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More Collection Explorer card sorts
User testing report v1.0
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Executive summary

After an earlier card sort examining records associated with military and war subject tags, two additional card sort studies were run so we could understand how users label and group content currently tagged with other subjects. The information architecture that underpins the Explorer will be fundamental to the success of the project, enabling users to navigate the catalogue.

Building on the findings from the earlier card sort we found that:
- Users organised records predominantly by subject matter and document type
- Some records could be associated with more than one topic
- Users wanted to combine record attributes, e.g. topic + date, topic + type, type +date
- While eras were mentioned as an alternative way to organise the content, not one participant organised the content in this way although a few participants incorporated elements of time into their sorts
- Content could also be organised geographically. At its simplest: Home/domestic vs Foreign/International, or by continent.

Participants also pointed out the difficulties of organising by time:
- A record has two dates: the publication date, and the date the record is about
- Dates are not a moment in time, but are ranges and these ranges can fall outside of categories used within a devised organisation scheme

Overall, records were difficult and time consuming to understand. Labelling records offers users a quick and easy way to understand a record and evaluate its usefulness within the context of their goal. Labels were perceived as conveying archival expertise and authority. It's an imperative that records are well labelled and these labelled should be applied to the underlying navigational structure for the collection explorer.

As small card sorts these studies give a high-level idea of how we could organise the explorer. For Private Beta I recommend using topics as the entry point and allowing users to filter by the time periods already used in Discovery – a combination of centuries and smaller 20th century periods. The explorer should allow users to filter by type of document. Further research could examine additional ways of navigating the collection, for example: by geography or by government body and by records that are indexed or digitised.

The studies suggest that as users consider different record attributes – type, subject, date, domestic/international to organise records. This way of organising lends itself to faceted navigation.

These card sorts were tiny in comparison with the size of the archive. If proceeding with the topic hierarchy for private Beta further research should validate the proposed high-level structure so that content findability is maximised as much as possible. Future work could consider how the existing Discovery taxonomies might be split into subject, and and how these could be improved and expanded, for example, by creating parent and child topics and adding more topic tags to some records.

Lastly, this research trialled the use of the custom Optimal Workshop recruitment. This could be used for future card sorts. These card sorts were cognitively challenging. For equally challenging studies I recommend over-recruiting by 25% to account for poor quality unmoderated responses that will need to be discarded from the final data. Moderated research participants were largely recruited via personal networks. This is less than ideal. We are unable to recruit a mix of participants that reflects the diversity of the UK population and a mix of new and non-users. If we do not remove the internal obstacles to participant recruitment within the next day or two, we run the likelihood of designing a solution that is more likely to meet the needs of the white folks over 55 – the people who remain on our website sign-up list – instead of the intended UK population as a whole.

Approach

Two card sort studies were created. Records were selected using the existing subject taxonomy in proportion to the existing tags. Card sort two included records that fell into the existing topics of Business, finance and innovation; Crime, courts and justice, Family and identity, British state and citizens. Card sort three included: Agriculture and environment, Art and culture, Health and welfare, Transport and travel, Religion, Land and buildings.

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.

The studies ran between 4 June and 21 June and included a mix of face-to-face and unmoderated sessions. Each sort had at least 3 moderated participants and 15+ unmoderated participants. Participants for moderated sessions were recruited from our existing website sign-up list. Because this had been reduced to people over 55 years of age, and approval for other recruitment methods was yet to be signed off, younger, minority and non-user participants were recruited through personal networks – friends and family of archive staff. Participants for unmoderated sessions were recruited via Optimal Workshop custom recruitment. Roughly two-thirds of unmoderated participants had never interacted with The National Archives before.

Findings

Observations from card sort set-up

- There were 58 million instances of subject tags on approximately 24 million records
- The volume of content in different topics varies hugely. (This variety hasn't been represented in the prototype.) For example, Military tags account for about one of every three tags used, while Religion accounted for about one in 300 tags.
- An unknown number of records have no subject tag

General findings from research

- Participants found it difficult and time-consuming to organise records as descriptions and titles varied from poor and vague, to lengthy. They didn't read all the items in detail.
- Participants wanted to but couldn't read some of the documents:
  - the image was blurry
  - they couldn't decipher the cursive writing
  - the image was rotated
- In comparison with the prototype, card sort participants had a much better understanding of what the archive held. When asked to describe what the records were, common threads were:
  - History
  - Government
  - Documents
- Participants mentioned searching by name and bringing up documents that mention specific people.
- Reference numbers were removed from the sort but again novice users mentioned that archive reference numbers don't mean anything to them and are for the archive not them

How users organised records

- The way users labelled content was not too dissimilar from the existing subject tags already in use. Users organised our content:
  - Mostly by topics – what the record was about – and by document type.
    - Topics could be hierarchical with parent and child topics
    - A record could also have more than one topic
  - Records could also be organised by geography and continent or more simply by domestic vs international.
  - By whether the record included an image, or not
- Most thought records could be organised by time
  - few incorporated elements of time into their labels or groups

- ○ no participant organised records by time periods such as Georgians, Victorians etc.
- Users wanted to combine different organisation schemes, for example topic with document type or year.
- A few included government departments and organisations. Mostly The Home Office for domestic records and NHS for health records.
- Participants mentioned that volume influenced whether or not something had its own category. They expected that if there was a lot more of a type of document or topic they would expect it to get its own category - if not it would be grouped with other records.

Recommendations

General recommendations

- Labelling will help users make sense of records, and potentially compensate for poor descriptions, and missing or illegible images. It's vitally important that labels and groupings are tested and derived from a human-centred design process so they provide a way for users to quickly understand what records are about.
- If possible, improve the quality of the images. Make sure images are rotated correctly so the top of the image is at the top of the image viewer.
- Explain the site using 'government' 'history' and 'documents'. This language should go in the Explorer site tagline.
- 'People' topics may be more appropriate for search. Because users sometimes want to search for relatives, consider distinguishing records that have names, or are searchable within the Explorer.
- Minimise the use of archival reference numbers within the Explorer, if possible. Do not rely solely on reference numbers to communicate the structure of the archive or information about the record.

Suggested ways of organised Collection Explorer

- [Suggested organisation scheme for Private Beta, considering launch in mid-July.](#)
- [Spreadsheet version](#) with iterations over time and references to existing subject taxonomy and high-level research findings.
- Some subjects or records may be expected in more than one topic. Place them in both.
- [Recommended high-level structure for Collections Explorer.](#)
- [List of user-generated record types that could be incorporated into a future filter](#)

Appendix 1 Materials and results

Cards

[Sort 2](#)
[Sort 3](#)

Results

[Sort 2 – unmoderated](#)

[Sort 2 – moderated](#)
[Sort 3 – unmoderated](#)
[Sort 3 – moderated](#)

Ask me for the password