



# Finding help on the UCSD Library website

UX audit brief and findings

*Fi @ UCSD, student UX agency*  
*Suhui Ho, Digital User Experience Librarian*



# Table of Contents

<a href="#"><u>3</u></a>	<a href="#"><u>Executive Summary</u></a>
<a href="#"><u>4</u></a>	<a href="#"><u>Audit Process</u></a>
<a href="#"><u>5</u></a>	<a href="#"><u>Problem Scope</u></a>
<a href="#"><u>7</u></a>	<a href="#"><u>Pain Points</u></a>
<a href="#"><u>13</u></a>	<a href="#"><u>Solution Scope</u></a>
<a href="#"><u>14</u></a>	<a href="#"><u>Solution Research</u></a>
<a href="#"><u>17</u></a>	<a href="#"><u>Moving Forward</u></a>

## Credits

### Report coauthors

**Jose Alvarenga**

**Shan Prasad**

on behalf of Fi @ UCSD

**SuHui Ho**, Digital User Experience Librarian  
UCSD Library

### UX Agent Team

**Bella Zendejas**

**Claire Liang**

**Denzel Rodil**

**Joel Loo**

**Justin Dang**

**Justin Yang**

**Xirui He**

# Executive Summary

## Background

As the Geisel Library Revitalization Initiative (GLRI) aims to create a service model that “empowers users to actively engage with library services,” there is an increasing demand to revamp the Library’s virtual space, [library.ucsd.edu](http://library.ucsd.edu), to meet a similar caliber of service and assistance when needed. In the current state of the site, a critical concern has been raised, over whether users are getting meaningful experiences from help, and if they enjoy it.

In partnership with Digital User Experience Librarian SuHui Ho, student-run experience agency Fi @ UCSD coordinated a project in April 2019 to perform an environmental scan of the Library website’s help channel system, looking for possible pain points. The research was followed by an analysis of best practices, observing what could inform a redesign of the “home of help” on the Library website.

## Pain points

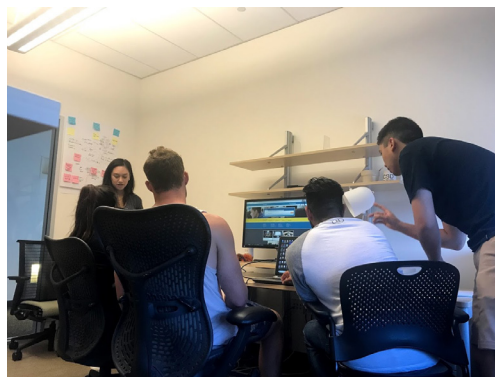
There are specific points of criticism, both from user and from expert view that signify a need for change in the current help channel system:

- Visitors have trouble with the usability of the site before they can find help
- Users aren’t utilizing help channels as often as perceived by library staff
- Users prefer outside methods over traditional help channels to fill their needs
- Help functionality on the Library website is insignificant and ineffective

## Solution scope

To address the needs of users and the interaction levels experienced, Fi proposes that the solution be centered around the five (5) most equally crucial pain points discovered:

- Accessible help functions across the site
- Tips/dialogue for explaining use of simple and complex resources
- Recreating a central hub for finding help
- New search implementation
- Cohesive physical and virtual service models

