The Morgan Library & Museum

User Test Report
An evaluation of themorgan.org

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EXECUTIVE SUMMARY

The Morgan Library & Museum, located in New York, NY, holds a rich collection of literary and historical manuscripts, books, and art. It has a non-circulating library, but allows researchers to use the materials on-site provided they have made the appropriate requests. The museum also curates exhibits, provides public and educational programming, and hosts film screenings and live performances as one of many ways of engaging with the local community.

This report details our findings on the overall usability of the Morgan Library & Museum website (**themorgan.org**). A team of four evaluators tested a total of eight users. We gave users three tasks and evaluated how easily users were able to complete them, what their thought processes were during the test (using the "think aloud" method), and how they felt about the tasks in general. Each task tested different aspects of the Morgan's website. Users were given a pre-test (consisting of demographics and experiences using museum websites) and a post-test questionnaire (to record their general observations of the website). Evaluators were present to answer any questions and provide feedback whenever users needed guidance in completing their tasks.

Task 1: A visitor planning to come to Museum for a program.
  a) You are considering going to the Friday Evening Classical concert on November 27th. When is it and how much does it cost?

Task 2: A student researcher interested in Oscar Wilde's letters.
  a) See if any of Oscar Wilde's letters are digitized online.
  b) Request to see a book related to Oscar Wilde in person using the Online Catalogue.

Based on those problems we found from user tests, we recommended the following solutions that can improve themorgan.org for both new and returning visitors

Recommendations:
- Create a "Request Item" button.
- Rename "Online Application" to "Send Your Request."
- Create a search box specifically for Corsair Collection Catalogue and rename it "*Online Catalogue*."
- Streamline the "Collections" tab in main navigation menu so visitors know what the tab contains.

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INTRODUCTION

The purpose of this user test report is to recommend how the Morgan Library & Museum can make its website functional and easy to use for a diverse group of visitors, from casual visitors to visiting scholars and local researchers. The user testing was conducted by four moderators with a total of eight users. Users were given a pre-test questionnaire to gauge their knowledge about museum libraries and museum websites, then they were given an overview of their tasks and asked to complete them. There were two evaluators present with each user to answer any questions users may have had. While there were slight differences among the user responses and response time, most users were able to complete all the tasks in approximately 15 - 20 minutes. At the end of the user test, users had the opportunity to provide additional feedback through a post-test questionnaire.

After evaluating our results, it was clear that nearly all the users faced difficulties in navigating the library catalogue to search and request materials. While it may be common knowledge for returning visitors to the museum, many new visitors were unaware that the Morgan had a library through which literary and historical texts were available for research purposes. Users were also unsure if they were searching the correct catalogue to access library materials, and the procedure for requesting materials was unclear. This report details our findings and our recommendations to make the Morgan's collection more accessible to users. We have also included test results in the appendices for a more detailed reading of our findings.

METHODOLOGY

User Testing

User testing measures the performance of users--the "experimental subjects"--completing tasks in a controlled setting (e.g., a laboratory) and allows researchers to use the resulting data to determine the usability of a system (e.g., website) (Rogers, Sharp, and Preece, 2011). User tests can be conducted remotely or in-person; this is a matter of preference, but unmoderated remote testing may rely too completely on the user to provide necessary data. There is a risk that participants are only interested in the incentive (e.g., money) and may not produce the best data, striving for completion over quality (Soucy, 2010). Real time, moderated user tests allow moderators to ask "probing questions," rendering more usable data. Furthermore, in-person testing has some open source software options for recording user tests (e.g., QuickTime Player).

Both remote and in-person testing can use the "think aloud" protocol. Nielsen (2012) defines "thinking aloud" as "simply verbalizing [users'] thoughts as they move through the user interface." The think-aloud method is beneficial for several reasons: it allows users to provide largely unfiltered commentary, it is "cheap," "robust," "flexible," "convincing" and "easy to learn" (Nielsen, 2012).

Preparation

After browsing and doing a quick informal evaluation of the Morgan website, we defined our user groups for the purpose of deciding on proper tasks to meet particular user groups' needs. We structured our tasks based on three personas (of which had already been created from a prior usability test. It is atypical that ready-made personas would be available for most user tests). The summarized personas are as followers:

1. General public/non-scholar
2. Advanced scholar/student
3. Remote advanced scholar/researcher/professor

Based on the personas described above, we then came up with a series of tasks that would fit their needs when using the Morgan's website. Below are the list of tasks that users completed:

Task 1: A visitor planning to come to Museum for a program.
   a) You are considering going to the Friday Evening Classical concert on November 27th. When is it and how much does it cost?

