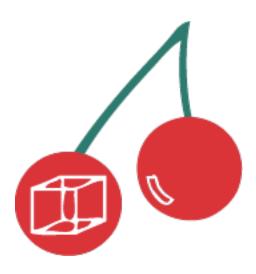# ArchivesSpace Public User Interface Enhancement Project
# PUI Recommendations Report

Submitted by:

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Monday, December 21, 2015

# The Cherry Hill Company

December 21, 2015

Dear Brad Westbrook,

Please find enclosed an overview of our recommendations for the ArchivesSpace Public User Interface Enhancement Project.

All supporting materials can be found linked from the PUI Enhancement Project Working Group Wiki — https://archivesspace.atlassian.net/wiki/display/ADC/Public+Interface+Enhancement+Project — and on github — http://cherryhill.github.io/aspace_pui/index.html.

It has been a pleasure working with ArchivesSpace and the Working Group to prepare these recommendations. We are available to answer questions, and if changes need to be considered after initial implementation, we will be happy to assist.

 Sincerely,

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# The Cherry Hill Company

# Table of Contents

# The Cherry Hill Company

## Overview

This report outlines the results of a five month effort between the ArchivesSpace Public Interface Enhancement Project Working Group and The Cherry Hill Company to recommend specific improvements the public user experience of default ArchivesSpace installations.

This report references the following companion elements:

- Functional wireframes: http://cherryhill.github.io/aspace_pui/index.html
- A style guide: http://cherryhill.github.io/aspace_pui/design-elements/phase1_final/style_guide_final.jpg
- A visual guide for design elements: http://cherryhill.github.io/aspace_pui/design-elements/phase1_final/AS_DesignElements_final.jpg
- A list of recommended icons: http://cherryhill.github.io/aspace_pui/design-elements/phase1_final/icon_list_final.jpg
- Design comps of key page layouts: http://cherryhill.github.io/aspace_pui/index.html
- A recommended default glossary for ArchivesSpace terminology: https://archivesspace.atlassian.net/wiki/display/ADC/Glossary
- A list of UI elements that archivists should be able to easily customize: https://archivesspace.atlassian.net/wiki/display/ADC/Customizable+Interface+Elements

All of the PUI Working Group meetings, as well as the results of user tests done at the beginning of the project, are archived here: https://archivesspace.atlassian.net/wiki/display/ADC/Public+Interface+Enhancement+Project. The archives include access to video recordings of all meetings and user testing sessions.

## Process

### User Personas

We started this process by collecting user personas from the working group. The following personas came out of this process:

1. Academic researcher — professor: https://archivesspace.atlassian.net/wiki/display/ADC/Persona%3A+Academic+researcher+---+professor
2. Academic researcher — graduate student: https://archivesspace.atlassian.net/wiki/display/ADC/Persona%3A+Academic+researcher+---+graduate+student
3. Academic researcher — undergraduate student: https://archivesspace.atlassian.net/wiki/display/ADC/Persona%3A+Academic+researcher+---+undergraduate+student

# The Cherry Hill Company

4. Archivist: https://archivesspace.atlassian.net/wiki/display/ADC/Persona%3A +Archivist
5. Doing their job researcher (misc): https://archivesspace.atlassian.net/wiki/ display/ADC/Persona%3A+Doing+their+job+researcher
6. Hobbyist or personal interest: https://archivesspace.atlassian.net/wiki/display/ ADC/Persona%3A+Hobbyist+or+personal+interest
7. Librarian or curator: https://archivesspace.atlassian.net/wiki/display/ADC/ Persona%3A+Librarian+or+Curator
8. Search engine bot: https://archivesspace.atlassian.net/wiki/display/ADC/ Persona%3A+search+engine+bot

The personas, and what those individuals might want or do, guided decisions about what was most important in the public interface, and helped focus the user testing.

## User Testing

Based on the stories provided, we came up with test scenarios to find out how people have been using current ArchivesSpace. Our goals were to not only to identify the most important areas for improvement, but also to see how the users wanted to engage the tool. Overall observations from these user tests can be reviewed here: https://archivesspace.atlassian.net/wiki/display/ADC/Usability+Testing+General +Observations

## Working Group Meetings

Finally, our process was a collaborative one largely guided by the Working Group. We meet every two weeks, and presented ideas and asked questions of the working group. The wireframes, designs and recommendations that we are presenting are the result of all three of these efforts, as well as extensive input and feedback from the Working Group.

# Browse-ability and Find-ability

Ultimately, the working group had two goals for user interaction with ArchivesSpace:

1. Make it easy for those who know what they want to get right to it;
2. Enable those who have time and are curious to look around and follow subjects that might interest them.

Both of these needs came up in the user personas, as well, but in user testing we found that neither was easy with the current ArchivesSpace UI.

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From our research, browse-ability and find-ability are the most important enhancements to make to the public user interface. These improvements will have the most significant overall impact on the user experience.

