

THE	
NATIONAL	
ARCHIVES	

Topics navigation + Explorer 3.1  
User Testing Report v1.0  
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# Executive summary

Two pieces of research were combined for this study. Following the previous testing of the Collection Explorer we iterated on the design so the most pressing issues and those most easily fixed could be addressed prior to the launch of Private Beta.

For version 3.1 we:

- addressed the lack of colour by adding a blue header background
- added a strapline to the top right of the homepage header to make it clearer that the site includes historical government documents
- streamlined the homepage navigation to 'Explore by topics' or 'Explore by time'
- added 'Highlights' to 'Explore topic' text to help users understand the site is a selection of the archive.

While the header added more colour, only a few users described the site as inviting or enticing. Adding the strapline appears to have improved user's understanding of the site proposition, but some users still didn't understand. The idea that the site was a selection of the archive was clearer, but again some users didn't grasp this. As with previous studies there was some indication that users might want to explore beyond highlights and browse more or all of the collection. The information at the top was scrolled past without users taking it in and the two navigation blocks for topics and time fit perfectly within the viewport, meaning users didn't scroll further. Lastly, the more streamlined navigation was much easier for users to digest. As with previous research we saw that users wanted to start exploring via a topic rather than a time period.

To find a more engaging visual design consider testing several designs to find one that is the most engaging. For private Beta consider a different visual treatment for the top of the site so that the logo and strapline do not get lost next to the page header. So that users are more likely to read and see the strapline consider placing it on the left hand side of the page and so that users understand the site proposition consider mentioning 'Highlights' in the page header. Increase the font size of the blurb under the header so this is more likely to be read. Consider a different visual treatment around the main content area so users are aware there is additional content beyond below and above the fold. To make this site more easy to navigate I recommend starting with topics and using time as secondary navigation to filter topic results. Analytics data captured in Private Beta could be used to further assess whether users prefer to start with a topic or time period.

The second part of this research examined potential navigation for the explorer. Earlier card sort studies indicated users thought of archive records in terms of topics and document types. Labels and categories generated using earlier card sorts were tested using a TreeJack study. The aim was to see how well user-generated labels and categories worked, and identify possible locations for topics that were not clearly grouped in those studies.

As per a previous tree test, we found that users thought records could fall into multiple topics. For example, when asked to find information related to The Pope's visits to the UK, users considered 'Diplomacy', 'Religion' and 'Travel and transport'. To mitigate against this, and design a working site structure I suggest conducting further studies using the subject

taxonomy itself and hybrid card sorts. This type of study could incorporate the categories that worked well, while also discovering new categories for the areas of the catalogue that haven't been thoroughly tested.

# Approach

This research examined the effectiveness of changes to the [Collection Explorer prototype](#) and tested a revised site structure incorporating labels and structures generated by users in earlier card sort studies.

Three moderated tests were conducted using Microsoft Teams and desktop computers. Participants viewed the revised Collection Explorer homepage and then tried the user-generated topics structure via the Optimal workshop platform. Participants were screened to meet non-user and first-time user profiles.

Unmoderated tests were conducted via two separate studies. To gain feedback on the prototype's visual design, and examine whether users understood what the site offered, a short survey was run using Optimal Workshop. 50 participants were recruited with 9 in 10 meeting the non-user profile. To supplement the moderated sessions, 18 users were recruited for an unmoderated version of the Optimal Workshop study. These participants were recruited via the Optimal Workshop in-app custom recruitment. Data was discarded for 5 of these participants as it was poor quality.

Observations and notes from the moderated sessions were combined with data from the unmoderated tests. Detailed findings and recommendations are described below.

