

# User Experience Research Report

## Usability Test

### Team Visionaries

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## **Executive Summary**

ProQuest ETD Administrator is an online platform through which students can submit theses and dissertations.

### **Methods and Implementation**

Our target demographic for tester recruitment included master's and PhD students with dissertation submission needs. We recruited 5 users via university Slack channels and existing connections. We scheduled in-person and zoom meetings, measuring usability metrics such as time and success and providing pre- and post-test questionnaires to gather qualitative feedback.

### **Key Findings and Recommendations**

Testers struggled with text-heavy descriptions and unclear graphics when navigating the Pre-order copies and Creative Commons pages. Additional feedback highlighted issues with the special offer's appeal—3 out of 5 testers choosing to decline. The help feature was also a hurdle for many testers, with all testers initially avoiding the search bar.

Recommendations include refining instructions for the Creative Commons page to reduce ambiguity and altering graphics and input buttons on the Pre-order copies page to promote clarity. Furthermore, adding a general FAQ to the Submitting your ETD help page could improve support for struggling users. These adjustments aim to enhance user experience and optimize engagement with the platform.

### **Summary**

In summary, testers had difficulty using the help function and understanding the Pre-order copies and Creative Commons page instructions. The feedback garnered proved valuable, contributing significantly to our understanding of the platform's usability.

## Introduction

### System Goals and Users

ProQuest ETD Administrator is an online platform designed to streamline the submission of theses and dissertations for graduate students. The expected tasks to perform include choosing publishing and creative commons options, uploading documents, and ordering physical copies. With a focus on user-friendly functionality, the platform aims to ensure an efficient submission experience for ETDs.

### Research Goals and Questions

After meeting with our client to discuss their preferences and goals for the usability tests, we established our research goal to assess **how easily users can navigate ProQuest, follow instructions, order copies, and utilize the help function**. Based on these goals, we formulated key research questions:

1. To what extent are instructions clear and easy to follow, particularly for the licensing and publishing options pages?
2. How can the process of pre-ordering ETD copies be improved? Is the special offer pop-up accessible and enticing?
3. Is the help function effective in supporting users who encounter difficulties?

We developed our metrics and methodologies in accordance with the research questions. Our approach involves observing users as they navigate the platform, noting the time and errors for each task, and analyzing the data to identify the areas for improvement. Our research aims to reduce user confusion and enhance engagement with features like special offer pop-up, providing valuable insights for our clients.

## Methods

### Participant Selection Criteria

We targeted master's and PhD students currently engaged in the process of preparing their thesis or dissertation. Our proxy users were individuals who intended to submit their ETD but had not yet started the process. This demographic was chosen to ensure tester's would have the necessary context to efficiently complete tasks. Recruitment efforts were focused on university Slack channels and existing connections.

### Pilot Test

Prior to the main usability testing phase, we conducted an in-person pilot test to evaluate and improve task flow. The pilot tester was an undergraduate Computer Science major. The following changes were made as a result of the session.

- Added note to Task Three letting testers know they could use the search bar.
- Altered instructions to mention that the information in the billing section could be inputted randomly.
- Included a note in Task Two to prompt users to pay attention to the special offer, clarifying its relevance to the task.

## Participant Description

The participants for our usability tests were kept anonymous to maintain confidentiality. Testers come from diverse academic backgrounds including biomedical engineering, antibody engineering, drug delivery, human-computer interaction, and archival studies. Three testers are currently working on their theses, while two are not. All have minimal to no familiarity with ProQuest ETD Administrator. This is ideal for evaluating the system, as submission is typically a one-time experience, and fresh perspectives are valuable.

## Test Setting and Equipment

Usability tests were conducted in-person and recorded using Zoom's screen-sharing feature. In-person meetings provided an opportunity to observe participants directly. Sessions were recorded for reference and analysis purposes.

## Test Protocol

The test protocol was scripted to ensure consistency across sessions. Participants were delivered a preamble outlining the purpose of the study and their rights as participants. The order of activities, including tasks and debriefing strategies, was structured to facilitate a smooth testing process. Task sheets were prepared for each participant, detailing the activities they were required to complete during the session. Notes were taken during each session and compiled into rainbow spreadsheets for analysis.

## Tasks

Tasks were designed to evaluate specific aspects of the platform's usability. Each task was clearly described in the test script, with detailed instructions provided to participants. Tasks were designed to assess the clarity of instructions, ease of navigation, and effectiveness of features such as the help function and ordering process for physical copies.

## Pre- and Post-test Questionnaires

Pre- and post-test questionnaires were administered to gather additional qualitative feedback from participants. The pre-test questionnaire recorded demographic information such as area of study and familiarity with ProQuest, while the post-test questionnaire collected information on user satisfaction and perceived usability.

## Findings and Recommendations

Based on our observations from the usability tests, here are the findings and recommendations organized by specific areas and severity:

### Findings

- **Inefficient help functionality:**
  - **5/5 testers** noticed the red help icon in the top right corner, 0 noticed the alternate help icon in the bottom right that offers more functionality.
  - All testers skimmed the Submitting your ETD article and required a hint to proceed.
  - Testers struggled with the search bar, unsure of how to phrase their questions. Feedback highlighted the complexity of the help page: "Lots of information on the help page with little direction" (pilot tester).
- **Misleading copy size graphics and confusing quantity inputting**
  - 4 out of 5 testers made mistakes when selecting copy sizes due to unclear visuals. Testers attempted to click on the sizing graphic, misled by the blue border that made it appear clickable.
  - The method of inputting quantity is not intuitive. 2 testers had difficulties entering the quantity of copies and failed to notice the input box initially.
- **Unclear instructions on licensing page**
  - The average time spent on task one was 3.4 minutes, with every tester experiencing difficulty with decision-making.
  - Only one tester correctly selected the Creative Commons option, while others chose partially correct options. Testers were unfamiliar with these licenses and struggled to differentiate between them.
- **Special offers not enticing**
  - The special offer failed to attract most testers: 2 out of 3 in Test A (See Appendix) and 1 out of 2 in Test B declined it
    - Notably, P4 (given Test B) initially refused, reporting no need for three copies. They tested changing the initial quantity to one to see

if the discount still applied. Although the offer did not appear again, their actions indicate a willingness to accept the special offer if the final quantity were two copies.

