

# Guiding Special Collections Users through Multiple Discovery Platforms

UX Design Team: Dani Vykydal, Alex Maxim, Maddie Gaudet, Jason Moy  
For: Boston Public Library

Research and Requirements Report  
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## Executive Summary

Our team conducted usability testing and a user survey to get feedback from current BPL patrons (familiar users) as well as those from a larger audience (unfamiliar users) in order to better understand and design for user needs. Through our research and analysis, we gained deeper insights that were both surprising and helpful. We were able to compile various common trends and themes from our users' experiences using the Special Collections website and attempting to request materials. Some main areas that we found needing improvement were: general navigation issues with finding the Search & Discover page alongside linked pages, difficulties finding where to get help, unclear images and descriptions, and confusion with the discovery tools and item request features.

In addition to our analysis we further empathized with our users through personas, value propositions, and use case scenarios. In this report, we will highlight these main methods and research insights from the past few weeks based on the current state of the online catalog search. To finish, we will list out requirements based on our main findings to focus in on certain areas for our prototype iterations. These include business requirements for BPL staff and library standards, user requirements for ease of use and accessibility, and functional requirements for consistency on the online platform.

## Project Description

The Boston Public Library mission is dedicated to four main areas, including “reading and literacy, spaces and programs, reference and instruction, and special collections and cultural heritage.”<sup>1</sup> In order to uphold these principles, the Special Collections department wishes to improve their digital catalog search and guide patrons to their desired research materials. During the Covid-19 pandemic, the library took initiative to make more of their materials available digitally and thus began the long process of adding a variety of items to their digital catalogs. With this came updates and increased usage of the online search system and a need to make Special Collections more accessible to patrons, which was one of the platforms that was digitized.

BPL currently uses several discovery systems in order to organize their Special Collections materials digitally. This has caused issues wherein patrons are unable to identify different materials and artifacts that they are looking for. Currently, these platforms cannot be unified into a single one, so the goal is to improve the online navigation experience of the BPL Special Collections website to inform users about what these unique platforms contain and how they work, so it's been the case that individuals,

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<sup>1</sup> “About the BPL,” Boston Public Library, accessed January 11, 2023., <https://www.bpl.org/about-the-bpl/>.

especially those new to the platforms, struggle with using and navigating the systems. In the past, there was not a condensed online space that informed users about what these unique platforms contain and how they work, so it's been the case that individuals, especially those new to the platforms, struggle with using and navigating the systems. Thus, Special Collections' staff have often had to provide guidance, which can be time-consuming. As of now, however, the BPL has attempted to resolve this issue by creating a web page ([www.bpl.org/special-collections/search/](http://www.bpl.org/special-collections/search/)) that describes and provides links to each of their discovery platforms.

## **Project Goals**

For this project, our primary goal is to provide a way for the BPL stakeholders to more easily access and navigate Special Collections materials offered through the multiple discovery platforms, which has discoverability effects on users as well as having impact on how staff assist users in finding content. This should allow users to spend less time figuring out the search system and more time accessing their desired content.

Another goal is to center our research and design around user needs and complaints. By conducting extensive user research, we hope to highlight the primary concerns of current BPL patrons. We will attempt to measure the success rates of users when finding desired materials and aim to make this process more intuitive.

Our final goal is to improve the experience of Boston Public Library staff wherein they will be able to spend less time directing patrons on how to use the Special Collections search catalog. One of the aims of our project is to ensure that the staff are able to similarly navigate the Special Collections pages easily.

## **Research Goals**

1. Gain insight on what motivates familiar users to use the Special Collections over other resources and positive aspects of the website
2. Better understand how familiar users go about finding and requesting materials
3. Better understand first impressions and assumptions of new users to the Special Collections search
4. Get a user flow that demonstrates how people (new and returning) find and request materials
5. Determine issues and pain points that familiar and new users encounter

## Research Questions

- What motivates users to access the BPL Special Collections materials?
- Are users satisfied with the current process for finding and requesting Special Collections items online?
- Do new users find the BPL Special Collections search intuitive? Can they successfully locate and request to access these materials either digitally or in the Reading Room?
- What are the main pain points of using the current Special Collections search?
- Can new users figure out how to ask for help if needed?

## Research Plan & Methodologies

The research methods for this project include an online survey and usability testing. Surveys were sent out to familiar users who were identified as willing to participate in future research by BPL. A QR code link was also posted in the Reading Room at BPL. 9 usability tests were conducted by the research team with users unfamiliar with the BPL website using the current Special Collections search. These included students at the University of Michigan, family members, and UMich Special Collections librarians. Recruitment was conducted using convenience sampling and email outreach to UMich library staff.

