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Building a User Testing Toolkit at Your Consortium or Institution

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A User Testing Toolkit

...

Outline

- The Consortium
- The Project Group
- Group Members
- Goals for the Toolkit
- Product Overview
- FAQ
- Sample Documentation
- Overview for Librarians
- Promotion + Marketing
- Assessment + Sustainability

<https://tinyurl.com/usertestingtoolkitslides>

Presenters

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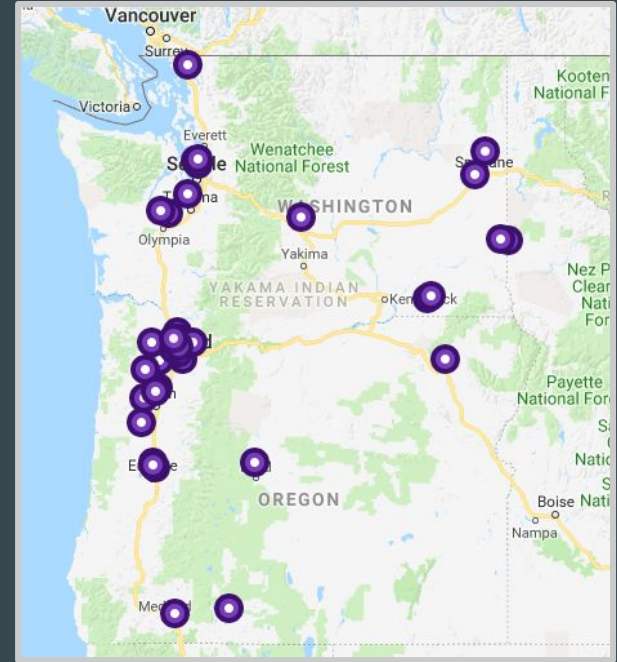
Systems & Discovery Librarian

University of Puget Sound

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The Orbis Cascade Alliance Consortium

- 39 academic libraries in ID, OR, + WA
 - 7 community colleges
 - 17 private 4-year colleges
 - 14 public 4-year colleges (lg & sm)
 - 1 health sciences institution
- Total FTE: 275,000



User Testing Toolkit Project Group

The User Testing Toolkit Project Group (UTTPG) assists the Discovery & User Experience (DUX) Team, with a focus on building a user testing toolkit to support user testing at Alliance libraries.

Authority of group: performs operational work, make recommendations.

User Testing Toolkit Project Group Members

Holli Kubly, Chair

University of Oregon

Kate Thornhill

University of Oregon

Rebecca Marrall

Western Washington University

Kathleen Veldhuisen

Chemeketa Community College

Hilary Robbeloth

University of Puget Sound

Kathy Watts

Whitworth University

Cassie Schmitt, ex-officio

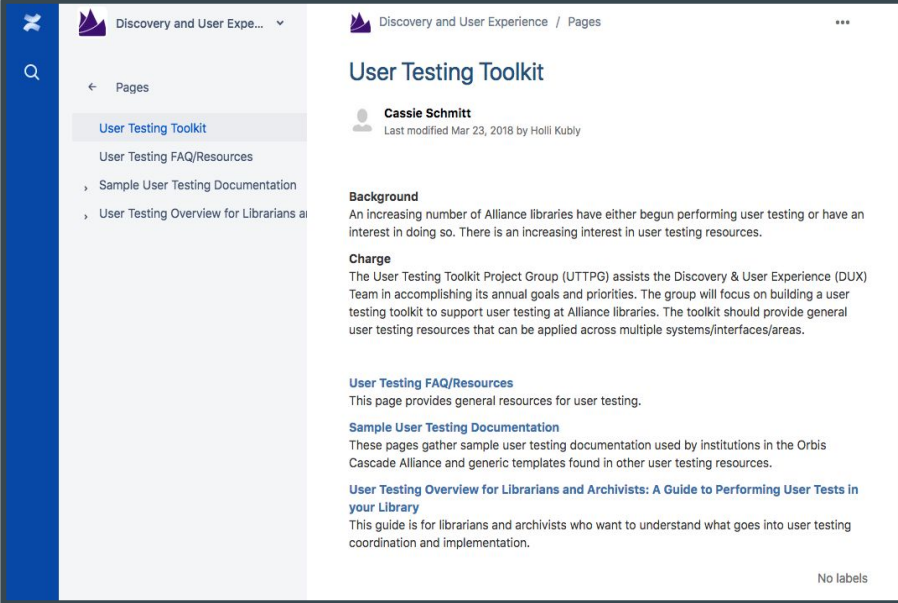
Orbis Cascade Alliance

Goals

- Provide user testing resources for application across multiple systems/interfaces/areas.
- Acknowledge varying skill sets, staffing considerations, and . . . time
- Empower members to perform usability testing at their respective institutions
- Allow colleagues to select testing that might work best for their situation
- **Entire project done remotely**

