User Requirements Gathering for the Humanities

Oxford's involvement in the CREE project

http://www.hull.ac.uk/esig/cree/

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CREE Project Partners

- **The University of Hull** (e-Services Integration Group, Academic Services)
- **The University of Oxford** (Oxford University Computing Services)
- **The University of York** (Archaeology Data Service)
  The University of Edinburgh (EDINA)
- **Newark and Sherwood College**

CREE Project Aims

- Assess, test and document user requirements for Internet-based search tools both through their native interfaces and embedded within portal and non-portal environments in a broad range of user contexts.
- Investigate and document generic aspects of adapting a range of existing search tools and toolkits (JAFER toolkit, GetRef, GetCopy, HEIRPORT, and Google APIs) for presentation using the WSRP and JSR 168 portlet standards, facilitating their integration with any conformant national or institutional portal.
- Investigate in detail, test and document the practical integration of these tools with reference portal implementations. CREE will actively seek other national and institutional portal reference implementations with which to test software components.

CREE: User Requirements Activity

CREE project meeting
11th February 2005

User evaluation

JISC

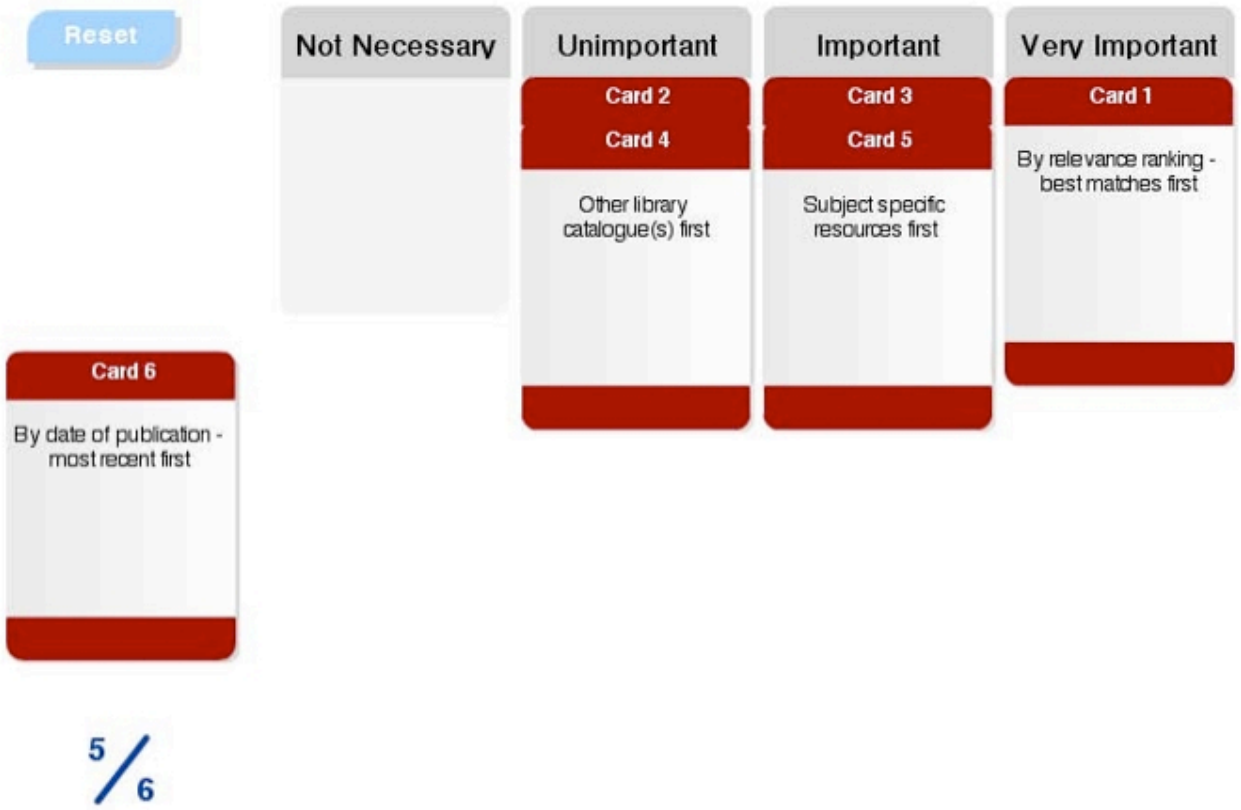
- How do users want to search?
- How do they currently search?
- What requirements do users have for searching?
- How might different contexts affect searching?