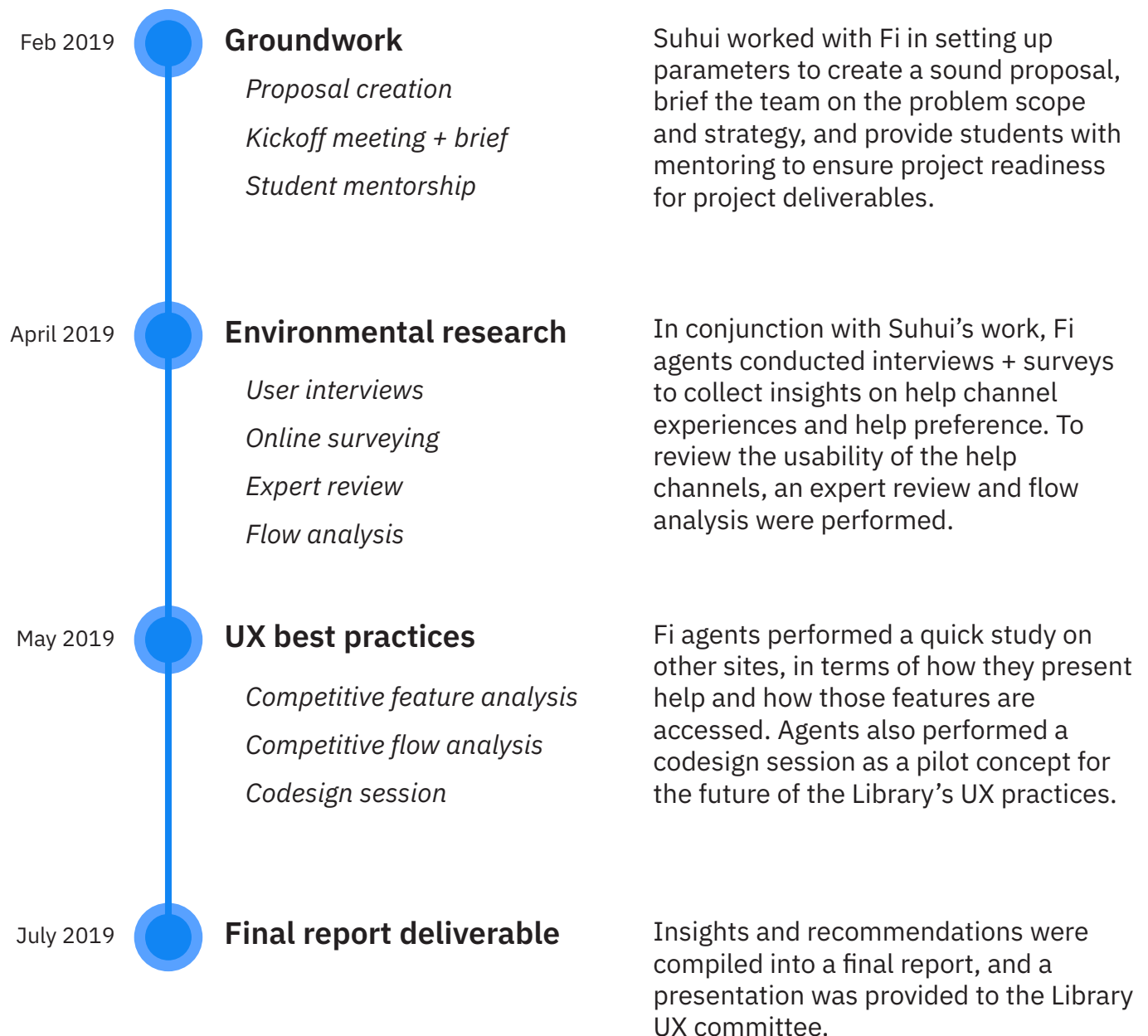


# Audit Process

In February 2019, the UC San Diego Library (“Library”) engaged Fi @ UCSD, a student-run user experience (UX) agency, to explore how users were using the Library website, specifically in finding help for using resources and services provided by the Library.

Fi organized a group of nine (9) undergraduate researchers and designers (“agents”) to perform a UX audit of the help channel usage of the Library website, with . Fi partnered with the Library Digital UX Librarian, Suhui Ho, to develop a timeline and iterative process from the agency’s research.

The audit was performed in four units of work:

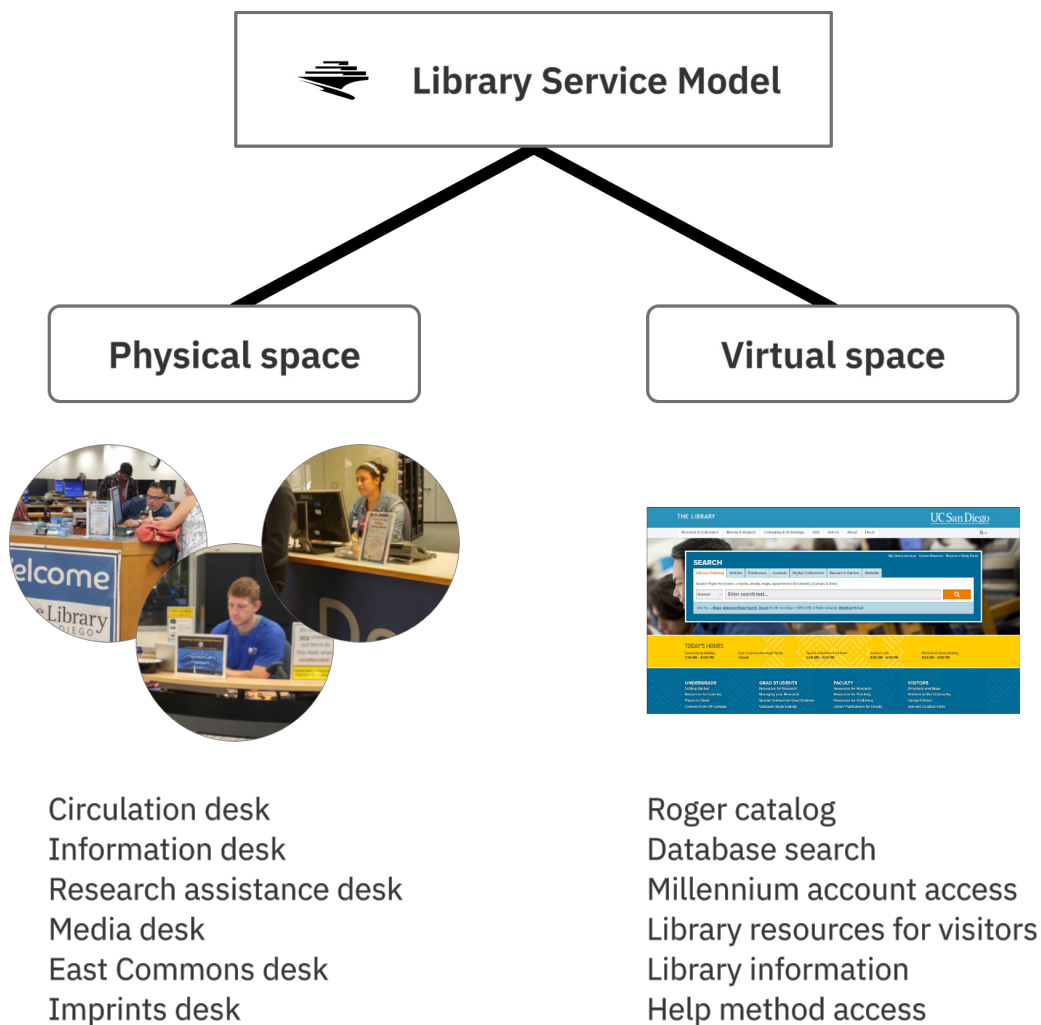


# Problem Scope

The Library launched the Geisel Library Revitalization Initiative (GLRI) in July 2015 to transform the Library to meet needs for growing students and scholars. As part of the GLRI, the Library created sub-goals to expand on a new service delivery model that “empowers users to actively engage with library services, and deliver an integrated user experience across services.”