Task 2: A student researcher interested in Oscar Wilde's letters.
   a) See if any of Oscar Wilde's letters are digitized online.
   b) Request to see a book related to Oscar Wilde in person using the Online Catalogue.

Using Google Forms, we then created a pre-test questionnaire, which covered basic demographics and users' general experiences using museum websites, and a post-test questionnaire, which allowed us to document users' overall experiences using the Morgan website and learn new insights that went beyond insights learned from the think aloud process.

We chose QuickTime Player, an open source software, as our method of recording data. QuickTime Player allows for simultaneous video/audio recording and screen recording.

We then wrote a script, intended for all four moderators to read aloud to her respective user(s), which provided an explanation of the user test.

Lastly, we wrote a consent form for users to sign, assuring the each user's anonymity and his/her acceptance of having his/her face and voice recorded.

Procedure

A four-person team conducted eight user tests at Pratt Institute's School of Information. Each test lasted approximately 15-20 minutes and ended with a "reward" as incentive (i.e., various dessert foods) (which is customary in user tests [Rubin and Chisnell, 2008]). All tests were conducted with two moderators--one who asked leading questions and encouraged the user throughout the process and one who acted as a silent observer, taking notes; using two moderators, we were able to parse and analyze hand-written notes.

Before beginning the test, users were asked to read and sign a consent sheet, then fill out an online pre-test questionnaire. A moderator then read from a script, explaining what the user was to expect when taking the test, encouraging the use of the "think aloud" method. The moderator handed over a typewritten list of tasks (which allowed users to easily refer back to the list if they

forgot a task), then began recording the user's face/voice and on-screen navigation using QuickTime Player software (on a Mac computer).

When the test concluded, a moderator asked users to fill out an online post-test questionnaire, then offered the user his/her "reward."

After all user tests were completed, researchers convened to discuss the eight user test's resultant data. We did experience some problems when using QuickTime Player, at times either missing a video/audio file or a companion screen-recording file or vice-versa. However, since we decided to conduct our tests in-person and conducted tests with two moderators--one who encouraged the user and the other who acted as a silent observer, taking notes--we were able to use our hand-written notes to gather a more robust and complete set of user data. We also transcribed all audio, which allowed us to easily incorporate user feedback (particularly direct quotes) from the think-aloud protocol into our findings and recommendations.

All resultant data from the questionnaires and think-out aloud dialogues was analyzed and incorporated into this report.

FINDINGS & RECOMMENDATIONS

***Finding 1:** Users are unsure about the necessary steps to request a book.*

While the Morgan is a non-circulating library due to the unique, fragile, and often irreplaceable nature of their books and manuscripts collection, researchers are invited to request material for study in the Sherman Fairchild Reading Room. To make requests, the Morgan asks users to fill out an online application. Here, the researcher identifies the desired item(s) using information provided in the CORSAIR Online Catalog, as well as describes the reasons why their research would benefit from physical examination of the book or manuscript.

To test the usability of the Morgan's website that pertain to item requests, we asked our participants to request a book about Oscar Wilde discovered using the CORSAIR Online Catalogue.

In both observation notes and in post-test questionnaires, we found that users overwhelmingly expressed confusion about the steps needed to fulfill this task.

One user wrote in the post-test questionnaire:

> *"The first two tasks were easy enough; the third task (figuring out how to request the book) was difficult."*

Another user wrote:

> *"I again had to work backwards to find out how to fill out an application to request to access the book. That would have been frustrating if I'd just been working with one window open and had to open up the application and then go back to the catalog to find my record again to copy and paste the info into my application."*

***Recommendation 1a:** Create a "Request Item" button within the catalog record.*

Since a number of users, especially those visiting the website for the first time, may not already know about the requirement to fill out an online application, or that it is located on the Sherman Fairchild Reading Room page (located under the Research tab), we recommend the website create a "Request Item" button (Fig. 1) located directly on the item record page. This way users

can be immediately linked to the appropriate form without having to spend additional time familiarizing themselves with the requirements.
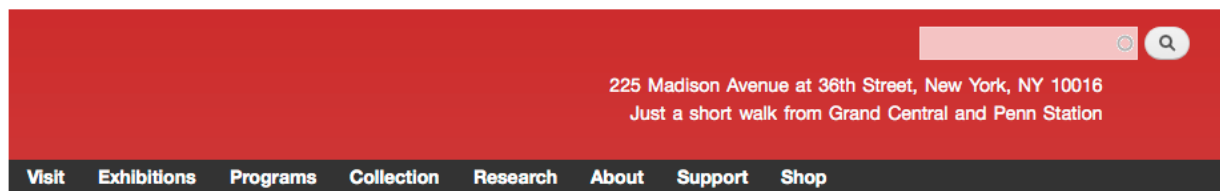

