Understanding the User’s Mental Model

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California Digital Library
Describing collections for online environment

“Archive’s stack”
Formulating a design strategy for online collection description is a complex challenge.
Hearst (William Randolph) Jr. Papers

Descriptive Summary

Title:

Collection number:
BANC MSS 91/2 c

Creator:
Hearst, William Randolph, 1908-

Extent:
Number of containers: 13 boxes, 1 carton, 2 oversize boxes, 20 volumes
Linear feet: 28

Repository:
The Bancroft Library Berkeley, California 94720-6000

Abstract:
Consists of 19 bound scrapbooks, correspondence and clippings chronicling the career of William Randolph Hearst, Jr. Born in New York City Jan. 27, 1908 to newspaper magnate William Randolph Hearst and Millionair Willson Hearst. In 1928 he began his career as a reporter and served as an overseas correspondent during World War II in both Europe and the Pacific. Hearst served successively as reporter, editor and publisher of the New York American-Journal through 1956 when he assumed the reins of the Hearst Corporation and Foundation. He died in 1995.
Reference archivists
• Familiar with finding aid
• Scrolling views
• Use Control + F to scan for relevant keywords

Expert researcher
• Familiar with finding aids and archival practices
• Willingness to travel to archives

Novice researcher
• Unfamiliar with finding aids
• Need for mediated research guidance
It’s only just begun...
Expansion into MARC records
• Brief record view

2011 user demographic assessment and web analytics
• 39% college, graduate, and faculty researchers
• 75% of OAC visits enter at “repository content”
• Didn’t reveal user’s satisfaction with collection guide page
2012 “Request” button testing
2012 “Request” button testing
2012 “Request” button testing
Eureka!
“Mental model with features aligned beneath it.”
General behavioral findings

• Research trigger
• Self-guided research activities
• Mediated research activities
• Collection relevancy assessment
• Material availability and location determination
# Research triggers and activities

## Research Triggers

<table>
<thead>
<tr>
<th>Novice user</th>
<th>Expert user</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likes specific topic areas that are frequently curated or grouped on websites, such as Japanese internment.</td>
<td></td>
</tr>
<tr>
<td>Receive a paper assignment from teacher that requires use of primary source.</td>
<td></td>
</tr>
<tr>
<td>Broader or more esoteric topic areas that are not as pre-curated on primary source websites or archives.</td>
<td></td>
</tr>
<tr>
<td>Prepare a class syllabus for an undergraduate history class that will require primary source use.</td>
<td></td>
</tr>
<tr>
<td>Commence research for a series of scholarly papers to help reach tenure.</td>
<td></td>
</tr>
<tr>
<td>Decide on a dissertation research topic for a history graduate degree.</td>
<td></td>
</tr>
</tbody>
</table>

## Self-guided Research Activities

<table>
<thead>
<tr>
<th>Novice user</th>
<th>Expert user</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit library’s website page for links to archival websites that might be relevant to their topic area.</td>
<td></td>
</tr>
<tr>
<td>If one primary source website does not yield direct access to digital versions of primary source, user will move on to next topic choice on assignment list.</td>
<td></td>
</tr>
<tr>
<td>Visits the primary source websites to see if there is enough material available to fulfill assignment.</td>
<td></td>
</tr>
<tr>
<td>Searches library’s online catalog in search of immediate access to digital versions of relevant material.</td>
<td></td>
</tr>
<tr>
<td>Looks up topic for paper on Google for background information</td>
<td></td>
</tr>
<tr>
<td>Looks up topic for paper on Wikipedia for background information</td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit library’s website page with links to relevant collections that belong to home institution.</td>
<td>Searches online catalog for material and will follow links that leads them to archival descriptive records.</td>
</tr>
<tr>
<td>In Google search, sometimes stumbles upon websites with primary source finding aid references.</td>
<td>Finds secondary sources for topic area and looks at footnotes to find additional sources to explore.</td>
</tr>
<tr>
<td>Looks up topic area on Google or Google Scholar to get background information and “lay of land”</td>
<td></td>
</tr>
</tbody>
</table>
Research triggers

- Novice users – short term triggers
- Expert users – long term triggers

Self-guided research activities

- Novice users – Wikipedia, Google
- Expert users – Google, secondary sources

Mediated research activities

- Novice users – teachers and librarians
- Expert users – instigate relationships with reference staff and attend instructional workshops
Is the content of the collection what I need?