## Search Functionality

During user testing we found two challenges that make it hard for users to get directly to an object they knew they wanted:

1. Most users were confused by the simple search. They tended to want advanced search functionality right away, and didn't really see how to get it (even though advanced search was readily available).
2. Since many objects inherit data from the objects above them, often things like title searches would result in long lists of objects all named exactly the same, with no easy way to quickly see what the difference was between each clickable title. Users had difficulty knowing what to click on next because they had no sense of context.

Our wireframes address these issues with the following recommendations:

**Start with advanced search**
- Rather than offering simple search at all, simply make the advanced search the always-present search tool.
- Readily provide AND/OR/NOT operators to the user, as well, so that they are confident which operators are in use when doing their search.

**Improve abilities to refine results without leaving results**
- Provide a "refine results" toggle on the search results page where users can add new search parameters and remove previous ones.
- In the facets, include controls so that users can refine the dates of their results.

**Improve context of items in search results**
- Include basic information about a record in the results so that the user has an idea of what they are looking at before they click. This includes:
  - An icon, word and color indicator of whether the record is a collection, a person, a subject, or a record within a collection;
  - The item's breadcrumbs displayed directly in the search results;
  - The item's abstract displayed directly in the search results;
  - If the item is a collection, items the collection contains that match the search parameters.

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**Search layout**
It has become clear that different users prefer to see search results in different ways. Some prefer flat results that give them access to everything, while others prefer hierarchy. For this reason, we recommend offering the user the ability to see flat results (all results), or to focus in on collections. Likewise, probably more for Phase II, we recommend replicating the functionality from Archon that allows users to see a grid of records associated with digital items.

## Browsing

The user personas revealed a desire for ArchivesSpace instances to be places where curious individuals can explore and organically discover material that is interesting to them. In the current incarnation of ArchiveSpace, this is very difficult to do. You have to start off knowing what you want to search for, and then you are presented with lists of content that are difficult to contextualize.

Our recommendations for making the overall browse-ability of ArchivesSpace more accessible include:

**Move the facets from the left sidebar to the right sidebar**
In the user tests, users were inclined to ignore the left sidebar. They tended to dismiss its contents as overall archive navigation rather than something specifically focused on the current task at hand. This particular recommendation merits A/B testing, as it may or may solve this problem to move it to the right sidebar. Our expectation, however, is that users will consider content in the right sidebar as more closely related to the work they are currently doing. Either way, the design comps also increase the visual prominence of this content.

**Make it easier for the user to explore subjects or agents**
Some users might come to the archives interested in a specific topic or person. Enabling them to follow searches through to landing pages for agents and subjects, which then guides the user into relevant collections, will help with this.

**Encourage general curiosity by featuring what it contains**
We recommend whetting users' appetites for what the archives contains through two methods:
- Present the user with featured collections — on the archives home page — of which the archive might be particularly proud, or which might have specific relevance at a certain point in time;
- Give the user a big picture overview of what the archive contains, using large icons and impressive numbers (see the "what's in the archive/repository" sections on the wireframes).

While the featured collections could be automated in some way, we suggest that this be handled manually. Archivists would need to add a summary and branding image

# The Cherry Hill Company

specifically designed to display on the home page of the archives. This ensures that the instance presents a more professional feel.

# Collection and Record Display

## Language

In general, ArchivesSpace faces a similar challenge to all professional resources: it has a very specific language associated with it that the general public doesn't typically understand. We have renamed elements throughout the entire interface. This effort was done in collaboration with the Working Group, and includes recommendations as simple as changing terms such as "Agents" to "People and Organizations" or "Components" to "Contents and Arrangement." The full glossary of recommended language changes can be found here: [https://archivesspace.atlassian.net/wiki/display/ADC/Glossary](https://archivesspace.atlassian.net/wiki/display/ADC/Glossary)

## Context

One of the biggest challenges user testing revealed with the current ArchivesSpace user interface is that users didn't have a sense of where they were in the repository when looking at an individual record. This challenge is addressed through a number of adjustments, some of which were recommended through JIRA ticket requests, and others through extensive conversations with Working Group members.

**Breadcrumbs**
The first one is simple: move the breadcrumbs to a place where users will actually see them. During user tests, users simply did not see the breadcrumbs in their current location, even though they are in the standard location for breadcrumbs. In order to combat this, we moved the breadcrumbs below the title, as well as below the record identifiers. We also labeled them "Context" and added Series and Subseries identifiers to them. The goal is to have the user quickly identify the breadcrumb as related to the item they are currently looking at, and as a cheat sheet helping them back up to whatever might be above that item in the hierarchy.

**Contents and Arrangement in right sidebar**
In our wireframes, we moved the element called "Components" from the bottom and into the right sidebar, where it has been renamed "Contents and Arrangement." We also included the search feature for components directly above the list of components.

The way that contents and arrangements display in the right sidebar was the result of collaboration with the Working Group.
  * The icons and color coding help the user identify what items actually are, and where they fit in the hierarchy.

