

Overview

Lyris contracted with Atimba to conduct a UX research study for CollectionSpace during June - July 2016. The purpose of the project is to complete a review of the CollectionSpace user experience and interface in anticipation of a re-write of the underlying code.

Tim Stutt conducted interviews as the primary investigator with the following individuals:

Name	Institution
Rick Jaffe	UC Berkeley
Chris Hoffman	UC Berkeley
Nathan Kerr	OMCA
Jadeen Young	OMCA
Adele Seltzer	Bolinas Museum
Ray Lee	UC Berkeley
Kara Vetter	Museum of Mann
Michael Campos-Quinn	BAMFA
Holly Forbes	UC Herbaria

Interviews involved 1 hour of observation and discussion of the Collection Space interface and tools, as well as relevant work flows and processes in each respective organization.

Organization's CollectionSpace usages cluster into 3 buckets roughly, between large (Hearst), medium (Jeps), and small (Bolinas). There is a wide range of expertise and resources amongst this user population. That said, the user needs organize around 2 groups, the beginners and the advanced.

Respondent rate to interview offer was over 50% and there was 1 cancellation.

Please see the follow pages for a summary of Findings, Interview Highlights, User Screenshots, and Design Components.

Findings

Top User Interface/User Experience issues:

1. **Identifying context and location.** I.e. Which record is open? Where other fields are within this record? How do I get to an associated record? Where is the save button? What other tabs do I have open in my browser (cSpace, portal, and 3rd Party)
2. Repetitive strain of multiple mouse clicks and extensive vertical scrolling.
3. Lack of visual cues, icons, and aids to focus attention on the immediate task and overall workflow process.
4. Difficulty filtering search, exporting results, and reporting.
5. Lack of training, online help or reference resource materials linked from specific fields and records to organization specific terms, hierarchy, policies, and best practices

List of recommended improvements:

1. Emphasize the Save button with color and size. Also consider highlighting required fields. Emphasize current open tab with color or outline.
2. Enable Table of Contents with links to sections. Make this quick navigation available via top or left sidebar menu that can be hidden. Enable search to find a field by name.

3. Enable iconography for most used functions and common tasks. Ideally, make this customizable by organization. For example; Update primary media record, Publish to website, Export search results to a file, etc..
4. Reporting: As a start, include more types of standard reports. Seriously investigate another reporting tool integration. Ultimately, find a way to create a more a graphical report building experience for an average user. If necessary, consider CSV or Excel file export for users to customize reports and labels in a more familiar toolset.
5. Create a set of documentation shared across instances. Link this documentation to the application via help icons and menus. Provide regular updates related to system versions and new features. Enable organizations to embed their own policies, documents and links and an HTML section of the Cspace pages, perhaps at the top of the page or in the right column area.

Interview Highlights

The following text excerpts are taken from the individual interviews:

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On navigating:

“The system is good and solid, although it lacks some features, and you need to do some workarounds”

“sidebar is critical – but also can be confusing..pivoting can be learned, but it’s not intuitive”

“Parsing out the data can be challenging, there’s so much to fill in”

“There’s a lot to understand conceptually before you know where to put things”

“Sortable results and tables within records would be awesome”

“The annoying thing is that I have to scroll a lot up and down to find the save button”

“The system has no memory about my recent activities”

“It would be nice to have an easier to share and link URL to a record”

“I would like a left sidebar with the file structure - browse like a finder, traverse the directory”

"I wish I could easily see all images in a grid for a related Catalog / Acquisition record"

On help:

"Callouts could be better ..warnings for the wrong locations.. And updating multiple records with a single change"

"Changing field labels could be easier"

"I'd like some confirmation when a file upload is complete"

"Going through the same procedure and screens helps me not forget anything"

"Autocomplete can be a pain if the vocabularies are big and/or the data isn't clean, which is the case for us"

"autocomplete is incredible, much easier to do my job, really easy to move between records"

"Auditing is minimally functional, who changed a record last, when we discover a problem it's so hard to trace, there's no real audit trail or logging"

Overall Look and Feel:

"It's ok, once you get the hang of it.. Although I wish there were less clicks"

"Speed is sometimes an issue, that wheel of death, although it's not always"

"It's quite difficult to produce a report, near impossible for an average user.. So we went back to the old database to print labels and run inventories"