Figure 1

This recommendation parallels the recommendation expressed by our participants. In answering the questions "Did you find the tasks difficult to complete / what would you recommend in completing them?" and "Any final thoughts?" four out of the eight participants recommended a request button to be directly on the item record, while one user recommended directly calling a librarian if they wished to conduct research.

Recommendation 1b: *Rename "Online Application" to "Send Your Request".*

Following our previous recommendation, in the event that a researcher were to make item requests from the Sherman Fairchild Reading Room page (and not on the item record page), we recommend that the button for the "Online Application" be renamed "Send your Request." (Fig. 2) In addition to the language for requesting material remaining consistent throughout the

website, "Send your Request" creates a direct link between the name and the action being afforded. For visibility and to emphasize importance, we also recommend increasing the size of the button.

Figure 2

***Finding 2:** Participants did not immediately recognize the CORSAIR Collection catalogue as being the online catalogue.*

The CORSAIR Collection catalogue is a database providing access to 250,000 records for manuscripts, rare and reference books, musical scores, drawings, prints, and other art objects. It also provides access to over 57,000 digitized images from the Morgan's collection of medieval and Renaissance manuscripts. Given the volume and diversity of the collections CORSAIR provides access to, we aimed to evaluate the usability of the catalogue. To do this, we tasked

our participants with finding a digitized version of an Oscar Wilde letter. We instructed: *See if any of Oscar Wilde's letters are digitized online.*

Depending on how participants approached the task (by either considering the letter as part of a collection, or by thinking of it as a research item) they may find the CORSAIR Collection Catalogue in either the Collection or Research tabs on the navigation menu. At this point, some participants noticed the collection catalogue but were confused by the name "CORSAIR."

Instead, many participants either searched the site through the general search bar or browsed through the Collection page, with some participants eventually clicking on Literary & Historical Manuscripts before scrolling through images.

In the post-evaluation, one user wrote:
"I found the Oscar Wilde letters difficult to locate. Having a list of existing collections that I could pull up and perhaps use ctrl-F with "Wilde" to find them would be a lot easier. I had to find them in a kind of backwards way."

At the same time, because the page that loads after clicking on the CORSAIR Collection Catalogue is different depending on whether the participant goes through Collection or Research (after clicking on Collection -> CORSAIR Collection Catalog, the catalogue appears, while clicking on Research -> CORSAIR Collection Catalog, the "about" the catalogue page appears), it may also contribute to confusion for a novice user.

Recommendation 2a: Present the user with a search box that searches the same content that CORSAIR does. Rename CORSAIR Collection Catalogue to Online Catalogue. From the top navigation bar, remove catalogue from Research tab but keep in Collection tab.

By presenting the user with a search bar that can search more than just the website, including content within the CORSAIR Collection Catalogue, the user can immediately begin their search for various digitized items and requestable material. We recommend a search bar that is divided by site, online collection, and museum, with subtitle text to help identify the materials that can be accessed.

Additionally, by renaming "CORSAIR Collection Catalogue" to "Online Catalogue," there is no ambiguity with the identity or function of the catalogue.

Lastly, because most participants either utilized the search bar or intuitively selected the Collection drop-down menu or went to the Collection page, and most users neglected the Research page, we recommend removing the catalogue from the Research drop-down menu (Fig. 3 and 4).
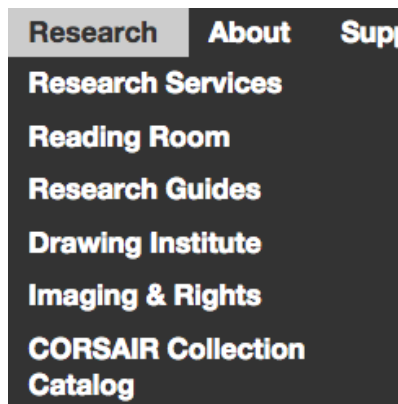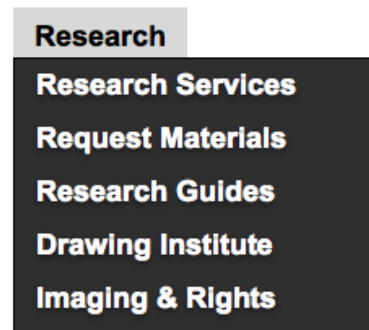

