**Update following 9 April 2018 Tech Call**

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

**Method**

The third round of testing for full-text search on beta.biodiversitylibrary.org was conducted with 2 Secretariat staff and 7 BHL Staff the weeks of March 26th and April 2nd, respectively. This round of testing followed the completion of a few iterative changes that were informed by the second round of testing.

Sessions were completed over Skype or Vidyo with 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 and second round of testing, all three of these sessions involved a combination of free searching and scripted searching.

**Summary of Results**

All told, the full text functionality was well-received and several participants mentioned that they are pleased to see it moving along and look forward to the launch. Several positive comments about different features are documented in the individual reports.

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 and second 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. There were several new suggestions that did not come up in previous testing.

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

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| --- | --- | --- | --- | --- |
| **First Round** | **Second Round** | **Third Round** | **Comments** | **Initial Launch?** |
|  |  | **Details**  4 users would like to click on a snippet and go directly to that page in BHL | Revisit | No |
|  |  | **Details**  1 tester recommended something similar to EBSCO, with partial summary displayed. Maybe already have Details partially expanded with option to view more | No | No |
|  |  | **Details**  1 tester requested Page Numbers be displayed in the Details snippets, rather than just text.  Same participant requested Show More option in Details so can see more than just first 5. | Revisit  Revisit – would be easy enough, but how valuable? | No |
|  |  | **Details**  1 user indicated when using an AND search, they would expect to see both of their search terms bolded in the Details snippets. | Revisit to look into in future; may not be feasible/ reasonable | No |
|  |  | **Details**  2 participants recommended using a word other than Details. Noted wouldn’t have clicked on it if it weren’t pointed out. Not clear what to expect there.  Suggestion: “Search Terms in Context” | Revisit if can come up with better term | No |
|  |  | **Navigation**  2 suggested for pages of results, having a way to navigate to next page of results at top of page as well would be helpful. | Yes | Yes |
|  |  | **Navigation**  One tester suggested that when the next page of results loads, if it could open above the tabs (Pub, Auth, etc) it would give visual confirmation that loading at top of page.  Observed other testers scrolling up to check they were at the top | Might be as simple as an anchor? Or potentially more complicated. Revisit | No |
|  |  | **Navigation**  Option to vary number of results per page? Would like to view 20 – 50 sometimes | Revisit | No |
|  |  | **Navigation**  1 suggested that it would be helpful to make current search editable | Yes, in future | No |
|  |  | **Navigation**  One user indicated that they are inclined to click on the hyperlinked title more so than the View Book button. They would like the title to take them to the item in question. |  | Yes |
|  |  | **Results display**  Don’t think Holding Institution needs to be shown here.  Publication info – maybe  Definitely need Title, Author, Volume, Year | Revisit | No |
|  |  | **Search Inside**  1 user requested to have cursor already active when open the Search Inside | Yes | Yes |
|  |  | **Search Inside**  1 user requested having search term pre-loaded in the ‘Search Inside’ box. Otherwise will have to remember what searched on or go back to copy and paste it | Revisit; this would be nice to have | No |
|  |  | **Facets**  Dates – 1 user clicked on a date range to narrow their search, hit the back button and that range remained checked even though results page now showing unfiltered results; kept that checked and added filter for Archival Material (14) 🡪 0 results. When user hits back button, can we uncheck the last facets they used since they are no longer applied? | Joel to try to reproduce and troubleshoot with Mike | Yes ; might be a bug |
|  |  | **Facets**  Dates – 1 user stated it would be useful to be able to select more than 1 range at a time. | Revisit (if comes up again). Could be fairly complext | No |
|  |  | **Adv Title searches**  Two testers (Sec) noted that for advanced title searches, it seems like results with all search terms in the title should be prioritized. For an example, an advanced title search for Wash Acad Sci yield the match for that Variant Title until more than halfway down the second page of results.  Similarly, Advanced Search Title = Desert Arizona Grasses, the one that seems like it would be the best match is third in the list. | Will try boosting title variants | Yes |
|  |  | **Adv Title Searches**  On tester indicated that for Advanced Searches, when searching in the Title field they would prefer to see results displayed at the title level. Could then go to Title Record if want to see other volumes. How would this affect searching for Article/Segment titles? | Table this |  |
|  |  | **Adv Title Searches**  When conducting an Advanced Search for Title = Nature, Volume = 88, the first match was relevant. However, when Details were expanded, the tester noted that the ‘Other’ for the Associated Title was puzzling. Is there a way to suppress that? Or was that entered as part of the metadata by a cataloger? | In metadata | No |
|  |  | **Adv title Searches**  one tester indicated they would like to have ‘material’ as a drop-down option. | No | No |
|  |  | **Adv Search**  1 tester indicated wanting to be able to see somewhere on Advanced search options that could search within the text | Revisit in future | No |
|  |  | **Adv Title searches**  One user indicated they might be interested in searching or filtering inside a single title. | Revisit in future | No |
|  |  | **Advanced Author search**,  4 testers would expect to see author names sorted alphabetically by last name.  Second best would be to toggle between alphabetical sort and highest number of matches. (x1) | Revisit in future | No |
|  |  | **Advanced Author search**  1 participant requested showing all names found on a single page. Would prefer to scroll than click to another page. | Revisit. This would have implications for how subject results are shown, etc | No |
|  |  | **Adv Search Scientific Names** –  1 participant requested being able to have the four tabs (Publication, Author, Subjects, Sci Names) with results opening in scientific name tab for those searches. This would give the option to tab over to Publications and use facets to narrow results. | No | No |
|  |  | **Adv Search Scientific Name**  1 user requested seeing article title in scientific name bibliography. Perhaps as an expansion of the Title column, under that title. | No; this is separate from full text | No |
|  |  | **Sorting**  Might be handy to sort results alphabetically by title (looking at a basic search result set) | Revisit | No |
|  |  | **Proximity over frequency**  2 users would expect to see proximity ranked higher than frequency for results based on text (in Basic search; similar feedback was received for Advanced Title Searches). | Revisit in the future | No |
|  |  | **Browsing**  1 user indicated they would like to be able to use facets when browsing as well |  | No |
|  |  | **Navigation**  For Try Our New Interface – can we make that bigger and bolder than Try Our Old Interface to encourage people to try it? | Nice to have | No |
|  |  | **Tips & Tricks / Help / FAQ banner or other indicator**  4 testers emphasized the importance of adding text or some indication that full text is now possible, including but not limited to a Search Tips page | Yes, not really a tech development/programming thing tho |  |
|  | 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). | At least 2 noted speed was good  At least 1 noted that it feels a bit slow  Most didn’t comment on it |  |  |
| 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. | **Author facet** – 2 indicated they would want these sorted alphabetically |  |  |
| 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 chronologically 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. | **Sorting**  5 testers indicated they would like to see results presented in chronological order or have the option to sort by date |  |  |
| 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 | 4 testers requested 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 | Most found these generally or somewhat useful and thought they might use them at some point. A couple noted that they would need to re-do their search with the alternate spelling or term but it might be better than not having the suggestion. |  |  |
|  | 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. |  |  |  |
|  |  | On tester suggested having contributors as a facet. |  | No |