"Checkbox for primary image could be more obvious.. I wish it were easier to set a primary image"

"It's not that intuitive to know which tab you're in, since they repeat, effectively it shows the tab you're in with the type"

"My initial impression was that this is a lot of chew off, I have a lot of data but don't know how to organize it, and there are many options", it would be helpful to have a getting started guide for someone who just needs the basics"

"It would be really cool to capture the user information - public web interface - logins - user info about these records and make that visible in cSpace"

"I should be able to get everything I need above the fold in a search result"

"Something like a table of contents at the top of the page would save us from a lot of scrolling"

"The number one thing we don't have is reporting"

Technical - Advanced - Developers:

"Free one click installer would be great"

"I'd like to explore the system and features on my own"

"Postgres schema is not broadly understood or shared"

"ad hoc data imports are not really possible today"

"There should be an import template, like a csv or something"

"A developer website would be a good start"

“Some automation in the system around creation and update of records.. And some notice for policies to look at certain records for an audit”

“Structured date and location ranges would be really useful”

“More granular permissions on views would be helpful, since some things are sensitive and we have a lot of people looking at the system”

“Open systems have their advantages as long as there is support and service to go along with it, and a community to share reusable tools and things like the portals”

User Screenshots

The following screenshots are from real users in observation. Titles aim to describe the function or behavior that is useful or not useful in the system.

Automatically open first record in results

2002.020

[Add record](#)

Related Cataloging Records

Identification Number	Summaries	Last Edit Date
2002.020.0001		2015-01-26T07:28:41.999Z
2002.020.0002		2015-01-26T07:28:41.999Z
2002.020.0003		2015-01-26T07:28:41.999Z
2002.020.0004		2015-01-26T07:28:41.999Z
2002.020.0005		2015-01-26T07:28:41.999Z
2002.020.0006A-B		2015-09-09T18:30:38.000Z
2002.020.0007	Contributions a la Paleopatologie Pre-Colombina", Tesis de Bachiller	2015-09-05T11:58:25.999Z
S020682	Untitled	2016-05-23T21:11:30.167Z
S020683	Untitled	2016-05-23T21:16:54.616Z
S020684	Untitled	2016-05-23T21:21:01.855Z

Show 10 per page < previous 1 2 3 7 8 9 (last) next > Viewing page 1. Showing records 1 - 10 of 84 items.

Edit Cataloging Record

[Go To Record](#) [Cancel changes](#) [Delete this relation.](#) [Save](#)

Object Identification Information

Identification Number* 2002.020.0001 [Select number pattern](#) Record Status Pending Review Collection Type Objects

Number of Objects 1

Other number Type Note

Other number	Type	Note
2002-20-1	Please select a value	

Controlled Object Name

Controlled Object Name	Object Name Level	Object Name Note	Object Name System	Object Name Language
Cloth Fragment	Please select a value		Art & Architecture Thes	English

Popup covering nearby fields

57153 - Serene velocity by Ernie Gehr

Current Record | Cataloging | Condition | Export | Items Available | Yelwinton

Create new from existing | **Cancel changes** | Delete | **Save**

Object Identification Information

Identification Number*
57153 Select number pattern

Responsible Department
PFA Library

Collection
CineFiles

Title

Article	Title*	Display Name
	Serene velocity by Ernie Gehr	Serene velocity by Ernie Gehr

Document Type*
article

Production Date
1/22/1974

Production Date popup:

Display Date	Date Period	Association	Note
1/22/1974			

	Date			Certainty Term OR Qualifier, Value and Unit					
	Year	Month	Day	Era	Certainty	Qualifier	Value	Unit	
Earliest/Single Date	1974	1	22	CE	Please	+/-		Plea	
Latest Date					Please	+/-		Plea	

Contributors

- Bob Bentley
- Bob Bralver
- Bob Brien
- Bob Brooks
- Bob Claver
- Bob Connolly
- Bob Cowan
- Bob Crane

Add "Bob " to:

Film Subject

Name Subject

Multiple Object IDs can be useful

2016.002.0098 - Stage props. Owl pin.