- **Preference for Traditional over Open Access due to cost concerns and lack of benefit clarity**
  - 4 out of 5 testers chose traditional access almost immediately, despite instructions to select an option that allows full-text access for everyone.
  - No user invested time in reading the descriptions to understand the differences between traditional and open access, driven by reluctance to incur additional costs.
- **Lengthy and distracting text:**
  - The text was too lengthy for testers to read during the 15-minute test. P5 stated, "A lot of text to skim through, text was displayed all at the same time which caused me to miss details." P4 commented, "Very text heavy with the paragraphs - overwhelming for someone at this stage"

## Recommendations

- **Remove the redundant help icon and add a FAQ section**
  - Remove the second help icon to avoid redundancy.
  - Add the FAQ section to the top of the help landing page. Both P1 and P3 indicated that a browsable FAQ section would be helpful here.
- **Redesign the input box and the sizing graphic**
  - Convert the input box into a stepper to clarify its function.
  - Redesign the book size diagram to prevent users from mistakenly clicking on the image to select the size.
    - Alternatively, convert the size diagram to a clickable format and adjust input fields accordingly.
- **Highlight differences and suggest typical use cases for licensing options**
  - Add additional videos, student perspectives, or even a chart/table to show differences in access to the Creative Commons page
  - Highlight most commonly chosen options. "I wish I knew from another student what's the best thing to do, like reviews. Just knowing what everybody does?" (P4)
- **Clarify the offer details and emphasize its exclusivity**
  - Improve clarity on the pricing and benefits of the special offer according to P4's feedback: "I would concisely describe it as free shipping + \$18 off."
  - Emphasize that this is a one-time offer through visual cues and comparison charts to underscore the exclusivity and urgency of the deal.
- **Enhance visibility of Open Access benefits**

- Clearly highlight the advantages of choosing Open Access over Traditional Access. Use concise language and engaging visuals to illustrate its broader dissemination benefits.
- **Fragment the text**
  - Feedback includes suggestions such as "less text, add some interactive content to describe features" (P4) to improve engagement, and "fragment the text and screens" (P5) to enhance readability.

## Discussion

### Shortcomings

The shortcomings of our study can be broken down into two categories: **task construction** and **test logistics**. Given the sequential nature of the platform, we were limited when coming up with task flows. To ensure testers weren't locked out of completing tasks, we prompted them to input random information on some pages. Questions such as "Should I choose X option?" and "Do I need to fill out this part?" arose, lengthening testing time. Similarly, the wording of some tasks caused confusion among testers. For instance, task three prompted users to search for when their dissertation would be available **via ProQuest**. 2 out of 5 users took this to mean information on when their copies would be **delivered**.

Additionally, though we were able to conduct ½ tests in an ideal environment, last-minute developments caused us to switch from a private room to a public space during our final test. Both the tester and moderator were forced to communicate quietly, which may have limited the results of the **Think-Aloud Protocol**, where testers walk through their process verbally.

### Next Steps

In terms of next steps, our team intends to compare the findings and recommendations from our usability tests with data from previous reports. Further analysis will allow us to create a list of general suggestions for improving the product. We intend to present our collective findings in video format, to ensure easy comprehension.

# Appendices

## Appendix A

### Recruitment Message A

Hi everyone! My teammates and I are looking for PhD/Masters students currently working on their thesis or dissertation to take part in our usability tests for SI622 Needs Assessment and Usability Evaluation. This semester we're working with ProQuest to evaluate their online submission platform and come up with potential improvements. If you're interested in volunteering, please check out the attached form! We'd really appreciate it!

<https://forms.gle/6QbXDpjUTqsmc3k58>

4/10/24, 5:23 PM

ProQuest Usability Test

### ProQuest Usability Test

We're Team Visionaries, a group of graduate students from the School of Information. This semester we're working with ProQuest to evaluate their electronic submission system (ProQuest ETD Administrator) and come up with potential improvements. We are looking for usability testers who are **PhD or Masters students** currently working on their thesis/dissertation. We are looking for testers with **no prior experience** using ProQuest ETD Administrator who can meet with us **in person** over the course of the next two weeks. Please let us know if you're interested in participating and we'll send you the details!

1. Email \*

---

2. Uniqname

---

3. First name

---

4. Last name

---

5. Are you free to meet with our team on campus before Friday 4/12?

*Mark only one oval.*

Yes

No

## Recruitment Message B

Hi [omitted]! Thank you so much for volunteering to help find people for this project! We've actually scheduled a few more tests in the past day so we're still uncertain on only one slot (we have to conduct 5 tests total). The project is for our usability evaluation and needs assessment class, we're working with ProQuest this semester looking for ways to improve their online thesis/dissertation submission platform. Our contacts from ProQuest have given us the following guidelines for testers: they should have no prior experience using the platform and must be a student currently working on their thesis/dissertation. The test will take 15-20 min max, during which we'll give testers 3 tasks to complete on the demo site while we observe their process.

## Recruitment Message C

Hi [omitted],

Thank you so much for volunteering to participate in our team's usability testing. As [omitted] mentioned, this semester we're working with ProQuest to evaluate their online submission platform (ProQuest ETD Administrator).

The usability test should take 15 minutes or less—along with the tasks, we'll give you a brief questionnaire to fill out before and after. Our team has the most availability on weekends, Mondays and Fridays, but our schedule is largely flexible. Is there a time that works best for you?

Thank you again, we really appreciate it!  
Kay

## **Appendix B**

### **Test #1 Summary**

Moderator: Kay

The tester is a PhD student studying Biomedical Engineering. They are currently working on their dissertation and, at the time of the test, had no prior experience using ProQuest ETD Administrator.

### **Test #2 Summary**

Moderator: Catherine

The tester is currently a PhD student studying antibody engineering and drug delivery. They did not face the dissertation phase right now, and also did not have any prior experience of using any online submission system.

### **Test #3 Summary**

Moderator: Zi

The tester is currently a PhD student studying Drug Delivery. They did not face the dissertation phase right now, and also did not have any prior experience of using any online submission system.

### **Test #4 Summary**

Moderator: Kay

The tester is currently a PhD student studying Human-Computer Interaction. They are currently working on their dissertation and, at the time of the test, had no prior experience using ProQuest ETD Administrator. Members of our team met with the tester in a conference space on campus. The test spanned a little under 15 minutes, not including the debrief.

### **Test #5 Summary**

Moderator: Kay

The tester is currently a PhD student whose listed areas of study include Archival Studies, Diaspora Studies, Decolonial Theory, Critical Latinx Indigeneities, and Memory Studies. They reported that they are currently working on their dissertation and, at the time of the test, had no prior experience using ProQuest ETD Administrator. We had initially scheduled the session to take place in a private study room on campus, but due to a last minute change in the tester's schedule we conducted the usability test in a more public setting—the open-floor study space at the undergraduate library. We kept the volume of the test at a minimum to keep from disturbing others, but were ultimately able to conduct a successful test.

