

## Appendix 2. User Personas

---



Name: Eva L.

Age: 63

Primary role: Staff Assistant, Mary Buie Museum,  
University of Mississippi

Education level: M.F.A.

Residence: Oxford, Mississippi

Hometown: Vicksburg, Mississippi

Marital Status: Married 42 years

Children: 3; 7 grandchildren

Hobbies: Junior League, volunteering through her church

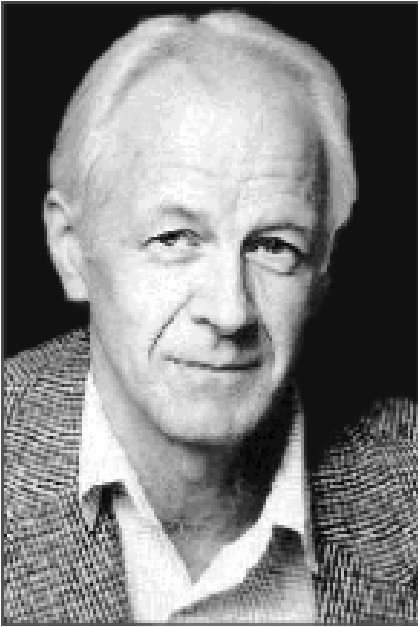
Computing skills: Has a PC at home which she uses to check her e-mail. Uses Internet Explorer to browse the internet. Never installs or modifies software; takes a long time to feel comfortable with new things her children do to the computer when they visit.

Primary software used: Microsoft Word, Internet Explorer, and Image Viewer

Primary goals: Would like to use the internet to spread the word about her idol, Theora Hamblett, and Ole Miss's Hamblett collection (some of which is online on the University's pages). Isn't sure about the legality of posting Hamblett images elsewhere on the internet, but can easily provide an item-level catalog of the museum's holdings in Word format to other interested scholars. Would also love to view images of art similar to Hamblett's.

Primary features: Catalog contribution, browsing images

Frustrations/pet peeves: Doesn't want to be overwhelmed by options. Wants to access the features she needs and wants without having to figure out what everything else does.



Name: Allan W.

Age: 57

Primary role: Professor, Department of American Studies, Vanderbilt University

Education level: Ph.D. (Cultural Migration in the American South)

Residence: Nashville, TN

Hometown: Boston, MA

Marital Status: Partnered

Children: none

Hobbies: Film discussion group, reading, travel

Computing skills: Doesn't seek out new technologies, but isn't afraid to learn to use them, either. Uses word processing and presentation software programs, and browses the internet recreationally. He even has a MySpace account, created to see what his students were talking about all the time. He has recently finished scanning every photograph he has ever taken, as well as every photograph and slide his father ever took, so he has some basic knowledge of photo-editing software. Discovered Flickr while looking for a way to share his photographs after a trip to Europe last summer and has been an avid fan ever since.

Primary software used: Microsoft Word, Picasa Photo software, PowerPoint, Excel

Primary goals: With fabulous teaching evaluations, Professor W. is known for his trendy, pop-culture-laden lectures and of-the-moment insights. He dedicates himself to his teaching and spends a great deal of time looking for interesting, engaging ways to discuss sociological aspects of the American South. He would like a bank of syllabi for inspiration, and he would be grateful for easy access to primary sources, video, and images useful for his lectures and his students' classwork. But balancing a fulfilling personal life and a committed teaching life is difficult, and Professor W. considers chat/bulletin board sites to be pretty much a waste of his time.

Primary features: image repository, syllabus repository, other primary-source access, search feature, teaching tools

Frustrations/pet peeves: Confusion, lack of clarity, or extraneous features that make his research harder to do.



Name: James D.

