

Beta Explorer 2.1
User testing report v1.0
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Executive summary

The previous version of Explorer had been well received, however it posed a number of accessibility problems. An alternative, accessible version of the Explorer prototype was created and tested with six participants in mid-December 2020. Recruited participants had no or limited experience using The National Archives' website.

The research found that:

- Periods of time were an easy and accessible way into the archive. Having eight periods was a manageable number.
- Thumbnail images of records lead to serendipitous and joyful discovery.
- New users will bring their experiences of Wikipedia and museums to the site.
- Users expected the site to include images of each record. For exploration they don't need to know specific details for records that aren't digitised. They need to know about their existence if/when the goals of their exploration shifts and they want to conduct a narrower search.
- Participants expected and needed categories within the time periods. The volume of records available within a time period, the broad historical context, and ambiguous record images meant participants felt completely lost and overwhelmed and could not make sense of what they were looking at.
- Record titles intimidated and confused participants. They didn't understand the titles, found them wordy, or mistook them as category labels.

Recommendations:

- Quickly communicate how the archive differs from museums or Wikipedia in that it physically holds materials and that these are limited to written records, and more recently multi-media digital records.
- Refocus the explorer on digitised records, but mention there is more. Limit details pages to digitised records. Consider communicating the volume of non-digitised content at more refined stages of exploration, eg. category results. Also communicate what is available online and offline at archive level, to give an overview.
- Categories will help users make sense of the sub-set of records they are exploring, especially if records are poorly documented or not digitised. Introduce sub-navigation between the results sets, so the size of the sub-set is more manageable and context is provided alongside the results. Allow users to pick from a list of categories from within the time period results page so they can narrow down results, and so as to provide a context to the results set.
- The records must be described in a way that makes sense to users. Ideally titles are short, and descriptive. They should not be so broad as to be mistaken as a category.

Operationally, the research was delayed by the existing recruitment processes. While there was a large pool of volunteers, they had not been screened. Once screened potential participants were not representative of the UK population and were overwhelmingly experienced users. Pre-screening a larger segment of the existing database should allow us to better target and balance participants. Additional recruitment approaches may be needed

to reach first-time visitors; black, Asian and minority ethnic participants; and those outside the southeast and England.

Approach

Beta Explorer 2.1 was tested in mid-December over three days. The test sought to understand whether an accessible version of Beta Explorer 2.0 would support exploratory behaviour and be accessible to and understood by new and novice visitors to TNA's website catalogue.

While an existing database of participants was approached, those who had opted in tended to be more experienced users of the archive, and there were no minorities. Instead, six participants were recruited informally via the development team's personal networks. None of the participants had extensive experience of the archive: five were new users and one had visited The National Archives' website a couple of times over this past summer. Four of the participants had a general interest in history, and two did not. Five participants were female and one male. Half of the participants lived outside the southeast, with one in the United States and one in Scotland. Two of the six participants were black.

All participants tested the prototype on a desktop computer with sessions conducted and recorded over the Teams platform. As well as a moderator and participant each session had an observer. After a brief interview to understand participants' previous experience with archives and the broader heritage sector, participants were given four tasks where they interacted with the prototype. Overall impressions were sought at the end of the test. Some participants were also asked to label this functionality for a future site menu, however this did not result in meaningful data, and this question and data was discarded during the test.

Findings and Recommendations

Recruitment

Finding

- I emailed over 30 people asking them to fill in a screener in order to participate in our user research. These were people who had opted into user research via a call to action on the website. Around a third of these filled in the screener and two were approached to participate. Neither participant replied. Most of the respondents from this cohort were moderate to heavy users of TNA's site. Minorities and those outside England were not represented.

Recommendation

- While screening a larger portion of our database may help us recruit participants that match the novice user profile, we may need to undertake additional recruitment tactics to recruit first-time users, those outside England and the southeast and those representing minority ethnic groups. After screening our existing database, review how well each group is represented and if needed brainstorm additional ways of reaching under-represented users and groups.

Prototype

Finding

- Participants were distracted by the lorem ipsum text and this contributed to a feeling of being overwhelmed by the content in the results page

Recommendation

- Avoid using lorem ipsum in future prototypes. If accurate text is unavailable, use a realistic substitute.

Homepage

[Toggle CSS & JS](#)

THE
NATIONAL
ARCHIVES

Explore the collection through time

From The Domesday Book to recent Cabinet papers, 1,000 years of international history are preserved in millions of records. Explore wars, revolutions, life stories and landmark rulings, and iconic figures including Shakespeare, Queen Victoria, Gandhi and Churchill.