Current Record | Cataloging | Loan In | Loan Dist | Acquisition | Loc/Mov/Inv... | Object Exit | Intake

15 of 184
Return to search

Create new from existing | Cancel changes | Delete | Save

Object Identification Information

Identification Number*
2016.002.0098 | Select number pattern

Other number +

Other number	Other number type
77A	Box Number
L2015.010	Previous number
S2	Box Number
PA2016.004.0098	Previous number

Collection category +
Production

Artifact class | Work type
Props, scenery and related construction materials | Stage props

Extent
1

Should there be any validation on new terms?

Creator

ghdjsdghf

- No matches -

Add "ghdjsdghf" to:

- + Local Persons
- + Local Organizations

Find and Editing Groups could be easier

Oakland Museum of California

OAK LAND MUSEUM OF CALIFORNIA

Create New | Find and Edit | Administration

Find and Edit

Advanced search

Record Type | All Record Types | Search

More human readable recent search would be nice

Search Tools

Recent searches

```
{ "initialState": false, "keywords": "", "recordType": "cataloging", "vocab": "", ...  
{ "initialState": false, "keywords": "", "recordType": "cataloging", "vocab": "", ...  
{ "initialState": false, "keywords": "", "recordType": "cataloging", "vocab": "", ...  
{ "initialState": false, "keywords": "", "recordType": "cataloging", "vocab": "", ...  
{ "initialState": false, "keywords": "", "recordType": "cataloging", "vocab": "", ...  
{ "initialState": false, "keywords": "", "recordType": "media", "vocab": "", "rela...  
{ "initialState": false, "keywords": "", "recordType": "media", "vocab": "", "rela...  
{ "initialState": false, "keywords": "", "recordType": "media", "vocab": "", "rela...  
{ "initialState": false, "keywords": "", "recordType": "media", "vocab": "", "rela...
```

Saved searches

There are currently no saved searches.

