What Do You Mean It Doesn’t Make Sense?

Redesigning Finding Aids from the Users’ Perspective
Rethinking Finding Aids

• Archival patrons don’t understand archival terminology
• Don’t understand hierarchy
• Need to become more user-centered
Print to Digital

• Print paradigm doesn’t work in the digital realm
  – Archival intervention is not possible in the same ways online that it is in person
  – If users can’t get an answer, they won’t stick around online
User Studies and Archivists

• Not as scary as they seem
• Users often have a lot of good ideas
• Finding aids really aren’t for us anyway
Social Navigation

• Designed to enhance the user experience by enabling them to find relevant information in a timely and effective manner.

• What are they? (sometimes referred to as Web 2.0)
  – Annotation
  – Commenting
  – Bookmarks
  – Tags
  – Reviews
EAD in LTPSC

• 2001: Began investigating EAD
• August 2002: 700 finding available online
• Lessons learned
  – Importance of Standardization
  – Need to make creation of EAD finding aids simple
  – A powerful delivery system is a must
Delivery Systems

• Perry Special Collections has used three delivery systems in the last five years
  – 2002-2005 used Xindice
    • Replaced when experience capacity problems at 800 finding aids
  – 2005-2007 used eXist
    • Replaced when experience capacity problems at 900 finding aids
  – 2007 CONTENTdm (interim solution)
  – 2007 Decided to build on solution on MySQL
Project Management

• Project Definition
  – Objective: Design and build an improved EAD system addressing and improving usability issues
  – Constraint matrix
    • Resources—Least flexible
    • Schedule—Medium flexibility
    • Scope—Most flexible
  – Team identification
    • Special Collections staff
    • IT staff
    • Reference staff
Major Deliverables

• Major Deliverable—What do you want the system to do or be?

• Identified 7 major deliverables in 3 main categories
  – Development of a new database delivery system
  – Redesign of the web presentation of the finding aids.
  – Promotion of the new site
Deliverable: Interface

IS

- Maintains Authority of EAD document
- Has Social Networking Capabilities
- Allows User Generated Content
- Has advanced search
- Relevance ranking
- Utilizes simple, persistent URLs
- Designed by LIT webteam

IS NOT

- Static
- Digital copies of print finding aids
Project Phases

• Phase I
  – Presentation, Searching and Browsing EAD-encoded finding aids

• Phase II
  – Implementation of Social Navigation Tools

• Phase III
  – Authority control via EAC
Statement of Requirements
User Centered Design

Discover

Objectives

Explore

Design

Choices

Design Process

Evaluate

Use

Diagram design adapted from John Cato's User-Centered Web Design.
User Needs Analysis

• Objectives:
  – Understand who users are
  – Understand what users want
  – Understand what users expect
# User Personas

## Karen Taylor: Archivist/Librarian

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Tech. Comfort</th>
<th>Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age group: 45-51</td>
<td>PC: Medium</td>
<td>“My primary needs are reference and collection development. I need powerful tools for finding information for my patrons, and ways to visualize and explore collections to assist in the appraisal and processing of new collections.”</td>
</tr>
<tr>
<td>Years online: 5-8</td>
<td>Web: Medium</td>
<td></td>
</tr>
<tr>
<td>Income: $48k+</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Needs
- Advanced search capabilities
- Tools for collection development
- Ways to promote collections

<table>
<thead>
<tr>
<th>Motivations</th>
<th>Scenarios</th>
<th>Features</th>
<th>Behaviors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for manuscript materials.</td>
<td>• Searching for manuscript collection for a patron.</td>
<td>• Advanced search reaching any element.</td>
<td>• Karen uses advanced search form to walk patron through search.</td>
</tr>
<tr>
<td></td>
<td>• Searching for manuscript collection for personal research.</td>
<td>• Ability to search on administrative elements (call number, etc.)</td>
<td>• Karen uses advanced search terms in basic search box to quickly get results.</td>
</tr>
<tr>
<td></td>
<td>• Searching for manuscript collections whose creators share certain characteristics.</td>
<td>• Ability to search creators based on personal characteristics.</td>
<td>• Karen re-sorts results to group collections by creator (or location, etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Advanced search vocabulary in basic search box.</td>
<td>• Karen selects and saves items from her search</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Clear, ranked search results with multiple re-</td>
<td></td>
</tr>
</tbody>
</table>
Competitive Set Analysis

Logos courtesy of their respective institutions.
Competitive Set Analysis
Competitive Set
Usability Testing
Usability Results

• Archival terminology is confusing
• Users are fundamentally dissatisfied with online finding aids
• Users want item-level access that is understandable
User Centered Design

Objectives → Explore → Choices → Design → Use

Design Process

Discover

Explore

Design

Choices

Evaluate

Use
Conceptual Models

- Researcher
- Requests
- Document
Users want descriptions of archival materials by a creator.
Inventories and Site Maps

