

# Samvera/Blacklight UX Benchmarks

Samvera Connect 2017



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# Agenda

- Background
- Methodology
- Findings
- Next steps and discussion

# Background



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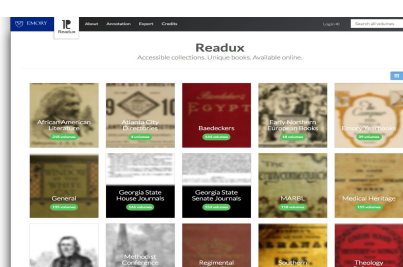
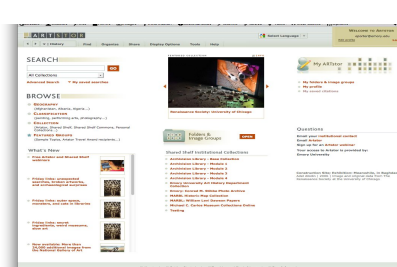
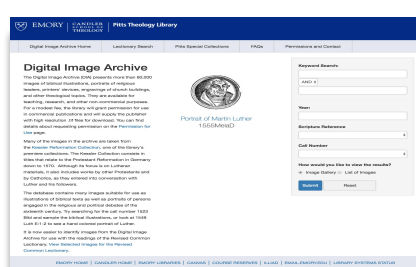
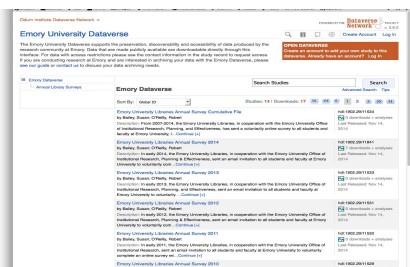
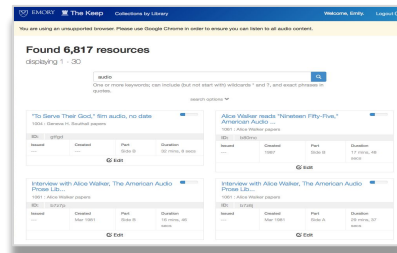
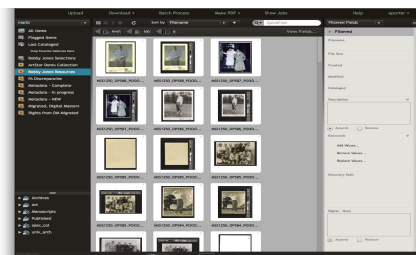
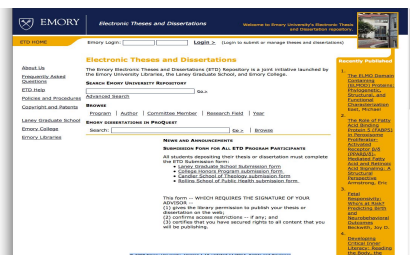
# Emory's Digital Library

*A new suite of applications and services supporting long-term access to unique Emory digital assets*

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- A project to create a program
- A new department
- Technical solution is based on the Samvera framework