Out of the box reports - small font

OMCA Public Research

July 05, 2016 11:46

Object ID

2015.6.1

Object Name

feather

Production Date

Late 20th Century

Title

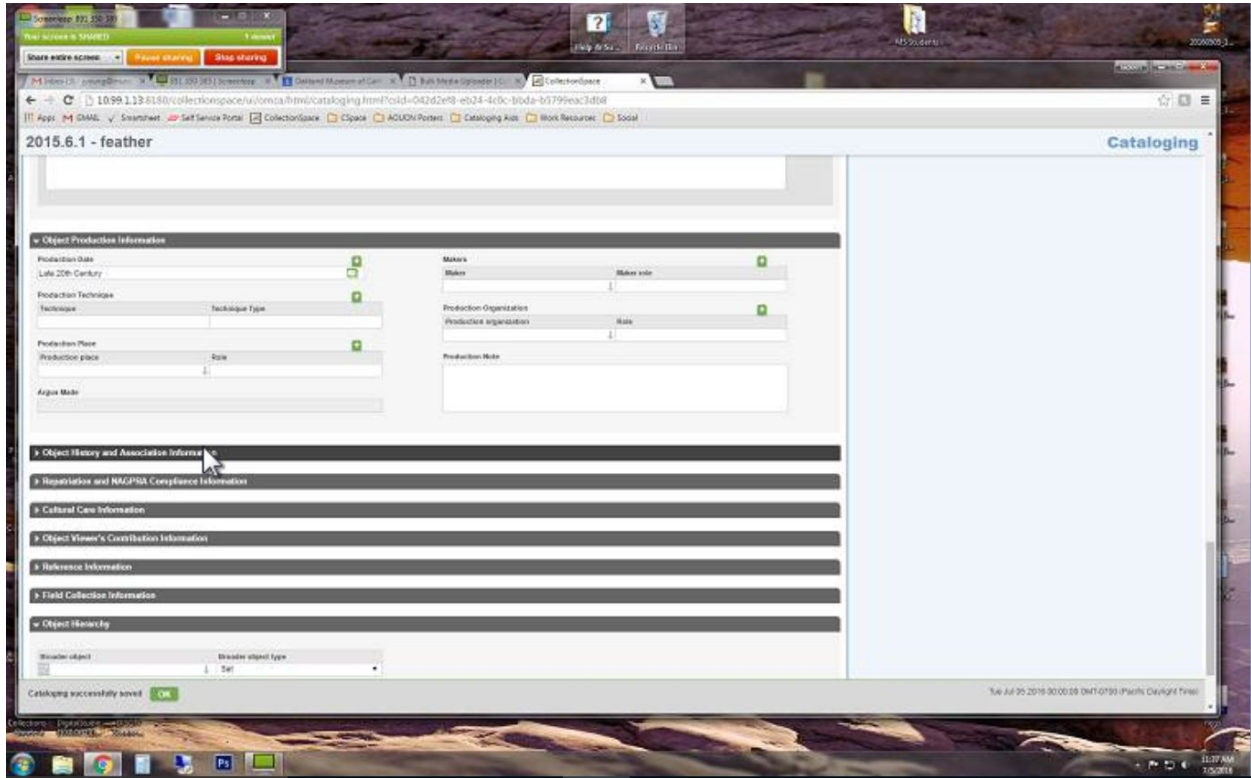
Maker

Material/Technique Summary

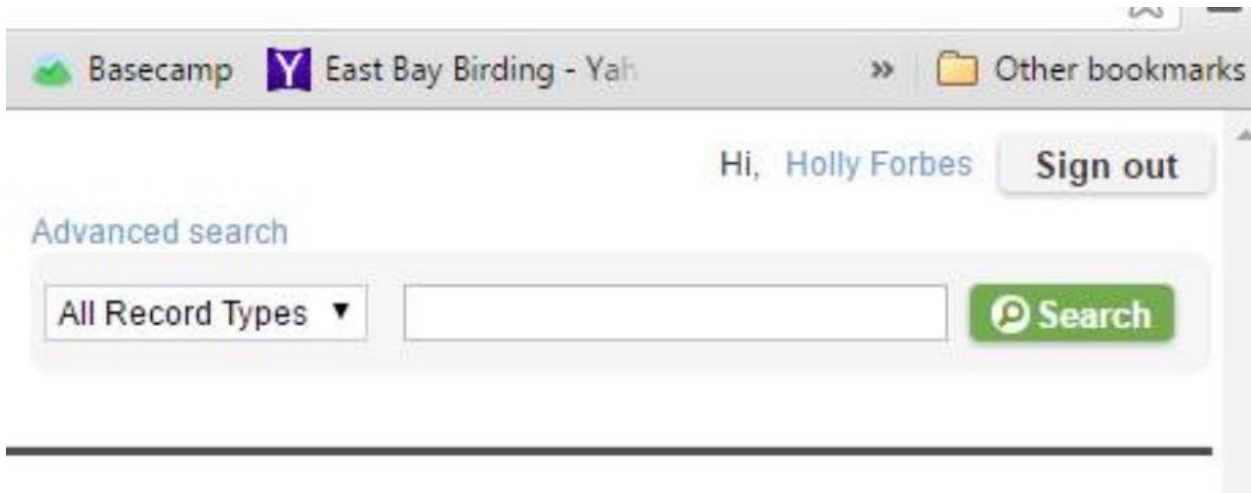
feather



Collapsed Tabs - Readability of Headings



Skipping the dropdown in Advanced Search - All Records



Right Column is Useful as long as Term Name is populated

▼ **Terms Used**

Term	Vocabulary	Field
Sedlack, Elaine	person	requestedBy
Hootman, Steve	person	identBy
Taiwan	place	fieldLocPlace
Rhododendron pseudochrysanthum Hayata	taxon	taxon
Rhododendron aff. morii Hayata	taxon	taxon

5 ▼ per page < 1 > Total of 5 items.

▼ **Cataloging**
Show Add

No records yet.