# Homepage

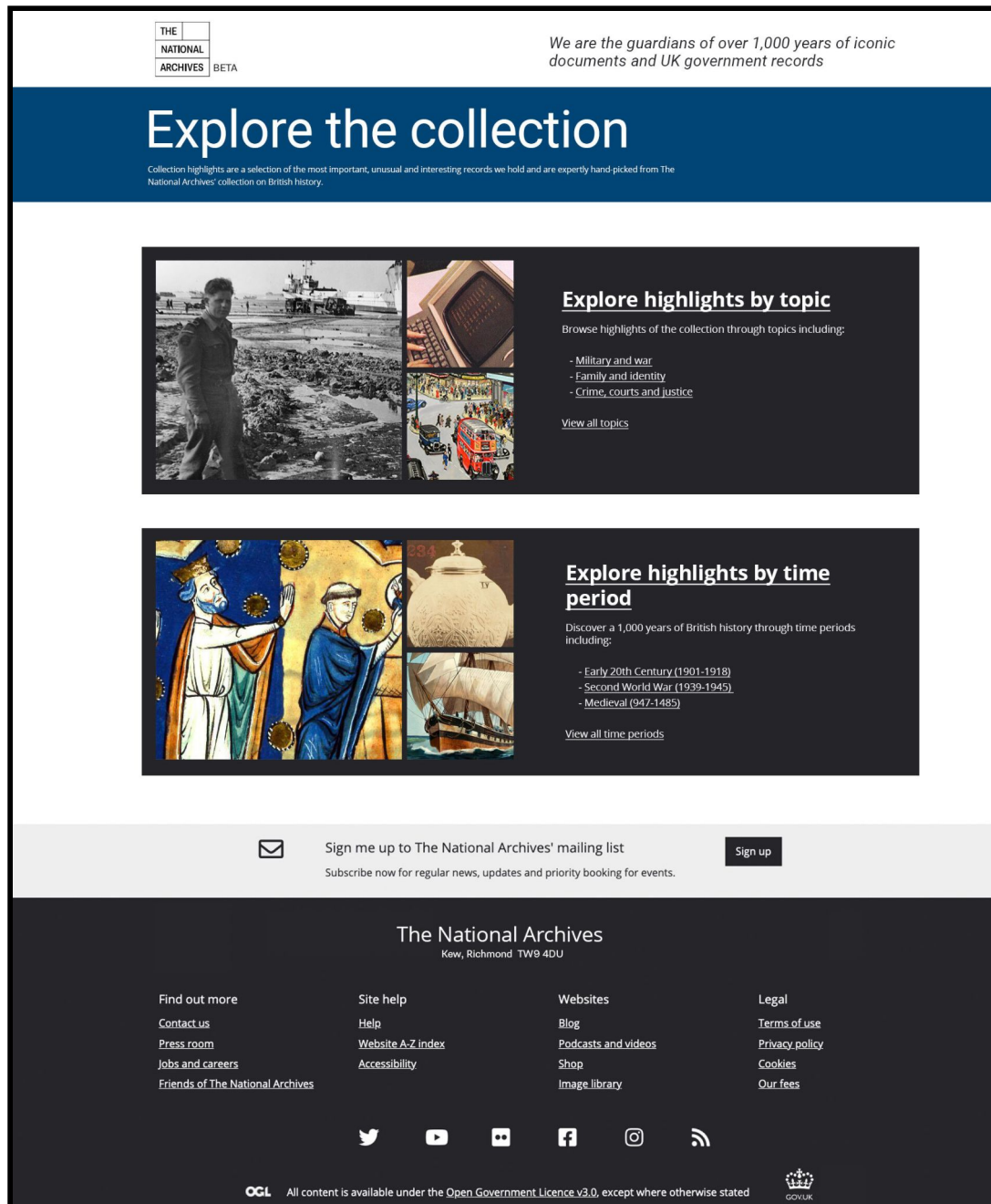


Figure 1: Collection Explorer 3.1. This study included only the homepage

## Findings

- A third of survey participants understood the site was about historical documents or records and a further third understood they were on The National Archives' site.
- About 4 out of 10 survey participants didn't know what the site offered or thought it was a museum or gallery, and two of the three moderated participants also didn't know what the site was about.

- About half of participants realised the site was a selection of the archive and half didn't; participants didn't read the blurb under the header and it was perceived as an underline.
- Again, there was some reservation about the online proposition. Users mentioned they might want to know about records not included in the site and would contact the archives if needed.
- In moderated sessions every participant wanted to start their journey via the topics.
- The images to the left of the topics didn't match the topics listed to the right.
- In moderated sessions, one user thought the archive logo 'got lost' and one user scrolled past the logo and did not realise they were on the archive's site.
- Feedback on the design indicated it was clear and professional – more colourful than Wikipedia, but overall few users described it as attractive, inviting or colourful.

## Recommendations

- To make it clearer that the site offers UK government records for Private Beta, consider moving the strapline to the left where it is more likely to be read. For iterations beyond Private Beta, consider surfacing records and record data on this page so users understand what the archive holds.
- To make it clearer that the site offers a selection consider mentioning this in the page header using a larger font-size.
- For private Beta link to the main site so users can navigate the full archive. Analytics data could examine whether more users are clicking into contact us on Private Beta. For future iterations test the full user journey to ensure users can navigate the archive and find what they are looking for.
- Focus the Collection Explorer around topics and use time as a filter. This will reduce the depth of the Explorer structure by one level, and keep the number of top-level navigation options manageable.
- Throughout the site ensure that all imagery used is representative of the copy associated with it.
- To find a design that is both clear, professional and engaging and inviting I recommend creating several variations of the visual design and seeking feedback from users to find one that is best received.