### Familiar Users

Familiar users are BPL Staff and BPL patrons, specifically authors, artists, and scholars who have successfully identified what they are looking for and made it into the in-person reading room. BPL used a list of people who have successfully made it to the in-person reading room in order to email out the survey to patrons. Additionally, they sent out the survey to other BPL staff members. The survey opened 1/25/2023 and is still open as of the creation of this report.

### Purpose

The research questions were:

- What motivates users to access the BPL Special Collections materials?
- Are users satisfied with the current process for finding and requesting Special Collections items online?
- What are the main pain points of using the current Special Collections search?

Because familiar users have experience navigating the Special Collections page and understand how they work, the survey questions focused on gaining insights into familiar

users' thoughts, issues, and pain points from their past experiences rather than identifying specific usability issues with the Special Collections page.

## **Methodology**

To learn more about familiar users' thoughts, issues, and pain points with using the Special Collections page, we used online surveying as our research method utilizing Qualtrics. Surveying allowed us to combat location constraints to be able to gain insight from patrons and staff currently in Boston and using BPL services. We recruited members from the list of BPL patrons given to us by the Special Collections coordinating team. The questions asked whether patrons have been satisfied with their experience with the online search catalog, what aspects they like, what parts they found confusing, and how they have gotten help if needed (see survey link for entire list of questions).

## **User Research Materials**

In order to conduct our surveys, we prepared a survey design that further details our goals, research objectives and the layout with specific questions. After revising our surveys according to instructor and peer feedback, we used Qualtrics to build the survey for optimal data analysis features. The survey link was sent out twice (once per week) by BPL staff to their willing participant list and once to BPL staff through mass email with a direct link.

## **Unfamiliar Users**

Unfamiliar users are BPL patrons who don't have previous experience with navigating the department's corresponding website. These individuals include students, scholars, authors, and artists who are interested in using BPL's Special Collections.

## **Purpose**

The research questions that we are focusing on:

- Do new users find the BPL Special Collections search intuitive? Can they successfully locate and request to access these materials either digitally or in the Reading Room?
- What are the main pain points of using the current Special Collections search?
- Can new users figure out how to ask for help if needed?

These users had varying experience using library services, especially with Special Collections and Reading Room services for in-person appointments. Their unfamiliarity with using the website means that they had no background on how the discovery platforms or Reading Room appointment creation for BPL worked. As such, our team

wanted to focus on gaining insights on their experience with attempting these actions and any usability issues they face while using the Special Collections webpages for the first time.

## **Methodology**

Regarding unfamiliar users, conducted usability testing combined with additional follow-up questions that match an interviewing research method. We recruited interviewees through convenience sampling due to time constraints and difficulties with reaching out to those living in Boston remotely. We tried to find users with varying degrees of knowledge with library and technical systems, ranging from working adults outside the university, students with research experience, to Special Collections Librarians at the University of Michigan. Questions focused on qualitative observations and initial impressions of the search catalog (see link to script for specific questions).

## **User Research Materials**

To conduct our usability tests, we created a script that explains our list of tasks, research objectives and follow-up questions after the tests are complete. We conducted interviews both in-person with close observation of task completion and remotely on Zoom with screen sharing capabilities. All interviews were recorded and several of the sessions had two team members (one interviewer and one note taker). Tasks included finding specific areas of the Special Collections page, completing specific search tasks, and scheduling a Reading Room appointment.

## **Research Results**

### **Participant Demographic Summary**

- Familiar users (surveys):
  - BPL staff
  - BPL patrons who have successfully completed a Reading Room visit (emails saved by staff)
  - BPL patrons who have recently visited the Reading Room (QR code in physical library)
- Unfamiliar users (usability tests/interviews):
  - University of Michigan students
  - University of Michigan Special Collections librarians
  - Adults with less research/library experience

## Key Findings

After releasing our survey to familiar users and BPL staff as well as conducting nine usability tests with unfamiliar users, we compiled our data in Google spreadsheets (refer to Appendix C). Below are some of our findings for each research method (which can be found in Appendix C):