This new model implementation encompasses two main spaces. The first spaces include the **physical spaces** offered to assist Library visitors, specifically the circulation, information, research assistance, media, and East Commons desks found across the 1st and 2nd floors of the Library.

The second space is encompassed in the **virtual space**, primarily the Library’s main website, available at <https://library.ucsd.edu>. This website is a service hub allowing for Library users to use if a) they’d like to pre-organize their Library visit, b) they cannot physically attend the Library, or c) they are curious about the services and resources offered by the Library.



*Fig.1: Visual representation distinguishing physical space from virtual space. While different service points in the Library serve as hubs for finding help on Library resources/ services, the website acts as a single hub and centralizes information to one virtual space.*

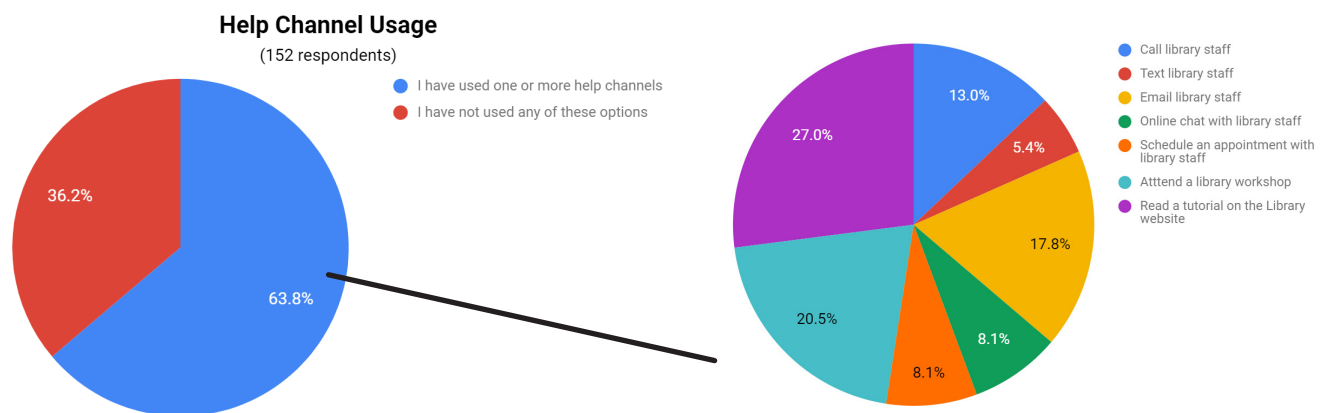
The focus of the UX audit is to specifically focus on the service model offered in the virtual space, by critically observing the help access offered by the virtual space (“help channels”).

Currently, there are seven help channels available for use on the Library website:

- 1) Calling** the library desks
- 2) Texting** a library staff phone
- 3) Emailing** a library staff
- 4) Online chat** with a library staff
- 5) Scheduling a consultation** with a librarian
- 6) Viewing and attending a workshop**
- 7) Reading a tutorial** on the Library website

While there is an abundance of these tools to help users in accessing a service or resource, they are used sparingly. From a survey of 152 respondents, about 64% of users reported having used one or more help channels before. There still accounts 36% of users who do not or have not used help channels, raising concerns over why those users have not felt empowered to reach out to the Library through help channels for any type of assistance.

Even looking at the 64% of users who have used help channels, a majority of users have felt more compelled to use the latest channels for help more often than the traditional methods of calling, emailing, texting, or chatting with a library staff. This also raises concerns on how the traditional help channels are performing in terms of user engagement and success.



The aim of the project narrows the problem scope to focus on four key research questions:

- 1) What methods of help are users using, and what do they prefer to use?
- 2) What methods work for them and what does not?
- 3) How does the design of these methods affect the user experience of their mission in finding help?
- 4) How should help be displayed for users online?

# Pain Points

What are the specific points of evaluation that could display a need to focus on help access on the Library website? Through the Fi team's use of user interviewing, surveying, and performing of an expert review, new insights came to light that contributed to findings of this report.

## Users have issues with general usability of the website before they even find help

From user interviews, interpretations revealed that Library website users often run into situations where they need help because of the general usability of the site. The Fi team broke down personas into those of UCSD undergraduate students, Masters/PhD students, and faculty staff.



### Undergraduate students

Undergrad students reported that **it is difficult to understand the services and resources offered by the Library**, specifically on how to find them and use them. The Library website does not assist them in using online tools (database access, Roger lookup, etc.) remotely. They usually rely on friends and instructions from teaching personnel for guidance.

*“The website isn’t always clear about the instructions..”*



### Graduate students (Masters, PhD)

Grad students have reported that **navigation on the Library website is complicated and troublesome**, specifically in their needs for utilizing database engines, research articles + papers, and the full Library catalog. While the expectation for a slow search is expected, these students usually “bounce off,” using other third-party resources.



### Faculty staff (professors, researchers)

Faculty reported that **it is often hard to utilize the help channels due to the time it takes out of their day to do so**. They feel that connecting with a librarian staff will take too much time for a reply. Staff also reported that searching on the Library site has proven counterintuitive at times with the inaccurate search results it creates.

*“It’s easier to just search instead of talking to someone.”*

## Users aren't utilizing help channels as often as we think they do

From an online survey of 117 responses, with a large majority of participants being undergraduate students (73.5%), about 64% of users did use one or more of the help channels available on the Library site. But there is a second demographic of 36% of users that have never used those help channels.