## Appendix C

### Test Script

Good afternoon,

Thank you for joining us today. As you have heard, our team is doing a consulting project with ProQuest this semester, evaluating their online submission system for theses and dissertations. This usability test will take about 15 minutes. We'll provide you with a list of tasks to carry out on the demo site as well as a pre and post test questionnaire. Remember, this is a test of ProQuest ETD Administrator's user experience, not of you or your abilities. It's impossible to fail or do poorly on this test, so please feel free to share your full thoughts and feelings.

Before we begin the test, I'd like to lay some groundwork to ensure we're both on the same page and that you feel at ease throughout the experience.

Note that your participation is entirely voluntary, and you have the right to withdraw from the test at any time.

If it's alright with you, we'd like to make an audio and video recording of the session. This is purely for our reference, to ensure that we don't miss any valuable insights you provide. The recording will not be shared publicly or with anyone outside of the members in our team. May I have your permission to proceed with the recording?

Okay, let's go ahead and begin.

### Task Sheet A

#### 1. Task One: Submitting Your Dissertation with Specific Publishing Preferences

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text. On the **Creative Commons** page, choose the option that allows others to **distribute or build on your work as long as they credit you**. Please complete all the submission steps until you are prompted to **upload the required documents**.

#### 2. Task Two: Ordering Copies with Special Offers

Proceed with your submission, navigate to the **Pre-order copies** page and purchase **one 8.5 x 11 hardcover copy**. Complete all the remaining steps, including making the payment, to finalize your submission. When the credit card

information prompt appears, input 4 and then fifteen 1s until the card number is completed. The rest of the information, including billing address, can be random.

Note: **Be sure to take note of the special offer pop-up.**

### 3. Task Three: Utilizing the Help Function

You are curious about how soon your dissertation or thesis will be available via ProQuest after submission. Before reaching out to your advisor for assistance, try to find the answer using the **help features** available on the site.

Note: Feel free to use the **search bar** if you are having trouble finding the answer.

## Task Sheet B

### 1. Task One: Submitting Your Dissertation with Specific Publishing Preferences

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text. On the **Creative Commons** page, choose the option that allows others to **distribute or build on your work as long as they credit you**. Please complete all the submission steps until you are prompted to **upload the required documents**.

### 2. Task Two: Ordering Copies with Special Offers

Navigate to the **Pre-order copies** page and purchase **two 8.5 x 11 hardcover copies**. Complete all the remaining steps, including making the payment, to finalize your submission. When the credit card information prompt appears, input 4 and then fifteen 1s until the card number is completed. The rest of the information, including billing address, can be random.

Note: **Be sure to take note of the special offer pop-up.**

### 3. Task Three: Utilizing the Help Function

You are curious about how soon your dissertation or thesis will be available via ProQuest after submission. Before reaching out to your advisor for assistance, try to find the answer using the **help features** available on the site.

Note: Feel free to use the **search bar** if you are having trouble finding the answer.

# Appendix D

## Pre-test Questionnaire

4/10/24, 5:38 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

1. Please list your area(s) of study.

---

2. Are you currently working on a thesis or dissertation?

*Mark only one oval.*

Yes

No

Other: \_\_\_\_\_

3. On a scale of 0 to 5, how familiar are you with the online submission process?

*Mark only one oval.*

0 1 2 3 4 5

Not       Very Familiar

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# Post-test Questionnaire

4/10/24, 5:42 PM

Post-test Questionnaire

## Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

1. How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

*Mark only one oval.*

0 1 2 3 4 5

Very       Very Easy

2. Did you encounter any errors or difficulties during the entire process?

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3. Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

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4. How effective did you find the "help" feature?

*Mark only one oval.*

1 2 3 4 5

Very      Very Helpful

5. Regarding the "special offer" feature: Is the offer clear and understandable?

*Mark only one oval.*

- Yes  
 No  
 Other: \_\_\_\_\_

6. Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

*Mark only one oval.*

- Yes  
 No  
 Other: \_\_\_\_\_

7. Regarding the "special offer" feature: Is the offer easy to apply for?

*Mark only one oval.*

- Yes  
 No  
 Other: \_\_\_\_\_

8. On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

*Mark only one oval.*

0 1 2 3 4 5

Very       Very Satisfied

9. Any suggestions?

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# Appendix E

## Pre-test Questionnaire Response #1

4/10/24, 5:38 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

Please list your area(s) of study.

Biomedical engineering

Are you currently working on a thesis or dissertation?

Yes

No

Other: \_\_\_\_\_

On a scale of 0 to 5, how familiar are you with the online submission process?

	0	1	2	3	4	5	
Not Familiar at All	<input checked="" type="radio"/>	<input type="radio"/>	Very Familiar				

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## Pre-test Questionnaire Response #2

4/10/24, 5:39 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

Please list your area(s) of study.

antibody engineering; drug delivery

Are you currently working on a thesis or dissertation?

Yes

No

Other: \_\_\_\_\_

On a scale of 0 to 5, how familiar are you with the online submission process?

0

1

2

3

4

5

Not Familiar at All

Very Familiar

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## Pre-test Questionnaire Response #3

4/10/24, 5:39 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

Please list your area(s) of study.

Drug delivery

Are you currently working on a thesis or dissertation?

Yes

No

Other: \_\_\_\_\_

On a scale of 0 to 5, how familiar are you with the online submission process?

0 1 2 3 4 5

Not Familiar at All       Very Familiar

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## Pre-test Questionnaire Response #4

4/10/24, 5:39 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

Please list your area(s) of study.

Information - Human Computer Interaction

Are you currently working on a thesis or dissertation?

Yes

No

Other: .....

On a scale of 0 to 5, how familiar are you with the online submission process?

0 1 2 3 4 5

Not Familiar at All       Very Familiar

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## Pre-test Questionnaire Response #5

4/13/24, 10:15 PM

Pre-test Questionnaire

### Pre-test Questionnaire

This brief pre-test questionnaire is intended to gauge your familiarity with ProQuest and theses/dissertations in general.

Please list your area(s) of study.

Archival Studies, Diaspora Studies, Decolonial Theory, Critical Latinx Indigeneities, Memory Studies

Are you currently working on a thesis or dissertation?

Yes

No

Other: .....