CREE Survey

JISC

- National survey carried out
- September - October 2004
- Over 4500 responses
- 2500 of them came from Oxford!
- Used Multimedia Flash-based card sort toolkit

Card sort toolkit



Web + Library Searching: tell us how you'd like to do it!

Do you use Internet and library search tools?

Fill in a short questionnaire and you could win
an **iPod music player** or **£100 Amazon or Marks and Spencer vouchers**!

The survey should take less than ten minutes to complete.
The prize draw will take place on 29th October 2004.

The JISC-funded CREE project is investigating user preferences for conducting library resource and Internet searches.
We intend to use the information we gather to inform the development of next-generation Internet and library search tools.

The Contextual Resource Evaluation Environment (CREE) is a project arising from the Joint Information Systems Committee (JISC) Portals: Investigations into User Requirements & Sustainability.

Email : *(needed to enter prize draw)*

Age:

Gender:
- Male
- Female

University Department:

College affiliation (if any): Please select one

Primary Role: Please select one

Q1. How often do you use Internet search tools?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Less than monthly
- ○ Never

Q1a. How do you usually assess the quality of online material retrieved by searching the Internet?

Q2. How often do you use Internet search tools for purposes connected with teaching, learning and/or research?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Less than monthly
- ○ Never

Q3. Which Internet search tools and directories do you use most often for teaching, learning and/or research?

	Frequently	Occasionally	Never used	Never heard of
Google	○	○	○	◉
Ask Jeeves	○	○	○	◉

CREE Focus groups

JISC

- 11 groups held: 5 staff and 6 student
  - >60 people from across disciplines
- University of Hull, University of Oxford, Newark and Sherwood College
  - Including online focus group at Hull
- Testing results from the survey
- Gathering experience and views in depth

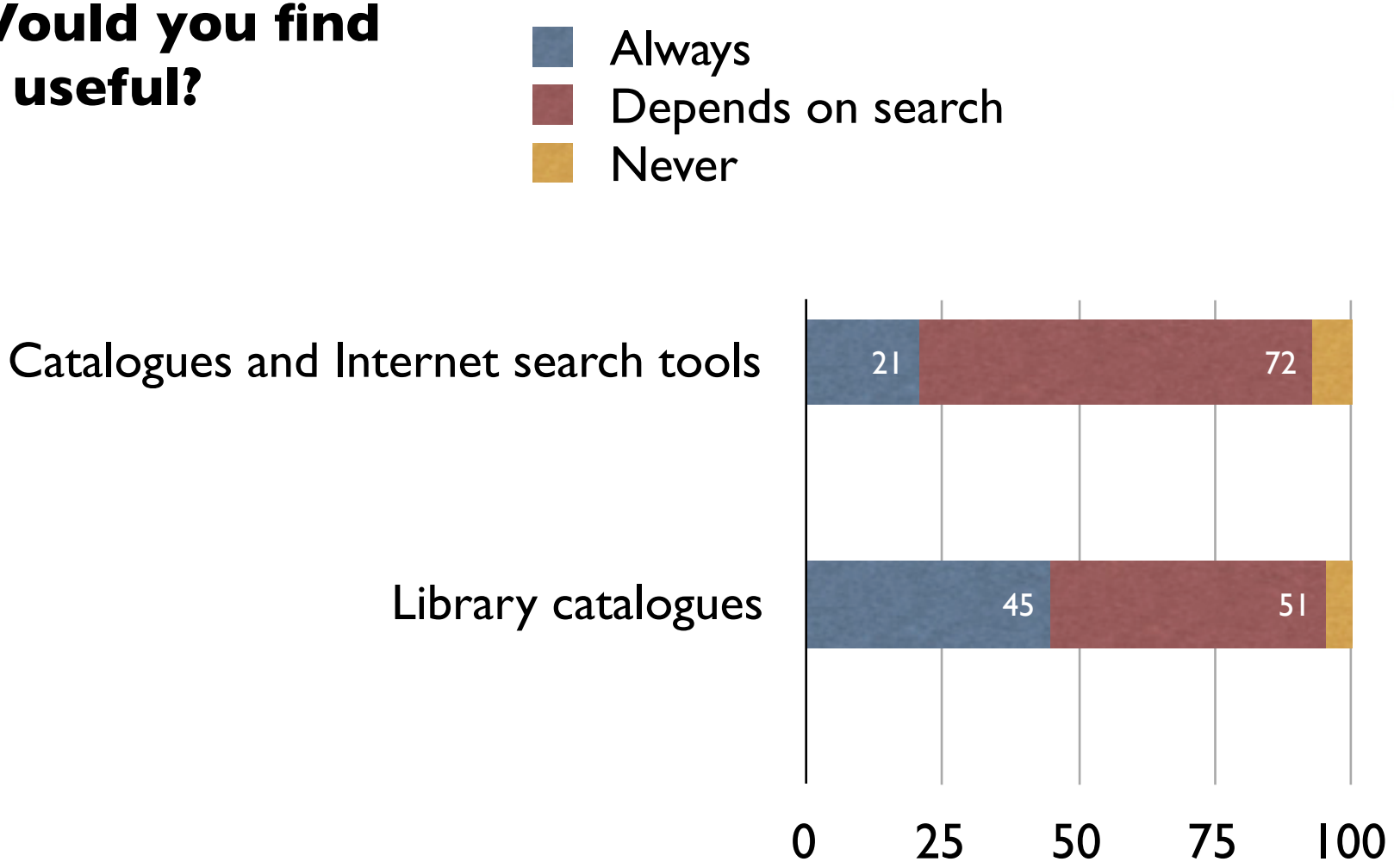
What did the survey find?

