

Beta Explorer 2.1
User testing report v1.0
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Executive summary

The previous study of Explorer 2.1 indicated that users would like to explore National Archives' records, however the prototype didn't support exploratory behaviour. Users couldn't make simple observations and comparisons about the collection, and many assumed it was like a museum or even Wikipedia. A new iteration of the prototype attempted to address some of these shortcomings. To test this, six participants, matching our 'new-user' profile, tested Explorer 2.2.

This round of testing demonstrated that:

- The updated descriptions under each time period box on the homepage meant participants were able to understand the size and breadth of the archives quickly and confidently.
- Participants were disappointed that their exploration was initially constrained by time. While the time periods were an accessible way into the archive, participants voiced a strong preference for initiating their exploration via a topic of their choosing, or possibly something topical or popular at this moment in time.
- The inclusion of a small subject-based taxonomy on the Postwar page did not support exploration. The taxonomy was too broad, too shallow (one level) and the labels were not clear and distinguishable to participants. Participants continued to feel overwhelmed and lost on the results page and given the task of finding Cold War topics stated they would have left the site.
- Again, participants found record titles hard to understand, vague, full of meaningless codes (catalogue numbers) and too long. Novice users perceived record titles as for archives staff, not public facing. As long as titles are difficult to read and interpret users will be unable to explore the archives and are likely to abandon the site.

I recommend devising alternative entry points for navigating the archives and testing these. Participants mentioned topical subjects such as news and events, subjects, geography, people and time.

Taxonomies will be fundamental to the Explorer and to supporting exploratory behaviour. We will require a user-friendly taxonomy. It would be very helpful to review this issue as a team to understand how this work is being planned. If this work is not planned my recommendation would be to take one part of the prototype, for example, medieval, and independently generate a taxonomy using a user-centred, evidence-based approach before re-integrating that taxonomy back into the prototype and resuming testing the Explorer.

Lastly to support exploratory behaviour we must address record titles. These must make sense to users. The current prototype demonstrated that users will leave the site if these remain as is. I strongly recommend we review this issue as a group to come up with solutions to this problem.

In addition to findings derived from the research, the current study highlighted opportunities to improve participant recruitment. To make this more efficient and inclusive I strongly recommend we:

- Make use of APIs and marketing automation so that those who opt in on our website are sent the screener within two to three days
- Brainstorm and investigate alternative recruitment sources in order to recruit minority and young (under 35) participants.
- Pay market rates for incentives (£50+/hour)

Approach

While there were limitations to the catalogue data we could test with, we decided to develop a new iteration of the Explorer drawing on findings and recommendations of the earlier version and using a catalogue data API originally developed during the alpha phase. Because of these limitations to the data, we decided this would be the last iteration developed before the new contractor started and before switching to the new and improved catalogue API.

The previous version of the Explorer had been tested in December 2020. Study participants indicated that they were likely to and wanted to explore the archives, however the prototype failed to support exploratory behaviour.

This study aimed to understand whether changes made to the prototype supported exploratory behaviour. Specifically we aimed to understand whether:

- the inclusion of volume figures, and bulleted time period descriptions on the homepage made would help users:
 - understand the volume and breadth of content available
 - make simple observations and comparisons about the collection as a whole
- the addition of categories and filters in search results pages would help users make sense of what they were looking at and reduce feelings of being lost and overwhelmed
- the Explorer could be focused exclusively on digitised content.

Six participants were recruited for a remote moderated usability study via an opt-in mechanism on The National Archives website. All six participants had been screened via an online survey. All six participants were selected for their limited use of the archives, and matched our ‘new user’ profile.

The study took place on 1–2 February. Each one-hour session was conducted using a desktop computer and Microsoft Teams and alongside the moderator, included a dedicated notetaker. Sessions started with a brief informal interview, followed by three tasks where participants were able to explore the archives and find three topics associated with the Cold War.

Due to the time and catalogue API constraints we were unable to focus on the Explorer entirely on digitised content, and this goal was abandoned from the study objectives. This could be explored and tested in future iterations.