Product Overview

- Workflow: brainstorm many possible needs and refine into products.
- Ultimately three sections/products were developed.
- Group members paired up to take a lead on each product.



The screenshot shows a SharePoint page titled "User Testing Toolkit" under the "Discovery and User Experience" site. The page is structured as follows:

- Navigation:** A left-hand navigation pane shows a breadcrumb "Pages" and a list of items: "User Testing Toolkit" (selected), "User Testing FAQ/Resources", "Sample User Testing Documentation", and "User Testing Overview for Librarians and Archivists".
- Header:** The page title is "User Testing Toolkit". The author is "Cassie Schmitt", last modified on "Mar 23, 2018" by "Hollis Kubly".
- Content:**
 - Background:** An increasing number of Alliance libraries have either begun performing user testing or have an interest in doing so. There is an increasing interest in user testing resources.
 - Charge:** The User Testing Toolkit Project Group (UTTPG) assists the Discovery & User Experience (DUX) Team in accomplishing its annual goals and priorities. The group will focus on building a user testing toolkit to support user testing at Alliance libraries. The toolkit should provide general user testing resources that can be applied across multiple systems/interfaces/areas.
 - User Testing FAQ/Resources:** This page provides general resources for user testing.
 - Sample User Testing Documentation:** These pages gather sample user testing documentation used by institutions in the Orbis Cascade Alliance and generic templates found in other user testing resources.
 - User Testing Overview for Librarians and Archivists: A Guide to Performing User Tests in your Library:** This guide is for librarians and archivists who want to understand what goes into user testing coordination and implementation.
- Footer:** "No labels" is displayed in the bottom right corner.

FAQ

- Each group member contributed by brainstorming questions and resources
- Developed a final list - limited to three resources per question

The screenshot shows a web page titled "User Testing FAQ/Resources" within a "Discovery and User Experience" portal. The page is structured with a left-hand navigation menu and a main content area. The navigation menu includes "User Testing Toolkit", "User Testing FAQ/Resources" (which is highlighted), "Sample User Testing Documentation", and "User Testing Overview for Librarians and...". The main content area features a header with the page title, a byline for "Cassie Schmitt" (last modified Mar 21, 2018 by Holli Kubly), and a brief description: "This page provides general resources for user testing." Below this, there are several expandable sections, each starting with a right-pointing chevron (>). The first section is "What is User Experience (UX)?", which is expanded to show two sub-sections: "Usability & Web Accessibility (Yale University)" and "Web Usability Articles (Nielsen Norman)". The second section is "What are some good general websites about UX?", which is also expanded to show three sub-sections: "Usability.gov", "Are there any good videos about UX?", and "How can I conduct a user test?". The third section is "How do I create a testing objective?", which is expanded to show two sub-sections: "How do I create testing goals?" and "How do I know what is the best test to use?".