JISC

- 85% used Internet search tools daily
  - 61% used them daily for learning, teaching or research
- 67% used subject-specific resources
- 68% used the local library catalogue at least weekly
  - 54% used other library catalogues at least monthly

Simultaneous searching?

Would you find it useful?

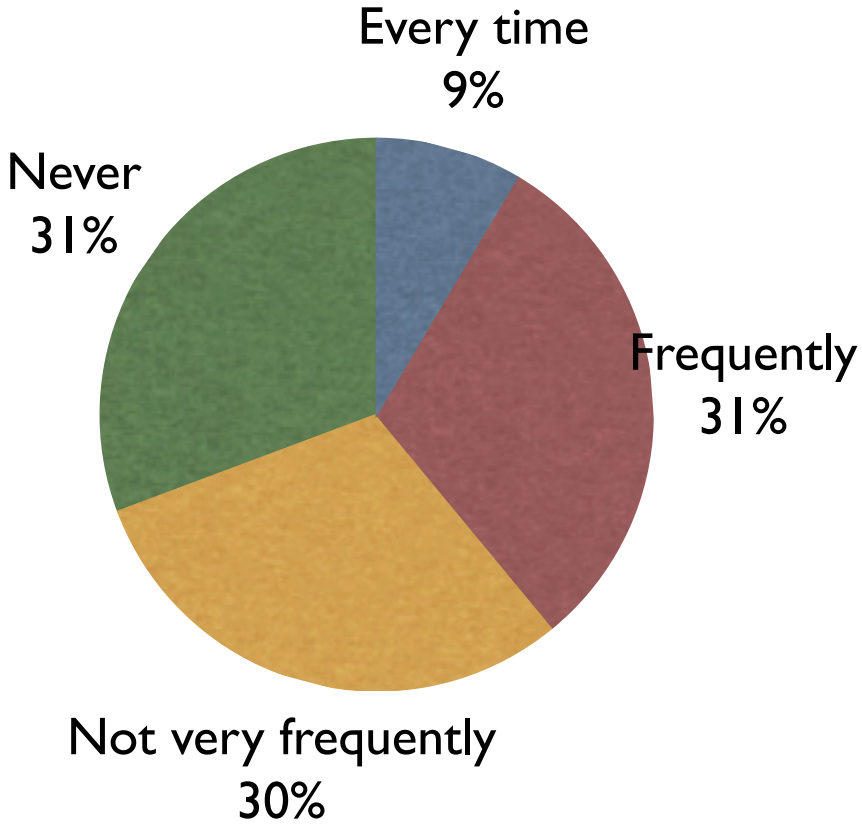


Simultaneous searching

JISC

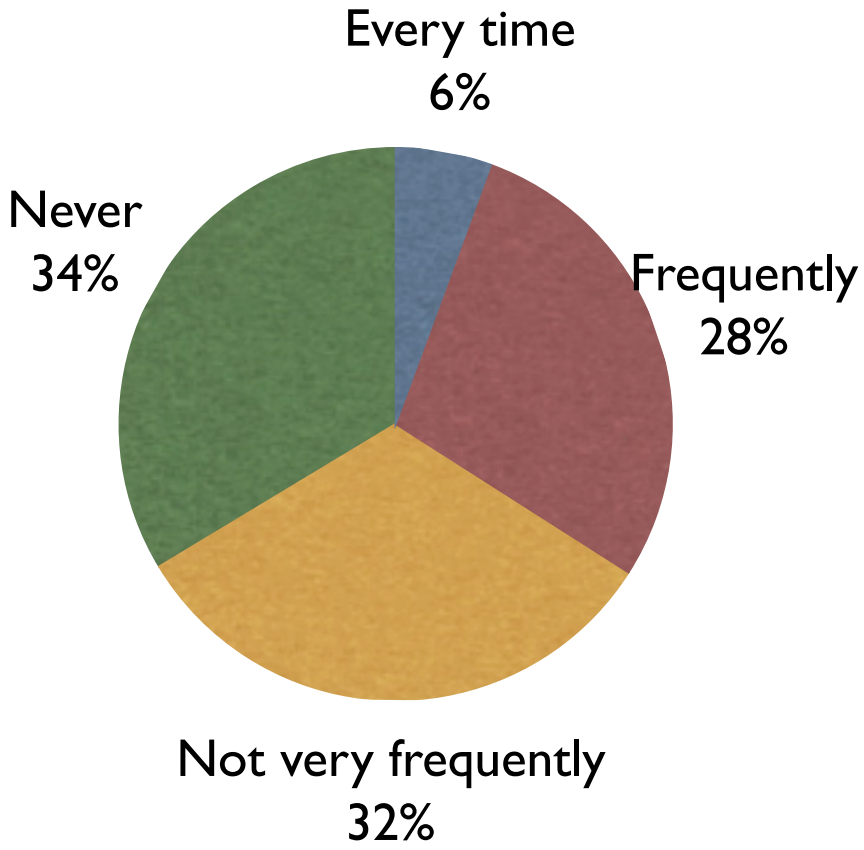
- Focus groups agreed that simultaneous searching was a good thing, but with caveats
- Saves time
- Google and others!
  - Though common search of library catalogues OK
- Needs to be done well, or results are not usable