When asked why they have never used the help channels, students had very insightful feedback on their experience with Library services.

- 1) Most students view the Library in a basic manner. E.g. they only arrive to check out books or find a place to study.*
- 2) Students are generally unaware of a librarian's specialties. They tend to perceive them as bookkeepers with a limited scope of knowledge.*
- 3) Students receive help from other resources (friends, instructors, staff, etc.).*
- 4) Students perceive interactions with library staff as intimidating.*

Overall, users from all groups said that they perceived help channels as **time-inconvenient, inefficient, slow, or unintuitive.**

## Users prefer methods outside of traditional help channels to find what they need

During the survey, participants were asked what help channels they would prefer to use in nine (9) given scenarios. The given scenarios are listed below.

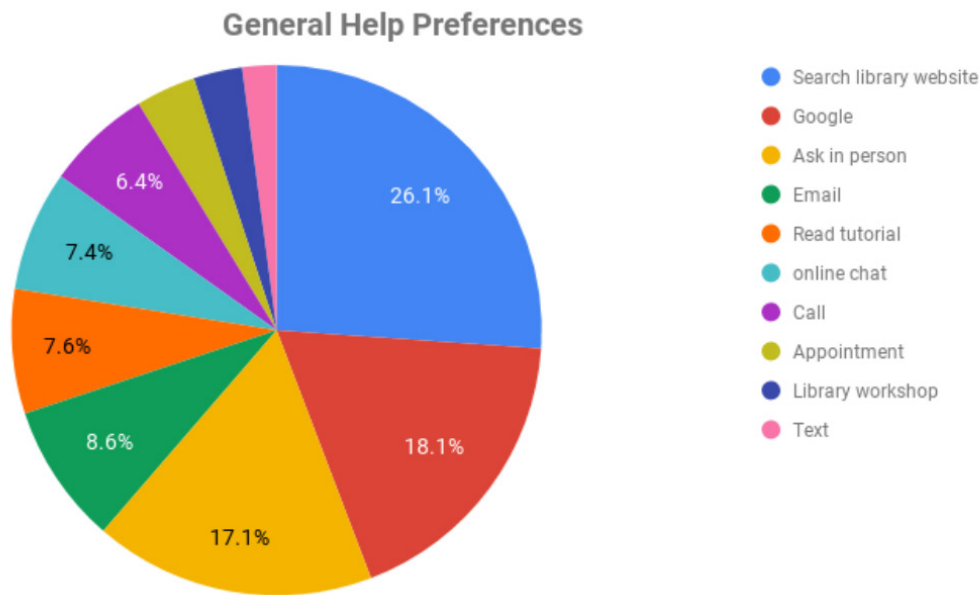
### ***How would you go about searching for help if you...***



- 1) want to reserve a study room?
- 2) want to borrow a book from another UC?
- 3) found an article of interest within a database but cannot access it?
- 4) want to store your research data for a long term?
- 5) need help finding articles on a topic?
- 6) need help using the Library catalog?
- 7) need help formatting a reference citation for a paper?
- 8) are working on a course assignment, and need help identifying appropriate keywords and search strategies?
- 9) working on a research project, and need help selecting databases or other appropriate resources?



Depending on the complexity of the service/need, distinct but consistently proportional results for user preferences were highlighted. The results were generalized and averaged to reflect overall preference of all participants, as shown in the pie chart below:



*Fig.2: Generalized help channel preference based on scenario.*

Preferences were ranked and compiled with given feedback to draw insights on why the top-ranking channels were frequently chosen:

**1) Search.** Many users start their search for help with a Search method, using the search function through the Library website as a form of self-help.

**2) Google.** Users use Google as a method of finding help for relatively simple tasks, if the Search Engine Optimization (SEO) has been set up correctly for a specific service or resource.

**3) Ask in person.** If a task is too complex, or if there is convenience for users (primarily students) to visit the Library in person and ask for help, they will ask a librarian as needed.

**4) Email, reading a tutorial, online chat, call.** Four of the seven traditional help channels are interchangeably utilized by Library users in different scenarios.

## Help functionality on the Library site is insignificant and ineffective

An expert review involves the analysis of a system (such as a website or application) of to check for possible usability issues. Performing an expert review of the Library website in terms of help functionality helped the project focus on how the interactivity, layout, and aesthetic of the help features available affect the user experience of finding help in need.

The expert review was critiqued with a total of five (5) usability problems, as listed below.

### Call to Action (CTA)

An effective call to action prompts the user to take a specific action. For example, Fig.3a shows an effective call to action for a data analytics platform, prompting the user to “Request a Demo” with a large, color-contrasted button.

Shown in Fig.3b, the Library website has a button to access help channel information, but it does not act as a CTA when the user is on any given page. Instead, it acts as a dropdown, making it unclear to click the top selection or use the other selections to find what they need.

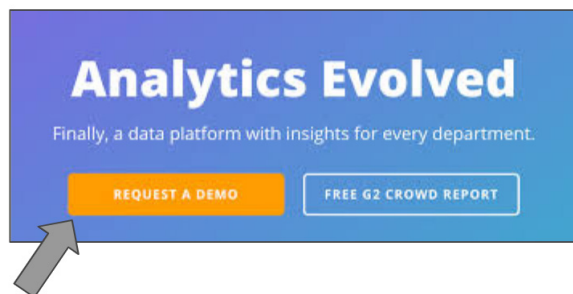


Fig.3a: Example of effective CTA.