▼ **Procedures**
Add

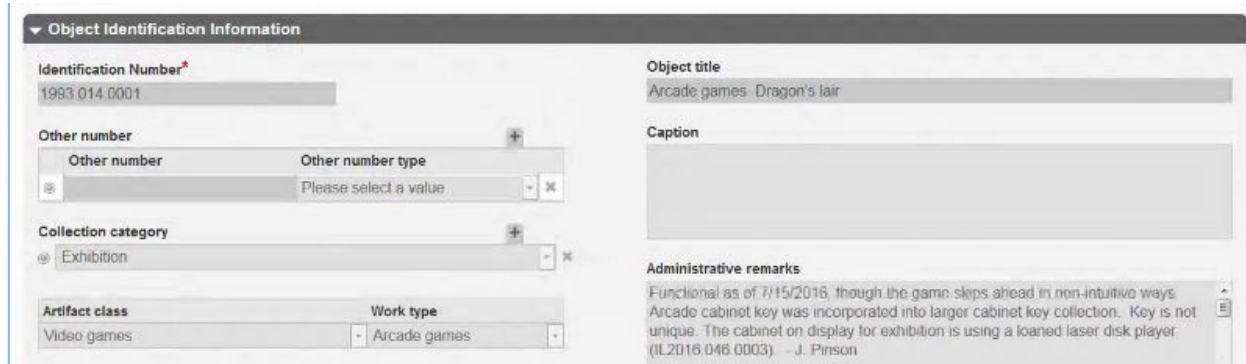
Number	Title	Last Edit Date
		2013-06-11T22:58:46Z
University of California Herbarium		2010-04-25T22:21:06Z
249, Asian	Other	2006-10-02T13:28:00Z

5 ▼ per page < 1 > Total of 3 items.

Hierarchy term helpers are sometimes helpful, sometimes not



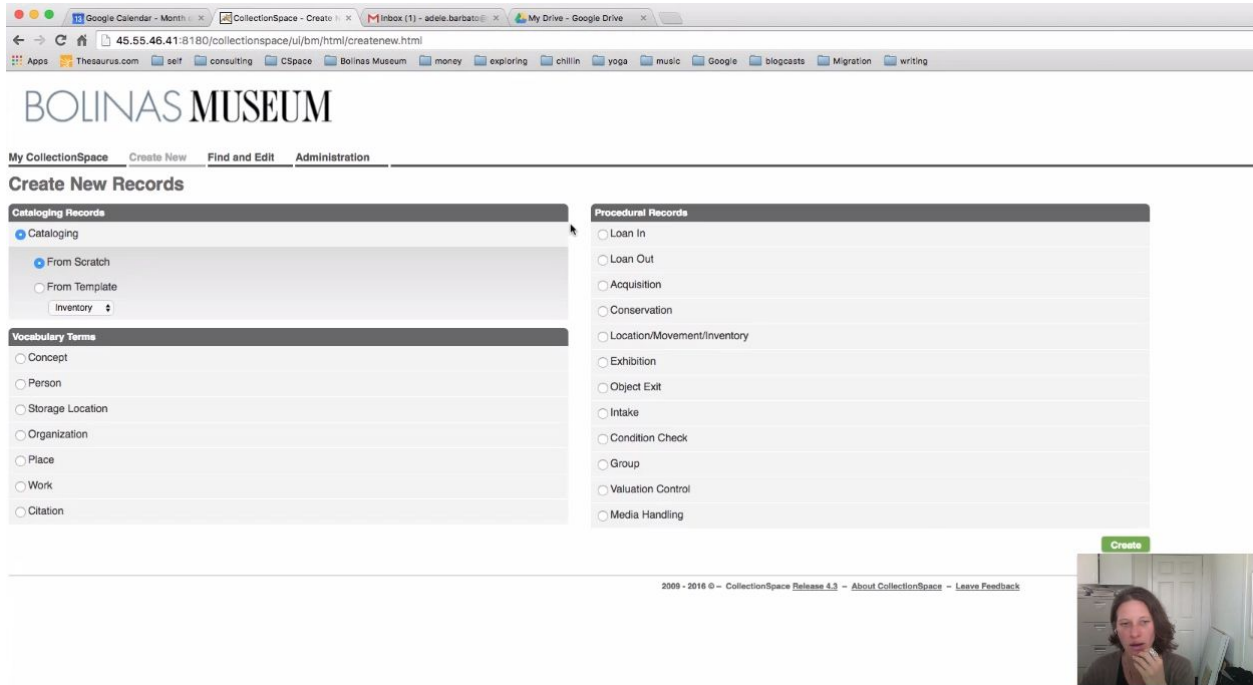
Grey on Grey - Read Only Fields - Hard on the Eyes