Search tools and the VLE



Using Internet search tools whilst using an LMS

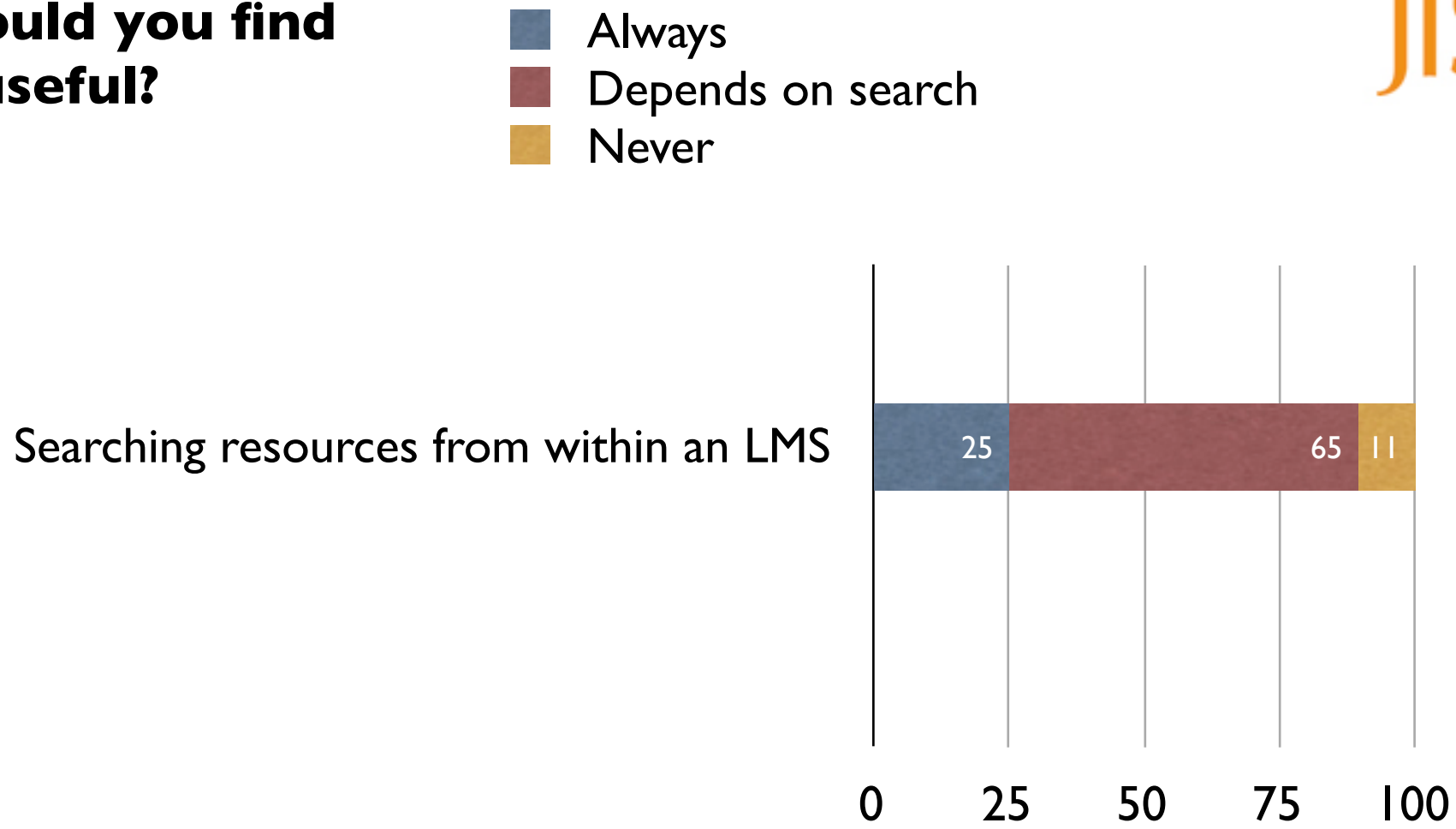
Catalogues and the VLE



Use of library catalogues whilst using an LMS

Searching from within an VLE?

Would you find it useful?