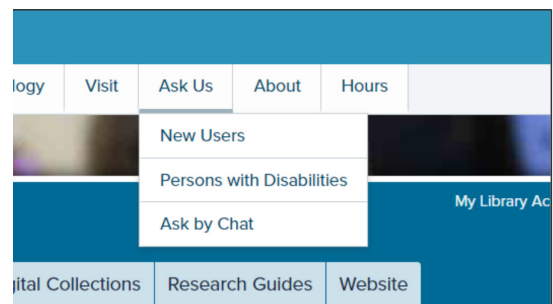


Fig.3b: Library “Ask Us” button/dropdown.

### Help function efficiency

An efficient help function is evaluated based on the display of information and how it directs the user to find a solution to their issue with minimal cognitive overload.

When observing the Library site’s “Ask Us” page, information is displayed in a way that overflows the scroll, disallowing the user to quickly parse for their problem, and diluting the significance of critical help channel options.

Agents recognized issues with the dense layout of information and prioritized this page for a need in redesigning.

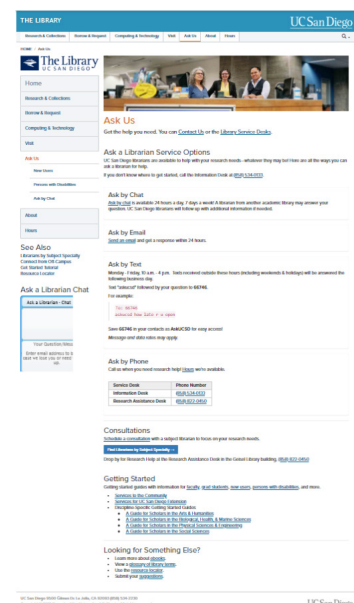


Fig.4: Library website “Ask Us” page.

## Display of key help features

Effective display of help features allows for ease of access to those features. When observing Fig.4, the dilution of help channels restricts the user from intuitively using them to solve their problem. There are four help channels displayed on the homepage of the Library site (Fig.5a), however they are buried deeply beyond the other information available, making them rarely used (Fig.5b).

Additionally, a heatmap of the site shows that while “Ask Us” button and “Search” function are used frequently, scrolling ends before the blue Resources tab, hiding the help channel module from public sight. Users are less driven to use these help features if they are not posted in plain sight.

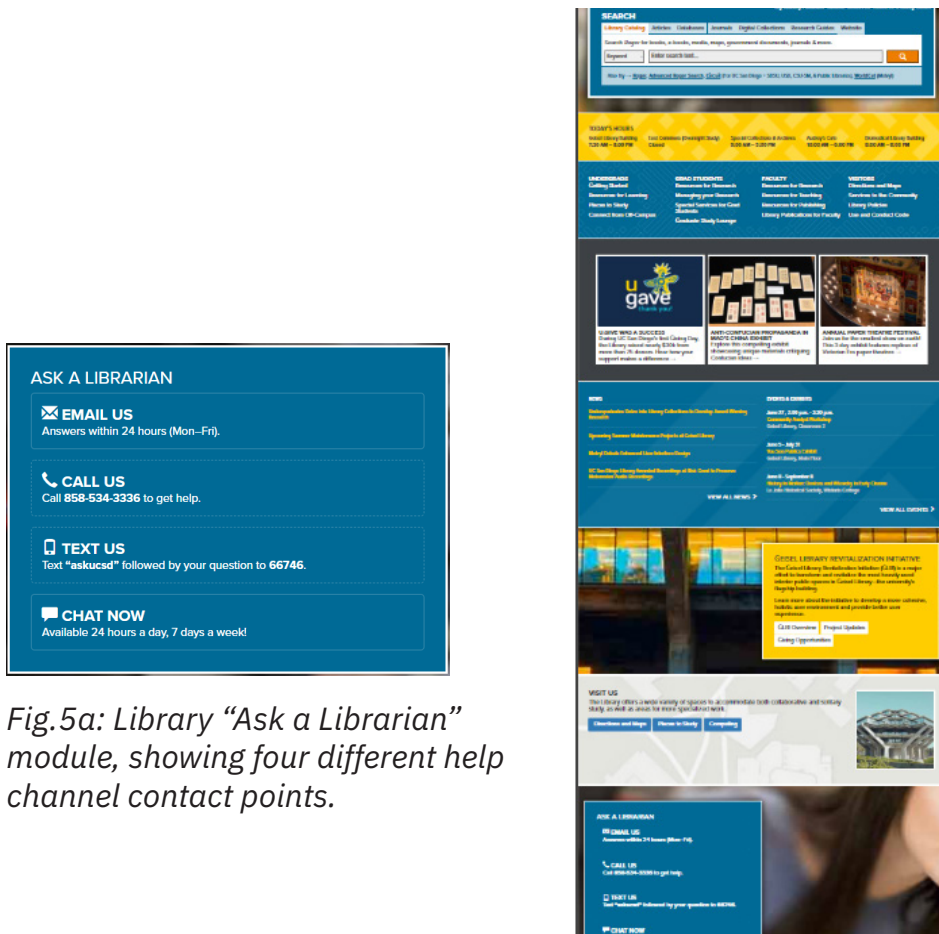


Fig.5a: Library “Ask a Librarian” module, showing four different help channel contact points.



Fig.5b: Visual hierarchy of module shown at bottom of Library homepage, accompanied with heatmap showing sparse usage.

## Universal search function

A useful search function allows for finding useful pages and articles relevant to the user's query. For example, Google is a high standard for its search functionality, creating relevant results to what the user is searching for.

Search serves as a self-help method, allowing users to quickly find access + documentation to Library services + resources. Even though search was shown to be the most preferred method of finding help on the Library site, Fi agents pointed out more than one problem with the search functionality on the site.

