used to explore the usability of spaces and services in the real world. User testing is a critical component of any design process, and should be conducted frequently throughout the design cycle.

The University of Chicago Library convened its User Experience Group in 2012 in order to "conduct usability testing or other research to support user-centered design practices in support of the Library's web presence."[3] The UX Group was comprised of individuals from across the library who had interest in or experience with user testing, and was cochaired by the library's assessment librarian and web program director. The work of this group specifically focused on the library's web presence and other digital interfaces; this work complemented projects conducted by the Assessment Project Team, which had previously held responsibility for user testing.

Applying User Experience Methods

Over a three year period, library staff members applied a range of user experience methods to exploring the issues identified in the initial interviews. The use of these methods provided opportunities for staff from across the library to share their experiences of the intranet; for many, this was likely the first time they had been asked their opinion about the usability or, in fact, the utility of a site that was supposed to be essential to their daily work.

Method: Interviews

While the stakeholder interviews were intended to generate requirements for improving the intranet, they also served as the first phase of user engagement. Staff were pleased to be asked about their experience with and opinions of the site, and the focused conversations about the intranet and its role resulted in more conversations across the library.

Engagement Outcome: Governance Group

The findings and recommendations from the interview project were reported to library administration, with one of the most crucial outcomes being the creation of a governance group charged with addressing many of the issues detailed in the report. This governance group was recruited from units that had a large amount of content on the intranet, or whose staff were understood to be heavy users of the intranet. As a result, the group was comprised of both librarians and staff, with representation from service units that are often excluded from such groups. Crucially, this diversity of membership ensured that the specifications and priorities of the site reflected the needs of the entire library, not just those with the most power in the organization. This was particularly important given that lack of consistent representation had been identified as a significant organizational issue with the previous intranet.

Method: Heuristic Analysis

Having established the problems by talking to users and identifying solutions based on an understanding of technology and institutional culture, work on the intranet shifted to the library's UX Group. All members of the group were users of the site; however, most were relatively new to the library and had had no involvement in the creation of the site.

In order to identify next steps for the redevelopment of the intranet, members of the UX Group conducted a heuristic analysis of the top-level pages. Over time, these pages had turned into lists of shortcuts to content on the rest of the site, presenting links to content that was expected to be of use to a large portion of the library. A closer review of these pages revealed many redundancies within and between pages, with many links appearing multiple times under different display text in order to ensure that site visitors could find needed content using the language that would be most clear to them.

Engagement Outcome: Reflection and Discussion

The review of these pages was conducted in a highly collaborative way, with members of the UX Group working together to identify problems with page content and propose solutions for either improving the existing site or developing a new site altogether. Working in this way was engaging and fun, and built enthusiasm among members of the UX Group at the prospect of an improved intranet.

Method: Testing Use Cases via a Survey

In order to test the use cases described in the interviews, the UX Group developed a survey to capture information about site visitors' use of the intranet, as well as their understanding of the site's layout, navigation, and content. A pop-up survey, administered through Qualtrics, asked site visitors to indicate the purpose of their visit to the site based on common use cases identified in the interviews. Respondents were then asked to click on a screenshot to indicate where they expected to be able to complete their intended task or find the information they were seeking. Finally, respondents were asked about the frequency with which they used the intranet to complete this particular task.

The findings of this survey generally affirmed the use cases described in the original interviews; however, they also revealed that 25% of respondents visited the site by default, perhaps because it was set as their homepage, rather than to access specific content or to complete a task. This finding reinforced the importance of building engagement around the new site.

Engagement Outcome: Different Voices

Previous user testing methods had focused on site stakeholders (e.g., members of the governance group) or expert users (e.g., the UX Group), but this test engaged actual site visitors during an authentic use. Rather than asking participants to speculate about how they might use the intranet, this survey asked those currently visiting the intranet to describe how they were actually using the site. It gave site visitors an opportunity to indicate their actual use, rather than what they believed to be the intended use of the site. In this way, this test captured different data from different users, including those who might not have had the opportunity to share their experiences because they did not consider themselves to be site users.

Method: Paper Prototyping in Pairs

Once the library moved forward with the development of a new intranet, different methods of user testing were used to refine specifications and test aspects of the design. Paper prototyping was used to explore user preferences for the presentation and organization of search results, as the usability of the existing search function was so bad that site developers were essentially starting from scratch. Participants were recruited from across the library, and were then matched with a colleague with whom they did not ordinarily work. Each pair worked through a series of tasks using printouts of possible search result configurations. Discussion was encouraged, culminating with the pair collaboratively ranking the prototypes.

Engagement Outcome: Shared Discovery

This exercise was conducted several months after it had been announced that a new intranet was finally being developed, and more than three years after the initial interviews that provided the specifications for the site. Participants were recruited via a library-wide e-mail; more volunteered than were able to be involved in testing. The pair format facilitated conversations between individuals from different departments; these conversations often included reflections on similarities or differences in needs and behaviors related to the intranet. Test facilitators were pleased by the enthusiasm and engagement displayed by participants, particularly those who had used the old site for years and so had reason to be skeptical of the new site's utility.

Method: Task-Based Testing via a Scavenger Hunt

Following the launch of the new intranet in early 2016, task-based testing was conducted under the guise of a scavenger hunt. Library staff were invited to complete a series of information-seeking tasks using the new intranet. Answers and the addresses for the pages where they had been located were submitted via a web form, with correct answers resulting in entry in a drawing for several small prizes.

Engagement Outcome: Explore the Intranet

Conducting the task-based testing in this format allowed for feedback from far more participants than would have been manageable in a more traditional user testing environment; it also allowed participants to complete the tasks at their own pace and while exploring the new site. In addition to encouraging library staff to explore the intranet, the scavenger hunt also created an incentive for units to migrate their content to the new site in order to prevent site visitors from finding empty or incomplete pages where desired content should be found.

Conclusion

While user experience and usability testing are crucial to the design and development of systems and interfaces, these forms of testing can be beneficial for participants as well. While staff engagement was not the original intent of the user testing conducted by the University of Chicago Library on its intranet, the positive response from staff to each round of testing resulted in user testing being considered a core component of the communication plan for the launch of the new intranet. The theme "beautiful because you're involved" could be applied equally to the new site and content created by dedicated staff members—and to the enthusiasm and positive engagement around the site that was fostered by user testing through the design, development, and implementation process.

Endnotes

1. Robert Fox and Ameet Doshi, *SPEC Kit 322: Library User Experience* (Washington, DC: Association of Research Libraries, 2011), http://publications.arl.org/Library-User-Experience-SPEC-Kit-322/.

2. Christian Rohrer, "When to Use Which User-Experience Research Methods," Nielsen Norman Group, October 12, 2014, https://www.nngroup.com/articles/which-ux-research-methods/.

3. Charge of the User Experience Group, accessed September 30, 2016, https://loop.lib.uchicago.edu/groups/ux-group/.