On a scale of 0 to 5, how familiar are you with the online submission process?

0 1 2 3 4 5  
Not Familiar at All       Very Familiar

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## Pre-test Questionnaire Data Table

Link to Google Sheets:

<https://docs.google.com/spreadsheets/d/1zgjmTOuCHxnMkRm2pwTEdkS4AqUrOrSPbBt1kpvWmao/edit#gid=1297763151>

Test #	Timestamp	Please list your area(s) of study.	Are you currently working on a thesis or dissertation?	On a scale of 0 to 5, how familiar are you with the online submission process?
Pilot	4/6/2024 14:03:59	computer science	No	0
P1	4/7/2024 11:33:32	Biomedical engineering	Yes	0
P2	4/8/2024 16:56:12	antibody engineering; dru	No	1
P3	4/9/2024 13:46:41	Drug delivery	No	0
P4	4/10/2024 12:17:46	Information - Human Corr	Yes	0
P5	4/11/2024 10:24:03	Archival Studies, Diaspo	Yes	0

# Appendix F

## Post-test Questionnaire Response #1

4/13/24, 10:18 PM

Post-test Questionnaire

### Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

Very Difficult   0   1   2   3   4   5   Very Easy

             

Did you encounter any errors or difficulties during the entire process?

The last part with finding the specific information on the help page

Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

Ordering of it seemed straightforward, it was separated into sections so the flow was good

How effective did you find the "help" feature?

Very Unhelpful   1   2   3   4   5   Very Helpful

Regarding the "special offer" feature: Is the offer clear and understandable?

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer easy to apply for?

- Yes
- No
- Other: .....

On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

	0	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Very Satisfied

Any suggestions?

Add the FAQ information to a link on the help landing page

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## Post-test Questionnaire Response #2

4/13/24, 10:26 PM

Post-test Questionnaire

### Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

0 1 2 3 4 5

Very Difficult       Very Easy

Did you encounter any errors or difficulties during the entire process?

No .....

Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

Yes .....

How effective did you find the "help" feature?

1 2 3 4 5

Very Unhelpful      Very Helpful

Regarding the "special offer" feature: Is the offer clear and understandable?

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer easy to apply for?

- Yes
- No
- Other: .....

On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

	0	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Very Satisfied

Any suggestions?

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## Post-test Questionnaire Response #3

4/13/24, 10:34 PM

Post-test Questionnaire

### Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

	0	1	2	3	4	5	
Very Difficult	<input type="radio"/>	<input checked="" type="radio"/>	Very Easy				

Did you encounter any errors or difficulties during the entire process?

Not really. However, the help page is quite complicated. I have a hard time finding the help icon and I don't even have any idea what exact words I should search for to get the answers once I receive the task. It'd be super helpful to have a FAQ section where I could just browse common questions without having to guess the right way to ask for help.

Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

Yes

How effective did you find the "help" feature?

	1	2	3	4	5	
Very Unhelpful	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Helpful

Regarding the "special offer" feature: Is the offer clear and understandable?

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer easy to apply for?

- Yes
- No
- Other: .....

On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

	0	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Very Satisfied

Any suggestions?

The frequently asked questions can be placed beside "chat with us" for easy access.

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## Post-test Questionnaire Response #4

4/14/24, 7:09 PM

Post-test Questionnaire

### Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

0 1 2 3 4 5

Very Difficult       Very Easy

Did you encounter any errors or difficulties during the entire process?

Choosing creative commons access level, understanding the acronyms, knowing what is best for me, my work, etc. was a bit stressful. After all of this work, I don't want additional stress to make this choice.

Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

Yes - but the licensing, copyright decision making could benefit from additional videos, student perspectives or even a chart/table to show the differences in accessible materials. Very text heavy with the paragraphs - overwhelming for someone at this stage of the PhD/MS etc.

How effective did you find the "help" feature?

1 2 3 4 5

Very Unhelpful      Very Helpful

Regarding the "special offer" feature: Is the offer clear and understandable?

- Yes
- No
- Other: .....

Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

- Yes
- No
- Other:  
I don't "need" another copy. the \$31 vs. \$18 is a bit vague. I would clearly concisely describe it as free shipping + \$18 off .....

Regarding the "special offer" feature: Is the offer easy to apply for?

- Yes
- No
- Other: .....

On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

	0	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Very Satisfied

Any suggestions?

Less text, add some interactive content to describe major decision points.

This form was created inside of University of Michigan.

Google Forms

## Post-test Questionnaire Response #5

4/14/24, 2:30 PM

Post-test Questionnaire

### Post-test Questionnaire

This post-test questionnaire is intended to collect information about your experience using ProQuest ETD Administrator.

How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?

0 1 2 3 4 5

Very Difficult       Very Easy

Did you encounter any errors or difficulties during the entire process?

Alot of text to skim through, text was displayed all at the same time which caused me to miss details, skip over prompts. Text was also really small re: size

Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.

Generally, yes was OK to navigate and finish my overall goal of completing the tasks, I missed an additional charge to the \$68 so would have gone back a few screens to verify which is annoying but overall not too terrible.

How effective did you find the "help" feature?

1 2 3 4 5

Very Unhelpful      Very Helpful

Regarding the "special offer" feature: Is the offer clear and understandable?

Yes

No

Other: .....

Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)

Yes

No

Other:

I didn't even read it because I saw shipping and didn't deem it important (not too in a hurry to receive a hard copy) maybe if I was - I would have taken a moment to read but didn't in this case.

Regarding the "special offer" feature: Is the offer easy to apply for?

Yes

No

Other:

Didn't even read the special offer - didn't seem important at the time though now curious of what it was about!

On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?

	0	1	2	3	4	5	
Very Unsatisfied	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very Satisfied

Any suggestions?

Fragment the text, the screens, I would use a different design for rhe pop-up - maybe move more towards the end of order - I think it was in the middle so I didnt feel it was important to read.

This form was created inside of University of Michigan.