### Surveys

Theme	Findings
Finding materials/discovery tools	<ul style="list-style-type: none"><li>● Familiar users experience difficulties with filtering through collections and accessing information quickly<ul style="list-style-type: none"><li>○ "I had trouble understanding how to accomplish the several steps to understand what was in there."</li></ul></li><li>● Familiar users find that clear discovery tool headers and descriptions are majorly important</li><li>● Images and descriptions may not be recognizable to all demographics<ul style="list-style-type: none"><li>○ "Well, I am old enough to know what a card catalog is, but I suspect other users won't know..."</li><li>○ "I'm old enough to know what a card catalog is and how it works, but I wonder if others are...."</li></ul></li></ul>
Getting Help	<ul style="list-style-type: none"><li>● Several users either access or search for tips on the Special Collections web pages and/or talk to a librarian, archivist, or curator</li></ul>
General Navigation issues	<ul style="list-style-type: none"><li>● Users believe that BPL's Special Collections web pages are mostly easy to navigate, but general confusion about Special Collections' tools still exists<ul style="list-style-type: none"><li>○ "I think the images for the different departments and research centers</li></ul></li></ul>

	<p>help communicate their purpose. The differences between the images for "archives.bpl.org," "Research Catalog," and "Collections A-Z" is rather subtle and could be clearer, though I admit I do not know how I would suggest doing so."</p> <ul style="list-style-type: none"> <li>○ "Sometimes they provide very efficient access to rare materials."</li> <li>○ "Satisfactory, but not as accessible as other archival searches"</li> <li>● Users don't believe that Special Collections is featured prominently on the BPL main website</li> </ul>
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**Usability Tests / Interviews**

Based on the below [rainbow spreadsheet](#) and comments from our participants, we have developed both quantitative and qualitative findings that will help inform our design requirements.

Usability Test/Interview Rainbow Spreadsheet										
Task	P1	P2	P3	P4	P5	P6	P7	P8	P9	General Comments / Observation
	Jason	Alex	Maddie	Alex	Jason	Dani	Dani	Alex	Maddie	
Navigated to Special Collections page from BPL Home	X		X							P3 - Took a long time, scrolled through whole page, tried footer first and tried "visit" link before finding it under "Books & More"
Navigating to the "Search & Discover" page (finding the Discovery Tools)			X	X			X			P7 - Went to Use Our Collections page because they thought it made more sense to go there to search for items
Found searching guide					X		X	X		P7 - Went to <a href="#">archives.bpl.org</a> and thought searching guide was the search bar on the page
Finding where to get help and support from staff										P4 - Mentioned making in-person appointments rather than email request
Finding where to make a Reading Room appointment	X		X						X	P1 - Made appointment through normal BPL (didn't understand difference between BPL and Special Collections)
Looking for a specific Special Collections' item		X	N/A		X				N/A	P5 - Had issues with finding an item due to filtering (took a while)
Navigating to/logging in Reading Room account after finding an item				X						
Creating a new Reading Room request		X		X		X				P6 - Needed suggesting to go back to New Requests page to find correct link for requestin materials form

**Quantitative Findings**

Tasks that unfamiliar user had the **most** success with completing:

Task	Success Rate
Navigating to where to get help from BPL staff	9/9
Locating where to make a Reading Room appointment after finding an item	8/9

Tasks that unfamiliar users had the **least** success with completing:



Task	Unsuccess Rate
Locating where to make a Reading Room appointment for the first time	3/9
Navigating to the “Search & Discover” page (and finding the discovery tools)	3/9
Finding a department's searching guide	4/9
Creating a request for a Reading Room appointment	3/9

**Qualitative Findings**

Finding	Evidence
Confusion regarding information on the “Search & Discover” page	<ul style="list-style-type: none"> <li>Many users (P1, P3, P5, P6, P7, P8) found images and descriptions used in detailing the various discovery tools not informative enough in differentiating the multiple platforms and explaining what they include (ex. Digital Commonwealth)</li> </ul>
Issues finding and using the multiple discovery tools	<ul style="list-style-type: none"> <li>A few users (P3, P4, P7, P9) struggled with knowing that they could go to the “Search &amp; Discover” page to learn about and/or proceed to the different discovery platforms (ex. one user thought that it was more obvious to go to the “Use Our Collections” page to search for items)</li> <li>Some users (P3, P7) weren’t sure how to use the tools after navigating to them</li> </ul>
Navigation problems with requesting to view materials via the Reading Room	<ul style="list-style-type: none"> <li>Users sometimes struggled with either knowing that they had to go to their Reading Room account to request an item (P6) or how to get</li> </ul>