**Other comments (some are and some are not related to full text implementation) :**

* Third Round: One user asked if we could filter on whether something is in the public domain
* Third Round: Two users were interested in offering a way to limit searches to only internal content (maybe a checkbox that would filter out External Content, should the user so choose)
* Third Round: One user asked if we could suppress Canadiana in the results
* Third Round: For Advanced Scientific Name searching, one user was interested in seeing which pages might have illustrations, i.e., seeing page type in addition to page number.
* Third Round: One user indicated they’d really like to see the scientific names in hierarchical context, similar to in Zoo Record (part of WoS)
* Third Round: One user commented they would really like to search based on a particular date but noted that it would be their lowest priority of the suggestions they made.
* Third Round: One user noted that they never noticed the EOL logos in scientific name box before and found them too subtle.
* Third Round: One user noted that when viewing a Title record in BHL, if you want to go back to your search results, you have to hit Back twice.
* 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.

Questions

* Where does Material come from? Appears to be from Title record. Is that correct?
* Does Advanced Search, using the Title field, also look in related titles? Anywhere else?
* Will widget boxes display images in production? (Assuming so)
* One user noted that on the production site there are 11 names retrieved for adv sci name search = Hamamelis virginiana while on beta there are 10. Is that because beta does not include 100% of content?
* For basic search for **“Abtheilung der nicht schwimmenden zu benutzen“** (in quotes), why is the third result retrieved? The quotes should keep the terms adjacent. When search inside (<https://beta.biodiversitylibrary.org/item/91644#page/1/mode/1up> ), the phrase doesn’t come up there either.
* Is ‘or’ (lowercase) a stopword?