Google Forms

# Post-test Questionnaire Data Table

Link to Google sheets:

[https://docs.google.com/spreadsheets/d/1msWP1fUs\\_KU903wVIRrTxI406GL\\_j7DCCugVwWV00TA/edit#gid=2020404713](https://docs.google.com/spreadsheets/d/1msWP1fUs_KU903wVIRrTxI406GL_j7DCCugVwWV00TA/edit#gid=2020404713)

Test #	Timestamp	How would you rate the ease of navigating the ProQuest ETD Administrator site on a scale from 0 to 5?	Did you encounter any errors or difficulties during the entire process?	Were the instructions throughout the submission process clear and easy to understand? Please provide examples if you could recall any.	How effective did you find the "help" feature?	Regarding the "special offer" feature: Is the offer clear and understandable?	Regarding the "special offer" feature: Is the offer appealing or enticing? (Did the special offer affect your decision?)	Regarding the "special offer" feature: Is the offer easy to apply for?	On a scale from 0 to 5, how would you rate your overall satisfaction with the ProQuest ETD Administrator?	Any suggestions?
Pilot	4/6/2024 14:18:31		lots of information on the help page with little direction	yes Ordering of it seemed straightforward, it was separated into sections so the flow was good	3	Yes	No	Yes		3 none
P1	4/7/2024 12:14:18		The last part with finding the specific information on the help page		2	Yes	No	Yes		Add the FAQ information to a link on the help landing page
P2	4/8/2024 17:16:54		3 No	Yes	3	Yes	Yes	Yes		4
P3	4/10/2024 12:37:13		Choosing creative commons access level, understanding the acronyms, knowing what is best for me, my work, etc. was a bit stressful. After all of this work, I don't want additional stress to make this choice.	Yes - but the licensing, copyright decision making could benefit from additional videos, student perspectives or even a chart/table to show the differences in accessible materials. Very text heavy with the paragraphs - overwhelming for someone at this stage of the PhDMS etc.	4	Yes	I don't "need" another copy, the \$31 vs. \$18 is a bit vague. I would clearly concisely describe it as free shipping + \$18 off	Yes		Less text, add some interactive content to describe major decision points.
P4	4/11/2024 12:12:20		A lot of text to skim through, text was displayed all at the same time which caused me to miss details, skip over prompts. Text was also really small no: size	Generally, yes was OK to navigate and finish my overall goal of completing the tasks. I missed an additional charge to the \$68 so would have gone back a few screens to verify which is annoying but overall not too terrible.	3	No	I didn't even read it because I saw shipping and didn't deem it important (not too in a hurry to receive a hard copy) maybe if I was - I would have taken a moment to read but didn't in this case.	Didn't even read the special offer - didn't seem important at the time though now curious of what it was about!		Fragment the text, the screens, I would use a different design for the pop-up - maybe move more towards the end of order - I think it was in the middle so I didn't feel it was important to read.
P5	4/11/2024 15:36:52		Not really. However, the help page is quite complicated. I have a hard time finding the help icon and I don't even have any idea what exact words I should search for to get the answers once I receive the task. It'd be super helpful to have a FAQ section where I could just browse common questions without having to guess the right way to ask for help.	Yes	3	Yes	Yes	Yes		The frequently asked questions can be placed beside "chat with us" for easy access.

## Appendix G

### Participant Key Table

Link to Google Sheets:

[https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf\\_gly2JXYMo/edit#gid=226440739](https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf_gly2JXYMo/edit#gid=226440739)

	P1	P2	P3	P4	P5
Scheduled session	April 7, 11:30 AM	April 8, 5:00 PM	April 9, 1:00 PM	April 10, 12:15 PM	April 11, 12:00 PM
Area of Study	Biomedical Engineering	Antibody Engineering, Drug Delivery	Drug Delivery	Human-Computer Interaction	Archival Studies, Diaspora Studies, Decolonial Theory, Critical Latinx Indigeneities, Memory Studies
Working on ETD? (Y/N)	Y	N	N	Y	Y
Familiarity with ProQuest? (0-5)	0	1	0	0	0

## Usability Test Metrics Table

Link to Google Sheets:

[https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf\\_gly2JXYMo/edit#gid=1799059636](https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf_gly2JXYMo/edit#gid=1799059636)

	Task 1			Task 2			Task 3		
	Success	Errors	Time (min)	Success	Errors	Time	Success	Errors	Time
P1	0.5	2	3	1	1	4	0.5	3	3
P2	1	0	2	1	3	4	0	1	2
P3	1	2	3	1	4	3	0.5	6	4
P4	1	2	5	1	1	4	0.5	1	4
P5	0.5	2	4	1	1	3	0.5	2	2
Mean	0.8	1.6	3.4	1	2	3.6	0.4	2.6	3
Count	5	5	5	5	5	5	5	5	5
Standard Deviation	0.273	0.894	1.14	0	1.414	0.547	0.223	2.167	1

## Usability Test Observations Table

Link to Google Sheets:

[https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf\\_gly2JXYMo/edit#gid=0](https://docs.google.com/spreadsheets/d/1MQKLW9DZ9CbznojmxjIV9pJ18fxnMrFBf_gly2JXYMo/edit#gid=0)

Observations	P1	P2	P3	P4	P5	Possible Solutions
Skipped directly to the Creative Commons page						N/A
Didn't spend significant time on the publishing options page						N/A
Struggled to differentiate between creative commons options						Simplify descriptions
Noted that they wished they had further direction on the Creative Commons page						N/A
Clicked on the "Continue with pre-order" option before filling out the order information						Add instructions, increase size of the purchasing options table
Confused as to whether the size chart on the Pre-order copies page was clickable						Remove the border on the popular size graphic
Didn't pay much attention to the special offer						Give the special offer prompt closer to the end of the purchasing process
Selected "decline" on the special offer						N/A
Searched for the information on the Submitting your ETD page instead of using the search bar for Task 3						Include FAQ listing on the Help button landing page

## Appendix H

### Data Logs

#### Data Log Key

Codes
E: Error
PC/C/NC: Positive/Negative Comment/Comment
F: False Positive
U: Usability Issue

#### Tester P1

##### **Task 1. Submitting Your Dissertation with Specific Publishing Preferences**

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text.

**Estimated time range:** ~2-3 min

**Success measure:** Selects Open Access publishing option, selects Attribution CC BY option on the Creative Commons page

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
11:38 -11:41 (3 min)	PQ Publishing options	F	Chose traditional access without hesitation
	PQ Publishing options	NC	Didn't really look through the descriptions of traditional/open access
	Creative Commons	NC	Struggled to differentiate Creative Commons options, eventually chose attribution non-commercial

**Task 2. Ordering Copies with Special Offers (Copy A)**

Proceed with your submission, navigate to the Pre-order copies page and purchase one 8.5 x 11 hardcover copy.

**Estimated time range:** ~2 min

**Success measure:** Selects the correct number of copies, selects the correct size, completes the purchasing process

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
11:41 - 11:45 (4 min)	Pre-order copies	E	Misclick, confused about whether or not the sizing graphic was clickable
	Submit	NC	Didn't pay attention to/declined special offer

**Task 3. Utilizing the Help Function**

You are curious about how soon your dissertation or thesis will be available via ProQuest after submission.