Figure 3

Figure 4
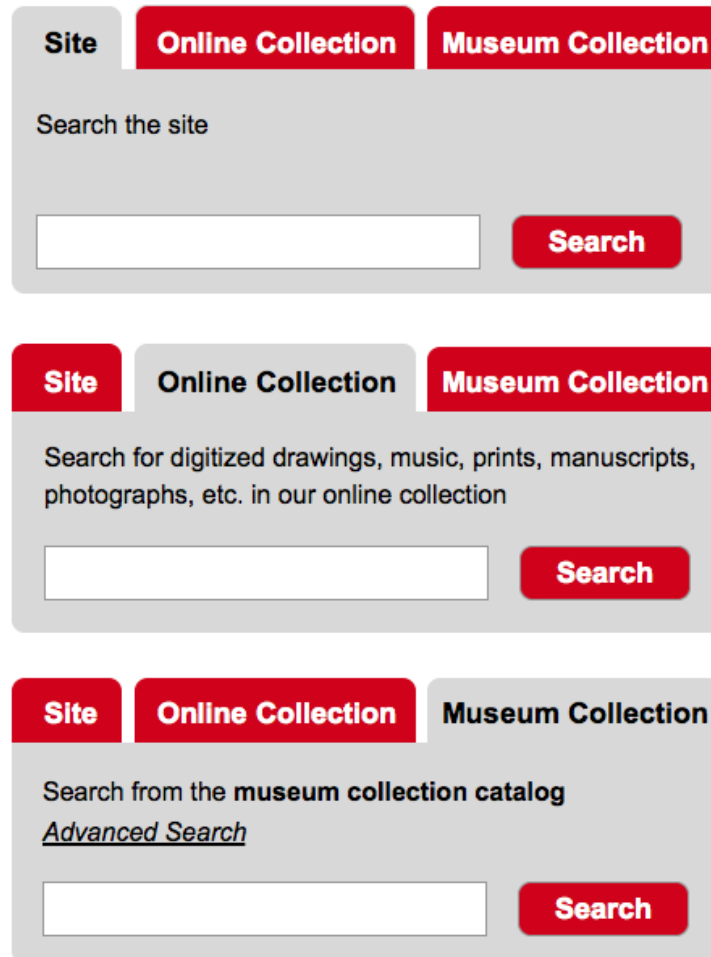
Figure 5

***Finding 3:** Word choice related to the Morgan's collections made the search process unclear for users.*

The Morgan website contains beautiful online collections of digitized manuscripts, prints, sheet music, and photographs. However, currently it is not clear to users that the online collection search bar is a separate function from the museum collection catalog, and thus most users had a hard time finding the tasked materials. The drop-down menu under "Collection" contains a link to "Collection Highlights," which brings users to online collection highlights, but it could also be interpreted as highlights of museum collection. Meanwhile the "Drawings Online," "Rembrandt Prints Online," and "Music Manuscripts Online" lead users to think that only these three categories are available online and they wouldn't know where to find other online collections.

To find Oscar Wilde's letters, one of our users went to the "Collection" drop-down and clicked on CORSAIR Collection Catalog. Another user mentioned that she was looking for something like "Correspondence" while looking at the "Collection" drop-down menu. However, users have to go to "Collection Highlights" to see all categories.
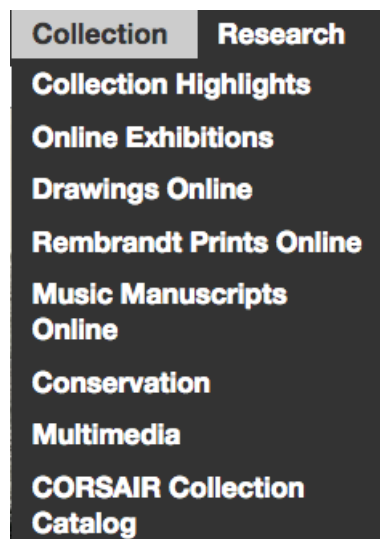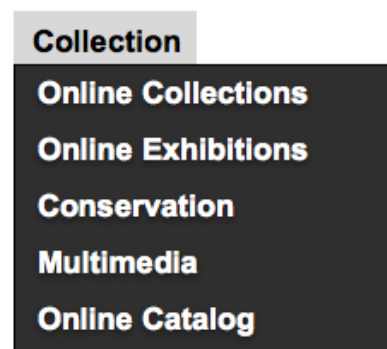
Figure 6   *Figure 7*