Findings and Recommendations

Homepage



Medieval
974 - 1485
48,662 digitised records available

William the Conqueror's Domesday survey aimed to put every inch of his new kingdom on paper. Explore other aspects of Anglo-Saxon and Medieval England through the Magna Carta, and see the earliest records of immigration to England.



Early Modern
1485 - 1750
419,831 digitised records available

Uncover the Gunpowder Plot, see how the newspapers of the time reported the Great Fire of London, delve into Nell Gwynn's papers, and proofread Henry VIII's will.



Explore the digitised collection through time

We hold **24,218,562 items** in our archive, consisting of written documents like letters and diaries, as well as objects like weapons, textiles and maps.

These 24,218,562 items document periods of UK history like wars, revolutions, landmark rulings and life stories of iconic figures like Shakespeare, Queen Victoria and Gandhi.

8,998,554 of these items are digitised, which means they are available to view online and download.



Medieval
Categories include patent rolls, seals, letters.
974 - 1485
48,662 digitised records available

Collection highlights include:

- Great Domesday
- Magna Carta
- Caxton's printed indulgence



Early Modern
Categories include: newspapers, wills, diaries.
1485 - 1750
419,831 digitised records available

Collection highlights:

- Uncover the Gunpowder Plot
- See how the newspapers of the time reported the Great Fire of London
- Delve into Nell Gwynn's papers
- Proofread Henry VIII's will.

Figure 1 Two versions of the homepage. The first one included a block of text under each time period image. In the second version the text was formatted as bullet points.

Findings

- Overall, most participants had a sense of the size of the archives and its content.
- As found last time, participants were easily able to understand and navigate the homepage using the time period structure and labels. When asked to look for cold war topics, participants immediately went to the Postwar section.
- When asked, participants were easily and confidently able to compare the volume of records between time periods.
- Of the two homepage versions, participants were more likely to pay attention to and read the time period blurbs when these were chunked up as bulleted text.
- Some of the participants had specific interests and were not keen on navigating the archive via time. They wanted to explore by topic, whether this topic was a long-held interest, or something ephemeral such as a news item or an event.
- The copy at the top of the page could be improved:
 - Some participants struggled to read the precise volume of records.
 - A few participants were confused by the mention of weapons
 - A few participants weren't sure if the website included all the content or if the digitised content was on the site
- Participants commented that the blurbs underneath each homepage time period could be improved:
 - Some bullet points needed more context to make them clearer to someone who was unfamiliar with the thing: eg. Cold war reports, Caxton's printed indulgence.
 - The categories under Second World War were clearer and easier to understand. Postwar included "Education", and 'Total War'. Second World War included 'Photographs', 'Letters', and 'Maps'.
 - One participant expected Crimea under the Victorians, so there was some doubt as to whether the most important documents and events had been selected for the highlights.
 - One participant suggested that the categories mentioned within the highlights could actually be links.
- Feedback on the homepage images was mostly positive, however one participant noted that Victorians image, wasn't what he expected and it didn't seem to relate to the highlights listed below it.

Recommendations

- As these were easier to read, chunk any time period descriptions into short and descriptive bulleted text.
- Provide multiple entry points for the archives. Consider: time, geography, subject, as well as popular or trending content.
- Improve the copy at the top of the homepage:
 - To make the numbers easier to read round them and write them out. Instead of 24,218,562, write 24 million records.
 - So as not to confuse or mislead users, clarify that the archive holds documentation about weapons, or weapons that compliment records.
 - Clarify what is actually available online: mention that 24 million records are *physically* held in the archives and 9 million are available to view on *this website*.
- Refine the time period descriptions:
 - If possible add more context to the homepage bullet points, providing more explanation of key documents. If there isn't space, provide an explanation on the next page.
 - Use clear and specific labels for the categories. Document types were easier to understand than broad categories.
 - Check that the most important records and events are the ones mentioned in the collection highlights on the homepage
 - Consider linking categories from within the time period descriptions on the homepage to a related list of refined results within the time period.
- Review the homepage time period images and ensure they are representative of the time period and relate to the content described within the categories and collection highlights text.