	<p>there (P2)</p> <ul style="list-style-type: none"> <li>• Many users (P2, P5, P6, P8) had difficulties with knowing where to go within their Reading Room account to request an item because they thought the links were hard to find (and one user expected that they could request an item from a discovery tool)</li> <li>• One user (P1) didn't know the difference between Special Collections and the general BPL</li> </ul>
<p>General navigation difficulties on the BPL's website and Special Collections pages</p>	<ul style="list-style-type: none"> <li>• Users (P1, P2, P3, P5, P7) would often head to incorrect pages due to misunderstanding labels</li> <li>• Many users (P1, P3, P4, P9) struggled with finding the Special Collections section from the BPL's website home page</li> <li>• Some users either didn't know what departments within Special Collections were (P5, P8) or were unfamiliar with what research guides were (P7)</li> <li>• There was some confusion about knowing what content was going to be on certain pages due to a lack of standout information located at the top (P6, P9)</li> <li>• Users (P2, P8) experienced difficulty in navigating between pages (ex. between the discovery platforms and the Special Collections webpages)</li> </ul>

## **Analysis**

For our research analysis, we used both affinity diagramming and spreadsheets to compare common themes across our findings. We further aimed to understand our users through user personas, creating value propositions, and use case scenarios.

### **Affinity Mapping**

Some preliminary assumptions we had were that the images and descriptions on the “Search & Discover” page would be confusing, broad topics/items are difficult to search for, and catalog guides are difficult to access. Most of our assumptions were validated in that understanding the sections of the Special Collections main page was difficult for most unfamiliar users. While most of the descriptions were helpful, multiple users claimed that the images were a bit confusing and that accessing certain pages wasn’t the most intuitive. One new insight we garnered was that getting to the Special Collections page itself from the BPL home was somewhat challenging for a majority of our users. This likely tells us that we need to alter the navigation bar and labeling on the Special Collections pages to be more clear. We will use the main themes from our diagramming and spreadsheets to inform what pain points were most prevalent.

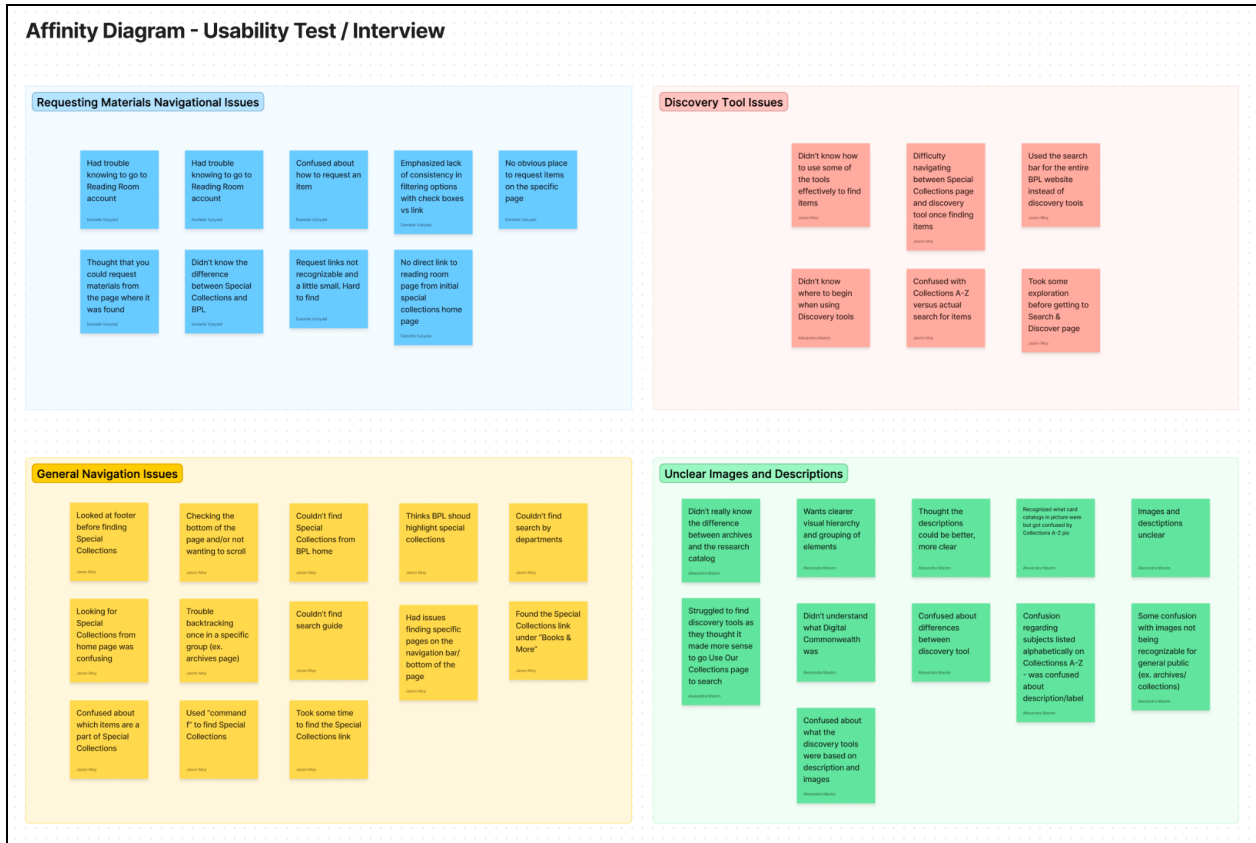
### **Familiar Users**

We have created an affinity diagram to convey relevant themes/insights observed with our current results. These themes/insights are ones that we brought up in the survey section of the [Key Findings](#) portion of this document. After gathering all of our data, we will recreate this [affinity diagram](#) to analyze all of our findings.



