<https://beta.biodiversitylibrary.org/>

Persona: Collection management in Fishes with former experience in Mammals and Marine Mammals and Invertebrate Zoology. In addition to organization of collections, responsible for enhancing collection database and serves as a web coordinator and webmaster for various resources. Familiar with BHL and acknowledged may use it differently from some of the curators.

1. Start by searching for something that you would normally look for in BHL.
	1. Are the results expected?

**Basic search: ‘Introgression’**

* 1. Narrow the results using the facets. Was this easy or hard?

**Used date facet**

Initially noted that results as expected

Then looked back at facet options and realized that dates weren’t presented in chronological order. Found this very confusing as had missed the preferred range that would have filtered by in initial attempt. Was less interested in the number of matches per option than finding the date ranges in chronological order.

Similarly for **facet: Type**, requested to please always list in the same order, alphabetically.

Next looked at **Author facet**. Confirmed that it is not nearly as useful to know the number of matches but rather to see an alphabetical list or at least have the chance to expand and view all and sort alphabetically.

Also noted that none of the names she would expect to see there, the experts on the topic including some of the first to publish on it, did not appear in the facet list.

We discussed that the Authors appear to be taken from the title level records. Is it possible to also count the article level authors here?

**Subject facet** – noted that it always shifts for the options there and commented that didn’t like this. Would expect to see other subjects to choose from. I explained that those are hand-populated by librarians at different institutions across the globe so they’re hard-coded and won’t be updated with the full text search features. She understood but remained somewhat disappointed in our subject metadata.

1. Try another search, perhaps for something you’ve looked for in BHL but couldn’t find in the past. Any luck?

**Basic search: ‘procurrent rays’** (no quotes)

Skimmed results, looked relevant. Noted that her assessment was based largely on knowledge of the body of literature and recognizing the author names displayed in the results.

Asked about the length of the results displayed, said that was fine. Definitely need dates, want to see the volume and issue and edition information. Publication information can be important, especially for older volumes. Author important, too, for determining relevancy. (Side note: Best to spell everything out, no abbreviations please (this is a cataloging not full text issue)). Everything shown is potentially useful.

**Basic search: ‘takifugu’**

Quickly skimmed and noted that was puzzled by the results. We did not expand the +Details at this point but come back to that later in the testing

1. Try one more search on your own (author, taxon, subject, or publication, preferably one that hasn’t been tried in the previous two searches).
	1. Select one of the results
	2. Search inside the book for the same term. Are the results as expected? Why or why not?

**Basic search: ‘diodon’**

Noted that these are the kinds of results would expect to see

**Search inside** Fishery Bulletin <https://beta.biodiversitylibrary.org/page/4744984#page/559/mode/1up>

for: diodon – results as expected. Noted that this search is not particularly useful because the word occurs so many times; might be more useful in a larger monograph.

Search inside same volume for: swim bladder – this is as expected; remarked this was potentially useful.

Went back to results and selected Memoirs of Museum Victoria to search inside (<https://beta.biodiversitylibrary.org/item/192568#page/3/mode/1up)>

**Search inside: AMS** – looking for the museum code numbers. This is useful.

Note: We come back to find the references on the actual pages as part of scripted searching.

1. Do a basic search for “Transactions of the Linnean Society of London”
	1. Limit your results to ‘Serials’ and author ‘Linnean Society of London’
	2. Are the results as expected?

Scrolled through carefully. Asked how the results were organized? Not chronologically. Why not? Noted that sometimes these are published as As and Bs but it’s confusing the way it’s presented. Date published is the most important factor for sorting.

* 1. What’s the earliest volume you can find?

Scrolled up and down a few times. 1791 volume 1 probably.

* 1. Was that easy or hard?

Not sure. It appears to be listed chronologically after date filter applied but would want assurance that is the case. Because what if there were still 300 results with that filter? Wouldn’t want to look through all those to find the earliest.

1. Do a basic search for "linnean", and then view the results for the first alternate ("Search instead for") term.
	1. What is the first item found? Would you consider this to be an expected result for this search term?

Results are expected but the related terms are not necessarily what would expect to see there. Where is Linneaus as a suggested term? Some of these are completely off.

Tried another search for Linneaus and looked at **Search instead**’s – these are closer to what would be expectd.

* 1. Was this easy or hard?  Explain.
1. Search for " "temple of flora" "(use quotes) . Examine the details of the first result.
	1. Why do think this first result was included?

Because it’s in the title

* 1. Examine the second result. Why do you think this one was included?