Results page

THE
NATIONAL
ARCHIVES

[Home](#)

Postwar (1945-2020)

Collection highlights include:

- Cold War reports
- Windrush papers
- How the Moon landings were documented by the UK Government

Refine by subcategory

Diplomacy and foreign relations Education Empire, commonwealth and de-colonisation Finance and the economy Industry, agriculture and commerce

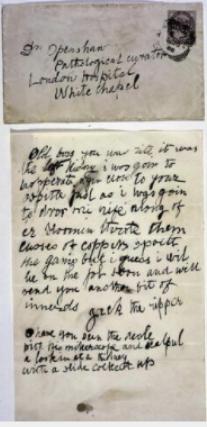
Infrastructure, energy and natural resources Law, liberty and society Limited war, conflict and the politics of defence Total war Welfare, social security and self-help

2,784,114 digitised records available

Letter written by person claiming to be 'Jack the Ripper' to Dr T H Openshaw of the London Hospital, Whitechapel, dated 29 October 1888.
The subject of the letter is the human kidney which was sent to G Lusk of the Whitechapel Vigilance Committee

1888 - 2001

[View more details](#)



The Air Defence of Great Britain: appendices and maps
1945 - 1946

[View more details](#)



No image available

Coronation of Elizabeth II Vol. IV: miscellaneous documents; minutes of Court of Claims; civil estimates; press cuttings; programmes; Orders for the processions; ceremonies and music;
1952 - 1953

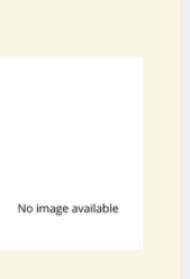
[View more details](#)



No image available

Home Secretary's views on dealing with producers of pornographic material
1963 - 1964

[View more details](#)



No image available

Ministry of Works: photographs of the unveiling of the statue of HM King George V 1947; lighting up of the Norwegian Christmas tree in Trafalgar Square, December 1947; unveiling of a memorial to President Franklin Delano Roosevelt by Mrs Eleanor Roosevelt
1947 - 1955

[View more details](#)



No image available

7 Items extracted from PREM 11/858. Examples of American-style comics in connection with proposed legislation to prevent the publication and sale of horror comics to children. With envelope addressed to 'The Hon Sir Winston Churchill'
1954 - 1955

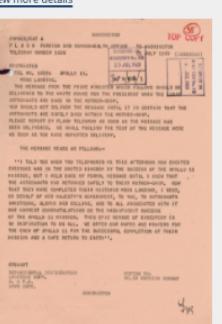
[View more details](#)



No image available

Moon landings, orbits and dust samples; Apollo 8, 9, 10, 11, 12 and Luna 15; UK messages and international reaction
1968 - 1969

[View more details](#)



No image available

The official Home Office cat
1929 - 1976

[View more details](#)



No image available

Employment of Jamaicans from the S.S. EMPIRE WINDRUSH
1947 - 1948

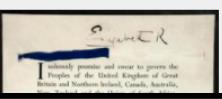
[View more details](#)



No image available

This document is in two parts: Part 1: Roll delivered on 31 May 1954 to Sir Francis Evershed, Master of the Rolls, to remain among the records in Chancery Part 2: Coronation Oath signed by Elizabeth II
1954 - 1954

[View more details](#)



No image available

Proceedings against Beate Uhse Ltd advertising and catalogue of sexual products
1973 - 1974

[View more details](#)



No image available

Various odd leaflets
1943 - 1945

[View more details](#)

Figure 2 Postwar results page

Findings

- Participants found the results organisation and completely random. They expected content to be organised by one or more of the following: time, topic, alphabet, or national importance
- It was difficult for participants to scan records to find cold war content.
 - Individual records took up a large vertical space within the viewport
 - The sticky navigation at the top of the page reduced the amount of vertical space available to view the records.
- A few participants didn't like the gutter spacing between the images: there was too much, or the spacing between rows and columns was uneven.
- There was no clear preference for records with or without images..