<table>
<thead>
<tr>
<th>Collection Description</th>
<th>Relevance Decision Point</th>
<th>1. Is the content of the collection what I need?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accurately forecasted what Request button would do for them. They were familiar with what the Request book feature would do on online catalog. Knew it would be similar.</td>
<td>Novice users also expect to be able to see clips or scans of what's inside the collection to help them make a judgment about the relevancy of the collection content.</td>
<td>Entire views are easy for repeat users to search, scan and do &quot;finds.&quot;</td>
</tr>
<tr>
<td>One novice user clicks on PDF entire view and quickly becomes confused. Finds the document very dense and difficult to read.</td>
<td>Date ranges are important for novice users.</td>
<td>Many like to save PDF to refer to later—especially if it seems like a very relevant collection for their information needs.</td>
</tr>
<tr>
<td>Look at genre information—sometimes this is in title, background, or description.</td>
<td>They do not care as much about collection construct. They just want items.</td>
<td>&quot;I'll save it … that way I can access it again easily.&quot;</td>
</tr>
<tr>
<td>Look at Overview section.</td>
<td>They are not as familiar with labels such as collection, institution, background, extent, and container list.</td>
<td>Some expert users say that they've always used entire view since it has more info and they don't need to click back and forth on the TOC area.</td>
</tr>
<tr>
<td>Collection Title</td>
<td>List of topics associated with collection is helpful to novice users in judging content relevancy.</td>
<td>&quot;Now I know that I will need that folder and that box. It makes your work in the archive that much quicker.&quot;</td>
</tr>
<tr>
<td>Novice user</td>
<td>Look at Collection Title</td>
<td>Some expert users do not expect to be able to Request 32 boxes of collection material that is described in the extent.</td>
</tr>
<tr>
<td>Expert user</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Is the material online?

### Collection Description

#### Relevance Decision Point

**2. Is the material online?**

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<tr>
<td>Look at Get Item area to determine if there are objects online</td>
<td>Locates Get Items area with varying degrees of immediacy to see if there are online objects available.</td>
</tr>
<tr>
<td>Need to log in after clicking on Request button was a barrier that undergraduates didn’t want to figure out.</td>
<td>For the expert user if the materials in collection seem especially relevant, if the items are not online, they ask the next question of where are items housed?</td>
</tr>
</tbody>
</table>

They understand that if it’s not online next step will be contacting institution but they don’t want to do it.

“Really have to know framework of page to locate info such as online/no online.”

“Once connection is made it’s simple to just look at that line again.”

Accurately forecasted what Request button would do for them. They were familiar with what the Request book feature would do on online catalog. Knew it would be similar.

From expert user of archives on OAC, “Is this an online catalog or an online archive that allows you to view items.” “Because as a user that’s what I’m looking for... [online items]”

“Kind of assume going in that everything is going to be available online.”

“I don’t know if you need any more information [collection description] if what you need is the online item.” “All the info in the world [detailed background] won’t be of great value without the item.”

If they inadvertently find themselves in the container list through the Table of Contents area, they will try and click on folders or boxes to open them to go to digital object. Their expectation is that most things will be clickable.

If there are no objects online, they either experiment with the Request button to see what they will have to do to get a copy. Not as aware of copying restrictions.

If there are objects online they will look through those items.

11/15/2012
Is the collection what I need? Material online?

• Novice users
  • “This is more information then I would find in a normal library catalog”
  • “Kind of assume…that everything is going to be available online…I’ve never used physical items from the library before.”
  • Willingness to use Request feature

• Expert users
  • On PDF: “I’ll save it… that way I can access it again easily.”
  • “I don’t know if you need any more information [collection description] if what you need is the online item… All the info in the world won’t be of great value without the item.”
  • Unwillingness to use Request feature
User information priorities that align with behavior patterns

- Overview
- Online object availability
- Contact information
- PDF view
- Complete finding aid information
Proposed design solution: overview

Overview

Collection Title:
Description:
Background:
Collection Size:
Collection Use Restrictions:
Proposed design solution: online objects
Proposed design solution: collection details

Collection Details

Box 1

Letters written by Allen, 1938-1947, holograph and typescript, concerned with obtaining grant assistance and publishing his Concordance. (1 folder)

Letters written to Allen, mainly from colleagues, relating to information or suggestions for the proposed Concordance. Arranged alphabetically by name of person or organization. A list of correspondents follows the Key.

Articles by Allen

[Aegeus - fragments]
Next steps

“Stepping Stones”
Online archival description is evolving and changing.

User online expectations are also expanding.
Small scale, iterative assessments and analysis methods can help keep a finger on the pulse of these changing dynamics.
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Thank you.
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