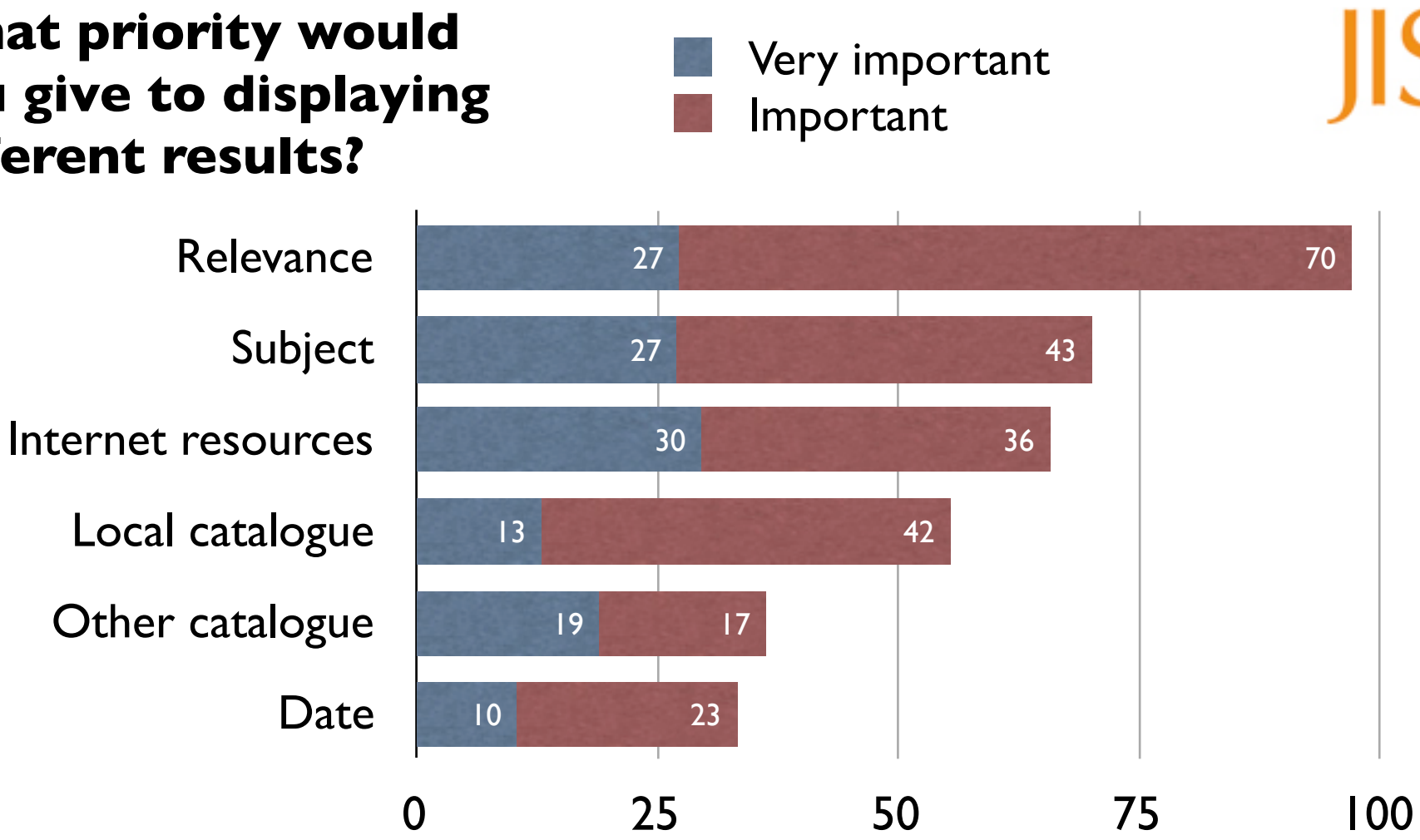


Searching whilst using an VLE

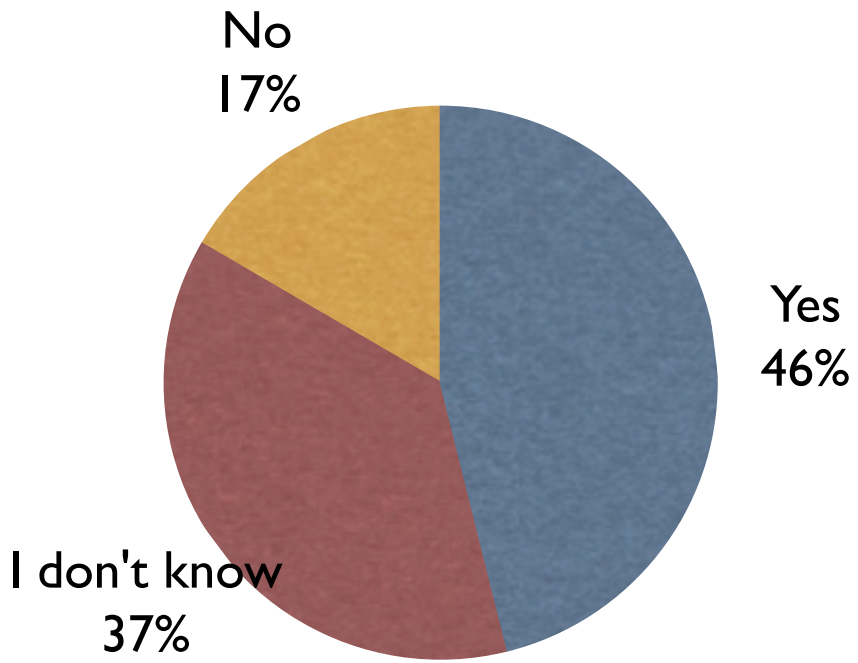
- Focus groups had a strong preference for multiple windows
  - Allows control of the search tools used
  - Considered to be as quick
- Access to quick reference tools considered useful, though
  - Dictionary, thesaurus etc.

Displaying search results

What priority would you give to displaying different results?