## Unfamiliar Users

In regards to unfamiliar users and the usability tests/interviews we took, we first created a rainbow spreadsheet in which we detailed which tasks were successfully completed and by which users, which we differentiated using unique colors for each. After analyzing task success among the users, we noted in our spreadsheet some difficulties faced by unfamiliar users which contributed to their unsuccessfulness. Furthermore, when creating our affinity diagram, team members jotted down significant usability issues and user opinions they collected from their tests/interviews and differentiated the observations based on the user with the same colors used in the rainbow spreadsheet. Once we finished adding our major findings, we grouped certain ones based on similarities in content and came up with overarching themes. The following themes/insights about unfamiliar users accumulated from both our [rainbow spreadsheet and affinity diagram](#) (relevant users are labeled as P for “participant” as they labeled in the spreadsheet image below and in Appendix C):



### Quantitative Findings

Based on our [quantitative findings](#) from our survey, we found that unfamiliar users had the least success with the tasks that pertained to getting started with finding items and requesting the item for a Reading Room visit. We had originally assumed most participants would have the most difficulty making the connection between the Special Collections page and the Reading Room Request page; however, our findings suggest that most participants struggle with the initial steps of how to find or how to request items.

This issue in which participants struggle with understanding the initial steps of finding and requesting items emphasizes how there are unclear instructions and navigational issues that prevent the user from successfully finding what they are looking for. Where familiar users understand special collections and how to navigate between the website, different platforms, and discovery tools to find what they want, unfamiliar users aren't aware of how to use special collections and navigate the complexities of the different platforms. With this in mind, our design requirements will have a heavy focus on discovery tools and general navigation as well as the process of requesting materials.

## **Qualitative Findings**

Based on our [qualitative findings](#), unfamiliar users experienced navigation issues throughout the entirety of BPL's website. They especially struggled with finding and using the discovery tools on the "Search & Discover" page as well as had navigational issues when moving between the Special Collections home page and the Reading Room request site. This is prevalent.

On tasks relating to the "Search & Discover" page and the discovery tools, unfamiliar users faced difficulties with both due to confusion regarding the content and purpose of the page and tools. This was a clear indication that the images, descriptions, and general content was not informative and clear enough to the user – they were unable to understand what was on the page and how to select and navigate the tools available. This suggests that, as the main aspect of Special Collections for finding materials, the images, descriptions, and content on the "Search & Discover" page and the discovery tools need to be clearer and more recognizable to the user.

Throughout multiple tasks, users often noted experiencing confusion with finding the correct pages or sections of information because the website's layouts didn't quite match their mental models, they misinterpreted the type of information that would be on a page given its label/title, or they didn't quite understand what certain information meant (such as what searching guides are). This was somewhat expected because unfamiliar users did not have prior experience with using the website or weren't familiar with Special Collections materials, but their confusion, again, reflects that the presentation of content, including its hierarchy, descriptiveness, and titles, could be improved in our design to better suit their expectations. Specifically regarding difficulties in finding content, users particularly struggled with knowing that they had to go to a Reading Room account and/or how to get there and use it. As such, this information needs to be made more clear to them.

Overall, our qualitative insights are critical in aiding our design as they point to issues within the website that make it difficult for people to use overall.

## **User Personas & Value Propositions**

Our research focused on familiar and unfamiliar users which included both BPL Patrons (researchers, scholars, artists etc.) and BPL Staff Members. Based on our surveys, which focused on familiar users, and usability tests and interviews, which focused on unfamiliar users, we created these user personas for each. Our user persona for BPL Staff Members as familiar users is still in progress due to delays in getting permission to send our survey


to staff members. Based on these personas, we further empathized with our users through use case scenarios.

## Familiar BPL Patron

For familiar users, George is a researcher and scholar that has experience and has visited BPL's Special Collection. He uses the Special Collections not only as a resource for various research projects and work but also as a way to learn and explore the vast unique archival and arts collections. He finds that it is difficult to access information efficiently through Special Collections in addition to understanding the difference between content.