Age: 20

Primary role: Sophomore, Georgia Tech

Education level: Some college

Residence: On-campus housing

Hometown: Savannah, GA

Marital Status: single

Children: none

Hobbies: Gaming

Computing skills: A true child of Generation Y, James has never been without a computer. He wrote his first simple program at age 7 and has never looked back. Despite his programming competency, he is considering biomedical engineering as a career. Computers are, therefore, tools – omnipresent and generally capable of doing what he needs, when he needs it – but not things about which James feels a passion, in and of themselves.

Primary software used: IM software, word processing, relevant scientific software, really cool widgets he picked up here and there

Primary goals: After a summer conversation with his grandfather, a peanut farmer, James has decided to try taking a limited number of humanities classes while at Georgia Tech, and is currently enrolled in a special topics course on Southern literature. He is enjoying the course, but certainly doesn't have the free time to devote much more than the minimum amount of energy to its assignments. James primarily wants to be able to find sources for his coursework.. He will browse interesting-looking sites, however, and might be interested in sharing his grandfather's collection of Depression-era photographs in a vital photo-sharing community, should he stumble upon it.

Primary features: search feature, image repository

Frustrations/pet peeves: Glitches annoy James to no end. He wants websites to work quickly and easily, and avoids troll-ridden sites at all costs.



Name: Alison B.

Age: 23

Primary role: Student, CSAS, UNC

Education level: M.A. student

Residence: Chapel Hill, NC

Hometown: Miami, FL

Marital Status: Single

Children: A terrier mutt

Hobbies: Movies, music, cooking

Computing skills: Doesn't find computers particularly interesting, but can do everything she needs to do with them – e-mail, keeping in touch with friends, researching, and writing papers.

Primary software used: Web browser, IM software, word processing

Primary goals: Alison lives pretty far from campus and doesn't have to drive in every day, so she tries to do as much of her research online as she possibly can. This living situation, and the essential nature of Southern Studies as a field, can lead to Alison's feeling pretty isolated, however. She'd love a way to meet other people interested in traditional foodways. She'd also love to be notified of the academic opportunities (like calls for papers or conferences) in the English and History departments, from which she is often excluded accidentally.

Primary features: Search, primary source repository, IM/chat, calendar, RSS feed

Frustrations/pet peeves: Really wants a community of like-minded individuals; that is, scholars or those with scholarly inclination. Isn't interested in unmoderated forums or places where the virtual community seems too large. Doesn't want to feel pressured to visit a site every day and back-read threads of conversation.



Name: Amado G.

Age: 29

Primary role: Librarian and subject liaison (History), University of Maryland

Education level: M.A. (History), M.L.I.S.

Residence: College Park, MD

Hometown: Atlanta, GA

Marital Status: married

Children: none

Hobbies: Outdoor sports, photography, music

Computing skills: Very good. Amado is competent at the normal range of academic tasks, but also has eagerly embraced his new digital camera and can edit photos and video handily using basic software. He even

leads occasional tech sessions when the regular librarians are busy.

Primary software used: Microsoft Office, Pinnacle Studio, Photoshop, Firefox

Primary goals: Receives many requests from faculty for sources relevant to the Civil War and Civil Rights eras, especially newspapers. Would love to make fulfilling these requests easier, especially by teaching faculty how to find that stuff themselves, if there were an easy source for such things.

Primary features: Search, image repository, video repository

Frustrations/pet peeves: Doesn't really love leading tech sessions for particularly obtuse faculty, and doesn't want to have to answer questions about how to utilize a website.



Name: Bobby J.

Age: 36

Primary role: Professor, Dept. of African American Studies, UC Berkeley

Education level: Ph.D.

Residence: Berkeley, CA

Hometown: Philadelphia, PA

Marital Status: Married

Children: 2

Hobbies: Barbershop quartet, mystery novels

Computing skills: Pretty decent. Having grown up prior to the computer revolution, he isn't quite sure how everything works, but is more than aware of how important computers are. Has worked hard to make sure his computing skills are at least passable, if not quite competitive.