Explore by time period

Our experts have identified eight consecutive time periods, from medieval to postwar, covering the full collection:

Medieval

974 - 1485

William the Conqueror's Domesday survey aimed to put every inch of his new kingdom on paper. But Anglo-Saxon and Medieval England can also be found in the Magna Carta and other treaties, charters, letters and financial records.

Early modern

1485 - 1750

Follow the complex manoeuvres, plots and double dealings of the Tudor and Stuart courts and the Jacobite risings of 1715 and 1745, through our records in this period dominated by religious conflict and conspiracy.

Empire and Industry

1750 - 1850

Find out about the impact of the Industrial Revolution and how living and working conditions changed for many in Britain. Political protest and crime and punishment are key themes in our resources for this period.

Victorians

1850 - 1901

The British Empire, crime, punishment, leisure and advertising are all brought to life in our resources which are based on records from the second half of Queen Victoria's reign.

Early 20th Century

1901 - 1918

Read original documents relating to Suffragettes, the Russian Revolution and the First World War. Cabinet papers, battle plans, maps and unit war diaries chronicle the conflict between Europe's great powers.

Interwar

1918 - 1939

Study records relating to the rise of dictators, the failure of international diplomacy and Britain's preparations for the Second World War. Discover more about life in 1930s Britain including unemployment, slum clearance and leisure.

Second World War

1939 - 1945

Our records cover the history of the Second World War including the roles of Churchill, Roosevelt and Stalin. Find out more about the Holocaust and life on the Home Front.

Postwar

1945 - 2020

Discover Cold War reports from behind the Iron Curtain, find out what it was like to live in Attlee's Britain or explore documents on Indian Partition.

Choose your own dates

Select your own date ranges to explore the collection:

Start year

End year

[Show records](#)

Findings

- After viewing the site, most participants thought this would be of interest to anyone 16+ with a general interest in history.
- Those visiting the archive for the first time didn't understand the type of information within the archive. Half thought of the archive like a museum. While they saw there were documents they thought there might also be physical objects like historical equipment and clothing. A few also thought of the site as a historical Wikipedia with information and facts. Although 'records' was mentioned in the first paragraph it was overlooked by participants, or didn't hold the same meaning to participants. Participants used terms like 'artefacts', and 'pieces' alongside 'materials' to describe what was within the archive.
- Participants only had a vague idea of how many records the archive contained.
- Half of participants commented on the large amount of white space on the right hand side.

Recommendations

- To help new users quickly understand what an archive offers and how it differs from a museum or Wikipedia, consider explaining that the archive physically holds written materials including letters, diaries, papers etc. If other materials are included within the archive mention this as well. Place this prominently on the site.
- Include the number of records on the homepage, ideally with the emphasis on the number available to view and download online.
- Centre-align the homepage and/or reduce the white space on the right-hand side

Homepage – Time period ‘boxes’

Explore by time period

Our experts have identified eight consecutive time periods, from medieval to postwar, covering the full collection:

Medieval 974 - 1485 William the Conqueror's Domesday survey aimed to put every inch of his new kingdom on paper. But Anglo-Saxon and Medieval England can also be found in the Magna Carta and other treaties, charters, letters and financial records.	Early modern 1485 - 1750 Follow the complex manoeuvres, plots and double dealings of the Tudor and Stuart courts and the Jacobite risings of 1715 and 1745, through our records in this period dominated by religious conflict and conspiracy.
Empire and Industry 1750 - 1850 Find out about the impact of the Industrial Revolution and how living and working conditions changed for many in Britain. Political protest and crime and punishment are key themes in our resources for this period.	Victorians 1850 - 1901 The British Empire, crime, punishment, leisure and advertising are all brought to life in our resources which are based on records from the second half of Queen Victoria's reign.
Early 20th Century 1901 - 1918 Read original documents relating to Suffragettes, the Russian Revolution and the First World War. Cabinet papers, battle plans, maps and unit war diaries chronicle the conflict between Europe's great powers.	Interwar 1918 - 1939 Study records relating to the rise of dictators, the failure of international diplomacy and Britain's preparations for the Second World War. Discover more about life in 1930s Britain including unemployment, slum clearance and leisure.
Second World War 1939 - 1945 Our records cover the history of the Second World War including the roles of Churchill, Roosevelt and Stalin. Find out more about the Holocaust and life on the Home Front.	Postwar 1945 - 2020 Discover Cold War reports from behind the Iron Curtain, find out what it was like to live in Attlee's Britain or explore documents on Indian Partition.

