Agile Assessment for Aquifer
American Social History Online
http://www.dlfaquifer.org
Why Agile?

- Experimental – small development team, distributed environment
- Facilitate feedback for the iterative development process of the portal
- Allow users to drive the development of the portal
- Focus on the user's goals and not the attributes of the software
- Large verbal component - frequent conversations for more effective communication.
Methodology

- August 29 – November 2 (8 weeks)
- Questions for participants drafted by the SWG
- Group conference call on August 27th, 2007, including system architect and developer
- 3 additional individual phone interviews
- Questions regarding search and find, identify, obtain, manage and use, and user workflow
- Began assessment with:
  - Draft of portal based on site at UM
  - Common Business Functions by SWG
Target Audience

- 8 participants
  - 1 faculty
  - 3 graduate students
  - 4 librarians
- Recruited by members of the Services Working group
- Librarians as user proxies
Initial Brainstorming call

- Question users about the workflow of their research
- Developers present to hear what participants say
- Developers able to prioritize next tasks immediately after the call
“A site that seems to increase my chances of coming across things is good---there might be things there that lead me in a new direction.”

- Need to see size and scale of collection to determine how much time to spend searching and browsing -
  - Implementation of collection registry and “browse collections” feature.
- Need ability to limit a search (once you have results) in many ways
  - Implementation of additional ways to limit after initial search
  - Implementation of date range limiting
- Importance of ability to browse
  - Implementation of subject clouds for browsing – still working on faceting for additional browsing
- Importance of visual aids, especially for undergraduate students
  - Implementation of timeline view for results
- Need for information for both about and creation of an object
  - Feedback to MWG
Browsing and Searching

- Dates - How best to interpret? Groupings by era or groupings by decade?
- Topic - How important is the ability to browse and winnow by topic vs. applying keyword limits?
- Subject - Persons and Organizations, Geographic Coverage, Temporal Coverage, Genre
- Genre - is browsing and winnowing by genre necessary if there is a choice for Type of Resource?
- Previews - what type of previews preferred for things that aren't images?
“Wouldn't have known I would have wanted a breakdown by decades until I saw the breakdown. I see that there's a flurry of activity for this decade.”

- **Dates – Took the feedback from participants to SWG and MWG**
  - Use of CDL date normalization utility based on TEMPER recommendations
  - Eras definitely out
- **Previews**
  - Implementation of Thumbgrabber to provide more thumbnails of non-image items
  - Implementation of both “list” and “grid” views for results
- **Genre**
  - Implementation of genre as option for limiting
Sorting and Narrowing, Full Record Results, Social Networking and Tagging

- Sorting and Narrowing
- Full Record Results
- Social Networking and Tagging
- Information Storage Preferences (local or remote)
- Sharing search strategies
“My colleagues and I use Zotero all the time ....Refworks is in a world of trouble.”

- Limiting Search Results
  - Feedback to Chick that users want to “drill down” in the search (continue to narrow using different limiters)
- Full Record Results
  - Normalization of collection names
  - Feedback to MWG of the importance of access condition and locator for using items in publications
- Social Networking and Tagging
  - Implementation of StumbleIt for full records
- Sorting and Narrowing
  - Implementation of more options to limit
  - Feedback to SWG and MWG to begin planning on implementation of faceting browsing
Zotero continued, Topical browsing continued...

- Controlled vocabulary for browsing?
- Zotero – Firefox limitation
- Zotero add to appeal of AASHO site?
- Your feedback influence design?
“I like using my own terms and narrowing the search myself”

- Controlled vocabulary for browsing?
  - SWG and MWG will help with development of faceting browsing
- Your feedback influence design?
  - Buy in from participants
What Was Learned

- Agile Assessment drove the prioritization of tasks
- Multiple phone interviews and email updates resulted in buy in for participants
- Brainstorming session for distributed group not as effective as personal interviews
- Next time......
  - Mix personal interviews with on-site observations, brief surveys, etc.
  - Invite more graduate students to participate
  - Shorter, more frequent interviews if possible
SWG currently planning for 2008 formal assessment of:

- AASHO portal
- Zotero implementation
- Sakai implementation
- Meta-search implementation
- Google implementation