# Collection explorer navigation

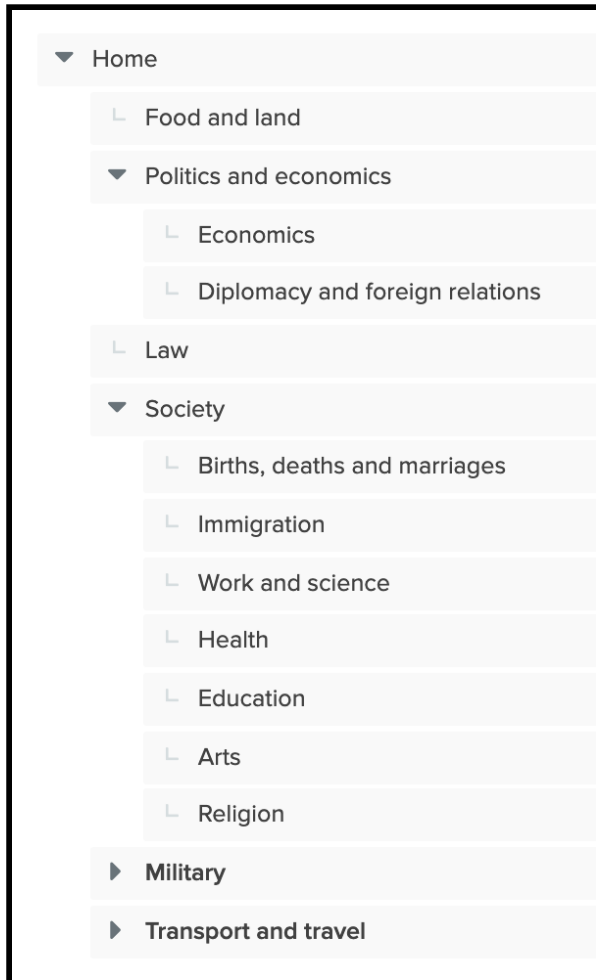


Figure 2: Top level of the Topics and Themes navigation

The complete navigation can be viewed in tab 4.0 of [this spreadsheet](#). Tab 5.0 includes the proposed changes. An interactive tree of version 4.0 can be [explored here](#).

## Findings

- As with previous studies, users considered multiple topics in relation to each task.
- Welfare records were not found.
- Food and land was perceived as to do with agriculture.
- There was perceived overlap with 'Politics and economics' and 'Law':
  - Politics was about laws that were passed
  - Law was associated with changes, application and the justice system
- Under 'Politics and Economics':
  - users expected electoral reform
  - there was no category for domestic politics
- Under 'Society':
  - 'Immigration' didn't convey emmigration or naturalisation

- 'Religion' could go under 'Society'
- 'Arts' on its own doesn't give users confidence that it also includes 'sport'
- Most users went to 'Society' for records to do with science, but didn't pick 'Work and science'

## Recommendations

- Because users consider multiple topics for the same task or record, I recommend carrying out hybrid card sorts with the subjects themselves and finding out where users would expect to find subjects instead. Any unclear labels could be tested in tiny card sorts with records. For the website, tag records with more than one topic - if appropriate, to support findability. E.g. records about The Pope could be found alongside 'Religion' or 'Diplomacy'.
- Design a new task to test where welfare records should go, or test with a hybrid card sort.
- Generate alternative labels for 'Food and land'. Possibly, Agriculture and planning.
- Consider testing whether Law should be grouped with 'Politics and economy' or relabelled as 'Justice'
- Place Electoral reform under 'Politics and economics' and find a label for the category. 'British politics' was one suggestion.
- Under 'Society':
  - Relabel 'Immigration' as 'Migration' and test whether it performs better
  - Place 'Religion' under 'Society'
  - To make it clear that 'Art' includes sport – relabel this as 'Arts and sport'
  - Consider a hybrid or closed card sort to find the best location for the subjects currently under 'Work and science'



# Conclusion

The changes to the prototype meant more users understood what the site offered, however some still did not. Further changes could be made to try and make it clearer to users what the site offers. Different variations of the visual design could be tested to try and find one that users find more engaging.

While the tree testing gave some indication as to what categories worked well and where some categories could be placed, asking users to find records, again proved to be difficult – records could be associated with multiple topics. To get around this, future studies could examine how users categorise the subjects themselves, possibly using a hybrid card sort to build on the categories that have emerged through previous studies.

I have enjoyed working on Project Etna and working with the catalogue. Thank you to everyone in the project team (and beyond) for helping me with all the different phases of the research. I wish everyone all the best as the project goes forward.

# Appendix 1 Test materials and results

## Navigation

[Topic and themes structure](#)

## Tree test results

[Moderated test](#)

[Unmoderated test](#)

Password: TNA2020\*

## Design survey

[Results](#)