**Primary Persona | Familiar BPL Patron**

**George Fisher, *Researcher & Scholar***



“The BPL's Special Collections contains historical documents vital to my research, including documents not held anywhere else. This makes it an invaluable resource.”

**About**

- Local Boston native and BPL patron
- Passionate about history, books, and archival materials
- Specific focus around U.S. History during the Revolution and Civil War time period

**Goals**

- Discover and gain information for various research projects and work
- To learn and expand knowledge on various history and art topics
- Find specific rare materials that can't be viewed elsewhere

**Motivations**

- Wants to discover and research historical documents and archives
- Find historical information through primary resources for research projects and work
- Explore BPL's vast collection

**Needs & Frustrations**

- Needs to access information quickly
- Needs to better understand
- Has difficulty finding Special Collections because it's not featured clearly on main BPL page
- Difficulty understanding content in Special Collections

## Familiar BPL Staff Member

For familiar users, Mary is a staff member at BPL working as an archivist and curator. She is passionate about archival and arts material. Mary wants to share this passion by helping BPL patrons find what they are looking for in a positive and supportive way. She is motivated by her passion for special collections and the people she helps. This can sometimes be difficult due to the Special Collections pages being difficult to navigate at times, information being inaccessible, and directing patrons to someone who can correctly answer their questions.

## Primary Persona | BPL Staff Member

**Mary Reed**, *Librarian, Archivist, Curator*



“I usually just direct them to the Special Collections reception area either by phone or in person visitors. I also try getting callers to email the Special collections department.”

### About

- Local Boston native and a BPL staff member
- Passionate about archival and art materials
- Often helps BPL Patrons discover, find, and request archival materials

### Goals

- To help BPL patrons find, identify, and request materials that they are looking for
- Create a positive experience for patrons when searching and viewing archival materials

### Motivations

- Help patrons find what they are looking for in an efficient and supportive way
- Make the Special Collection pages easier for patrons to use
- Motivated by passion for sharing and learning about special collections materials

### Needs & Frustrations

- Special Collections page is difficult to use at times (even for familiar users)
- Not being able to find the correct information to help patrons
- Needs an easy way to direct patrons to the correct staff member or department

## Unfamiliar BPL Patron

For unfamiliar users, Anna Harte is a full time business woman who occasionally visits BPL. She is passionate about her work and learning. Therefore, she hopes to learn more about BPL and expand her knowledge based on her interests through the unique archival and arts collections. She wants to explore these collections more but is not only unfamiliar with Special Collections but also general search and filtering functionalities.



## Primary Persona | Unfamiliar BPL Patron

**Anna Harte**, *Full-time business women*



“Finding Special Collections took me a bit of time because the tabs didn’t match my assumptions of what it would be under. Now that I know what the Special Collections are it makes more sense.”

### About

- Local Boston native and occasional BPL visitor
- Passionate about their work and learning new things
- Less experience and familiar with library systems and special collection materials

### Goals

- Explore unique archival and arts materials that can’t be found elsewhere
- Expand knowledge in areas of interest from a unique historical perspective

### Motivations

- Wants to learn more about Special Collections and BPL more generally
- Wants to explore BPL’s vast collection
- Wants to feel more connected to BPL and support local libraries