Recommendation 3a: *Streamline the "Collections" tab in main navigation menu so visitors know what the tab contains.*

We suggest changing "Collection Highlights" to "Online Collection" and removing "Drawings Online," "Rembrandt Prints Online," and "Music Manuscripts Online" from the "Collection" drop-down menu. When users enter the Online Collection page, they would see the categories for various digitized collections. It would also be helpful if there is a paragraph saying that the "Online Collection" contains digitized items that are also highlights of the museum collection.

The new search bar we mentioned in Finding 2 would also help clarify the different online collections.

CONCLUSION

From our user tests of the Morgan Library & Museum's website, themorgan.org, we found that overall, the website is well designed and functional. However, we did find that users were confused when using the CORSAIR library catalogue because it wasn't visible and the function it afforded wasn't clear from the language used. We based our recommendations on the findings of user tests conducted with eight participants.

Our recommendations include making the language clear for requesting collection items, making the catalogue clear and visible, and making it easier to request materials to view in person. We believe that these changes can be easily implemented into the existing website and will make the Morgan's website more efficient and user friendly.

REFERENCES

Nielsen, J. (2012). Thinking-aloud: The #1 Usability tool. *Nielsen Norman Group.* Retrieved from http://www.nngroup.com/articles/thinking-aloud-the-1-usability-tool/

Rogers, Y., Sharp, H., & Preece, J. (2011). *Interaction Design: Beyond Human-Computer Interaction (3rd Ed.).* Chichester, UK: John Wiley & Sons, Inc.

Rubin, J. & Chisnell, D. (2008). *Handbook of Usability Testing (2nd Ed.).* Indianapolis, IN, USA: Wiley Publishing.

Soucy, K. (2010 January 18). Unmoderated, remote Usability Testing: Good or evil? *UX Matters.* Retrieved from http://www.uxmatters.com/mt/archives/2010/01/unmoderated-remote-usability-testing-good-or-evil.php

APPENDICES

- Pre-Test Questionnaire (p. 18)
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- Post-Test Responses (p. 24)
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  - Persona 2 (p. 28)
  - Persona 3 (p. 29)

Pre-Test Questionnaire

Please fill out the questionnaire to the best of your abilities. There's no right or wrong answer.

What is your name?

[   ]

What is your gender?

○ Female

○ Male

○ Other

What is your age?

○ 18-25

○ 26-30

○ 31-36

○ 37-40

○ 41+

What is your highest level of education?

○ High school

○ Some college/not completed

○ Bachelors

○ Masters

○ Advanced degree

What is your occupation?

You can list more than one occupation

☐ Student

☐ Independent Researcher

☐ Information Professional

☐ Professor

☐ Other: [   ]

Have you visited the Morgan Library & Museum?

○ Yes

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○ No

○ Don't remember

If you have visited the Morgan Library & Museum, what was it for?

☐ General visit

☐ Class trip

☐ Concert

☐ Lecture

☐ Workshops

☐ Research

☐ Tour

☐ Exhibition

☐ Film

☐ Other: [_____]

Have you ever used the museum's website?

If yes, what was the purpose?

[   ]
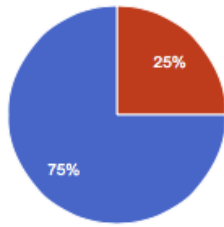
Have you visited other museum(s) websites for research purposes?

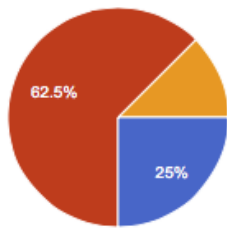If yes, which museum(s)?

[   ]

Submit

Never submit passwords through Google Forms.

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Pre-Test Responses

What is your gender?

Female	6	75%
Male	2	25%
Other	0	0%

What is your age?

