Agile Assessment for Aquifer American Social History Online
http://www.dlfaquifer.org

SUSAN HARUM

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Why Agile?

- Experimental – small development team, distributed environment
- Facilitate feedback for the iterative development process of the portal
- Allow users to drive the development of the portal
- Focus on the user's goals and not the attributes of the software
- Large verbal component - frequent conversations for more effective communication.

Methodology

- August 29 – November 2 (8 weeks)
- Questions for participants drafted by the SWG
- Group conference call on August 27th, 2007, including system architect and developer
- 3 additional individual phone interviews
- Questions regarding search and find, identify, obtain, manage and use, and user workflow
- Began assessment with:
  - Draft of portal based on site at UM
  - Common Business Functions by SWG

Target Audience

- 8 participants
  - 1 faculty
  - 3 graduate students
  - 4 librarians
- Recruited by members of the Services Working group
- Librarians as user proxies

Initial Brainstorming call

- Question users about the workflow of their research
- Developers present to hear what participants say
- Developers able to prioritize next tasks immediately after the call
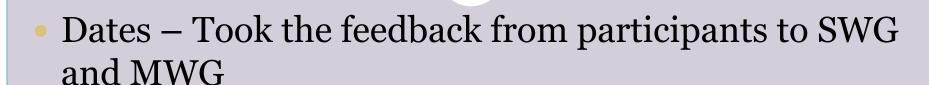
"A site that seems to increase my chances of coming across things is good--there might be things there that lead me in a new direction."

- Need to see size and scale of collection to determine how much time to spend searching and browsing -
  - Implementation of collection registry and "browse collections" feature.
- Need ability to limit a search (once you have results) in many ways
  - Implementation of additional ways to limit after initial search
  - Implementation of date range limiting
- Importance of ability to browse
  - Implementation of subject clouds for browsing – still working on faceting for additional browsing
- Importance of visual aids, especially for undergraduate students
  - Implementation of timeline view for results
- Need for information for both about and creation of an object
  - Feedback to MWG

Browsing and Searching

- Dates - How best to interpret? Groupings by era or groupings by decade?

- Topic - How important is the ability to browse and winnow by topic vs. applying keyword limits?

- Subject - Persons and Organizations, Geographic Coverage, Temporal Coverage, Genre

- Genre - is browsing and winnowing by genre necessary if there is a choice for Type of Resource?

- Previews - what type of previews preferred for things that aren't images?

"Wouldn't have known I would have wanted a breakdown by decades until I saw the breakdown. I see that there's a flurry of activity for this decade."

- Dates – Took the feedback from participants to SWG and MWG
  - Use of CDL date normalization utility based on TEMPER recommendations
  - Eras definitely out
- Previews
  - Implementation of Thumbgrabber to provide more thumbnails of non-image items
  - Implementation of both "list" and "grid" views for results
- Genre
  - Implementation of genre as option for limiting

Sorting and Narrowing, Full Record Results, Social Networking and Tagging

- Sorting and Narrowing
- Full Record Results
- Social Networking and Tagging
- Information Storage Preferences (local or remote)
- Sharing search strategies

"My colleagues and I use Zotero all the time ....Refworks is in a world of trouble."

- ## Limiting Search Results
  - Feedback to Chick that users want to "drill down" in the search (continue to narrow using different limiters)
- ## Full Record Results
  - Normalization of collection names
  - Feedback to MWG of the importance of access condition and locator for using items in publications
- ## Social Networking and Tagging
  - Implementation of StumbleIt for full records
- ## Sorting and Narrowing
  - Implementation of more options to limit
  - Feedback to SWG and MWG to begin planning on implementation of faceting browsing

Zotero continued, Topical browsing continued...

- Controlled vocabulary for browsing?
- Zotero – Firefox limitation
- Zotero add to appeal of AASHO site?
- Your feedback influence design?

"I like using my own terms and narrowing the search myself"

- ## Controlled vocabulary for browsing?
  - SWG and MWG will help with development of faceting browsing
- ## Your feedback influence design?
  - Buy in from participants

What Was Learned

- Agile Assessment drove the prioritization of tasks
- Multiple phone interviews and email updates resulted in buy in for participants
- Brainstorming session for distributed group not as effective as personal interviews
- Next time……
  - Mix personal interviews with on-site observations, brief surveys, etc.
  - Invite more graduate students to participate
  - Shorter, more frequent interviews if possible

Next in Assessment…..

- SWG currently planning for 2008 formal assessment of:
  - AASHO portal
  - Zotero implementation
  - Sakai implementation
  - Meta-search implementation
  - Google implementation