### Needs & Frustrations

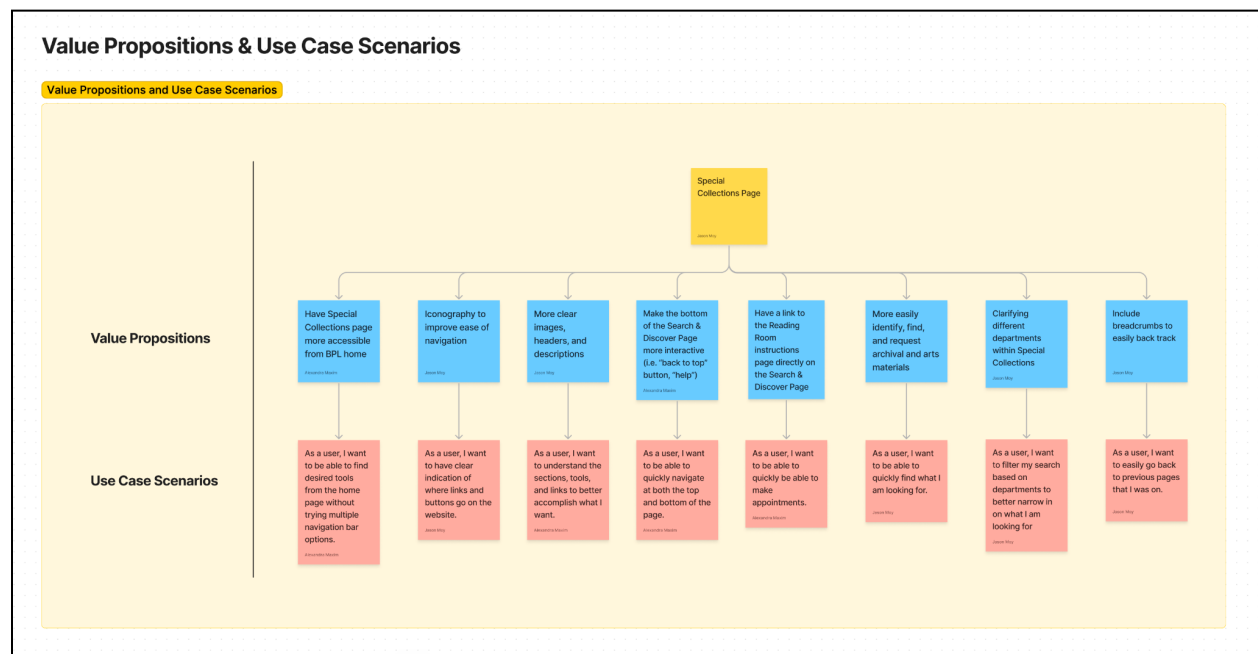
- Doesn’t know the Special Collections exists
- Needs to know the difference between BPL and Special Collections
- Unfamiliar with search and filtering functionalities

## Value Propositions & Use Case Scenarios

To build empathy with our users, we created several use case scenarios based on various [value propositions](#) and took into account our findings from our surveying and usability tests and interviews.

Value Propositions	Use Case Scenarios (As a user, I want to...)
Have Special Collections page more accessible from BPL home	As a user, I want to be able to find desired tools from the home page without trying multiple navigation bar options.
Iconography to improve ease of navigation	As a user, I want to have clear indications of where links and buttons go on the website.
More clear images, headers, and descriptions	As a user, I want to understand the sections, tools, and links to better accomplish what I want.
Make the bottom of the Search & Discover Page more interactive (i.e. “back to top” button, “help”)	As a user, I want to be able to quickly navigate at both the top and bottom of the page.

Have a link to the Reading Room instructions page directly on the Search & Discover Page	As a user, I want to be able to quickly be able to make appointments.
More easily identify, find, and request archival and arts materials	As a user, I want to be able to quickly find what I am looking for.
Clarifying different departments within Special Collections	As a user, I want to be able to quickly find what I am looking for.
Clarifying different departments within Special Collections	As a user, I want to filter my search based on departments to better narrow in on what I am looking for
Include breadcrumbs to easily back track	As a user, I want to easily go back to previous pages that I was on.



## Design/UX Requirements

### Discovery Tools Navigation Requirements

One of the main features of the Search & Discover page is the Discovery Tools, the main way for users to find and request what they are looking for. Commonly, users struggled to discern differences between the tools and figuring out which ones to access for their

needs. The requirements we established should help address the main pain points we found relating to the clarity and navigation issues with the Discovery Tools.

Priority	Requirement
High Priority	<ol style="list-style-type: none"> <li>1. Users should be able to quickly navigate to the search &amp; discovery page from Special Collections</li> <li>2. Users should be able to learn and expand knowledge on various history and art topics</li> <li>3. The system should adhere to classification methods put in place to organize archives, arts, and rare books/manuscripts data</li> <li>4. The system should only use the third party platforms and databases present on the current BPL site (for now)</li> <li>5. Users should be able to find specific rare materials that can't be viewed elsewhere</li> <li>6. Users should be able to understand and differentiate content in the Special Collections page</li> <li>7. The system should have discovery tool platforms open in a separate tab</li> <li>8. The system should make clear which discovery tools would be helpful for specific goals</li> <li>9. The system should make distinct which items are considered Special Collections items</li> <li>10. The system should have the search &amp; discovery page be easily accessible from the Special Collections page</li> </ol>
Medium Priority	<ol style="list-style-type: none"> <li>1. Users should be able to discover and gain information for various research projects and work</li> <li>2. Users should be able to efficiently book an appointment in the BPL reading room</li> <li>3. The system should have explicit descriptive captions for discovery tools</li> <li>4. The system should allow for in-person and digital to be easily distinguished</li> <li>5. The system should make clearer the menu on the Special Collections page</li> </ol>
Low Priority	<ol style="list-style-type: none"> <li>1. Users should be able to see featured and personalized content in Special Collections</li> </ol>

## Requesting Materials Requirements

In order to access Special Collections materials, patrons often need to request to view them in-person in the Reading Room or online. From our testing, we found that there was some confusion regarding where to find additional information on requesting materials as well as with searching for their desired items. The requirements in this section aim to make the system more intuitive for users to find their desired materials and make appointments for the Reading Room.