Findings

- Every participant recognised the dates on the homepage as years and periods of time. When asked they were able to quickly and confidently provide the date range for the entire collection.
- Participants found the time period boxes a helpful way of exploring the collection, allowing them to quickly pick a time period they were interested in. There were just the right number of options – eight.
- While the language used in the time period ‘boxes’ was easy to understand, participants didn’t read it or find it easy to scan.
- Even after exploring the rest of the site, participants struggled to know how many records a time box might contain, how many records might be available online, or the type of content available within the period. They wanted this information displayed within the time period boxes.

- One participant doubted the contents of the collection within a time period and another doubted they had picked their intended time period after reading the time period descriptions.
- A few participants expected a representative image alongside each time period.

Recommendations

- Chunk the time period descriptions into bullet points, to make these easier for users to digest quickly and at a glance.
- To help users understand the scale and scope of the collection so they know whether to spend time exploring a time period, add the following details to the time period boxes, possibly as bullet points:
 - Total records available to view online
 - Categories of content. This could by types of documents and/or other categories yet to be determined
- If continuing with this prototype, tighten up the time period descriptions:
 - Feature the most important people and events within the period
 - Communicate that events and people are among many that can be found within the time period, and possibly include key events and people from either end of the time period to indicate the passage of time.
- Include a representative image for each time period both to supplement the text and make the homepage more interesting

Homepage – Choose your own dates search

The screenshot shows a form titled 'Choose your own dates' with the sub-instruction 'Select your own date ranges to explore the collection:'. It contains two input fields: 'Start year' and 'End year', both labeled 'YYYY'. Below the fields is a dark button labeled 'Show records'.

Choose your own dates
Select your own date ranges to explore the collection:

Start year

End year

Show records

Finding

- A few participants didn't notice the 'Choose your own dates' search. Only one participant used it.

Recommendation

- The 'Choose your own dates' is more relevant when users want to narrow down results *after* getting an overview of the collection. Remove the date search from the homepage.

Results page

Home

Medieval (0974 - 1485)

William the Conqueror's Domesday survey aimed to put every inch of his new kingdom on paper. But Anglo-Saxon and Medieval England can also be found in the Magna Carta and other treaties, charters, letters and financial records that all combine to give us a picture of government and life in the Anglo-Saxon and Medieval periods.

At a glance

- 133,432 records exist in this era.
- With the filters selected, 6,672 of these records are displayed.
- All records displayed are available for download.
- All 6,672 records are available to access for free at our Kew site, or by purchasing a copy.
- Most of the records created in this period did not survive to the modern day.

Filters

Featured records are set to display first. Records without an image have been hidden.

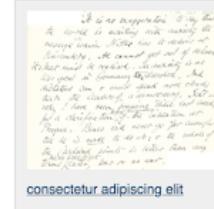
Show filters



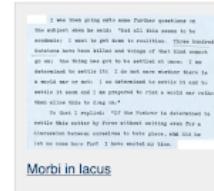
Caxton's printed indulgence by John, abbot of Abingdon, to Henry Lanley, and Katherine his wife, 1476.



Roll of receipts from the Jews, Rich 13 membranes, Northampton Donum



consecutetur adipisci p[ro]p[ri]etate elit



Morbi in lacus



Agreement by the competitors to receive judgment as to their claims from Edward I. Norham.



Confirmation in frank almoин, addressed to Walter, bishop of Rochester, by Thomas, archbishop of Canterbury, to the canons of Holy Trinity, London, of the church of St. Mary, Bixle, the grantor's predecessors, with lands and tithes belonging thereto; with



Edmund son of Robert de Wassyngton to John son of Robert de Wassyngton, and Thomas de Burgh of Dalton; Grant, indented, concerning lands in Bolton-le-Sands (Bolton in Lonsdale by Lancaster); Lancs. Seal(s) described at item level



272
Magna Carta, 1291, 1292
Parchment, 1291, 1292
Archives, 1291, 1292

of late times especially.
The cause of the fact that this has been more plain & differences between us or a difference of great importance in
earlier times was that we were not so much inclined to
recommend to themselves a policy with which we are not in
agreement.

From this time, I have become increasingly
conscious, as I have gone into society, of a difference of opinion between
us or a difference of great importance, which makes me
more inclined to act in accordance with which we are not in
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It seems to be the case that the country's interest is more likely

to be affected by action which is not in agreement

with the country's interest.