Discovery and User Experience / Pages

User Testing FAQ/Resources

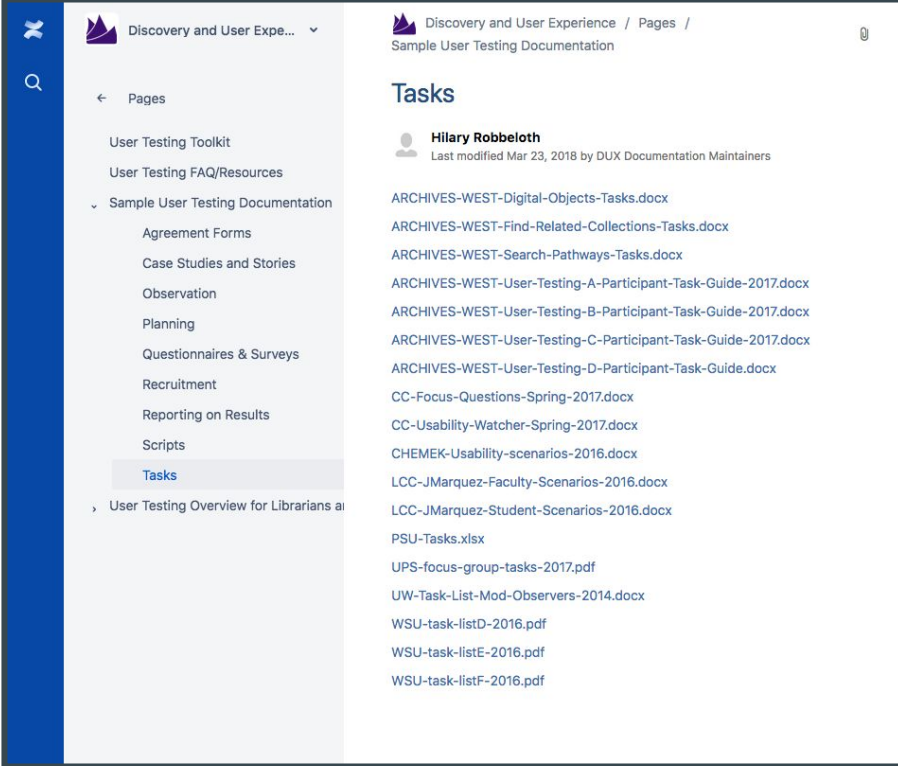
Cassie Schmitt
Last modified Mar 21, 2018 by Holli Kubly

This page provides general resources for user testing.

- > What is User Experience (UX)?
 - Usability & Web Accessibility (Yale University)
Yale University has an easy-to-understand website for beginning user experience professionals. This site contains templates, best practices, and simple recommendations into integration into web presence planning.
 - Web Usability Articles (Nielsen Norman)
These Nielsen Norman resources are geared mainly general website usability practices, organized by topics, popular and recent articles, and much more. Great place for beginning user experience professionals to engage in an introductory exploration on this topic.
 - Usability.gov
Usability.gov is a federal government resource (specifically, a website) dedicated to usability practices, which range from user testing to content strategy to good design and so much more. Free templates, checklists, and other resources are available her. It's a great tool for a user experience practitioner to move from exploring UX to doing it.
- > Are there any good videos about UX?
- > How can I conduct a user test?
- > How do I create a testing objective?
 - > How do I create testing goals?
 - > How do I know what is the best test to use?

Sample Documents

- Solicited content from Alliance colleagues
- Generic templates from online resources
- Builds upon previous presentations and workshops and incorporated their documents