18-25	2	25%
26-30	5	62.5%
31-36	1	12.5%
37-40	0	0%
41+	0	0%

What is your highest level of education?
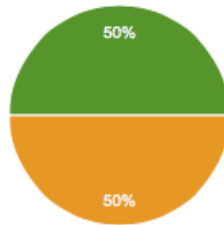
High school	0	0%
Some college/not completed	0	0%
Bachelors	4	50%
Masters	4	50%
Advanced degree	0	0%

What is your occupation?
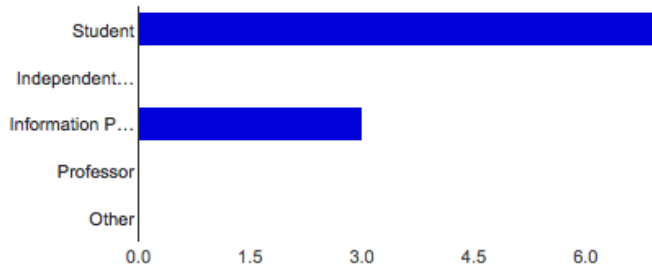
Student	7	87.5%
Independent Researcher	0	0%
Information Professional	3	37.5%
Professor	0	0%
Other	0	0%

Have you visited the Morgan Library & Museum?
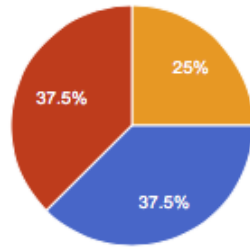
Yes	3	37.5%
No	3	37.5%
Don't remember	2	25%

If you have visited the Morgan Library & Museum, what was it for?

General visit	3	75%
Class trip	0	0%
Concert	0	0%
Lecture	0	0%
Workshops	0	0%
Research	1	25%
Tour	0	0%
Exhibition	1	25%
Film	0	0%
Other	0	0%
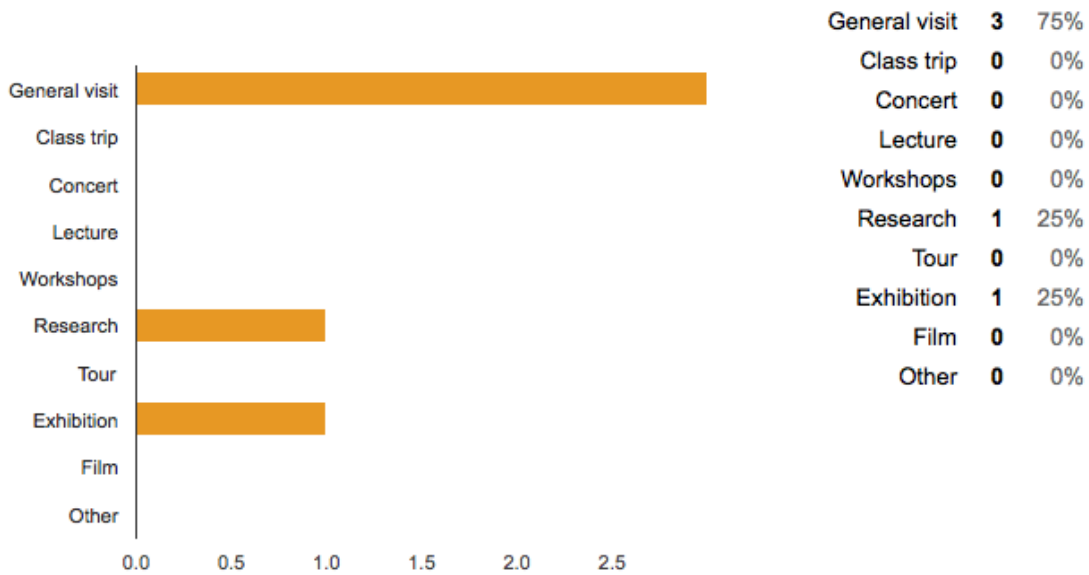
Have you ever used the museum's website?

- Yes, to look at it in comparison to other museum websites only.
- To verify information about the exhibit I was going to/find its location.
- No
- Yes, to find research materials.
- Yes, to get some inspirations.
- Yes, I may have checked it once or twice while looking for job and internship opportunities.
- No.

Have you visited other museum websites for research purposes?

- Yes, MoMA, the Met, the Cleveland Museum of Art, MoMA PS1, NY Historical Society, the Grolier Club.
- No.
- Yes. I wanted to see if a particular item was available to view in the library's special collections, as well as make an appointment to view said item.
- Yes: Met, Harn Museum.
- No.
- Not that I can think of
- Yes: MoMA, MET, MFA (Boston), Smithsonian, Guggenheim

Post-Test Questionnaire

* Required

How do you feel about your experience with themorgan.org? *

	1	2	3	4	5	
Hated it!	○	○	○	○	○	Loved it!

Did you find the tasks difficult to complete? If yes, what would help you complete them?

Using the Morgan Library online catalog was:

	1	2	3	4	5	
I had no idea what to do	○	○	○	○	○	I totally rocked it!

