THE NATIONAL ARCHIVES

Card sort – War and military records
User testing report v1.0
Helen Calderon
17 May 2021

Executive summary

An earlier study tested possible stepped navigation for Etna Explorer. Without first looking at how users understand and organise records from the archive we take several risks:
- Not discovering that the content users expect within certain places is not what the archive contains
- Not discovering other ways users organise or understand our content
- Taking longer to iterate towards a navigation system that users understand.

Our small tree test study indicated that there was an overlap and confusion about possible content within the 'Military and maritime' and 'War and conflict' groups. These areas were also where almost half of the archive's records fall.

To check the proposed structure resembled how users' interpret and organise our records a small card sort study was conducted. This drew from a mix of 30 'War' and 'Military' records.

The study revealed that the most common way of organising our content was by document type. Most participants came up with a combination of groupings including document type alongside military branches, and war periods. Participants expected to be able to drill down into narrower topics, and also combine topics, for example a battle' with 'Medals'. Users expected to sort and filter records by date.

Drawing on these findings the Explorer should group and surface records by type. This information could be presented alongside a record thumbnail and/or as a way of grouping, sorting or filtering content. Along with document type, allow users to browse and filter by subject and date.

This research trialled the use of Optimal Workshop in-app recruitment as a quick and easy way to recruit participants who meet the non-user profile. The quality of responses in this trial was very poor. Optimal Workshop offers custom recruitment and I recommend we investigate whether this option is viable before discarding their recruitment service all together.

Approach

To start, Discovery was reviewed to understand how existing tags within 'Military and maritime' and 'War and conflict' were used. This showed:
- many records were tagged with multiple tags, for example 'Armed Forces (General Administration)' and 'Medals' were often paired with one or more tags
- items like 'Badges and insignia' and 'Conscientious objection' had very few records
- and that records within series sometimes had different subject tags.

Drawing on these observations, records were selected to form part of the card sort. Cards featured records from a variety of departments and series and a range to subject tags. An effort was made to include records in the same subject proportion as Discover, but this was relaxed as double and triple subject tagging made this difficult to do quickly. Popular downloads and content with digitised records were prioritised simply because records with images provided more information for participants to use when organising records. Along with an abbreviated title and an image (for most cards), each card also included the series description. Any archival reference numbers were removed so as not to confuse or bias participants who may have some knowledge of archival codes.

15 participants were recruited for a mix of moderated and unmoderated card sorts. These were conducted using the Optimal Workshop card sort tool between 6–9 May. Some of the unmoderated participants were recruited via Optimal Workshop in-app recruitment with the remaining participants sources through the archive's website sign-up. Users were screened to meet our new and non-user profile.

Research findings and recommendations

How users organised our content

- Users sorted our records using multiple types of groupings:
  - Document or object types
    - The most common way of organising
    - The only scheme that some users used as the only way of organising
  - A combination of
    - The document/object types
    - Military branches
    - WWI, WWII, or more broadly 'war'
- Except for WWI, and WWII groupings, participants didn't generally organise records by time
- War groupings generally contained intelligence, security, and government minutes, possibly with some military records included.
- Users expected grouped content to be broken down further into sub-categories, possibly 3 levels deep
- Service records was a document type that some users created, that we don't currently have.
- Some users wanted to combine different organisation schemes. For example: the document type 'medals' with the military branch 'armed forces'; or a particular battle with a branch of the military
- Users expected to filter and order records by date.

Recommended structure

See the suggested organisation in [Miro](#),

Additional findings

- A few users commented that the digitised images were blurry
- In spite of the reference numbers being removed from the card sort, one user still commented that they didn't understand them!
- One user from abroad commented that some British government office terms were unfamiliar to them.

Additional recommendations

- Consider limiting Explorer to records with good quality digitised images or prioritising these records for new and novice users. Check whether user perceptions and usability of the archive are affected by poor quality digitisation.
- Because new and novice users find reference numbers baffling, avoid their use within the explorer. If for archival best practice these are required, minimise their use to make the archive more accessible to first time users.

- While most of our users are in the UK, around 25% are from outside. Future research should ensure that British terms, unfamiliar to those abroad, are only used where absolutely necessary. Consider using copy to provide an explanation of terms that are unfamiliar to international users.

Research operations

Findings

- Previous pilot tests with team members has been problematic. This study was piloted with a colleague from outside of Digital Services. As the pilot participant was familiar with the archive, the exercise didn't give me the confidence that the study was easy to understand and carry out for intended participants.
- In-app Optimal Workshop recruitment was trialled for this card sort as a quick, easy and affordable way to recruit participants who meet the 'Non-user' profile.
  - Optimal Workshop offered one screening question, with the caveat this if more than two thirds of participants fail to meet the screening question, any user will be allowed to complete the study. So as to include participants who were serious about the study, we included participants with an interest either 'Politics and history" or "Science and Education" and rejected those with interests in "Shopping" or "Hobbies and leisure". More than two thirds of participants were interested in 'Shopping' or 'Hobbies and leisure', so our screener was overridden.
  - The quality of the results was generally poor. The pilot session had indicated a participant would need 20-30 minutes to complete the study in a meaningful way. Optimal Workshop participants spent about 5 minutes on average, with only two spending 20 minutes. Many results had to be discarded because participants quickly grouped the cards into one group.

Recommendations

- To ensure studies are feasible and understood by new and non-users, pilot with participants who meet this profile. To avoid delaying research consider creating a separate pool of participants that are willing to participate at short notice
- Do not use the in-app recruitment within Optimal Workshop. Investigate whether Optimal Workshop's custom recruitment option may be a viable alternative. Get reimbursed for the poor quality of responses from this research.

Appendix 1 Materials and results

Cards

Password: TNA2020*

TNA participants – unmoderated

Optimal workshop participants – unmoderated

TNA participants – moderated