# Current State - Repositories & Related Systems



# Current State Digital Library Environment

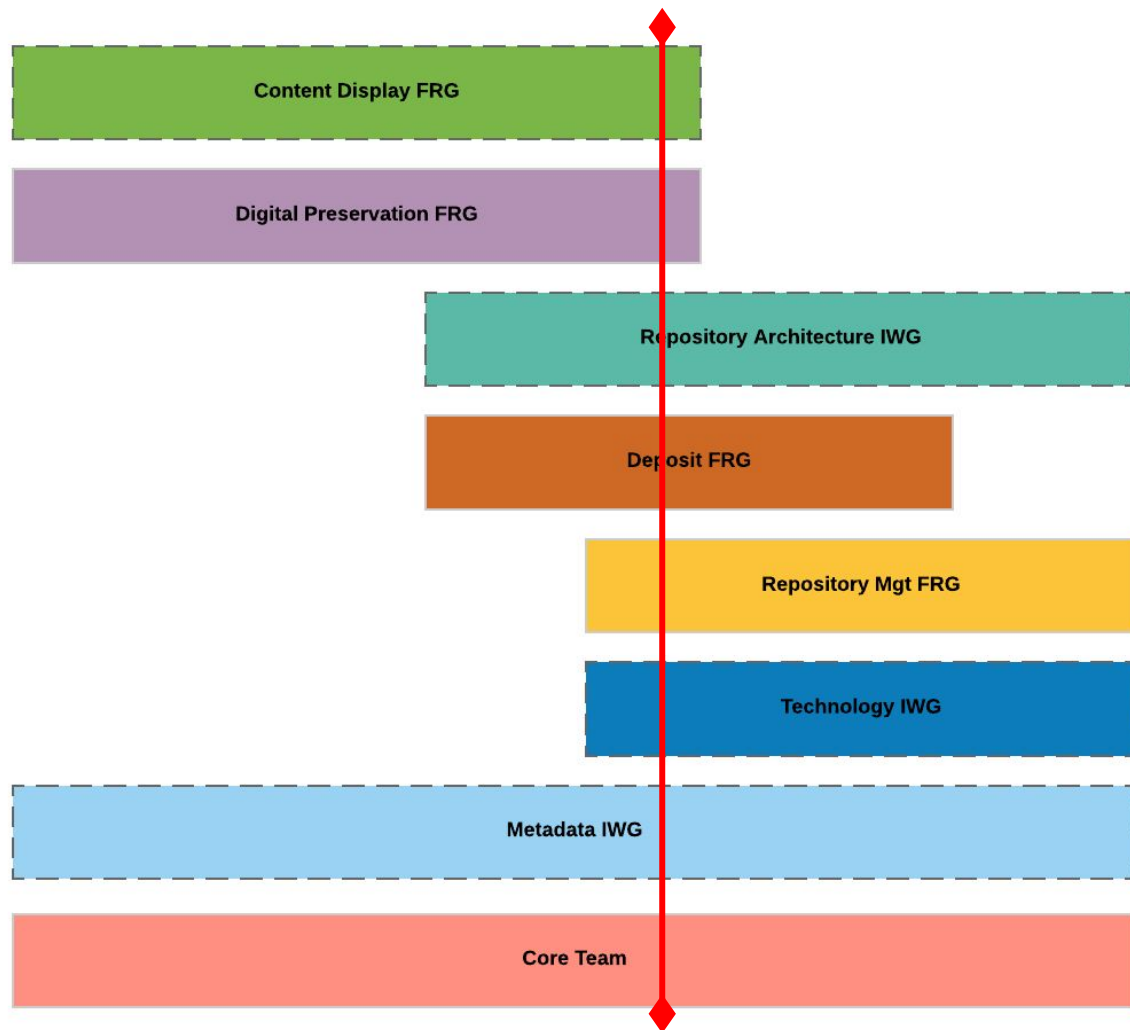
- Baseline user research effort took place on these systems in 2015.
- Much content is currently dispersed amongst mostly format-based silos.
- Much content is not publicly accessible.

# Project Overview: Phases

| Discovery (2017-2018)  | Technical Design (2018)  | Implementation (2018 -- )  |
|--|--|--|
| <p>Project governance</p> <p><b>Documenting requirements</b></p> <p>Prioritizing features</p> <p><b>User research</b></p> <p><b>Identifying best practices</b></p> <p>Identifying new policies needed</p>                        | <p>Analyze requirements</p> <p>Design optimal product suite</p> <p>Design integrations with other library/Emory systems</p>  | <p>Develop software products</p> <p>Integrate with websites; systems</p> <p>Migrate data and content</p> <p>Introduce new workflows</p>  |
| <p><i>What can we provide to inform the upcoming technical design process?</i></p> <p><b>Deliverables:</b></p> <p><b>Requirements documents/epics/features</b></p> <p>Metadata standards, recommendations</p> <p><b>Wiki</b></p> | <p><i>How many applications do we need to build? What does each application do?</i></p> <p><b>Deliverables:</b></p> <p>Metadata mappings/data models</p> <p>Planned product suite concept</p> <p>Development roadmap</p> <p>Prioritization of implementation</p> | <p><i>What's being built right now? How do we migrate the data? How do we go live?</i></p> <p><b>Deliverables:</b></p> <p>Individual product roadmaps, backlogs</p> <p>Fedora/Hydra content models</p> <p>Data migrations and mappings</p> |

# Discovery Phase Working Groups (2017-18)

*Functional Requirements and  
Implementation Groups*





# Content Display: Charter / Deliverables

- Focus: establishing user needs and preferences for display of digital assets in the repository
- Main user research effort for phase
- Broad questions - UX, not usability
- How can we design the repository as a research utility and pedagogical tool?
- We have a designated service offering to meet, but also want to gather information about interest in potential expansions.
- This was a good opportunity to engage a range of stakeholders.