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Findings

- Those with a general interest in history highly valued being able to view and download primary sources without having to go to the archives.
- Most participants expected to see images for each 'item'. Those drawing on experiences of museums were puzzled that a record without an image might be included. Reactions included 'Pointless', 'Wouldn't exist', 'Inconvenient – I'd need to visit in Kew'.
- Those who had used archives before, thought they may only need to know the volume of offline records when they had a more specific search in mind - ie. WWII war diaries.
- Half of participants expected some way of browsing the collection beyond the initial time periods. This expectation was more acute once they went into the page and understood how many records could potentially be displayed and how much scrolling may be required. With the volume and a lack of historical context participants felt lost. Possible sub-categories mentioned were historical events, people, places, type of document or another category scheme that represented whatever was within the archive.
 - Half of participants expected to see information about the type or categories of content in the 'At a glance' box
 - Some suggested that the filters could include categories.
- Most participants expected records to be organised chronologically with a few also considering alphabetically.
- While most participants really liked the thumbnail images, a couple found there were too many.

Recommendations

- Only include digitised records for the explorer and describe the explorer in terms of the digitised content, eg. 1,500,000 digitised items.
- Alongside digitised content communicate the volume of non-digitised content at more refined stages of exploration, and providing a route to those records outside of the explorer. This route could be digital or in person.
- At the sub-category level communicate the volume of records available offline within the category and provide information on how users can access these records either online or in person.
- Include a categorisation scheme within each of the time period result pages. Conduct further research into what these categories could be. Categories mentioned by participants included by time or event, and by type of document.
- Order results sets chronologically.
- Consider adding more space within the image results so these are less overwhelming to users.

Results page – At a glance box

The screenshot shows a web page for the 'Medieval (0974 - 1485)' results. At the top left is a 'Home' link. Below it is the title 'Medieval (0974 - 1485)'. A paragraph of text follows, stating: 'William the Conqueror's Domesday survey aimed to put every inch of his new kingdom on paper. But Anglo-Saxon and Medieval England can also be found in the Magna Carta and other treaties, charters, letters and financial records that all combine to give us a picture of government and life in the Anglo-Saxon and Medieval periods.' Below this is a grey box containing the heading 'At a glance' and a bulleted list of six items.

At a glance

- 133,432 records exist in this era.
- With the filters selected, 6,672 of these records are displayed.
- All records displayed are available for download.
- All 6,672 records are available to access for free at our Kew site, or by purchasing a copy.
- Most of the records created in this period did not survive to the modern day.

Findings

- Many participants glanced over the information in At a glance:
 - The different numbers were overwhelming and confusing.
 - The first bullet could be interpreted as the records exist but may not be accessible.
 - A few participants didn't understand that the Kew site was the in-person archive
 - Participants didn't understand that only 5% of the archive was viewable online. Once participants were told this they expected to see this as a disclaimer on the homepage. This would help frame their expectation of what is available online.
- The volume of records helped participants make a value judgement as to whether it was worth their time exploring this section of the archive/website. This may be overlooked in At a Glance, and also means users have to click into the section to read it.
- Half of participants expected to read more about the time period within the results page, with one specifically expecting to find the information in At a Glance.

Recommendations

- Make the at a glance information more accessible and easier to digest:
 - Remove all of the bullets and simply provide the total available to view online. This could just say 'Total: #number#'
 - Move the information on the number of digitised records to the homepage. Perhaps this figure could be dynamic as more content is digitised? E.g. View and download the digitised archive. 1,500,000 documents. Currently only 5% of the archive can be viewed online. The remaining 95% is available to view in person at the archives in Kew.
- Move the volume of records to the time boxes on the homepage to help users work out how much information is available and how much time it might take them to view what's there.
- Include copy about the time period on the results page towards the top of the page.

Results page – Filters

The screenshot shows the 'At a glance' section of a results page. It contains a bulleted list of statistics:

- 133,432 records exist in this era.
- With the filters selected, 6,672 of these records are displayed.
- All records displayed are available for download.
- All 6,672 records are available to access for free at our Kew site, or by purchasing a copy.
- Most of the records created in this period did not survive to the modern day.

Below this is a 'Filters' section with a note that featured records are set to display first and a 'Show filters' button.

The screenshot shows the 'Refine your results' section. It includes a 'Refine by year' dropdown set from 0974 to 1485, a 'Visual options' section with checked boxes for 'Show featured records first' and 'Hide records without an image', and a 'Refine results' button.