<table>
<thead>
<tr>
<th>ID</th>
<th>Page Name</th>
<th>Page Type</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Search Manuscript Collection Descriptions</td>
<td>Search</td>
<td>/ead_search.jsp</td>
</tr>
<tr>
<td>1.1</td>
<td>Advanced Search</td>
<td>Search</td>
<td>/ead_advanced_search.jsp</td>
</tr>
<tr>
<td>1.2</td>
<td>Manuscript Collection Documents Search Results</td>
<td>Results</td>
<td>/ead_results.jsp</td>
</tr>
<tr>
<td>2.0</td>
<td>Collection Description Shelf List</td>
<td>Browse</td>
<td>/ead_shelflist.jsp</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Page Name</th>
<th>Location</th>
<th>Status</th>
<th>Assigned</th>
<th>Draft Due</th>
<th>Final</th>
<th>Notes</th>
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</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Home page</td>
<td>index.html</td>
<td>No copy</td>
<td></td>
<td>August 2008</td>
<td>November 2008</td>
<td></td>
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<tr>
<td>2.0</td>
<td>Help</td>
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<td>November 2008</td>
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<td>November 2008</td>
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<td>Searching</td>
<td>searching.php</td>
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<td></td>
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<td>November 2008</td>
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<td>3.0</td>
<td>About</td>
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<td></td>
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<td>November 2008</td>
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<tr>
<td>3.1</td>
<td>About site</td>
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<td></td>
<td>August 2008</td>
<td>November 2008</td>
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<td>3.2</td>
<td>About finding aids</td>
<td>about_fa.php</td>
<td>No copy</td>
<td></td>
<td>August 2008</td>
<td>November 2008</td>
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<tr>
<td>3.3</td>
<td>Privacy notice</td>
<td>privacy.php</td>
<td>No copy</td>
<td></td>
<td>August 2008</td>
<td>November 2008</td>
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<tr>
<td>3.4</td>
<td>Terms and conditions</td>
<td>terms.php</td>
<td>No copy</td>
<td></td>
<td>August 2008</td>
<td>November 2008</td>
<td></td>
</tr>
</tbody>
</table>
Navigation Flowcharts

- Home page
- Advanced search
- Search results
- Refine results
- Creator record
- Finding aid
- Internal FA search
Interface Design

• Team member sketches
• Creation of wireframes
• Development of prototypes
Sketches and Wireframes
Prototyping

• Created in HTML

• Finding Aid Display
  – Two versions based on the same wireframe
    • Expandable tree menu for users to navigate the finding aid content (EAD 1)
    • Provision of immediate context with links to adjacent items and levels of hierarchy (EAD 2)

• Finding Aid Web site (EAD 3)
Prototype 1

Prototype 1

Manuscript Collection Descriptions

Search Browse About Help Reference Questions

 prototype 1

 Leslie E. Liechty collection of Rock Canyon Water Company materials
 Date: 1880-1992

Through family records and articles compiled by Leslie Liechty, detailed company minutes, account books, and corporate records reflect the importance of the Rock Canyon Water and Hardcorkable Canal Companies. This collection spans the years in Provo from 1880 and 1992.

- Extent: 5 boxes (ca. linear ft.)
- Creator: Liechty, Leslie E. (Leslie Earl), 1926-2006
- Repository: L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young University, Provo, Utah 84608
- Access Restrictions: Open for public research.

Languages and Scripts
Materials are entirely in English.

Custodial History
This collection was donated by Leslie E. Liechty. The records of the Rock Canyon Water Company were handed down through family members until the company was purchased by Provo City. At that time, Mr. Liechty kept the company minute books and correspondence until his donation to Brigham Young University in 1992.

Conditions of Use
It is the responsibility of the researcher to obtain any necessary copyright clearances. Permission to publish material from Leslie E. Liechty collection of Rock Canyon Water Company materials must be obtained from the Supervisor of Reference Services and/or the L. Tom Perry Special Collections Board of Curators.

Preferred Citation
Initial Citation: Mss 3458: Leslie E. Liechty collection of Rock Canyon Water Company materials; 19th & 20th Century Western and Mormon American; L. Tom Perry Special Collections. Manuscript & Rare Book Library. Brigham Young University.

Search this Collection

Collection Arrangement
Yellow highlight indicates current location in collection description

Leslie E. Liechty collection of Rock Canyon Water Company materials
Rock Canyon Water Company minutes
Rock Canyon Irrigation Company by-laws
Rock Canyon Irrigation Company daybook
Rock Canyon Water Irrigation Company

Help with this Collection

Copy Alum
Copy@byu.edu
+1-801-422-5504
Prototype 2

Manuscript Collection Descriptions

William A. Carter correspondence
Dates: 1863-1925

Letters, written 1863-1879, describe Carter's business activities in regard to Fort Bridger and his several enterprises, and include descriptions of his interaction with U.S. government leaders, especially military officers. He mentions the events of the time, such as the Credit Mobilier investigation, and comments on the people he meets, including Ben Holladay and Ned Buntline. He includes much news of the family related activities, including his search for teachers to be hired for the school at Fort Bridger. He frequently expresses tender personal feelings for his wife.

- Extent: 2 folders
- Creator: Carter, William A. (William Alexander), 1863-1925
- Repository: L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young University, Provo, Utah 84602
- Access Restrictions: Open for public research.
Advanced Search
Search Results

Manuscript Collection Descriptions

Search Results

Title: Rock Canyon Stuff
Call Number: ML 3987
Edition: 1899-1903

Summary: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Title: Rock Canyon Stuff
Call Number: ML 3987
Edition: 1899-1903

Summary: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Prototype Usability Testing
Usability Results

• Primary user group loved search within this finding aid
• Archivists and experienced researchers want to browse the entire collection
• Archival terminology is understandable in context
Software Requirements Specifications

- Elements
  - Introduction
  - Project overview
  - System features

- Designed for the programmer to use to make a design document
Social Navigation and Finding Aids

• Social navigation has the power to truly revolutionize archival finding aids

• Potential useful social navigation tools
  – Reviews
  – Annotations
  – RSS feeds
  – Virtual bookshelves
  – Tagging
  – Bookmarks