Because it’s in the title

What is all that Related/Analytical stuff? (related titles)

* 1. Was this easy or hard?  Explain.
1. ~~Do a basic search for "strix var\*".  Examine the details of the first result.~~
	1. ~~What are some of the words that matched the wildcard term ("var\*")?~~
	2. ~~Is this what you expected?~~
2. ~~Do an advanced search for the scientific name "strix varia".~~
	1. ~~How many were found?~~
	2. ~~Do the first few results look like what you would expect? Why or why not?~~
	3. ~~Was this easy or hard?  Explain.~~
3. ~~Do a basic search for "barred AND owl".  Note the number of publications, authors, and subjects returned.  Then do a basic search for "barred OR owl".  Note the number of publications, authors, and subjects returned.~~
	1. ~~Which search returned more results?~~
	2. ~~Is this what you expected?~~
4. Navigate to https://beta.biodiversitylibrary.org/item/122307 and search within that book for " "great britain" " (use quotes).  Navigate to the second page returned by the search.
	1. On what line of text does "great britain" appear?

Pointed to where it appeared

* 1. Was this easy or hard?  Explain.

Easy enough. But would nice to highlight. I think Google books does that? It’s helpful because otherwise the way I’m looking for it starting at the top of the page and skimming down. It would save me some time.

1. ~~Search for the book " "10.5962/bhl.title.98662" " (you’ll need to use quotes here, too).  Navigate to the book viewer and search within it for "galapagos tortoise"~~
	1. ~~How many pages were found?~~
	2. ~~Was this easy or hard?  Explain. Any other comments?~~
2. Do an advanced search for the author "darw\*".
	1. Is "Darwin, Charles," in the results?

Yes

* 1. Was this easy or hard?  Explain.

How are these sorted? It’s not alphabetical? That’s a no go. Need alphabetical for this. If not the default, the lack of sort options (ie by author name) is highly frustrating.

1. Search for "origin of species"
	1. What is the first title on the second page of search results.

Vol. 2. Why is Vol. 1 the third one in this list, and not the first? Why does Vol. 2 appear before Vol. 1?

* 1. Was this easy or hard?  Explain.

Would want first volume of first edition available presented first. Chronological is the best sort here.

Would be nice if could also sort by Author but in reality, if the author name was presented on the side, would prefer to filter over sort for that.

Doesn’t matter at all to me who the holding institution is or who the publisher is.

Also, I’ve noticed when the same volume is contributed by different contributors, different copies of the same volume, the enter the title or other information slightly differently from one another. It’s a little weird and confusing. I know that’s not really related here just a general comment.

1. Now that you have a sense of what’s possible, let’s try a few more searches of your own. Perform your own basic searches for publications, authors, subjects, and names (at least 3 of each).
	1. Were you able to find what you searched for?

**Basic search: Pontinus**

**Date facet: 1951-1975**

Yielded expected publications.

**Search instead** – not at all helpful. Would expect taxonomic synonyms or parents/children, or common names, or frequent authors like Eschmeyer.

Looking at **Author facets**, would expect Eschmeyer to be here, too, but not displaying. These are mostly the organizations. Also the number of items authored by someone isn’t always the most important indicator of relevance. Someone might only author 1 paper but it might be of interest.

As another example,

**Basic search: Scorpionfishes**

Eschmeyer appears in By field in seven of results on first page but is not listed in authors

Should be looking at article level authors for this filter to be useful.

Some of the Authors shown in the Author facet only have 6 matches, so why isn’t Eschmeyer shown before those if has more?

**Basic Search: Tyler**

**Type: ‘Published Materials’ and**

**Date: 1951-1975**

See the first few results have Tyler listed as in author field. Doesn’t appear in author facet. That seems weird.

1. ~~Perform your own advanced searches for publications, authors, subjects, and names (at least 3 of each).~~
	1. ~~Were you able to find what you searched for?~~
2. ~~Perform your own searches within a book (at least 3).~~
	1. ~~Were you able to find what you searched for?~~

General Questions:

1. Were you satisfied with the overall experience / performance of the site?  Explain.

Yes, this will be very helpful

Speed is fine. Used to much slower systems so maybe not the best person to gauge

1. Were you satisfied with the overall search navigation?  Explain.

Overall yes. The filters definitely need to be sorted chronologically or alphabetically but it’s very helpful to have them. And search inside is great.

For the most part, got used to the navigation.

Back button is broken.

The ‘search instead’ is useless to me. I’m usually coming in knowing something about the topic and body of literature; I’ll know the vocabulary, some of the authors. Suggested unrelated terms with similar spellings is not helpful to subject experts.

1. Any other feedback or suggestions on the search experience?

Do you all use Google Translate at all? No

Even for things like the filters (facets)?

**~~Additional questions if time permits~~**

1. ~~Do a basic Search for "thomas huxley".~~
	1. ~~How many authors were found?~~
	2. ~~Was this easy or hard?  Explain.~~
2. ~~Start a new basic search for "essays huxley". Limit the search to author="Huxley, Thomas Henry, Prof." and subject="Challenger Expedition".~~
	1. ~~How many publications are there?~~
	2. ~~Was this easy or hard?  Explain.~~
3. ~~Do a basic Search for "natural history essays waterton".~~
	1. ~~How many results are there?~~
	2. ~~Using the facets, narrow the results to just ‘Monographs’. Now how many results do you see?~~
	3. ~~Was this easy or hard?  Explain.~~