Confirmation Modal - Save Vs. Hard Save



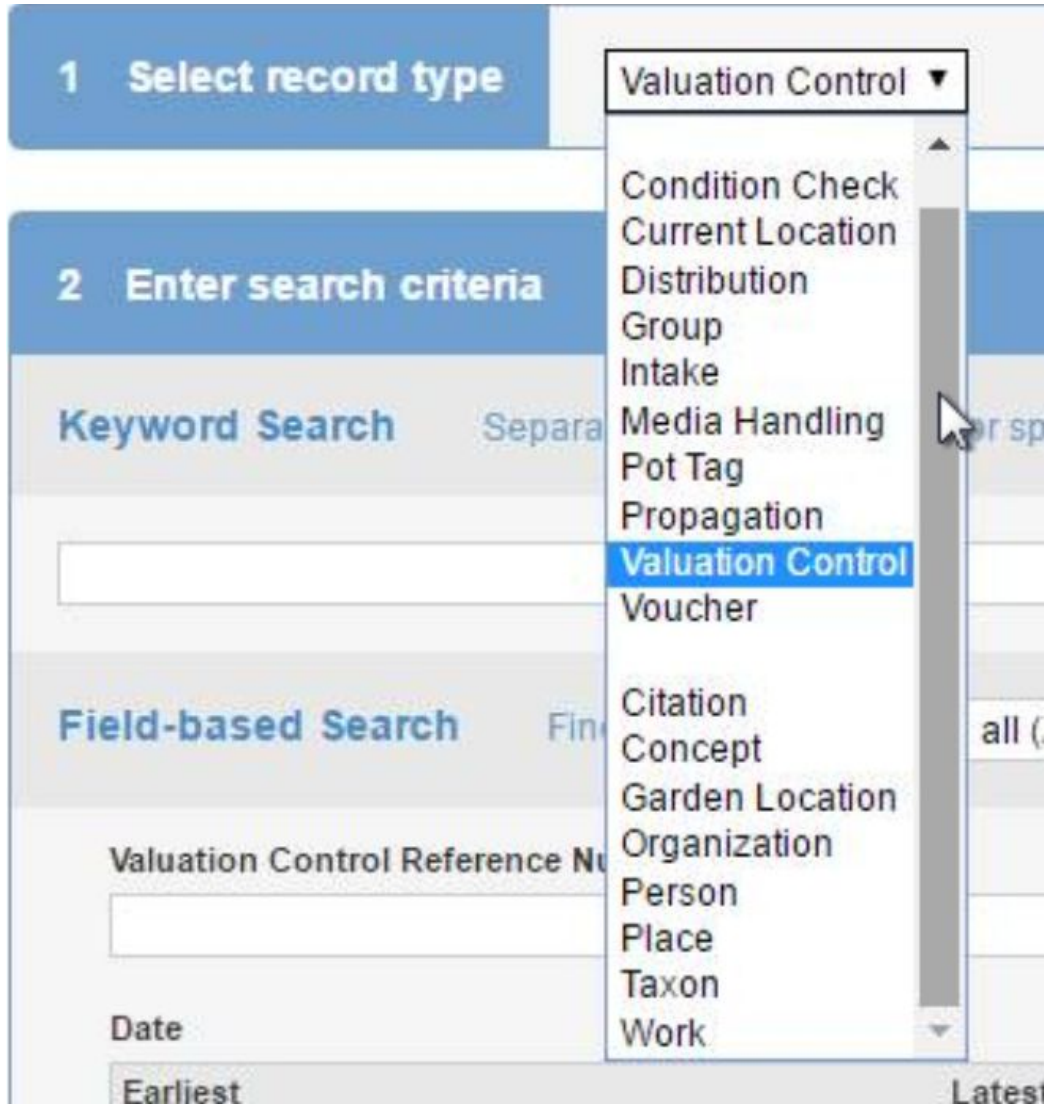
Create New Screen is Overwhelming to New User



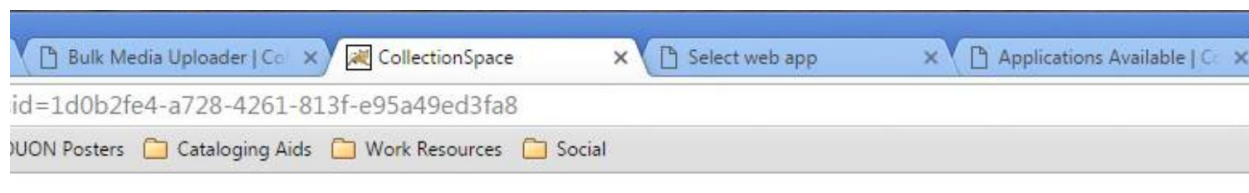
Fewer Tabs feels more manageable (<7)



Advanced Record Search - Very long dropdown menu



Descriptive Browser Tabs would be nice



Design components

Improving these interactions that are most critical, most heavily used, may significantly improve the User Experience of CollectionSpace.