Displaying results in the LMS



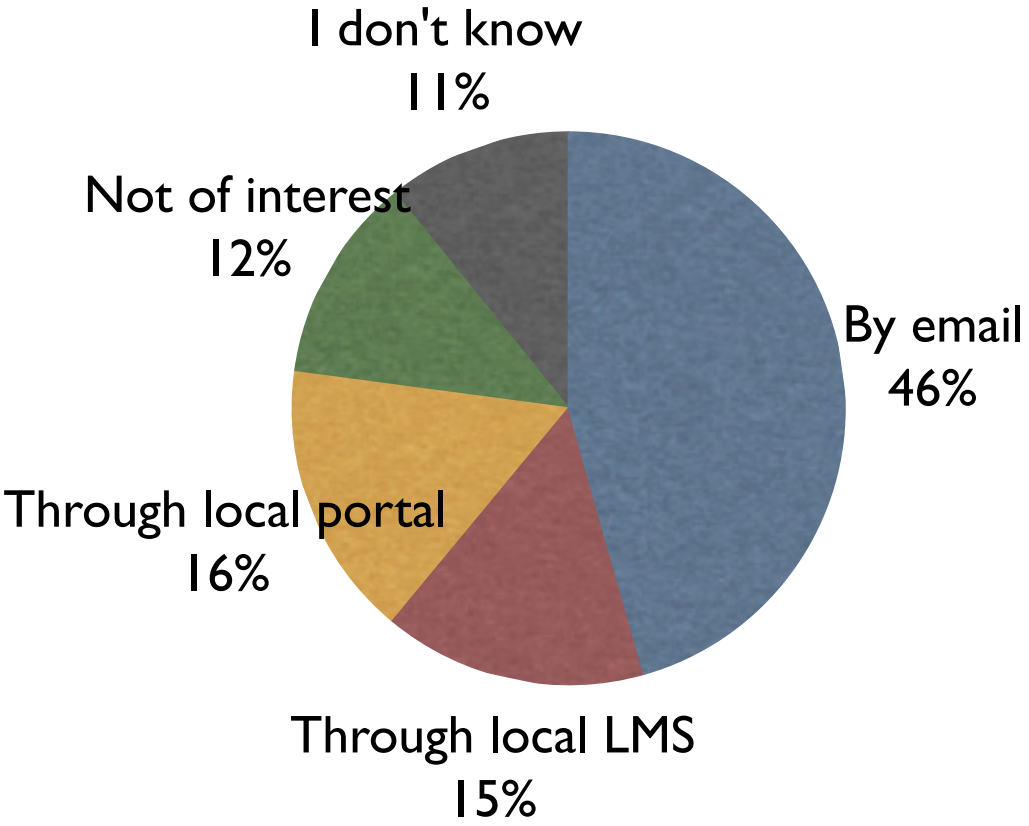
Would you like search results to appear within the LMS?

Displaying search results

JISC

- Focus groups were more concerned with the way results were displayed, not the order
- Preferred results sets to be separate, not a single list
- If a single list, then de-duplication is a priority

Keeping informed



Would you like to be notified of new resources as they become available, and how?

Further focus group findings I

JISC

- Google is used by everyone
  - Usually as first choice and starting point
  - Sometimes as last resort!
- But users are aware of the role of more specific search tools
  - Choice of tool is according to need

Further focus group findings 2

JISC

- How search tools are used depends on purpose of search
  - Assignments - whatever can be found
  - Research - more considered approach
- Quick use can lead to later advanced use

Further focus group findings 3

JISC

- Two search strategies are used
- Discovery - when nothing is known
  - Google, bibliographic databases
- Location - when item is known
  - Library catalogue, local and other
- Preference for searching only those resources that are available (i.e., can be located)

Lessons Learnt

Survey

- Wide advertising worked well
- Good spread of respondents across HE and FE
- Slight bias across user groups
  - Many library staff responded
- Errors in data mean some analysis not possible

Focus Groups

- Great trouble recruiting students until right incentive in place AND advertised in right place
- Need to approach directly, not through staff
- Staff interest OK but limited by time commitments
- Very valuable exercise

User testing

Aims of testing

- Investigate the use of search tools in different environments and contexts
  - Institutional portal
  - VLE
  - Standard web page
- Re-visit ideas from survey and focus groups and test further

Search tools: CREE

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- JAFER (can be configured to local catalogue)
- GetRef (may need local profile)
- ADS
- Google

Search tools: Other

JISC

- Go-Geo!
- Connect
- zetoc
- RDN-include

Demonstrators

JISC

- Institutional portal
  - Hull and Oxford - uPortal
  - Newark and Sherwood?
- VLE
  - Screenshots based on Sakai
  - WebLearn?
- Webpages

Types of testing

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- A. Have individual users in controlled environment or user's workplace, answering questions from interviewer
- B. Online interaction and response in user's workplace via questionnaire
- C. Focus groups with demo on screen
- D. Paper prototyping with groups

Proviso of testing

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- We are testing the presentation of the tools
- We are testing the type of the tools (catalogue/bibliographic/search engine)
- We are NOT testing the tools themselves

Testing timetable

JISC

- Development of demonstrators and testing regimes
  - Feb - Mar 05
- User testing
  - Mar - May 05

The End

- Questions?
- Thanks to Chris Awre, Hull for allowing me to use his slides

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