# Chartered Tasks

- Outline **search and indexing needs** based on user research, usability assessment, and persona development.
- Determine **filter, sort, facet, browse and navigation needs** based on user research, usability assessment, and persona development.
- Develop **specifications for metadata/record display**.
- Gather **requirements for user interaction with content** in order to inform content viewer needs (e.g. video players, page turners, image viewers)

# Primary UX Use Cases: Discover and Access Content

1. As a repository end-user, I want to **discover content stored in the repository by searching or browsing**, so that I can learn about materials stored there which may support my research.
2. As a repository end user, I want to **preview the details of a repository resource** to determine its appropriateness for my research, so that I know whether or not to download/view the material in greater detail.
3. As a repository end user, I want to **view/play/search the actual contents of the material** that I discover in the repository, in order to support my research.
4. As a repository end user, I want to **understand download options that are available** for the contents of the material, so that I can determine if I can download the material for my own use.
5. As a repository end user, I want to be able to **cite the material** that I find in the repository, so that I provide attribution in my research or share the materials with others.

# Methodology



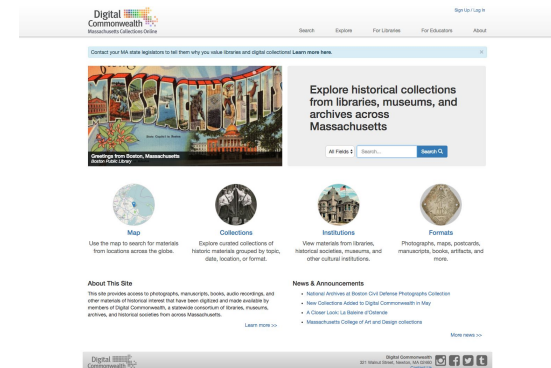
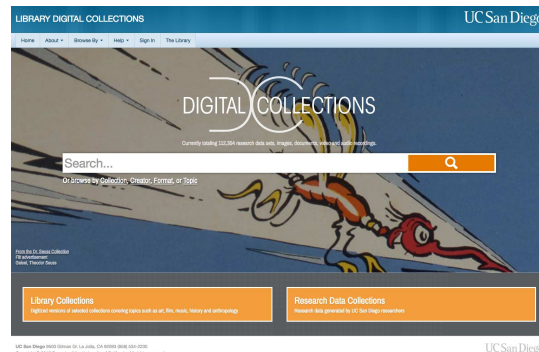
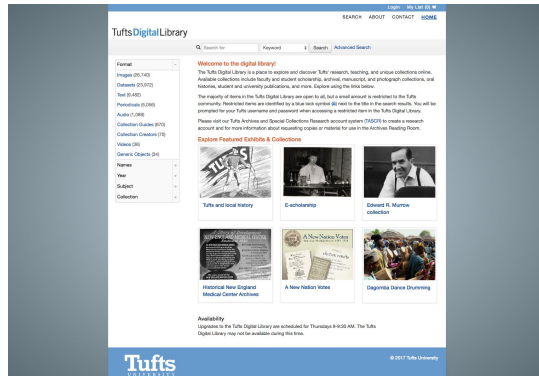
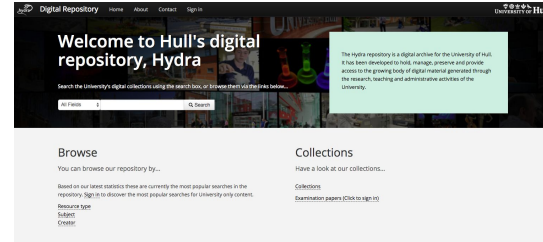
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# How to Design a Study?

- Lack of literature to inform this effort
- IRB concerns
- Working group members provided a unique skill set and resources for research effort.
- Didn't have the appropriate study environment locally. Needed content and a consolidated discovery environment.
- We want to draw in new users with new content, didn't have an established base.
- Interest in leveraging Samvera community.

# Samvera Benchmarks



# User Research Planning

- Working group members drawn from:
  - Scholarly Communications
  - Digitization
  - Exhibitions
  - Reference Services
  - Rose Library (archives and special collections)
  - Project Management Office
  - Library Web/UX
- Working group members contributed to recruitment efforts within their departments. Broad range of stakeholders.