Primary software used: Microsoft Word, PowerPoint, Internet Explorer

Primary goals: Because he has had to struggle to learn how to use some aspects of academic technology, he wants to make very sure his students know how to find reliable academic sources online. Moreover, he appreciates the ease of online citations and the entertainment factor added by well-designed digital presentations, which he requires of his students. And he would love to connect with other academics like himself to swap assignment suggestions.

Primary features: Search, image/video repositories, bulletin board, syllabi, teaching tools

Frustrations/pet peeves: Doesn't want to worry about the credibility of the sources his students use, and wants them to be able to use the sites to which he sends them easily and well.



Name: Patricia S.

Age: 39

Primary role: Anchor, WBRC-6 (FOX)

Education level: M.S.

Residence: Birmingham, AL

Hometown: Decatur, AL

Marital Status: Married

Children: 3

Hobbies: Crafts, golf

Computing skills: Uses computers mainly for communication. Can e-mail and chat easily, and can use a browser to find information she wants.

Primary software used: Microsoft Outlook, AOL-IM, Internet Explorer

Primary goals: Is the secondary anchor on the local 5-o'clock news. Has a weekly segment called "Patsy's Picks" which highlights events, happenings, and history locally and regionally. Would love to be able to scan headlines about local history, local events (especially cultural/artistic sorts of events), etc. to lend a more intellectual note to the segment, which sometimes features cheerleaders washing cars for lack of a better subject.

Primary features: RSS feed, directory (for contact information)

Frustrations/pet peeves:



Name: Liugen X.

Age: 61

Primary role: Professor Emeritus (Faulker)

Education level: Ph.D. (American Literature)

Residence: Beijing, China

Hometown: Tianjin, China

Marital Status: Married

Children: 1

Hobbies: Fishing, birds, martial arts

Computing skills: After two sabbaticals in the United States, bought himself a top-of-the-line PC in Hong Kong. Can use most standard software, although is not familiar with image/video editing, and hasn't figured out how to upload his grandson's baby pictures yet (grandson is now 2 years old).

Primary software used: Internet Explorer, Microsoft Word

Primary goals: To keep abreast of research and other academic happenings in the Faulkner/Southern Literature community. Communicates daily with colleagues in Denmark. Is planning a trip to Oxford, MS for the next Faulkner convention, and is co-authoring a new paper on Faulkner's sexuality with two other (American) colleagues. Relevant primary sources, networking tools, and online access to digital objects will be appreciated.

Primary features: Repositories, directory, bulletin board

Frustrations/pet peeves:



Name: Karin S.

Age: 41

Primary role: Administrative assistant, Tulsa Community College

Education level: M.A. (Art History)

Residence: Tulsa, OK

Hometown: Tulsa, OK

Marital Status: Married

Children: 2

Hobbies: Reading, home renovation, art

Computing skills: Basic. Uses proprietary software at work, so isn't exactly scared of computers, but had kids before she had one in her home so she's been too busy to learn much.

Primary software used: Microsoft Word, Internet Explorer

Primary goals: In her spare time, is co-authoring a book (with her sister) on Swedish and Norwegian art in the American South and Southwest. Has found that much of the primary-source documentation they require is a) in Swedish or Norwegian and b) hasn't been digitalized yet. She and her sister were inspired by discovering a stash of their great-grandmother's paintings and embroideries in a family attic, which they have documented digitally. Would be willing to share these images in a reliable environment in which Great-Grandma would still get credit for her work.

Primary features: Directory of archives, Archive locator (geographically), networking tools (to meet people who may live nearby or who can translate), search feature, possibly image repository

Frustrations/pet peeves:

## Appendix 3. Usability Study Protocol

---

Emory University received funding from the Andrew W. Mellon Foundation to create a sustainable cyberinfrastructure program for scholars based on focused interdisciplinary subject domain portals.

This project will form a capstone to the cumulative series of projects undertaken by Emory University to advance scholarly communication which have been sponsored by the Mellon Foundation.