**Estimated time range:** ~3-4 min

**Success measure:** Successfully finds the required information

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors: 3

Time duration	Screen	Code	Notes
11:45 - 11:48 (3 min)	Submission Completion Page	C	Click on the help icon in the upper right corner
	Help	E	Skim through the overview on the help landing page and confused about where the answer is located
	Help	E	After the hint, they searched for the word "availability", but got no answer.
	Help	E	Randomly navigated to the "Home" and "Submit a case" section with confusion.

	Help	C	Searched for “when will dissertation” and found the correct answer listed at the top of the search results.
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## Tester P2

<b>Task 1. Submitting Your Dissertation with Specific Publishing Preferences</b> You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text.  <b>Estimated time range:</b> ~2-3 min <b>Success measure:</b> Selects Open Access publishing option, selects Attribution CC BY option on the Creative Commons page <b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task) <b>Error rate:</b> Number of errors			
Time duration	Screen	Code	Notes
17:06 - 17:08 (2 min)	PQ Publishing Options	NC	Didn't spend much time on open access, asked "Should I select traditional?"
	Creative Commons	E	Tester ultimately chose the Attribution-Sharealike option
	Creative Commons	C	Looked through the Creative Commons options, spent time reading them

<b>Task 2. Ordering Copies with Special Offers (Copy A)</b> Proceed with your submission, navigate to the Pre-order copies page and purchase one 8.5 x 11 hardcover copy.  <b>Estimated time range:</b> ~2 min <b>Success measure:</b> Selects the correct number of copies, selects the correct size, completes the purchasing process <b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task) <b>Error rate:</b> Number of errors			

Time duration	Screen	Code	Notes
17:08 - 17:12 (4 min)	Pre-order copies	E	Clicked on "Continue with Pre-order" button without inputting preferences
	Pre-order copies	E	Clicked on the image sizing graphic, misclick
	Pre-order copies	E	Clicked on the 6 x 9 in hardcover copy input box
	Submit	PC	Chose "yes" to the special offer

<b>Task 3. Utilizing the Help Function</b> You are curious about how soon your dissertation or thesis will be available via ProQuest after submission.  <b>Estimated time range:</b> ~3-4 min <b>Success measure:</b> Successfully finds the required information <b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task) <b>Error rate:</b> Number of errors			
Time duration	Screen	Code	Notes
17:12 - 17:14, 2 min	Submission Completion Page	C	Used the uppermost help icon
	Help	NC	Searched for "delivery date" in the Search bar and selected the "How long will it take to get my order?" page*
	Help	C	After reminding him again of what information he should look for, asked 'should I use the search bar?'

Tester P3

**Task 1. Submitting Your Dissertation with Specific Publishing Preferences**

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text.

**Estimated time range:** ~2-3 min

**Success measure:** Selects Open Access publishing option, selects Attribution CC BY option on the Creative Commons page

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
13:47 - 13: 51 (3 min)	PQ Publishing Options	NC	Browsed the first 3-4 lines of the descriptions and chose traditional access
	Creative Commons	E	Initially selected "No thank you!" option on the Creative Commons page, misclick
	Creative Commons	E	After deliberation, selected the "Attribute-NonCommercial-Share-alike" option
	Creative Commons	C	Choose the CC BY first -> switch to CC BY-NC-SA after going through other options

**Task 2. Ordering Copies with Special Offers (Copy A)**

Proceed with your submission, navigate to the Pre-order copies page and purchase one 8.5 x 11 hardcover copy.

**Estimated time range:** ~2 min

**Success measure:** Selects the correct number of copies, selects the correct size, completes the purchasing process

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
13:51 - 13:54 (3 min)	Pre-order copies	F	Thought the copy was already chosen as the 8.5*11 in the image has a blue border around it
	Pre-order copies	E	Clicked the "Continue with Pre-order button" without

			inputting preferences
	Submit	E	Clicked on the number of copies input for the 6 x 9 in option instead of the 8.5 x 11 in option
	Submit	F	Attempted to continue submission without filling out the phone number on the shipping information page
	Submit	PC	Chose to add a copy through the special offer

<p><b>Task 3. Utilizing the Help Function</b></p> <p>You are curious about how soon your dissertation or thesis will be available via ProQuest after submission.</p> <p><b>Estimated time range:</b> ~3-4 min</p> <p><b>Success measure:</b> Successfully finds the required information</p> <p><b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)</p> <p><b>Error rate:</b> Number of errors</p>			
Time duration	Screen	Code	Notes
13:54 - 13:58 (4 min)	Submission Completion Page	E	Mistakenly clicked on the google chrome hamburger menu drop down when initially looking for the "Help" option
	Help	E	Browsed through the Submitting your ETD page instead of using the search bar
	Help	E	Typed "help" into the search bar
	Help	F	Selected "Delivery to ProQuest"
	Help	C	Clicked "yes" to the "Was this article helpful?" prompt at the bottom of the page

Tester P4

**Task 1. Submitting Your Dissertation with Specific Publishing Preferences**

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text.

**Estimated time range:** ~2-3 min

**Success measure:** Selects Open Access publishing option, selects Attribution CC BY option on the Creative Commons page

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
12:18 - 12: 23 (5 min)	Creative Commons	C	Directly navigated to the creative commons page and skipped the previous sections
	Creative Commons	C	"The ideas of tweaking and remixing is just strange when it comes to research"
	PQ Publishing Options	C	Jumped back to fill out the previous sections (before creative commons) after being reminded by the moderator
	PQ Publishing Options	NC	Selected Traditional Access option
	Creative Commons	C	"I wish I knew from another student what's the best thing to do. You know, almost like reviews. Just knowing what everybody does?"

**Task 2. Ordering Copies with Special Offers (Copy A)**

Proceed with your submission, navigate to the Pre-order copies page and purchase one 8.5 x 11 hardcover copy.