# Caveats

- Hard to tell what stack was composed of (even if the code is available in Github)
- SMEs and stakeholders unfamiliar with this kind of work



# Protocol

- Questions/tasks for different scenarios:
  - Federated search/discovery
  - Images
  - Video
  - Page Turner (book-like objects)
  - Collections
  - Research files (complex objects)
- Asked participants consistent baseline questions for regularity and comparison across study. Emphasis on demographics and getting to know the user.
- Additional protocol-centric questions for each scenario

# User Interviews - Demographics

| Segment              | Number | Percentage |
|----------------------|--------|------------|
| <i>Staff</i>         | 6      | 30%        |
| <i>Graduate</i>      | 6      | 30%        |
| <i>Faculty</i>       | 4      | 20%        |
| <i>Undergraduate</i> | 4      | 20%        |

1. Art History
2. CFDE
3. ECDS
4. Film Studies
5. Goizueta Business Library
6. School of Law
7. Candler School of Theology
8. Political Science
9. Rose Library
10. Laney Graduate School
11. Rollins School of Public Health
12. Teaching and Learning Technologies
13. Woodruff Research Engagement Services

# Findings



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# Findings

- Local in nature
- Positive correspondence between user data and the work of other groups (like Metadata)
- Lots of positive reception for UI and Blacklight functionality
  - Discovery features seemed meet or exceed user expectations, unlike current state
- Also a great deal of feedback on visual design choices like colors and fonts
- Still documenting in final form

# Selected Findings: Search / Indexing

## Top five user impressions for category:

- Advanced search valued/appreciated (35%)
- Clarity of search order results is important (15%)
- Helpful for results to show item type (15%)
- User primarily engages in simple search vs. advanced (10%)
- Incorporating facets into search box is helpful (10%)

# Selected Findings: Filter, Sort, Facet, Browse

## Top five user impressions for category:

- Year/date facet/refinements are important (40%)
- Sorting results should be easy (25%)
- Format facet is important (20%)
- Refinement options for search are valuable (15%)
- Collection is a high-priority browse facet (15%)

# Selected Findings: Interaction with Content

## Top five user impressions for category:

- Simple/straightforward/prominent download is important (15%)
- Zoom and rotate is valuable for a viewer (15%)
- Need scrubbing / precise indicator for time point in media (10%)
- Page turner - table of contents should match system numbering (5%)
- Audio player too small (5%)

# Selected Findings: Metadata/Record Display

## Top five user impressions for category:

- Citation feature is helpful (25%)
- Completeness/comprehensiveness of metadata is important (15%)
- Time-coded transcription for A/V is valuable (10%)
- Citation feature might not be accurate (10%)
- Requisite detail for citation is included (10%)



# Selected Findings: Other

## Top user impressions for category:

- Explanatory text on homepage should be concise; thorough in "About" (15%)
- Emphasis on imagery is valuable in design (10%)
- Large homepage images are engaging (10%)
- Consistent color scheme helps with navigation (5%)

# Deliverables

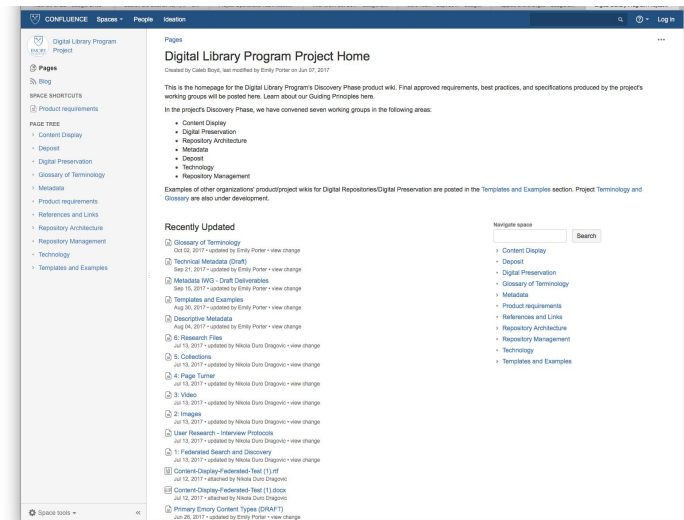
- User stories
- User profiles
- Strategy to incorporate local branding and accessibility needs

# Project Wiki

Public-facing space being populated:

- <https://wiki.service.emory.edu/display/DLPP>

Drafts and final documents will be added as requirements are finalized



# Lessons Learned

- Engaging users is good!
- Collaborative study design and preparation is essential
- Managing and analyzing qualitative data is challenging

# Next steps and discussion



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# What's Next?

- Local (Emory) -
  - UX group
  - Iterative testing for future phases (technical design and implementation)
  - Monitoring the community for updates
  - Learn more about Blacklight
  - Learn more about users to refine test scenarios
- Community
  - Working more with UXIG to determine what's of shared interest
  - Continuing to explore Samvera and Blacklight UI intersections
  - Learning more about implemented and available viewers
  - Preparing documentation?

# Thank you!

- Nik Dragovic, [nik.dragovic@emory.edu](mailto:nik.dragovic@emory.edu)
- Any questions or comments?