How likely are you to recommend themorgan.org to a friend or colleague?

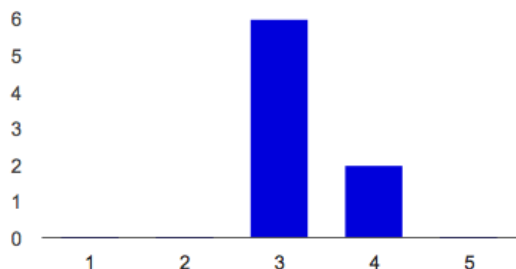|	1	2	3	4	5	
Never	○	○	○	○	○	Definitely

Do you have any general recommendations or final thoughts?

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Post-Test Responses

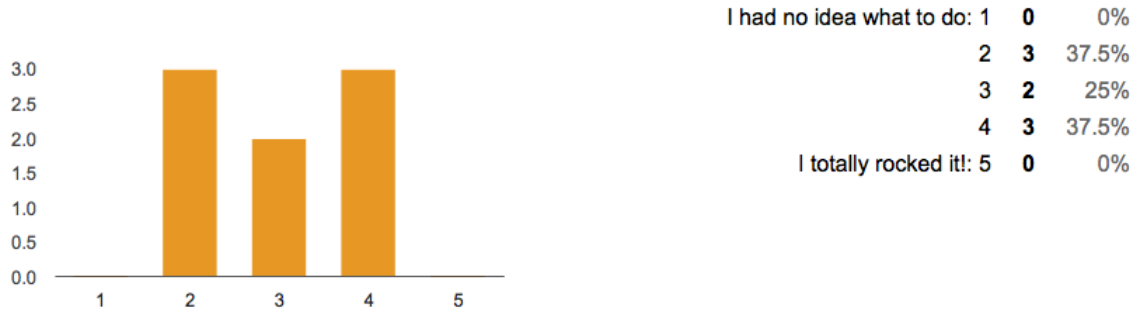**How do you feel about your experience with themorgan.org?**

Hated it!: 1	0	0%
2	0	0%
3	6	75%
4	2	25%
Loved it!: 5	0	0%

Did you find the tasks difficult to complete? If yes, what would help you complete them?
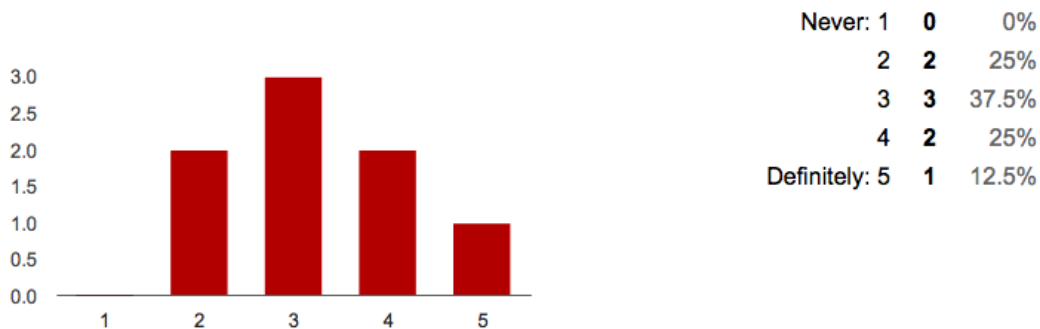
- Tabs could have been better developed for "Collection" and "Research". Perhaps a "request" button/link should be added to the public record view or go directly to the application/Reading Room FAQ page. Also, link to digital collections should be included on record page if it is available in that format.
- A little bit, because the UX is not well designed.
- Yes, the online catalog was difficult to navigate. I would have liked there to be an advanced search option. I would also like to have seen some sort of list or separate catalog specifically of digitized materials (if they do, in fact, have a decent # of them).
- No. the website is clearly structured and the search feature works well.
- Yes, I found the Oscar Wilde letters difficult to locate. Having a list of existing collections that I could pull up and perhaps use ctrl-F with "wilde" to find them would be a lot easier. I had to find them in a kind of backwards way. It would also have been preferable if I could have directly requested the Wilde book that I found. I again had to work backwards to find out how to fill out an application to request to access the book. That would have been frustrating if I'd just been working with one window open and had to open up the application and then go back to the catalog to find my record again to copy and paste the info. into my application.
- The first two tasks were easy enough; the third task (figuring out how to request the book) was difficult. It would have helped to have a REQUEST button on each record, or at least a "Contact a librarian" link so that I could copy/paste the relevant information and email someone.