- 1) Separate search bars.** The site renders two search bars, one in the middle of the screen, and another in the navigation bar in the top right of the page. Two separate bars (Fig.6a) confuses the user in which bar they would use to perform a successful search.
- 2) Main bar defaults to Roger catalog search.** The larger main search bar by default searches for books and articles across the Roger catalog. The user must find the "Website" tab (circled in red) to select and search for keywords relevant to their need. This causes a great deal of confusion for the user when they initially start a search query.
- 3) Failure to yield quick results.** The search engine used on the Library site is troublesome to users due to its failure to organize the most relevant search results. For example, in Fig.6b, searching for the keywords "COGS 8 course guide" would expect the first result to be for the course guide homepage for COGS 8. However, several results show for results not directly related to the course guide but had "course," "guide," "cog," or "8" in the metadata.

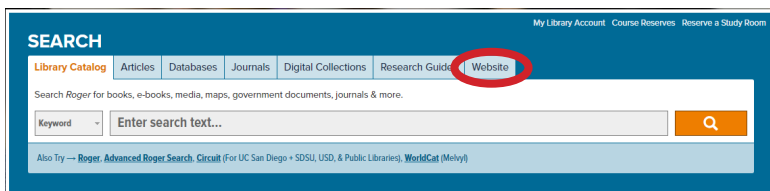
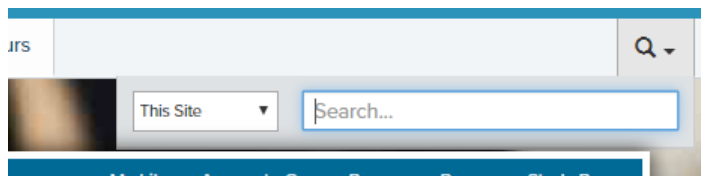


Fig.6a: The two search bars referenced, each sharing the same functionality but different appearances on the homepage.



### Search

Results 1 - 10 of about 108 for COGS 8 course guide .  
Results from: All UCSD Sites This Site

[Home - Course Guides - LibGuides at University of California San Diego](https://ucsd.libguides.com/courseguides)  
Mar 22, 2016 ... Course Guides: Home ... COGS 8: Hands-on Computing ... HIEU 151: Spain Since 1808 - Guide for Special Collections / Spanish Civil War ...

[UC San Diego Library Home Page](https://library.ucsd.edu/)  
My Library Account · Course Reserves · Reserve a Study Room. Search. Library Catalog: Articles; Databases ... Research Guides; Website ... 8:00 AM – 4:00 PM.

[University of California, San Diego General Catalog](https://library.ucsd.edu/dc/object/bb2357546h/_1.pdf)  
... be complete. yes no. 4. The UCSD General Catalog attracts me to the institution. y e s ..... In UCSD. Students may not receive units for courses which duplicate previous credits. 8 ..... choice, information integration, and cognitive functions.

Fig.6b: Search results for "COGS 8 course guide" none of which bring up the direct page link to the Course Guide. Agents noticed an issue in displaying the keyword paragraph rather than displaying a page most relevant to tutoring.

# Solution Scope

To address the needs of users and the interaction levels experienced, Fi proposes that the solution be centered around the five (5) most equally crucial pain points discovered:



## **Help functions that are discoverable across the site**

Graduate students and faculty reported that finding help on the site for their specific needs and flows is troublesome or time-consuming. Creating a module that allows users to access their preferred help channel(s) on any page they are on will empower them to utilize the channel more often.



## **Tips for explaining resources, simple and complex**

Undergraduate students reported that it was often hard to understand the resources/services offered by the Library. Creating multiple and frequent tips/dialogues (e.g. article links) to help guide the user to successfully utilize a resource/service will greatly increase success rates for a given scenario.



## **Recreating a central hub for finding help**

The “Ask Us” page was flagged by Fi agents in the expert review as highly inefficient in motivating a user to use advertised help channels. A newly redesigned page, with effective display of information and quick actions for accessing help channels, is an easily implementable solution for the site.



## **New search implementation**

As search was the most frequently preferred method of finding help, it would be best to rethink how search functions play a role in the virtual service model of the Library, and find a search engine provider that delivers.



## **Cohesive physical and virtual service models**

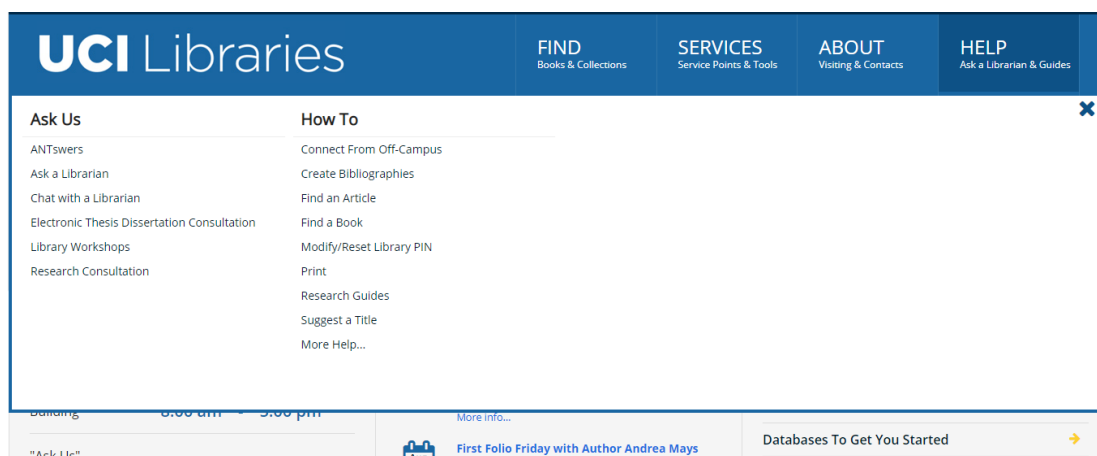
As the Library expands on the GLRI to create new service delivery models in the physical library, creating the same level of engagement in interactions with Library website users would provide a useful tactic for empowering service usage.