**Estimated time range:** ~2 min

**Success measure:** Selects the correct number of copies, selects the correct size, completes the purchasing process

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
12:24 - 12: 28 (4 min)	Pre-order copies	E	Initially declined the pre-order, viewed the alert that popped up

			and returned to the Pre-order copies page
	Submit	NC	Declined the special offer
	Pre-order copies	PC	Navigated back to the Pre-order copies page and selected one copy instead of two to see if the offer would still apply

<p><b>Task 3. Utilizing the Help Function</b>          You are curious about how soon your dissertation or thesis will be available via ProQuest after submission.</p> <p><b>Estimated time range:</b> ~3-4 min  <b>Success measure:</b> Successfully finds the required information  <b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)  <b>Error rate:</b> Number of errors</p>			
Time duration	Screen	Code	Notes
12:28- 12:32 (4 min)	Submission Completion Page	PC	Was glad not to lose the previous page when being redirected with the help button
	Help (Submitting your ETD page)	C	"Kind of wish I had some of this information earlier. Maybe if there were some information buttons I could have been sent out to get some of these questions answered that I have."
	Help	E	Struggled on realizing that there's a search bar they could use, initially used command F to search for specific terms

Tester P5

**Task 1. Submitting Your Dissertation with Specific Publishing Preferences**

You are about to submit your dissertation and are willing to share your dissertation with more people, allowing them to access the full text.

**Estimated time range:** ~2-3 min

**Success measure:** Selects Open Access publishing option, selects Attribution CC BY option on the Creative Commons page

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors:

Time duration	Screen	Code	Notes
11:57 - 12: 01 (4 min)	PQ Publishing options	F	Choose TRADITIONAL access without thinking too much
	ProQuest Agreement	C	Long agreement -> "I won't read it rn"
	ProQuest Agreement	C	Wish the agreement is segmented , if in a rush, might miss that, it is a lot
	Creative commons	C	Selected No first, 'I don't need that.'
	Creative commons	C	Skimmed through other options. Switched to CC BY
	Creative commons	E	Took a while to realize that the difference between the two options(CC BY / CC BY-NC) was whether they were commercially available; selected Select CC BY-NC -> "I don't want people make money on that"

**Task 2. Ordering Copies with Special Offers (Copy A)**

Proceed with your submission, navigate to the Pre-order copies page and purchase one 8.5 x 11 hardcover copy.

**Estimated time range:** ~2 min

**Success measure:** Selects the correct number of copies, selects the correct size, completes the purchasing process

**Success Rating** (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task)

**Error rate:** Number of errors

Time duration	Screen	Code	Notes
---------------	--------	------	-------

12: 01: - 12: 04 (3 min)	Pre-order copies	E	Clicked on the sizing image first (intended to select the size). Utilized the input box to enter the copy number after that.
	Submit	C	Declined the special offer, did not spend much time on reading the information
	Order summary	C	Unnoticed charges appear, want to go back and check, "why there is 78 dollar cost"

<b>Task 3. Utilizing the Help Function</b> You are curious about how soon your dissertation or thesis will be available via ProQuest after submission.  <b>Estimated time range:</b> ~3-4 min <b>Success measure:</b> Successfully finds the required information <b>Success Rating</b> (0= did not complete task, 0.5= completed the task somewhat, 1= fully completed the task) <b>Error rate:</b> Number of errors			
Time duration	Screen	Code	Notes
12: 04: - 12:06 (2 min)	Submission Completion Page	C	Selected the uppermost help button
	Help	E	Initially looked through the article on the Submitting your ETD page, used command F to try and search for specific terms
	Help	E	First tried to find information on the landing page and didn't even see there was a search bar

# Appendix I

## Debrief Notes

### P1

Completion time of task 1: 11:38 - 11:41, 3 min

Completion time of task 2: 11:41 - 11:45, 4 min

Completion time of task 3: 11:45 - 11:48, 3 min

Success Rate:

- [X] Select the correct publishing options (option chosen: Traditional Access) / [✓] Correct Creative Commons (option chosen: CC BY-NC-SA)
- [✓] Select correct type and numbers of copies and complete the purchase
- [✓] (completed after hint) Find the information they need in Help page (How soon you dissertation or thesis will be available via ProQuest after submission)

Task 1:

- Choose the traditional access without hesitation
- Do not really look through the description of traditional vs open access.
- Creative Commons: choose the one non-commercially (CC BY-NC-SA), struggled with CC BY-ND and CC BY-NC-SA
- \*Potential improvements: Highlight the difference between each selection, highlight the recommended one, HIGHLIGHT MOST CHOSEN ONE)

Task 2:

- Copies: first confused about if the size images are clickable or not, we may need to change the design of that.
- Special offer: don't care about that / don't pay much attention → **decline the one-time offer**

Task 3:

- Help page: Click on the help icon in the upper right corner → skim through the overview on the help landing page / Confused about where the answer is located; do not search for questions specifically until we remind her to use the search bar.
- After the hint, they searched for the word "availability", but got no answer. → Randomly navigated to the "Home" and "Submit a case" section with confusion.
- Searched for "when will dissertation" and found the correct answer listed at the top of the search results.

### P2

Completion time of task 1: 17:06 - 17:08, 2 min

Completion time of task 2: 17:08 - 17:12, 4 min

Completion time of task 3: 17:12 - 17:14, 2 min

(Tester do not tend to read long instructions/documents so the completion time is generally quick)

Success Rate:

- [✓] Select the correct publishing options (option chosen: Open Access) / [✓] Correct Creative Commons (option chosen: CC BY-SA)
- [✓] Select correct type and numbers of copies and complete the purchase
- [X] Find the information they need in Help page (How soon you dissertation or thesis will be available via ProQuest after submission) -> find the information of "delivery time"

Task1:

- Doesn't spend much time on choosing the access. Asked "should I select traditional?" but ended up choosing the open access
- Tester spent some time reading through the Creative Commons options, ultimately chose the Attribution-ShareAlike option
- Look through each creative commons license from left to right, top to bottom; spend time reading descriptions
- Tester selected the "No, do not file for US copyright" option

Task2:

- (Confused on how to select) click on the size image first → proceed to click on 'continue with pre-order' without entering any purchase number → reread the tasks → "I can't click on any copies, should I click on the image with "8.5\*11 in"? / "How should I select?"; tend to click rather than input
  - Seemed confused about the layout of the Pre-order copies page, implied they thought the sizing graphic was clickable
  - Ultimately found the input box on the side and entered the correct amount
- Special offer: choose 'yes', add to the cart with free shipping
- Easily entered the card information and proceeded to "submit" their dissertation

Task3:

- Tend to use the help icon on the top navigation bar rather than the bottom one → read the overview article on the landing page and tend to avoid using the search bar → after reminding him again of what information he should look for, asked 'should i use search bar?'