Priority	Requirement
High Priority	<ol style="list-style-type: none"><li>1. The system provides a way for patrons and staff of the Boston Public Library to more easily navigate the Special Collections' materials offered through the multiple discovery platforms to access both remotely and with in-person requests</li><li>2. The system should include a direct link to the reading room page from the Special Collections page</li><li>3. The system should have an obvious place to request items on the specific page</li></ol>
Medium Priority	<ol style="list-style-type: none"><li>1. Users should be able to efficiently book an appointment in the BPL reading room</li><li>2. Users should be able to efficiently and effectively request a Special Collections item</li><li>3. The system should allow for in-person and digital to be easily distinguished</li></ol>
Low Priority	<ol style="list-style-type: none"><li>1. The system should encourage users to make an appointment with the reading room</li></ol>

## Aesthetic & Emotional Requirements

Issues regarding organization and overall aesthetic preferences were raised in multiple of our user tests. These requirements aim to address issues with image sizing and clarity, descriptions, organization on the Search & Discover page, and any other adjustments with the intention of making the information more appealing to its users.

Priority	Requirement
High Priority	<ol style="list-style-type: none"><li>1. The system should align with BPL's current branding guidelines</li><li>2. The system will keep all current content and categories</li></ol>

	<ol style="list-style-type: none"> <li>3. The system should have clear visual hierarchy and grouping of items</li> </ol>
Medium Priority	<ol style="list-style-type: none"> <li>1. The system's organization should be up to par with other city library and museum websites</li> <li>2. The system should provide images that are descriptive and relevant</li> </ol>
Low Priority	<ol style="list-style-type: none"> <li>1. Users should be able to have fun while using BPL's website</li> <li>2. Users should be able to see featured and personalized content in Special Collections</li> <li>3. The system's interface should be sleek and modern looking</li> <li>4. The system's interface should include engaging animations and microinteractions</li> </ol>

**General Navigation Requirements**

Based on our research results and analysis, general navigation arose as a common theme. This includes issues of finding the Special Collections and Search & Discover pages, looking for information about making Reading Room appointments, and scrolling through the Search & Discover content. To address these navigational issues among Special Collections users, we have developed and prioritized various requirements to make it easier to find desired portions of the website in a timely manner.

Priority	Requirement
High Priority	<ol style="list-style-type: none"> <li>1. The system provides a way for patrons and staff of the Boston Public Library to more easily navigate the Special Collections' materials offered through the multiple discovery platforms to access both remotely and with in-person requests</li> <li>2. Users should be able to quickly navigate to Special Collections from BPL's homepage</li> <li>3. Users should be able to quickly navigate to the search &amp; discovery page from Special Collections</li> <li>4. Users should be able to access information quickly</li> <li>5. Users should be able to understand and differentiate content in the Special Collections page</li> <li>6. Users should be able to easily understand their past actions and present location in the system</li> </ol>

	<ol style="list-style-type: none"> <li>7. The system should provide a quick, simple way to access BPL's Special Collections on the home page</li> <li>8. The system should include a direct link to the reading room page from the Special Collections page</li> <li>9. The system should have discovery tool platforms open in a separate tab</li> <li>10. The system should have clear visual hierarchy and grouping of items</li> <li>11. The system should make distinct which items are considered Special Collections items</li> </ol>
Medium Priority	<ol style="list-style-type: none"> <li>1. Users should be able to efficiently book an appointment in the BPL reading room</li> <li>2. Users should be able to efficiently and effectively request a Special Collections item</li> <li>3. The system should allow for in-person and digital to be easily distinguished</li> <li>4. The system should make clearer the menu on the Special Collections page</li> </ol>
Low Priority	<ol style="list-style-type: none"> <li>5. Users should be able to navigate through the BPL website without using "command f" or the browser's back button</li> </ol>

**Appendix**

**Appendix A**

[Heuristic Evaluation](#)

**Appendix B**

[Survey Design](#)

[Qualtrics Survey](#)

[Survey QR Code](#)

**Appendix C**

[Usability Test / Interview Design and Script](#)

[Usability Test / Interview Notes and Analysis Spreadsheet](#)

## **Appendix D**

[BPL Figma Jam File \(Affinity Diagrams, Use Case Scenarios, Other Ideation\)](#)

[BPL Figma Design File \(Personas, Style Guide, and Wireframes\)](#)