# Solution Research

As part of researching solutions to address the scope of the project, Fi agents looked at several solutions that target help channel access in different ways. These features are recommended for consideration in the design process of a new help channel system on the Library website.

## Effective CTA with dropdown

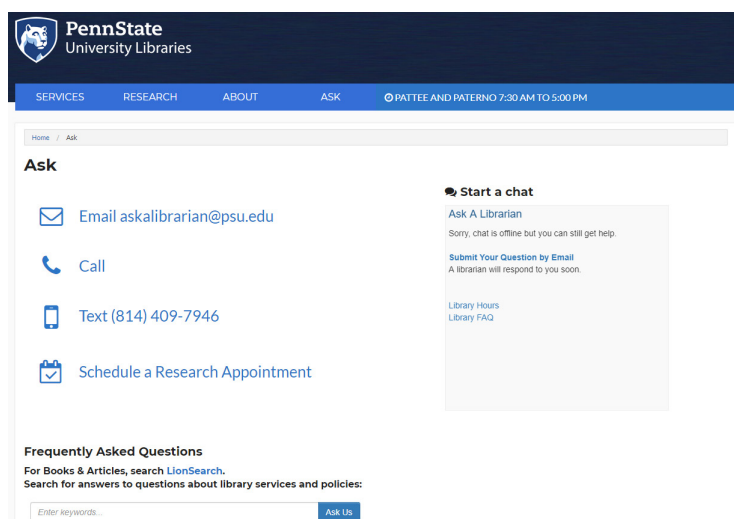
The Library's "Ask Us" tab can be prioritized as a CTA and displayed as a more modular tab, allowing the user to access help channels across the entire site. This example from UCI Libraries' site was found to be very effective in quickly routing the user to necessary channels and other helpful resources.



*Fig. 7a: UCI Libraries help CTA with quick links for accessing help functionality*

## Visual hierarchy for help channel access

UCSD's "Ask Us" page displays an overload of information. In contrast, Penn State Library's website was found to place important help channels at a higher visual hierarchy than other information for quick access, while the rest of the page is cleared of text clutter.



*Fig. 7b: Penn State Libraries help page with minimal clutter and very high visual hierarchy of help channel access*



## Hub for help needs with documentation

The Library includes a “Getting Started” page that includes a vast and dense list of quick links to tutorials, articles, and resources to learn more about given services. This can be condensed into a smaller list of most frequented subjects and include a search to allow users to find topics relevant to their needs, complete with documentation.

Harvard Library uses a very simplistic form of an FAQ, even going as far as putting the new topics into question form. Simple keyword searches will render a result that is proven to accurately answer the user’s question.

Looking outside the scope of library websites, Hotjar’s Support page uses a very user friendly approach, with a search and icons to indicate different subjects that are frequently searched through. Clicking on a said subject or searching brings up an organized catalog of articles for the user to use for their need.

## Search FAQs

| [SEARCH ▶](#)

### FEATURED QUESTIONS

[How do I use the new HOLLIS?](#)

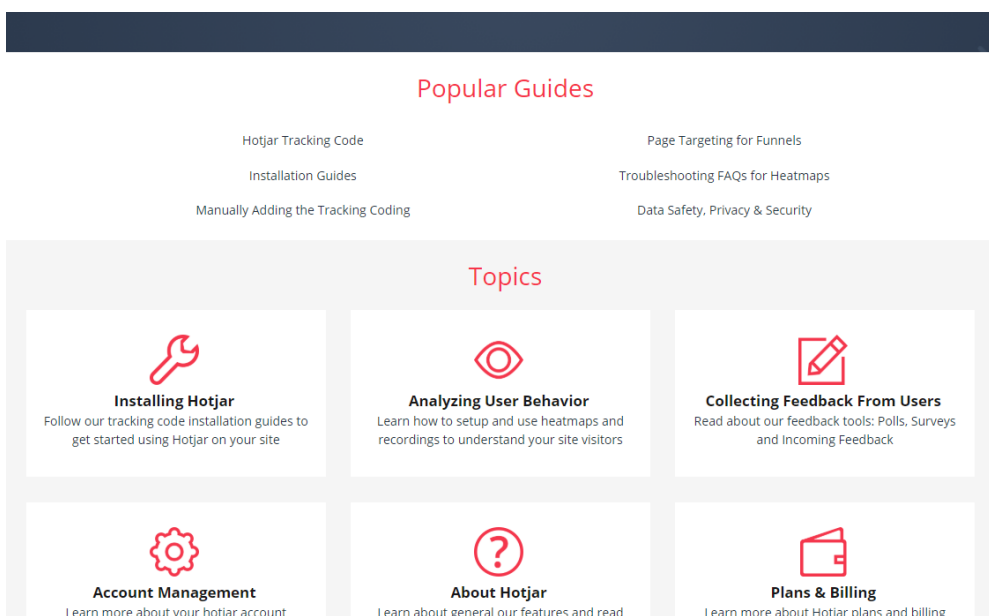
[Does the library have phone and laptop chargers available for loan?](#)

[What's the best way for me to determine if a newspaper is available at Harvard electronically?](#)

[Can I bring guests into Widener or another Harvard library? What about into the Widener stacks?](#)

[See all FAQs ▶](#)