Findings

- Participants commented that they hadn't set any filters –
 - they didn't expect these,
 - They didn't expect them to be pre-selected.
 - They didn't understand them
 - When explained to them didn't find them useful
 - If they noticed the figures in At a Glance, could only guess as to why some records were hidden.
- Some participants didn't notice the 'Show filters' button
- Even when it was pointed out to them, most participants did not use the 'Show filters' button
- Most participants expected to find a way of narrowing down results behind the Show filters button: by time and category and possibly with a search box.
- The only participant to use the filters, inputted a date range beyond the time period.
- One participant expected the 'Refine results' button to lead to further filters – it was not recognised as a 'Submit' button.

Recommendations

- Do away with the image and featured record filters by limiting the explorer to digitised records and improving the titles of digitised records so all are well described. Supplement this by providing a way to access non-digitised content via an alternative pathway whether digital or in person. If possible,

- Reducing the text within At a Glance, and to the left of the filters will help the filter stand out more. Additionally, consider left aligning the filter as users tend to notice content on the left-hand side.
- To make it easier to interact with the filters, consider exposing the filtering functionality on the page itself.
- Provide filtering by category, whether this be by document type, historical event or another yet-to-be-determined categorisation scheme.
- Conduct further research to work out whether the date selector is easy enough to use.
- If keeping a filter button, instead of ‘Refine results’ consider labelling the button ‘Submit’ or ‘Go’.

Results page – Record thumbnail



[1 item extracted from CO 1/1. An oath of allegiance \[to the English Crown\], signed by Walloons emigrating to Virginia in the sixteenth century.](#)



[Parchments and pamphlets](#)

Findings

- Most participants liked the thumbnail images. These facilitated serendipitous and joyful discovery.
- Participants couldn't make sense of some of the records:
 - Some thumbnail images were unclear meaning participants didn't know what they were looking at, for example, the image above left, or the seals pictured within the Medieval time.
 - Most of the participants found some of the titles difficult to understand. For example in the image above left, a participant didn't know what either CO 1/1 or a Walloon was and she felt ignorant and stupid.
 - The titles were too long leading to participants scanning through them and stopping at key events and people
- Half of participants expected the title at the top of the image, possibly in bold and not underlined.
- Some titles were so broad that participants expected to find a new narrower sub-set of results behind the image thumbnail. Half of participants thought thumbnails like Figure x were categories.

Recommendations

- Help users understand what they are looking at:
 - For example where many wax seals are shown consider including an explanation of their use during the era alongside the results set. For example,

a category could include seals along with a short description of seals. Having sub-categories may also provide users with some context as to what they are viewing.

- Spell out acronyms in titles or provide a glossary.
- Use brief titles that accurately describe the record or possibly hide titles and show results that have been tagged with categories derived from the title e.g. Walloon, Virginia, 16th century.
- Move the titles to the top of the image and format in bold without the underline.
- Provide more descriptive titles so these are not mistaken as categories.

Details page



Details Page (Under Construction)

This page is under construction. It would give you details about the record you clicked on.

[Go Back](#)

Findings

- Most participants expected a larger image on the details page, with one also expecting transcripts if the image was unclear.
- Half of participants expected links to related sites such as related government, and heritage sites and related content within the archive.
- All participants expected additional descriptive information to provide historical context. They mentioned:
 - What the record is
 - Why it was important – then and now
 - Who created the item
 - What the material was used for – its purpose
 - Key people related to the document and biographic information about them
 - Where the document came from
- One participant thought there could be expert commentary interpreting the record, however that wasn't essential, as she could interpret the document herself.

Recommendations

- Include a larger image in the details page, and make this prominent. For illegible images consider providing transcripts
- Link to related content from within TNA's collection as well as external sites that may be related and of interest

- On the details page provide contextual information, especially a description that explains what the record is, why it was important and where it came from.
- Consider further research into whether interpretive content could be included – this may enhance a record or it could clutter it.

Conclusion

Presenting the collection in eight consecutive time periods meant first-time and novice users could easily and quickly access TNA's online catalogue. The thumbnail record gallery provided opportunities for exploration, serendipitous discovery and moments of joy. The introduction of further categories will help users make more sense of the collection and results sets and will minimise the sense of being lost and overwhelmed.

Future research could be conducted to understand:

- Optimal category schemes, category hierarchies and corresponding interfaces for supporting sense-making and user exploration.
- When to communicate what's available offline in-person at Kew. One suggestion was at narrower result sets.
- What should be included on the details page, and whether interpretive content would enhance or clutter the page

For future research sessions we:

- Must use realistic text in our prototypes and try to minimise the use of lorem ipsum
- Screen participants earlier so we can recruit within two weeks
- Consider alternative recruitment approaches so new and diverse participants are included in our research.

I have enjoyed working on this prototype and look forward to working further on Project Beta.