Recommendations

- At a minimum organise content by date – left to right, or by relevance with the most important documents at the top. Next to the total number of records explain how the content is sorted. For example: 100,000 total records | Sorted by year ascending. For more refined prototypes consider providing users with more than one way to sort results.
- The thumbnail results page tested in Explorer 2.1 was better received.
 - Consider moving the filters to the right or left hand side of the page so there is more space vertically.
 - So support scanning and reading, the record 'boxes' could be condensed:
 - remove the year
 - shorten the title
 - remove the second title at the bottom.
- Use the same amount of space between record rows and columns, and possibly an amount somewhere between the two.
- Conduct further research to understand whether non-digitised content should be included.

Results page – categories and filters

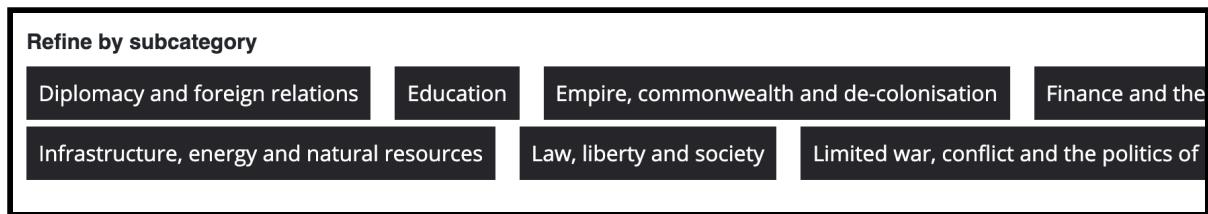


Figure 3 Subcategory filters as appeared on the Postwar results page

Findings

- Participants noticed the filters and were able to easily narrow down the results set using the filters.
- A few participants expressed a preference for a different type of filter - eg. smaller links, a drop-down menu, or something that could 'collapse' away.
- Even though Cold War was mentioned on the homepage and in the collection highlights at the top of the Postwar page, it was impossible for participants to find Cold War material or related topics from the results page:
 - Participants couldn't understand or distinguish between the category labels.
What was the difference between a limited war and a total war?
 - Participants weren't sure which category might contain the Cold War. Would it be under 'Total war', 'Limited war', or maybe 'Diplomacy and foreign relations'
 - The categories were very broad, and when selected resulted in huge result-sets with millions of records. Participants felt overwhelmed and a few mentioned they would have left the site.
- In the Postwar page participants expected different sub-categories. They mentioned: decades, key events, geography, popular subjects, or document types.
- A few participants expected a short description that would accompany and explain a category label.
- Participants expected the records within the time periods would be from the same time period. Where they did not, as in the case of the Jack the Ripper record from 1888 in the Postwar page, they thought they would lose faith and trust in the archives.

Recommendations

- Consider testing alternative, smaller patterns for the filters.
- Generate a user-centred taxonomy for the archive. Test this independently to any Explorer prototype. Once a working taxonomy has been devised incorporate this into a future prototype and resume iterative testing. To test the explorer as a concept, a user-centred taxonomy could be limited to a portion of the archive, e.g. the medieval time period.
- Consider providing a short description to appear alongside filtered content to provide users with further context.
- To maintain the archives reputation and authority, the results within a time period or category must be relevant. Only include results that fall within the time period and ensure that any record metadata that is shown within the results-set aligns with the

time period. A 1888 Jack the Ripper letter should appear under the Victorian time period.

Results page – record thumbnail

Change of Foreign Minister
1969 - 1969
[View more details](#)

No image available

7 Items extracted from PREM 11/858.
Examples of American-style comics in connection with proposed legislation to prevent the publication and sale of horror comics to children. With envelope addressed to 'The Hon Sir Winston Churchill'
1954 - 1955
[View more details](#)



Figure 4 Example records from the Postwar section.