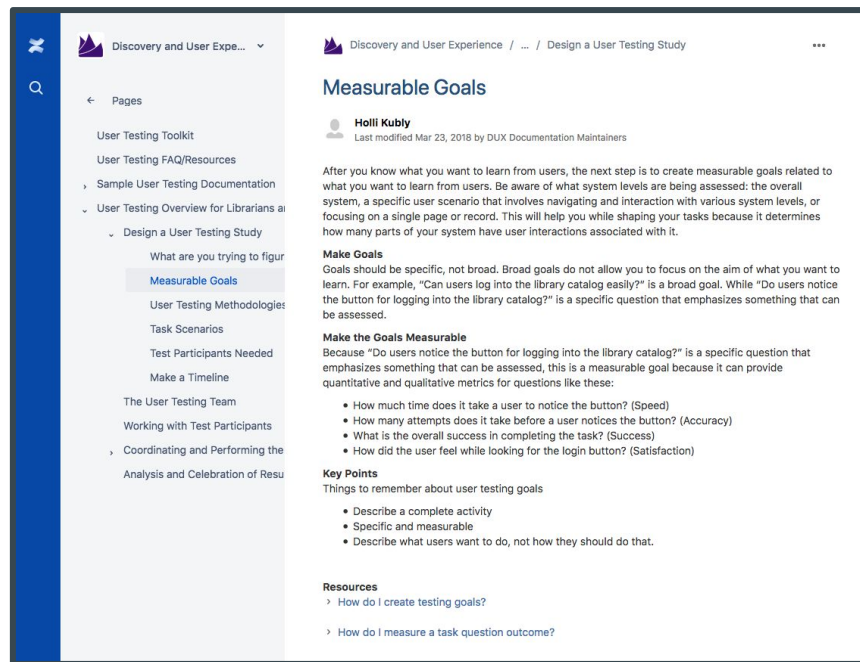


The screenshot shows a SharePoint page for 'Discovery and User Experience / Pages / Sample User Testing Documentation'. The left sidebar contains a navigation menu with the following items: 'User Testing Toolkit', 'User Testing FAQ/Resources', 'Sample User Testing Documentation' (expanded), 'Agreement Forms', 'Case Studies and Stories', 'Observation', 'Planning', 'Questionnaires & Surveys', 'Recruitment', 'Reporting on Results', 'Scripts', and 'Tasks' (highlighted). Below the menu, there is a link for 'User Testing Overview for Librarians and...'. The main content area is titled 'Tasks' and lists the following documents:

- ARCHIVES-WEST-Digital-Objects-Tasks.docx
- ARCHIVES-WEST-Find-Related-Collections-Tasks.docx
- ARCHIVES-WEST-Search-Pathways-Tasks.docx
- ARCHIVES-WEST-User-Testing-A-Participant-Task-Guide-2017.docx
- ARCHIVES-WEST-User-Testing-B-Participant-Task-Guide-2017.docx
- ARCHIVES-WEST-User-Testing-C-Participant-Task-Guide-2017.docx
- ARCHIVES-WEST-User-Testing-D-Participant-Task-Guide.docx
- CC-Focus-Questions-Spring-2017.docx
- CC-Usability-Watcher-Spring-2017.docx
- CHEMEK-Usability-scenarios-2016.docx
- LCC-JMarquez-Faculty-Scenarios-2016.docx
- LCC-JMarquez-Student-Scenarios-2016.docx
- PSU-Tasks.xlsx
- UPS-focus-group-tasks-2017.pdf
- UW-Task-List-Mod-Observers-2014.docx
- WSU-task-listD-2016.pdf
- WSU-task-listE-2016.pdf
- WSU-task-listF-2016.pdf

Overview for Librarians

- Kate Thornhill adapted our Overview from an overview document from another Alliance project.
- Member feedback developed the document further for our toolkit's needs.



The screenshot shows a web page titled "Measurable Goals" within a documentation system. The page is part of the "Discovery and User Experience" documentation, specifically under the "Design a User Testing Study" section. The page is authored by Holli Kubly and was last modified on March 23, 2018. The content includes an introduction to measurable goals, a section on "Make Goals" explaining that goals should be specific and measurable, and a section on "Make the Goals Measurable" providing examples of specific questions. There are also sections for "Key Points" and "Resources".

Discovery and User Experience / ... / Design a User Testing Study

Measurable Goals

Holli Kubly
Last modified Mar 23, 2018 by DUX Documentation Maintainers

After you know what you want to learn from users, the next step is to create measurable goals related to what you want to learn from users. Be aware of what system levels are being assessed: the overall system, a specific user scenario that involves navigating and interaction with various system levels, or focusing on a single page or record. This will help you while shaping your tasks because it determines how many parts of your system have user interactions associated with it.

Make Goals
Goals should be specific, not broad. Broad goals do not allow you to focus on the aim of what you want to learn. For example, "Can users log into the library catalog easily?" is a broad goal. While "Do users notice the button for logging into the library catalog?" is a specific question that emphasizes something that can be assessed.

Make the Goals Measurable
Because "Do users notice the button for logging into the library catalog?" is a specific question that emphasizes something that can be assessed, this is a measurable goal because it can provide quantitative and qualitative metrics for questions like these:

- How much time does it take a user to notice the button? (Speed)
- How many attempts does it take before a user notices the button? (Accuracy)
- What is the overall success in completing the task? (Success)
- How did the user feel while looking for the login button? (Satisfaction)

Key Points
Things to remember about user testing goals

- Describe a complete activity
- Specific and measurable
- Describe what users want to do, not how they should do that.

Resources

- > How do I create testing goals?
- > How do I measure a task question outcome?

Promotion + Marketing

- Reminder on Alliance listservs, open calls, and monthly newsletter
- Alliance Annual Primo New UI Day
- National presentations
- Google

Assessment + Sustainability

- Data from Confluence
- Alliance-wide survey
- Develop plan and timeline for refreshes
 - Continue to send out calls for new documentation
 - Solicit narratives from Alliance members

Contact Us

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Hilary Robbeloth
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<https://tinyurl.com/ocauttoolkit>

*Thank
you*