BACKGROUND
Usability testing and a user survey were conducted to better understand user perceptions and to aid decision-making about Interlibrary Loan (ILL) and Document Delivery (DD) cost and user experience.

Why? The problem
- Strong, differing opinions about service interface and user experience
- Decisions made on anecdotal evidence from users, i.e., non-users and reasons missing from the picture

What? The solution
An IRB-approved study to gather evidence using multiple methods:
- Usability Study (reported here)
- Survey (reported here)
- Institutional Inquiry
- Technical Analysis

When?
- October 2010 – August 2011

Who?
- Cross-functional task force from administration, interlibrary loan, public services, and information technology
- Chaired by a senior manager

METHODS

Usability Study
10 usability test sessions were conducted with participants recruited from the UNC Health Affairs schools. Participants were asked to think aloud while completing a series of (known item) search tasks. Post-task and post-test interviews and questionnaires were administered to measure user satisfaction and perceptions.

Survey
An IRB-approved online survey was administered via Qualtrics for one month using questions from the literature augmented with service-specific questions. 70 of 87 responses were analyzed for self-reported usage patterns, awareness of service availability and service costs, performance, expectations and service satisfaction.

LESSONS LEARNED
This evidence-based approach really works!
- helped produce consensus and create buy-in
- moved group from anecdotal opinions/perceptions to objective fact
- having effort led by an “outsider” had (mostly) advantages
- multi-modal approach built the big picture
- confirmed strengths as well as identified areas needing improvement
- may learn more than you thought you would

IRB process could be improved and shortened
- would have liked help at the beginning

Communication is key
- solicited feedback from affected staff throughout process
- noticed info gaps (e., a page for each subgroup, none for on-campus affiliates)
- identified and addressed areas of confusion and uncertainty
- told users what the service does!

FINDINGS & RECOMMENDATIONS (SELECTED)
- Consider eliminating fees
  - Not all users could accurately identify the cost of an ILL request. 2 out of 5 participants correctly estimated article requests to be free (when it cost $5).
  - Participants were generally confident that they knew the cost of their request (even when they were wrong).
- Service performance is an area of excellence.
  - Satisfaction with ILL and DD services is high: 42/45 (93%) of ILL were “satisfied” or very “satisfied,” 26/30 (87%) of DD users “satisfied” or “very satisfied”
  - Opening and reading an article was easy. 38/41 (93%) of respondents rated “very easy” or “somewhat easy.” 1/41 rated “somewhat difficult.”
- Turnaround time expectations matched actual performance.
- Increase awareness of campus delivery
  - More users know about ILL than DD. (93% vs. 77%)
- ILL/DD is one way to get a resource not available from the library
  - 32% of respondents would purchase a book through Amazon or a publisher, not the library.
- Improve article search and annotate resource lists when possible.
  - Locating an article or book from a citation was difficult. 2 participants repeatedly unsuccessfully searched by article title in the catalog and web site search.
  - Providing resource name alone was insufficient to some users. Two participants commented that they didn’t have enough information to know which resource to use.
- Add direct access to ILL/DD from search results pages.
  - “No results found” pages for Electronic Journal, Article and site search don’t contain links to ILL/DD. Links from Catalog and Article Linker are not very prominent.
- Remove requirement for user to choose affiliation
  - Choose Your Affiliation was confusing and/or annoying to users who just wanted their book/article. 3 participants volunteered comments.
- Allow Onyen access to ILL system
  - Participants could successfully register, reset password and log in to ILL.
  - Many users expected to use Onyen to log in. Participants were not specifically asked about Onyen, yet two mentioned this expectation. Two participants knew to log in with a separate ILL account from experience.
  - 9 survey respondents mentioned setting up an account/log in as a dissatisfaction.
- Improve ILL request experience to better match user expectations
  - Provide immediate confirmation of request success.
  - Propopulate book and article request forms from the catalog.
  - Add estimates for turnaround time. Participants were unsure how long a request would take to be completed – especially the difference between a rush and a regular request as there is a cost distinction.
  - Shorten the “Not Wanted By” default date. 5 participants thought that the default date was too early and not a year from today. 3 participants changed the month or day (not the year) and commented that they expected to receive the item within weeks or months.

NEXT STEPS
- Repeat usability testing to see if changes were effective (April – May 2012)
- Assess impact of dropping fee on service demand, staffing (ongoing)
- Change to LDAP authentication to allow Onyen login (May 2012)
- Merge patron databases to eliminate need to choose affiliation once registered (May 2012)
- Repeat the user survey to get further feedback (under consideration)