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- Collection records will display all items, three levels of hierarchy deep in the right sidebar. (We understand that this may need to change after A/B testing, but would like to recommend that you start with this idea).
- Deeper level records (not collections) display with the contents and arrangements narrowed in on the specific item (or its ancestor, because this only shows three levels deep) that the user is looking at. It will show three items above and three items below, and the specific item that is being viewed will be highlighted. The user can click on the "see more" links to see more records above and below the list of records already showing.

In addition to this display, however, there are three additional displays showing the contextual information about the record, as well as the other records in relation to it. These three displays are accessed via tabs at the top of the record. See the wireframes and design comps for how this works and looks.

**Intellectual/hierarchical display tab**
This display matches the contents and arrangement display, but shows *everything*. It does not stop at three levels deep in the hierarchy. Everything is organized within its Series and Subseries identifiers.

**Numerical inventory tab**
This display simply lists all contents by box and folder number, in order. This display is likely only intended for the archivist.

**Detailed contents tab**
This display is meant to behave similarly to the single scroll on the NYPL archives: http://archives.nypl.org/mss/18400#detailed. It also provides a quick link to the downloadable/printable PDF of the entire archive.

## Layout

The layout of the records in the current user interface provided a fair amount of confusion. When users land on a record, they are first presented with long lists of agent and/or subject links, and the user doesn't realize that they can scroll down for details such as scope and contents, physical location and more.

Our wireframes present an entirely new layout that does the following:
- Moves the scope and contents up to the top;
- Also moves all DACS required elements for the initial display up to the top;
- Places everything else, including agent links, subjects, and more detailed administrative information, into accordion-style tabs under the initial display, enabling the user to see what kind of information is present and expand only what they wish to see;
- Includes revision statements under administrative information for those who are curious;

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- Includes a representation of the digital item for any record that links to a digital item, along with the link (we understand that this may not be Phase I feasible);
- Organizes all notes that are not moved up to the initial display into the Additional Description accordion and orders them according to the DACS recommendation.

## Inheritance

In addition to the need for context on records, one of the challenges with the current ArchivesSpace user interface is that deeper records appear fairly spare in content. The user has a hard time knowing what the record actually contains, even though that information may be abundant higher up in its ancestral chain. Our recommendation is that the record automatically display content from its most recent ancestor if no record-specific content exists for a given field. This would include the title, dates, physical location, and scope and contents fields. If no information for a field exists anywhere higher in the chain, and none is provided on the specific record, then the field will simply  not display.

# Utilities

Our recommendation includes four utilities: bookmarks, citation, request access, and print.

## Bookmarks

This utility is meant to help various user personas with their day to day tasks in the archives. A researcher or faculty member might flag a number of items for review during a single browsing session, and then want to print or request access to all of them at once. A causal hobbyist might find certain topics fascinating and wish to return to them. While it would be nice to enable bookmarks to last beyond a browsing session, we do not recommend attempting any kind of user accounts or other workflow considerations for Phase I. instead, we recommend a noticeable note at the top of the bookmarks page, as well as on the modal that comes up when the user bookmarks an item,  warning the user that bookmarks will only last through their current browsing session.

## Citation

This simple utilities is a button the user can click on to access the preferred citation text for a specific record. Ideally it will speed up workflow for many users.

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## Request Access

This utility will, by default, bring up a form that the user will fill out. Citation information on the item will already been pre-filled, and the user then tells the archivist who they are, any additional information, and when (if) they might be wanting to come by. *In the event that the archive is using Aeon,* this form should be replaced by the Aeon functionality. This form should also be entirely customizable by the institution.

## Print

Our expectation is that the print button would trigger the browser's built in print functionality, but that it would print the page using a cleaned up printer-friendly stylesheet We understand that some archives have a printer-friendly PDF of various finding aids, and may want to give the user access to that PDF in place of this printer function. This may require A/B testing. If the instance is linking to a PDF instead of the print functionality, we suggest using the PDF icon instead of the printer icon.

# Customizability

Many institutions expressed the importance of being able to customize their ArchivesSpace instance. Our understanding is that the instance is already currently customizable, but some of those customizations are more difficult than others. This page on the wiki — https://archivesspace.atlassian.net/wiki/display/ADC/Customizable+Interface+Elements — lists all of those elements which we recommend making as easy as possible for archivists to customize in their ArchivesSpace instance.

# Finally

This entire report is based on priori research from the Working Group (from 2011), user personas, user testing, and collaboration with the Working Group. None of the items in this report have been tested in an actual ArchivesSpace instance yet. They should all be put to the test, and, if necessary, revised.

We strongly believe that the search recommendations will have the biggest overall impact on the user experience. The next biggest impact will probably come from a combination of the two simplest recommendations: 1) replace archivist-specific language with more obvious terminology, and 2) reorganize the elements on the record displays.

We look forward to seeing what happens as these recommendations are implemented.