**Report on first round of testing for full-text search**

**Method**

The first round of testing for full-text search on beta.biodiversitylibrary.org was conducted with 3 NMNH staff from February 1 – 6, 2018. All testing was conducted in person in the Smithsonian Library training rooms with the beta site projected on a large monitor and one observer taking notes. Individual reports for each of the sessions were produced to provide background information on the individuals testing and to document the searches conducted and their comments throughout the process. Testing for all three sessions involved a combination of free searching and scripted searching.

In addition to the three individual testing reports, notes on preliminary testing and feedback from two members of the BHL Tech Team, Susan Lynch and Carolyn Sheffield, are also distributed with this report.

**Summary of Results**

All told, the general consensus from the three testers was that the new search options will be very useful and will add a lot of value to accessing content in BHL. Searching inside the book was greatly appreciated and, despite some suggestions for improvement of facets, their presence was acknowledged as very helpful for filtering searches.

This was a small group with similar background and feedback was largely in alignment across all three, though there were some points of divergence. The most frequently mentioned and/or most heavily emphasized issues are outlined below and assigned to implementation stages (i.e., part of initial launch or part of future refinements). Assignments to implementation stages are based on a combination of potential impact for the users and potential effort required. Impact is inferred by the observer based on the results of testing. All potential effort values are currently based on assumptions and require further discussion and potentially research. Input from the BHL Tech Team will be required to determine **actual** anticipatedeffort values and to inform any changes to prioritization as outlined below.

**Issues for consideration for Initial Launch of Full Text Search**

* Ability to use back button to return to previous page appears to be broken during search inside and potentially at other points (High value / Low effort (or at least necessary effort))
* Unanimous request for the date facet to be presented chronologically (High value / Low effort)
* Other facets, users were more interested in alphabetical or at least consistent display (i.e., Type should always display in same order). (Med value / Low effort)
* The author facet in particular might be a more involved reworking; interest in not only alphabetical, expand to see all; also, for zoology titles it was noted that almost all authors were organizations; they were looking for individuals in the author facet. I don’t know if article-level authors are included there but should be. That’s where I see this getting potentially more involved. (High value / High effort)
* For results (prior to filtering) – all testers indicated they would like results sorted chronologically by date published. It was confusing to see volume numbers out of order. If default is relevancy ranked, we should add option to sort by publication date. (High value / Med effort)

**Issues for consideration for the second round of implementation:**

* 2 of 3 requested highlighting without prompting. All were able to manage without it. We should continue considering this as an update for a future release. (Med value / High effort – this one is already decided based on previous discussions of Tech Team)
* Folks would like to hit enter from the Search Inside box. This is a nice to have but they all figured it out on their own so likely is acceptable for now. (Med value / Med effort)
* Most didn’t feel they would use the Related Terms (Search Instead for) but that might be an area where input from a larger, more diverse group of testers will be informative. (Low value/ low effort)
* In terms of facets, this group had no interest who contributed the item or who the publisher was. This may be more important to contributing libraries or publishers but Contributor browses might be more useful for them (Low value / Low effort)
* One user asked if we’d have the ability to translate the search and filtering options; this is on our radar as a separate work package for the site. (Separate work package)
* Everyone liked the subject facet though it appeared our subject metadata is strongest for botany-related materials so there often weren’t the subjects of interest for the zoology folks. Full text can only go so far to address if the metadata is not available. One possible point that might help would be if Subject facet could be expanded to display all; (Med value / med-high effort)

**Future Testing**

Currently testing with BHL librarians (i.e., Staff and Members who have indicated interest in doing so) is scheduled for early April.

Additional testing with BHL users in February and/or March will be beneficial in pursuing further refinements before releasing to BHL internal stakeholders for testing. Additional expert and general users (at least 3 of each) will be recruited for further testing. The next round of tests will include more advanced searching, DOI searching, and prompting users to find specific items known to be in BHL without guidance on how to find said items (see also Internal Feedback 2 for some preliminary results on these kinds of searches). Many thanks to Susan Lynch for suggestions on enriching test scenarios and selecting user groups.

The Tech Team will discuss the best way to schedule those tests around changes being made to the system.