From 8-01-07 to 8-01-08, the scholarly communications analyst and digital library analyst will undertake a usability study of the Web interface to the portal. They will conduct this usability testing in 10 -20 individual, one-hour sessions with Emory undergraduates, graduate students, faculty members, and subject-specialist librarians using a survey instrument designed by the scholarly communications analyst, digital library analyst, and the market consultant.\* These sessions will be videotaped, and the data will be analyzed following the sessions.

The purpose of the usability study is to test the efficacy of the system. The survey instrument thus will be designed to test three interrelated issues in the portal: navigability of the system, ease of use, and intelligibility/lucidity of its search results. It will present to the user a series of specific usage scenarios outlining tasks that they are to accomplish. As they seek to complete these tasks, the users' responses will be measured by tracking and timing their mouse-clicks through the system (did they select the quickest pathway to the task completion?) and by monitoring their success in answering each question (were they able to do so correctly in the time allotted?). Further data will be gathered via videotape, particularly regarding frustration, confusion, or ease associated with the completion of each task.

Following each 30 minute testing session, the scholarly communications analyst and digital library analyst will debrief the user subject, and will invite the user subject to provide additional feedback to the team through a 30 minute conversation about the system and its features. During this conversation, each user subject will be asked to comment on such issues as their likelihood of using such a system to conduct their own research and why, the intelligibility of the ranking and display systems used for search results, and the look and feel of the site. They will also be asked to comment on the resources made available in this beta version of the portal—those they found particularly useful, those they consider less useful, and those that they would suggest adding to the site.

The usability studies will be hosted in a small teaching lab in the Emory Center for Interactive Technologies in Emory University's Robert W. Woodruff library. The room will be equipped with a standard computer (PC) at a desk. We will set up one camera to record each session placed facing the user. Camtasia (TechSmith, Michigan) software will be used to capture the screen and keyboard actions. The room also contains a projector and screen, which will be utilized for the conversational portion of the usability test. The data from this study will be

digitized immediately following each session, and will be analyzed by the scholarly communications analyst and the digital library analyst. Problems, bugs, and inefficiencies in the system will be documented in a usability study report, and will inform the development of a revised Web interface.

- The videotaped sessions will not be made publicly available and access will be restricted only to Cyber infrastructure for Scholars Usability Study investigators.
- All videotapes will be kept under lock and key with either of the Emory investigators.
- The basic questionnaire will also be kept under lock and key and access will be restricted only to Cyber infrastructure for Scholars investigators.
- Videotape of focus group sessions will not be used in any reports or publications pertaining to the project.
- Names of participants will not be used in any reports and publications pertaining to the project. Instead, pseudonyms will be used.

- Metadisciplinary orientation, research area and sub-area of specialization will be indicated in reports and publications.

\*As the data from this comprehensive study is analyzed, we will pay close attention to any differences that appear between the four subject groups: undergraduates, graduate students, faculty members, and subject-specialist librarians. Significant differences between these groups may enable us to tweak systems to particular user profiles in the future.

# Appendix 4: Usability Study Questionnaire

---

Proctor: \_\_\_\_\_

Date: \_\_\_\_\_

Recorder: \_\_\_\_\_

## Volunteer User Information

Name: \_\_\_\_\_

Field: \_\_\_\_\_

Status: \_\_\_\_\_ undergrad      Department \_\_\_\_\_

\_\_\_\_\_ grad student      Research Interests \_\_\_\_\_

\_\_\_\_\_ professor      Does s/he teach? \_\_\_\_\_

\*\*\*\*\*

\_\_\_\_\_ library staff      Job Title/Department \_\_\_\_\_

\_\_\_\_\_ other (explain) \_\_\_\_\_

Has the volunteer ever used SouthComb.org before? \_\_\_\_\_

Time Test Started: \_\_\_\_\_

Time Survey Completed: \_\_\_\_\_

**Total:** \_\_\_\_\_

## Usability Study Test Procedure

The proctor should introduce the user to the others in the room and thank him/her for coming. Make sure that s/he has partaken of the refreshments and is comfortably situated at the computer, and that the screen displays the SouthComb.org home page. Inform the user that s/he is being videotaped, and verify that that is acceptable. Then read the following instructions (or paraphrase them in your own words):