*Fig.7c: Harvard FAQ section with sorted featured questions and ability to search for documentation on specific subject*

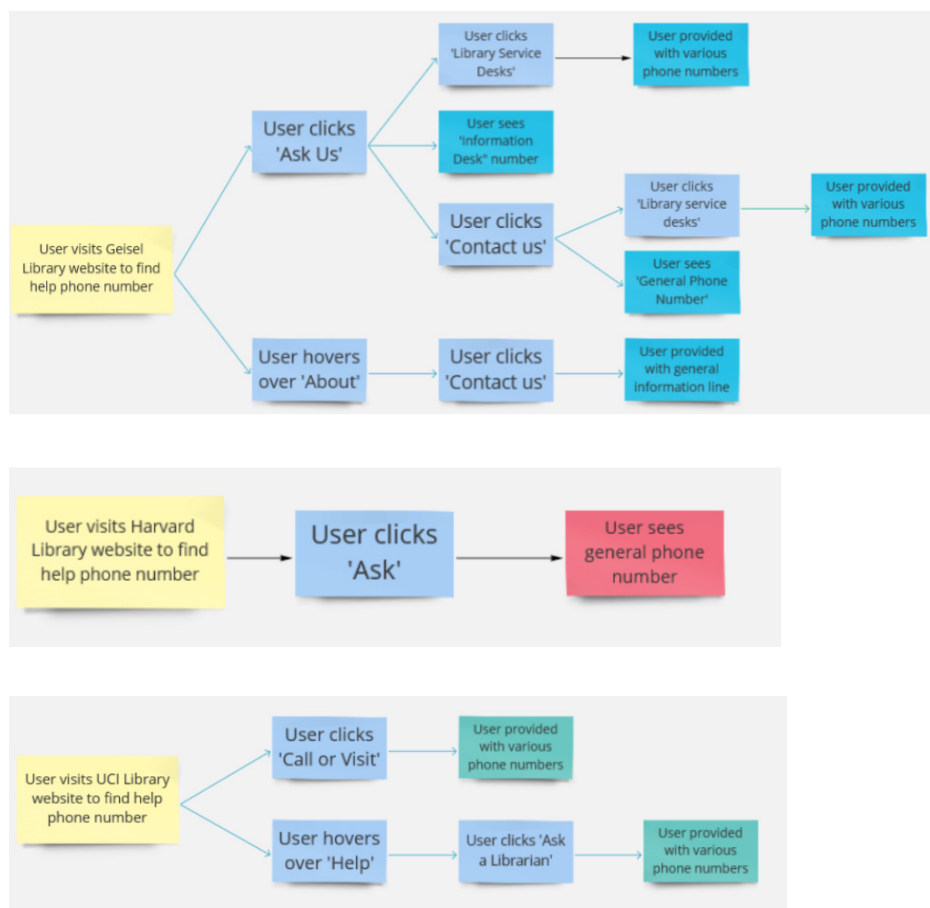


*Fig.7d: Hotjar Help page showing quick links for frequently viewed topics, including guides and organized categories for popular aspects of the Hotjar software.*

## Creating centralized flow

The flow of the access to the Library's help channels was mapped out in a series of user flowcharts. These flowcharts express the sequence of actions a user takes in performing a task. The flowcharts of accessing Library help channels were compared against those of the websites of Harvard Library and UCI Libraries.

For example, it was shown that for calling a UCSD Library staff, the flowchart of the Library split into several segments to receive either one general phone number or a series of numbers without proper indication of which number to call for what reasons. Harvard and UCI mitigated their flowcharts by reducing the duplicate avenues necessary to find a phone number. Harvard took an approach by including one general phone number that could forward calls to whichever necessary department needed to answer the call.



*Fig.7e: Top to bottom. UCSD Library, Harvard, UCI. Showing full flowchart of finding a phone number on each respective library website.*

To improve the performance of such flowcharts, it is recommended that through the duration of the GLRI, the Library simultaneously update their physical and virtual service models to be in sync with each other. This would allow for creating a more sound help access method in one space and easily reflecting the change in the other. For this example, it would be recommended to create a single phone to route to other departments and desks, and then update the Library website to have only one phone number.

The full flowchart can be found on Page 32 of [this document](#).



# Moving Forward

The evaluation of the different user and design pain points has led to a continuous mission to enhance the available help services on the Library website. As the GLRI evolves the physical spaces available in the Library, it is also important to remember the impact that the Library website has on a given user's experience with Library services and resources.

The Fi team is currently in the works of ideating and delivering a design deliverable solution by September 2019 that will tackle all given pain points and offer a solution that encompasses all aspects of the proposed solution scope.

Independent of the Fi team's solution, the goals of the project are to create meaningful experiences within the following domains:



## User behaviors and perceptions

As users become increasingly engaged with the Library services and resources put forward by GLRI projects, they should be excited and confident to engage with all Library help channel methods, whether they are inside or outside of the physical Library space.



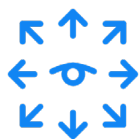
## Service efficiency

While the traditional virtual help channels show a lower usage than Googling and asking in-person, they are not to be ignored. The Library should work to increase the effectiveness of each channel so that it may reflect greater usage for Library website users.



## Service availability

A widely-reaching theme of the research done throughout this audit has pointed to conclusions from users that help needs to be available accessible throughout the Library site. Creating a method of including specialized help on each step of the user's journey will increase engagement with services.



## Staff awareness and actionability

While user experiences outside of the physical library space may not be disclosed to Library staff who operate said service models, creating measures for those staff to observe user behaviors with physical and online help methods will inspire better solutions to create user satisfaction.