- I was more just unfamiliar with the site, and it was difficult for new user to find where exactly where you needed to go. However, once I got familiar with the names of the resources down, I was able to find the book I was looking for.
- I did find them difficult to complete. If the site adopted the same language as some other museum catalog portals, it would really help a lot.

Using the Morgan Library online catalog was:

I had no idea what to do: 1	0	0%
2	3	37.5%
3	2	25%
4	3	37.5%
I totally rocked it!: 5	0	0%

How likely are you to recommend themorgan.org to a friend or colleague?

Never: 1	0	0%
2	2	25%
3	3	37.5%
4	2	25%
Definitely: 5	1	12.5%

Do you have any general recommendations or final thoughts?

- Make it more explicit for users not knowing what to do. However I know how to use the site. So it seems a bit more intuitive than I first thought.
- I would recommend the morgan.org site to a friend or colleague if he or she appeared to have a need to access the kinds of material that they hold. I wouldn't recommend it as a place to just browse or explore...
- Enlarge navigation button and make it easily to follow.
- The site isn't ugly or anything, it just has some jargon and things aren't where one would expect them to be, but I guess that's a bigger problem than how a website looks??????
- In regards to the above question, I would recommend the Morgan as a great resource for certain things... but I would NOT recommend its website. I'd probably actually

recommend they call or visit and talk to a librarian there in person if they were doing serious research.

- Maybe make the parameters for the catalog search a little stricter so users can explore the feature further.
- It's a pretty website. I like the museum itself so I'm probably more inclined to like their website, but the overall functionality is not great.

Hector **Bradley**

"If there's a rare book on the web, I want to the first to see it."

Age	**63**
Location	**Ann Arbor, MN**
Education	**Doctorate**
Studied	**Art History**

About Hector

Hector is a lecturer at the University of Michigan, where he's shared his knowledge of art and books with students for years. Outside the university, Hector spends a lot of time looking researching and browsing the web for new developments in the field. Always trying to stay connected without going too far from Michigan, Hector is on the lookout for unique content on web.

His Goals

- Finding interesting images
- Viewing rare materials
- Learning about material he can't see in person

His Frustrations

- Poor image quality
- Websites that are not up-to-date
- Material that is only visible in-person

His Needs

Beautiful Imagery　　　Rare Content　　　Remote Access

Regina **Lowe**

"I want it clear and simple, with just enough information to make me want to visit"

Age **45**

Location **Brooklyn**

Education **Master's**

Studied **Finance**

About Regina

Regina works as an accountant in midtown Manhattan, and has been living in Brooklyn for over 10 years. When she's not too busy with work, Regina likes to make time for a visit to a museum or gallery. Always curious to explore something new and fascinating, Regina likes to browse online to see what's available and most relevant to her interests.

Her Goals

- Discovering things that interest her
- Finding more art that she enjoys
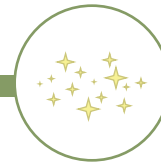- Feeling productive with her time outside work

Her Frustrations

- Limited images on exhibition pages
- Museum websites that are hard to explore and navigate
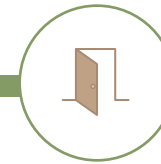- Overlapping museum and work hours

Her Needs
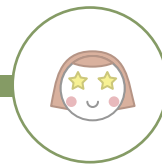
Eye-catching Visuals

New Experiences

Easy Access

28

Sylvia **Pearson**

"The only thing on my mind is: do you have the information that I need?"

Age **28**

Location **New York**

Education **Master's**

Studies **French History**

About Sylvia

Sylvia is a Graduate student at the CUNY Graduate Center, where she is studying life in 19th century France. She's passionate about her research, and is committed to finding whatever materials she can get her hands on . No stranger to poring over texts for hours on end, Sylvia would like to know if she's looking in the right place before she starts diving into the details.
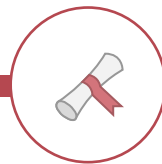
Her Goals

- Finding all available materials relevant to her thesis topic
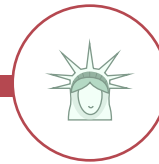- Conducting her research in a time-efficient manner.

Her Frustrations

- Confusion with the library's catalog
- Spending time with irrelevant items
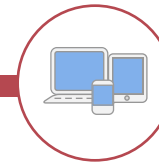- Feeling that she's missed helpful research materials

Her Needs

Scholarly Content   Local Access   Responsive Support