***This study is designed to test a new scholarly web portal called SouthComb.org. As the name indicates, SouthComb.org examines Southern history and culture. It will allow users to search and browse digital archive records, web pages, collection descriptions, article abstracts, library catalog entries and other multimedia such as photos, videos, and maps. It will also feature a Directory of scholars working in the Southern Studies field, including research institutions, programs, publications, and other organizations. Additionally, SouthComb.org will provide an RSS feed aggregation filtered by keywords of news services related to the South, a GIS service whereby users can find the geographic location of specific archives and collections, and a Classroom Repository that include subject guides, syllabi, and other teaching resources. Finally, SouthComb.org offers users the opportunity to contribute directly to the Southern Studies community. Users can submit photos, videos, maps, web links and other information relevant to the South.***

With the input of volunteers like yourself, we hope that SouthComb.org will become a trustworthy, interesting, and user-friendly resource. Today, we are testing to see how users navigate through the site and whether the site presents any difficulties to the typical user. Remember that we are testing the effectiveness of the site design, and not your skills as a user. Difficulties you may encounter signal a fault in our system or the server and not any problem on your part.

Before we begin the study, we would like you to take about three minutes to examine the site on your own. Please do so now.

At the end of the three minutes, hand the user a sheet with the questions, but do not provide him/her with a writing implement.

I will ask you to answer questions and perform various tasks using SouthComb.org. You do not have to write down the answers. I would like you to share your thoughts out loud as you use the site, and \_\_\_\_\_ will be taking notes. Three minutes will be allotted to answer each question, and the entire test should take no more than thirty minutes. Do you have any questions?

Clearly indicate when the test is beginning. If the user should ask, you cannot assist him/her in fulfilling the task, but it may be necessary to rephrase a question, if s/he just doesn't understand what is being asked. Refrain from commenting about the site while the test and survey are in progress. The proctor will read the questions, time the responses, and watch the pacing. The recorder will take notes.

1. Login to SouthComb.org with the user name **test\_user** and the password **test**.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ 1 2 3 4 5

2.a. Find an archival record in University of North Carolina, Chapel Hill's Southern Homefront collection about a catechism to be taught orally. (A Catechism to Be Taught Orally To Those Who Cannot Read; Designed Especially for the Instruction of the Slaves )

2.b. Save the record to your account.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ 1 2 3 4 5

3.a. Browse the Directory. Does Ole Mississippi offer a graduate degree in Southern Studies?

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ 1 2 3 4 5

3.b. Save the URL to your account.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ 1 2 3 4 5

4. View the records in your account.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ 1 2 3 4 5

**5.** Browse Classroom Resources. Find a syllabus for a course on Southeastern Indians.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

**6.** Search for a picture of Atlanta residents in 1960.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

6b. Save the photo to your account.

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

**7.** Find the link to GIS services. Search maps using the keyword Choctaw Indians. Where are the library archives that hold records on the Choctaw Indians?

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

**8.** Find the link to Today's South. How many feeds are available for you to browse?

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

**9.** Find User Preferences. Customize the RSS filter to include the category "culture."

Time started: \_\_\_\_\_ Difficulty Experienced:  
Time stopped: \_\_\_\_\_  
Completed? \_\_\_\_\_ **1 2 3 4 5**

**10.** Find the link to submit a photo. Upload the photo saved to your computer desktop to SouthComb. Be sure to include a picture title.

Time started: \_\_\_\_\_

Difficulty Experienced:

Time stopped: \_\_\_\_\_

Completed? \_\_\_\_\_

**1    2    3    4    5**