

Intranet Card Sort Brown Bag



Intranet Upgrade Investigation Team
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Who we are.

- Eliot Scott (Chair) - Drupal Developer, LIT
- Barbara Beaton - User Services Librarian, L&T
- Heidi Burkhardt - User Experience Specialist, LIT
- Emily Campbell - Special Projects Librarian, Collections
- Kat Hagedorn - Project Manager, LIT
- Elise Hall - HR Coordinator, LHR
- Chase Masters - Enabling Technologies Informationist, Taubman
- Mary Morris - Public Information Specialist, Communications
- Jennifer Wright - Info Resources Assistant, Collections



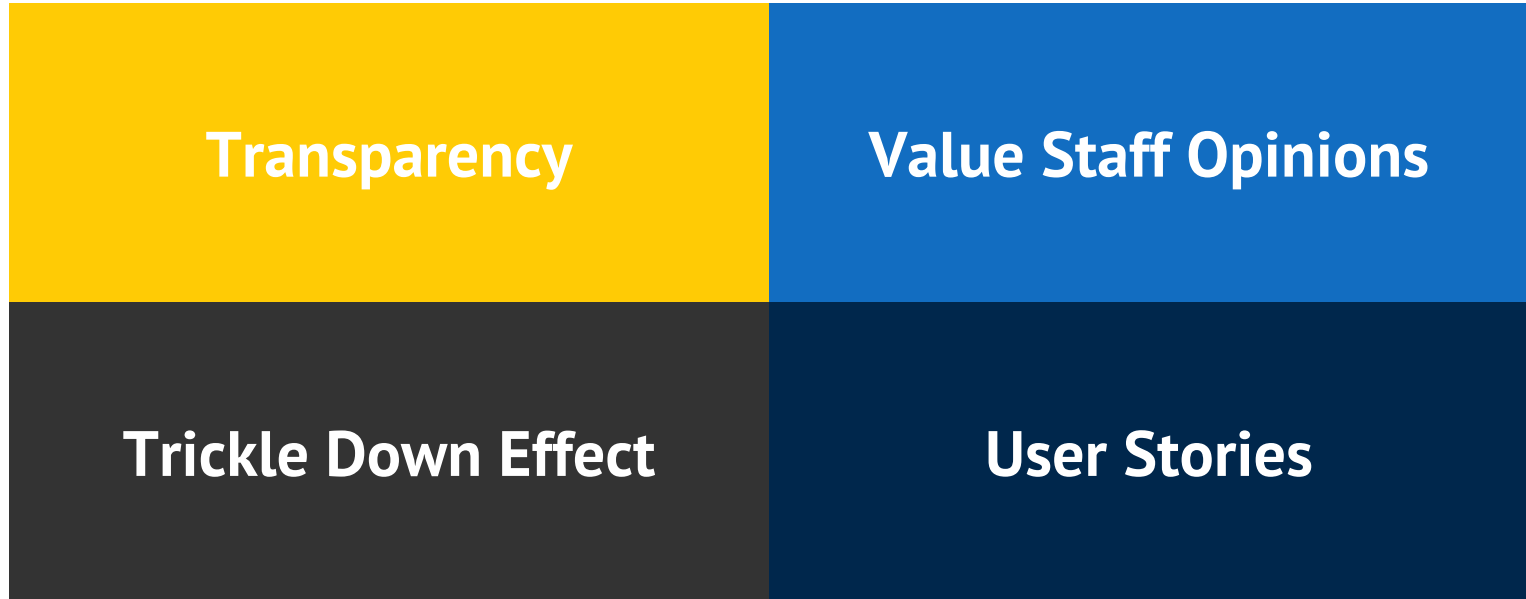


Drupal...

Our implementations of Drupal are **not indicative** of Drupal as a tool.

Upgrading the intranet to Drupal 8 is a **huge opportunity** for us.

Why we're here (and why we do all this research)



A bit of recent history

- All staff survey in 2015
 - Identify purpose of the intranet
 - See how often people use the intranet
 - Prioritize existing navigation items
 - Indicate what the intranet should provide that it currently doesn't
- Open card sort in summer 2015
 - Open sorts do not have defined categories
 - Eight users from different areas of the library
- Committee card sort
 - To test the closed card sort and help refine items and categories
 - These results are not included in the study and no team members retook the all staff card sort

Why a closed online card sort?

- Despite our whittling down, we still had a lot of items and categories
- We did a good amount of pre-research (survey and open sort) to inform the provided categories
- Closed categories provided consistency and made analysis easier

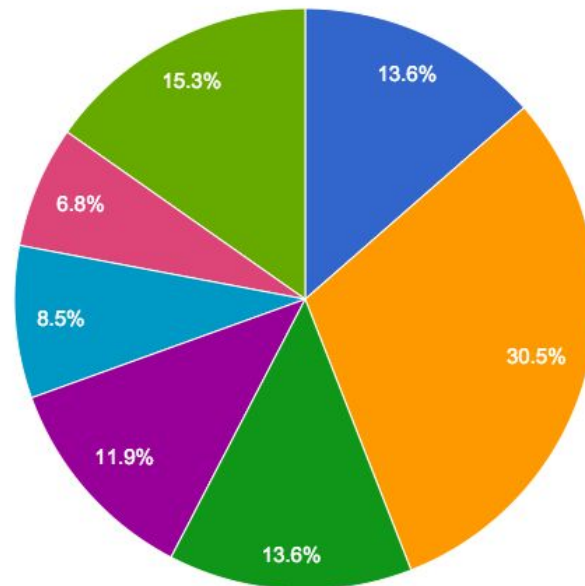
GOAL: Understand what everyone is interested in seeing on the Intranet home page and how they would organize those things.