- Tester initially scrolled through the “Submitting your ETD” page, when prompted said they’d found the answer, but it became apparent that they’d misinterpreted the task
- Didn’t understand the task requirement correctly, searching for delivery time of the copies rather than availability time of their submission.

### P3

Completion time of task 1: 13:47 - 13:51, 3 min

Completion time of task 2: 13:51 - 13:54, 3 min

Completion time of task 3: 13:54 - 13:58, 4 min

Success Rate:

- [X] Select the correct publishing options (option chosen: Traditional Access) /  
[✓] Correct Creative Commons (option chosen: CC BY-NC-SA)
- [✓] Select correct type and numbers of copies and complete the purchase
- [✓] (completed after hint) Find the information they need in Help page (How soon you dissertation or thesis will be available via ProQuest after submission)

Task1:

- Browsed through the first 3-4 lines of the Traditional Access description and chose this one; did not spend time looking into any explanations / information on open access
- Tester was confident moving through the initial steps
- Tester spent some time on the copyright page, selected multiple choices as they read through each, eventually landed on the option we’d specified
- Creative commons: choose the CC BY first → switch to CC BY-NC-SA after going through other options

Task2:

- Thought the copy is already chosen as the 8.5\*11 in the image has a blue border around (indicating it is selected?) ->click on the button ‘continued with pre-order’ → confused about why the alert sad ‘please choose one or more items’ → scroll back and click on the image → no response → noticed the input box
  - Eventually was able to complete the purchase copies process with minimal input from the moderator
- Special offer: choose ‘add a copy’
  - Chose the deal when the pop-up offer appeared, took some time to mull it over first

Task3:

- Didn't find where the help icon is → Look through the article on the landing page and each label on the side / in the navigation bar; didn't find the information he wants → having difficulties finding the search bar → initially searched for "delivery time" → under the feedback question of the article: 'was this article helpful', click 'yes'
  - The tester needed increased direction on the specifications of the task (what exactly to type into the search bar to look for)
  - Eventually the tester was able to find the intended page

## P4

Completion time of task 1: 12:18 - 12: 23, 5 min

Completion time of task 2: 12:24 - 12: 28, 4 min

Completion time of task 3: 12:28- 12:32, 4 min

Success Rate:

- [X] Select the correct publishing options (option chosen: Traditional Access) / [✓] Correct Creative Commons (option chosen: CC BY)
- [✓] Select correct type and numbers of copies and complete the purchase
- [✓] (completed after hint) Find the information they need in Help page (How soon you dissertation or thesis will be available via ProQuest after submission)

Task1:

- Directly navigated to the creative commons page and skip the previous sections → did not have any knowledge about the cc, 'I wish I have the information from university'
- Try to tell the difference of options ('the ideas of tweaking and remixing is just strange when it comes to research'), struggling to tell the difference between these acronyms (non-commercial/derivs), 'it feels strange' → [This is the most accommodating of license offered]' it is unclear that is it for me (author)'
- Jumped back to fill out the previous sections (before creative commons) after being reminded by the moderator
- Traditional access → 'I don't want to pay money for that'
- IR publishing options: what is the difference between two questions, they look the same
- Feels jumpy of the system → jump back and forth between sections to fill out all necessary information
- Need more time on making decisions of 'creative commons' stuff → 'I wish I knew from another student what's the best thing to do. You know, almost like reviews. Just knowing what everybody does?'

### Task2:

- Decline the pre-order first → view the alert pop-up and back to the order page
- special offer: decline the offer → try if only order one copy, what will happen -> Go back and change the copies to one, no special offer pop up again

### Task3:

- Take me to the new page, glad not to lose the previous page
- Looked at overview → 'Kind of wish I had some of this information earlier. Maybe if there were some information buttons I could have been sent out to get some of these questions answered that I have.'
- struggle on realizing that there's a search bar they could use

## P5

Completion time of task 1: 11:57 - 12: 01, 4min

Completion time of task 2: 12: 01: - 12: 04, 3 min

Completion time of task 3: 12: 04: - 12:06, 2 min

### Success Rate:

- [X] Select the correct publishing options (option chosen: Traditional Access) / [✓] Correct Creative Commons (option chosen: CC BY-NC)
- [✓] Select correct type and numbers of copies and complete the purchase
- [✓] (completed after hint) Find the information they need in Help page (How soon you dissertation or thesis will be available via ProQuest after submission)

### Task1:

- Chose Traditional access without thinking too much
- Long agreement → won't read it rn
- ProQuest agreement: Wish the agreement is segmented, if in a rush, might miss that, it is a lot
- Creative commons: select no first, 'i don't need that.' → took a while to realize that the difference between the two options(CC BY / CC BY-NC) was whether they were commercially available → Select CC BY-NC, 'i don't want people make money on that'

### Task2:

- Copies purchase: click on the image first.
- Special offer: decline, did not spend much time on reading the information

- Summary page: want to Go back and check, 'why there is 78 dollar cost'

### Task3:

- Clicked on the upper help button
- Look through the article on the help landing page → 'it is so long,' try to 'command+f,' search for keywords
- First trying to find information on the landing page and didn't even see there is a search bar (maybe fixed the search bar on the top)

## Appendix J

### Participant Consent Form

#### *University of Michigan ProQuest Evaluation*

Consent to take part in research

#### Study Details

The purpose of this study is for us to better understand the user experience on ProQuest ETD Administrator. Your participation in this study will help us evaluate the user workflow and identify possible areas for improvement. This study will consist of a usability test in which we provide you with a set of tasks. One of our team members will moderate your test while the other four members will observe and take notes.

#### Data we will Collect

We will give you a brief questionnaire to fill out before and after the usability test. For the usability test itself, we will observe your interactions with the platform as you carry out the provided tasks and take notes on how the site performs.

#### How we will use Your Data

Any data, recording or other personal information we collect will be treated confidentially. We will anonymize your responses and aggregate them with the responses of other participants in order to share results with ProQuest representatives.

#### Your Rights

Your participation in this study is voluntary. You can take a break or discontinue participation at any time without giving a reason. If you have any questions or concerns about this study or if you wish to withdraw your consent in the future, please email [teamvisionaries@umich.edu](mailto:teamvisionaries@umich.edu).

#### Your Consent

I give my consent:

- For the session to be recorded
- For individuals in our team to use the recordings and notes for internal purposes
- For our team to aggregate and anonymize my data to share study results with ProQuest

By signing below, you acknowledge that you are 18 years of age or older and have read and understood the information in this Research Consent Form.

Signature: \_\_\_\_\_

### **Researcher Names and Contact Information**

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