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

**Method**

The second round of testing for full-text search on beta.biodiversitylibrary.org was conducted with 3 frequent BHL users from March 2-6, 2018. This round of testing followed the completion of a few iterative changes that were informed by the first round of testing.

Two of the test sessions were completed over Skype one of the test sessions 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. As in the first round of testing, all three of these sessions involved a combination of free searching and scripted searching. The only change was the inclusion of a scripted search for an identifier (a DOI).

**Summary of Results**

All told, there was a lot of enthusiasm about the value the new features will add to each of their regular uses of BHL. Ability to search across all of the texts, limit searches using facets, and searching inside were all greatly appreciated. There are several positive reactions to different features that can be found in the notes from each session.

This document will focus on the suggestions for improvement including a couple of comments in line with some of the feedback received on the first round of testing. The most frequently mentioned and/or most heavily emphasized issues are outlined below. For ease of comparison, they are presented alongside similar comments from the first round when applicable.

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

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| **First Round** | **Second Round** |
|  | All 3 remarked that the site seemed to be significantly slower than normal. It is worth mentioning that, although changes have been made, the speed may or may not be that much different than it was in the first round. All of the testers in the first round noted they are used to using a much slower system in their daily work (EMu on SI network). |
| 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) | Author facets – at some point in each of the sessions, the users all indicated that they saw an author(s) they would expect to see in the facet list. 2 of 3 commented that they would prefer this list to be alphabetical, or to have the option to toggle between alphabetical and relevance sorting. |
| 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) | 2 of 3 commented on multiple volumes from the same title being presented in the list of results in no discernable order. Both indicated they would prefer these be returned chronoglogically or sequentially. One emphasized that if there are 20 volumes from the same title and the title is not of interest, this is a lot of noise to scroll through. |
| 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) | None from this group mentioned highlighting |
| 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) | Although this group noted that several of ‘Search Instead‘ terms for any given search might not be relevant or helpful, two of them could think of times when they’d consult these suggestions. For example, if they may have misspelled a word (especially for terms in a language other than their native) or for searching by author name and then seeing a term that has been used to name a species after that author |
|  | 1 user commented that the site may appear very “busy” now (aesthetically), at least for new users. That said, the same user felt they would make use of all of the new options that made the site appear busy and wouldn’t want us to take anything away. Just a comment on aesthetics, not functionality and prefers the functionality over aesthetics. |

**Other comments:**

* First Round: 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)
* Second Round: One user asked if we would be adding back in the ability for users to add comments (Separate work package: annotations)
* Second user: One user noted that from the results sets, they are generally inclined to click on the hyperlinked title and would like that to take them directly to the volume they’re trying to look at. Their eyes and hand don’t naturally gravitate to the ‘View Book’ or ‘View Article’ button and they’re often going back from the title to the search results to click on the right thing. It wouldn’t be that big of deal and might get used to it but it is more frustrating since the site is slower.

**Future Testing**

Testing with BHL librarians (i.e., Staff and Members who have indicated interest in doing so) is scheduled for early April. NYBG has already volunteered one of their staff to participate. Carolyn will put out a call for other volunteers (3-5 more).