Findings

- When asked to look for Cold War topics, participants were unable to work out if records pertained to the topic.
 - There was a sense that record descriptions were designed for employees of the archive - not members of the public.
 - Some titles were too vague so participants didn't understand what they were: E.g. 'Change of foreign minister', 'Relations with Muscat'
 - Some were so long so they didn't read them
 - Some contained references to catalogue numbers which meant nothing to them. E.g. 7 Items extracted from PREM 11/858.

Recommendations

- Users will be unable to explore the archives unless we provide clear, concise and descriptive record titles. As long as titles are hard to understand and contain catalogue references, the archives will be perceived as for internal and expert use.

Details page

THE	
NATIONAL	
ARCHIVES	

Details Page (Under Construction)

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

[Go Back](#)

Figure 5 Placeholder page for the details page

Findings

- Participants wanted to view the document, but also read it, read about it, and generally explore it.
- There was an interest in hearing related speeches and seeing links to external sites.
- When asked about related content they may expect to find within a record page, participants mentioned similar records related to
 - A person, e.g. Jack the Ripper
 - The time period
 - What has happened since then
 - The subject, e.g. Crime and punishment, the death penalty
 - An award
 - The law or government involvement
 - Royal involvement

Recommendations

- The details page must include the option to view and download the document, if digitised. Further research should reveal what additional content must be included

Recruitment

Findings

- Unlike the previous iteration, we were able to recruit participants via the opt-in mechanism on the website.
 - Participants had been screened meaning our invitation to participate reached participant 1-2 weeks before the test dates
 - We got rid of the requirement to sign-up to and download Microsoft Teams.
 - I cut back the invitation email text so as not to discourage potential participants
- Tens of thousands of people that opted-in on the website, however these people were not contacted for months, meaning less than 2,000 people filled in the screener.
- There are few potential minority participants or those under 34 within the list of screened participants.
- A third of our list, or 50+ people were emailed in order to recruit 6 participants.

Recommendations

- Reduce the drop-off in research sign-ups by automating the recruitment process. Integrate research sign-ups with an e-mail service provider and automatically send out the screener survey within 48 hours of an opt-in.
- So that our research is inclusive, hold a brainstorming session to generate ideas for alternative methods of recruitment. Plan new methods and recruit young and minority participants, ideally in time for the next round of testing.
- So that people are more likely to agree to participate and so we don't use up our list of participants I strongly recommend paying market rates for research. For a one hour moderated session this is currently £50-60. This will also support our stated goal of making the archive more inclusive, by not relying on participants who are time and money rich. Additionally consider:
 - enhancing the screener to ask participants when they would be available for research: the days of the week, morning, afternoon, and evening
 - Offering the option to participate in online testing
 - Re-focusing the sign-up as a research panel or group, allowing us to re-contact potential participants, every six months or thereabouts.

Prototype

Finding

- The blank space for the image confused participants and was a distraction
- This round of testing aimed to test a version of the explorer with digitised content, however we were unable to build a prototype that included digitised content alongside filters, within two weeks.

Recommendations

- For future tests do not use blank space as a placeholder for imagery. As with the previous version, placeholder content, whether images or text, only confuses participants and distorts research findings.
- Future iterations must include a data source that allows us to prototype the explorer so that non-digitised content can be hidden and results can be filtered.

Conclusion

This was a challenging study due to the limitations imposed by the intersection of the alpha catalogue API and the desire to include filtering on the Postwar results page.

Ultimately the simple taxonomy included on the Postwar page was ineffective in reducing participants' disorientation and feelings of being overwhelmed. This study indicated that a user-friendly taxonomy and record titles are likely to be required if we want to study and encourage exploratory behaviour.

While the homepage better supported sensemaking of the collection as a whole, participants didn't want to start their exploration by being constrained to a particular time period. This opens up the opportunity to prototype different versions of the Explorer with alternative or multiple entry points, such as by subject or by topical events.

I look forward to working on future iterations of the Explorer and discussing how we might incorporate user-friendly record titles and taxonomies. I have enjoyed working with Ash and Piriya on this iteration and study and look forward to working as a team again.