Findings

Responses

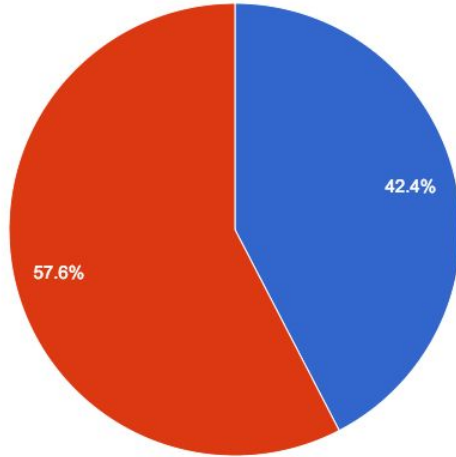
59 Completed Responses
(about 13% of all staff)

- Learning and Teaching
- Collections
- Operations
- Research
- Health Sciences
- Budget and Planning
- Information Technology



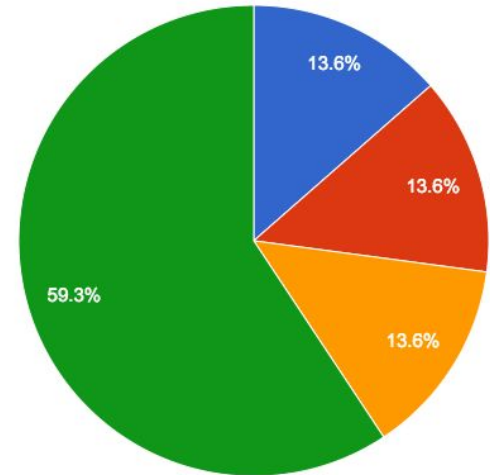
I am a...

- Librarian
- Staff Member



Supervisory Responsibilities

- Senior Manager
- Supervise regular employees
- Supervise only students
- Do not supervise



Item sort directions

- 55 items - sort all of them into the most appropriate category
- If an item fits in more than one category, choose the most appropriate
- If there is no appropriate category match, choose the closest one. Don't use this term at all category for things that really don't fit
- Some items are also categories, place together to indicate it should be a primary category or in another category if it should be nested under that term

Item sort results

	A	B	C	D	E	F	G	H	I	J	K
1		About	Communication	Departments	Documentation	Events	Groups	Help	HR	Meetings	My Account
2	About	90%									
3	Mission	90%									
4	Contact	56%									
5	Locations	56%		22%							
6	Staff directory	46%		31%							
7	All-staff messages		92%								
8	Communication		92%								
9	Newsletter / Newsletter archive		92%								
10	Announcements		83%								
11	Newsletter submissions /instructions		68%		20%						
12	Recent posts		66%								
13	Colleague appreciation e-cards		49%								
14	Send a message		49%								29%
15	Feedback forms		39%		31%						
16	Departments			76%							
17	Units			76%							
18	Org charts	32%		51%							

- Replace raw counts with percentages
- Determine a threshold (chose 15%) and delete all lower percentages
- Group and reorder based on highest percentage
- Analyze

27	Calendars					56%					
28	Committees						81%				

37 items (63%) placed in only one category 15%+ of the time

Level of consensus around where that item belongs in the intranet's structure.

Some examples:

- Mission → About
- All-Staff Messages → Communication
- Guidelines → Documentation
- Performance Management → HR

13 items placed in two categories 15%+ of the time

Sheds light on items that need to be cross-listed.

Some examples:

- Locations → About & Departments
- Org Charts → About & Departments
- Feedback Forms → Communication & Documentation
- Forms → Documentation & Tools

Five items placed in **three** categories 15%+ of the time

Sticky wickets! Items that generally lack clarity for whatever reason.

The five:

- Items pending management approval → Communication, My Account & Do Not Use
- Online Exhibit Request Form → Documentation, Events & Tools
- Policies → About, Documentation & HR
- Training → Documentation, Events & HR
- Web Manual → Documentation, Help & Tools

Item Sort Comment Themes

- Forms should be broken out and cross-listed as appropriate
- Search is important and should be part of the intranet's structure
- The various format types are ambiguous and do not have single "homes."
Ditto for many of the various tools and action based items
- Reuse & Recycle doesn't fit anywhere, but we ❤️ it

Item Sort Discussion

Category Rank Findings by Thirds

Top Third (Ranks 1-4)

- Search - 37
- Communication - 34
- My Account - 30
- About, Documentation - 20

Middle Third (Ranks 5-8)

- HR - 32
- Tools - 25
- Events - 25
- Departments, Meetings & Groups - 23

Bottom Third (Ranks 9-12)

- Meetings - 32
- About - 27
- Help - 27
- Groups -25

- **Search & Communication are top priorities**
- **About & My Account are divided between the top and bottom**
- **Middle priority categories are pretty firmly situated**
- **Help pulls fairly strongly towards low priority**

Category Sort Comment Themes

- Qualify About
- Rename HR to **not** be the department name
- Lack of clarity around what Tools is/are
- Combine Departments and Groups (or don't use Groups)
- Feature Events and Meetings in the same place
- Keep it simple!

Category Ranking Discussion

Some of what we're planning...

- Maintain prominent search
- Give homepage real estate to the highest priority things we come to the intranet to do and find
 - Recent posts not front and center, but still easily accessible for browsing
- Add ability to favorite items and access them from the homepage
- Put My Account in upper right
- Make Tools items action oriented
 - Examples: Request an Online Exhibit, Submit a travel request form
- Use the term Employee Resources instead of HR
- Put About & Help content in the footer

SIMPLIFICATION!
Offer fewer content types
Make the intranet easier to browse

**What's your intranet
user story?**

Questions?

Thanks!

Intranet Upgrade Investigation
Team

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