1. Always visible save Button - consistent location on top Right side of window
2. Primary media image in top right corner or display to give a quick visual cue.
3. Table of contents with links to every section of the record - saves scrolling effort
4. Reorganize create new screen, using a Dropdown menu for all the options.
5. Hit ENTER button to kick off an Advanced search.
6. Users: enable toggle of autocomplete ON / OFF via a button or slider.
7. Admin: Reorder fields in records, and reorder items in dropdown menus.
8. Admin: show more metadata fields for users (part time / temp, phone, email, division, location, supervisor, etc.)
9. Tabs: update look from rounded corners to square to match current fashion
10. Tabs: indicate current active record type by highlighting border or background of the tab
11. Personalization: Track user sessions to enable retracing of recent views, record actions, expand/collapse of sections, and personal settings.

Imitation of Competitive Products features that may be beneficial time to cost tradeoffs:

Browse records as CSV - aka Spreadsheet view:

Object Name	Object ID	Home Location/Building	Home/Floor	Home/Cabinet	Home/Drawer
Plex Photographic	P101942	Central+Dept	LAB 3	J	25
Plex Photographic	P101943	Central+Dept	LAB 3	J	25
Plex Photographic	P101944	Central+Dept	LAB 3	J	25
Plex Photographic	P101945	Central+Dept	LAB 3	J	25
Plex Photographic	P101946	Central+Dept	LAB 3	J	25
Plex Photographic	P101947	Central+Dept	LAB 3	J	25
Plex Photographic	P101948	Central+Dept	LAB 3	J	25
Plex Photographic	P101949	Central+Dept	LAB 3	J	25
Plex Photographic	P101950	Central+Dept	LAB 3	J	25
Plex Photographic	P101951	Central+Dept	LAB 3	J	25
Plex Photographic	P101952	Central+Dept	LAB 3	J	25
Plex Photographic	P101953	Central+Dept	LAB 3	J	25
Plex Photographic	P101954	Central+Dept	LAB 3	J	25
Plex Photographic	P101955	Central+Dept	LAB 3	J	25
Plex Photographic	P101956	Central+Dept	LAB 3	J	25
Plex Photographic	P101957	Central+Dept	LAB 3	J	25
Plex Photographic	P101958	Central+Dept	LAB 3	J	25
Plex Photographic	P101959	Central+Dept	LAB 3	J	25
Plex Photographic	P101960	Central+Dept	LAB 3	J	25
Plex Photographic	P101961	Central+Dept	LAB 3	J	25
Plex Photographic	P101962	Central+Dept	LAB 3	J	25
Plex Photographic	P101963	Central+Dept	LAB 3	J	25
Plex Photographic	P101964	Central+Dept	LAB 3	J	25
Plex Photographic	P101965	Central+Dept	LAB 3	J	25
Plex Photographic	P101966	Central+Dept	LAB 3	J	25
Plex Photographic	P101967	Central+Dept	LAB 3	J	25
Plex Photographic	P101968	Central+Dept	LAB 3	J	25
Plex Photographic	P101969	Central+Dept	LAB 3	J	25
Plex Photographic	P101970	Central+Dept	LAB 3	J	25
Plex Photographic	P101971	Central+Dept	LAB 3	J	25
Plex Photographic	P101972	Central+Dept	LAB 3	J	25
Plex Photographic	P101973	Central+Dept	LAB 3	J	25
Plex Photographic	P101974	Central+Dept	LAB 3	J	25
Plex Photographic	P101975	Central+Dept	LAB 3	J	25
Plex Photographic	P101976	Central+Dept	LAB 3	J	25
Plex Photographic	P101977	Central+Dept	LAB 3	J	25
Plex Photographic	P101978	Central+Dept	LAB 3	J	25
Plex Photographic	P101979	Central+Dept	LAB 3	J	25
Plex Photographic	P101980	Central+Dept	LAB 3	J	25
Plex Photographic	P101981	Central+Dept	LAB 3	J	25
Plex Photographic	P101982	Central+Dept	LAB 3	J	25
Plex Photographic	P101983	Central+Dept	LAB 3	J	25
Plex Photographic	P101984	Central+Dept	LAB 3	J	25
Plex Photographic	P101985	Central+Dept	LAB 3	J	25
Plex Photographic	P101986	Central+Dept	LAB 3	J	25
Plex Photographic	P101987	Central+Dept	LAB 3	J	25
Plex Photographic	P101988	Central+Dept	LAB 3	J	25
Plex Photographic	P101989	Central+Dept	LAB 3	J	25
Plex Photographic	P101990	Central+Dept	LAB 3	J	25
Plex Photographic	P101991	Central+Dept	LAB 3	J	25
Plex Photographic	P101992	Central+Dept	LAB 3	J	25
Plex Photographic	P101993	Central+Dept	LAB 3	J	25
Plex Photographic	P101994	Central+Dept	LAB 3	J	25
Plex Photographic	P101995	Central+Dept	LAB 3	J	25
Plex Photographic	P101996	Central+Dept	LAB 3	J	25
Plex Photographic	P101997	Central+Dept	LAB 3	J	25
Plex Photographic	P101998	Central+Dept	LAB 3	J	25
Plex Photographic	P101999	Central+Dept	LAB 3	J	25
Plex Photographic	P102000	Central+Dept	LAB 3	J	25
Plex Photographic	P102001	Central+Dept	LAB 3	J	25

Graphical Navigation with Buttons at the top / Top Ribbon

Objects Catalog

Screen View: **Anita Jones Collection**

Object ID: **1951.026.0024** | Date: 1960 thru 1970

Object Name: **Belt** | Catalog Date: 07/15/2005

Other Name: **Sash/Feja** | Cataloged by: Mason, Chelsea

Other#: | Status Date: 08/01/2007

Obj#: **08/01/20071961-26-24** | Status by: **Ramirez, Sandra**

Accession#: **1951.026** | Barney, Mrs. Lila | Status: **OK**

Home Location: **Curation Dept., Textile Room: J.5.Box 461**

Image Management (1 of 1)

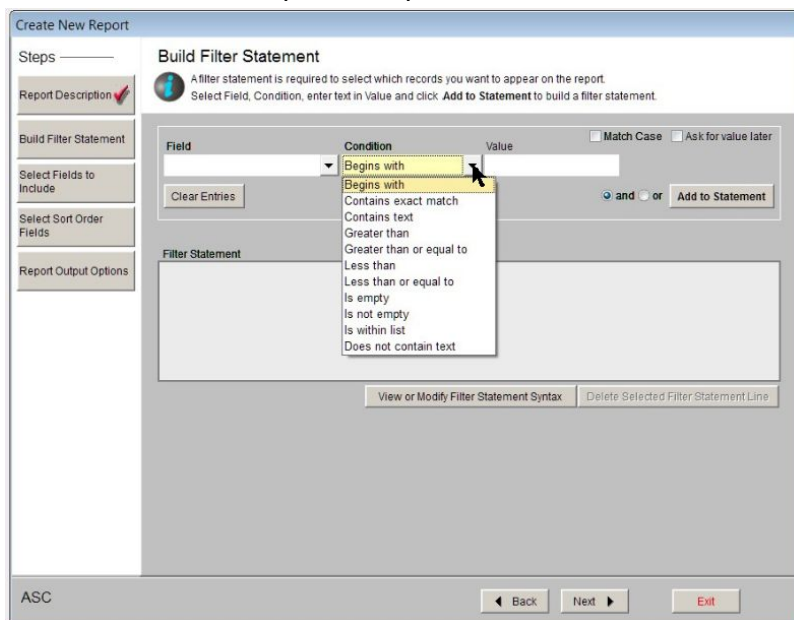
Description: Hand loomed cotton sash, red/white diamond pattern, wide banded pattern on each end; white fringe. W/rippled around waist folded in half lengthwise first. Part of costume SDM 1960-25-13 to 17).

Material: cotton

Found: Zapotec

Record 11709 of 51439 | On Temporary Location | Updated by: Helene | Updated: 10/28/2015 12:27 PM | Update History

Boolean Search / Graphical Report Builder



Primary image in top right corner, download button at bottom of page:

