

SPP Continuation Funding

Deliverable D3: Evaluation - portlets in production environments case studies

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This evaluative work regarding the SPP Alerting Portlet was carried out using three volunteers. Time was allowed for user tests and familiarisation, then an interview with the participant was carried out. The discussion was based around the question listed below.

This research was carried out in April and May 2007.

Questions

Overall

- Did it work?
- What were your impressions especially compared to other portlets you've used?
- Anything in particular you like about it?

Design

- Were the interface design and usability acceptable?
- Was the presentation of results useful, or if not how could it be improved?
- Were there any specific improvements you'd like to make to design?

Expanding content and functionality

- Would you like help to be available and if so, on what?
- Would you like any different options to be available? (apart from adding more repositories)

- What other data sources (other than PubMed and academic journals) would be useful to you?
- Any specific other improvements you'd like to make to functionality?

Future deployment

- Would you use it in future?
- Who would you anticipate hosting this service? (i.e. how might prospective users find it?)

Results

Case study 1

User 1 is a medical researcher working at a major U.S. university and regularly using PubMed. They had cross-disciplinary research interests and so an alerting mechanism which could be customised by keyword was very appealing to them. Their usual method of keeping up to date with relevant publications was to monitor new issues of certain journals of particular interest, searching PubMed, and selected RSS feeds.

User 1 did not usually use portlets, but found the alerting portlet to be a useful way of getting information about their areas of interest, preferring it to redoing saved searches and to RSS. They successfully set up a subscription and started receiving alerts. They described it as 'straightforward and intuitive'.

The presentation of results was good, and the direct links to PubMed in the alerts were especially appreciated. The look and feel was also attractive, although this particular user had reservations about the colour scheme.

They suggested that there should be more online help on the portlet, perhaps as a 'what's this?' link or a few words on the screen. It would be especially useful to have help on selecting by subject for a subscription, explaining what a 'data source group' is and what happens if you select nothing.

Suggestions for improvement focused on the selection of journals which could be included in a subscription. This user had research interests that crossed boundaries between subject areas and so would like to be able to create and re-use their own customised list of the journals which they regularly use. Failing this, it would be good to be able to copy a subscription and edit it to create a new one. Repeatedly compiling a list of the same journals for each subscription is laborious, especially because navigating through the list of journals is not easy. It was suggested that some aids to navigation

could be added: searching for a word/phrase, jumping to a given letter, being able to choose the number of journals visible on screen at one time.

The user also suggested that alerts could be consolidated into one feed (with duplicates removed), similar to an RSS feed. Overall they were very keen on it and said they would like to use it in future, but from a central source rather than a more local portal.

Case study 2

User 2 is a doctoral student at a British university, working in bioengineering and based in the computer laboratory. They hoped to find the portlet useful for alerting them to new publications in their areas of interest. They usually used mailing lists and relevant websites to get this information, but had little experience of portals.

This user's experience was rather less positive than that of user 1. They experienced problems receiving alerts and found it hard to distinguish between the portlet and the surrounding portal. This was probably because they were not used to using portals. Nevertheless, they thought the idea behind the portlet was very good.

On the subject of the user interface, User 2 said that the portlet 'had a nice format and easy window controls'.

User 2 raised one important issue which is that it should be possible to check and/or amend one's user details. Online help on creating a subscription would be useful. They thought they had created one but were unsure that they had done it correctly.

Another suggestion was to be able '[to run] the filter on previous days to see how many hits I got'. This would have allowed User 2 to see how useful different combinations of keywords (for example) would be.

This user would felt they would potentially benefit from the portlet, but would probably only make much use of it if they started using portals for other things too.

Case study 3

User 3 works on the portal team in a university computing centre, and has written a number of portlets. Here the brief was rather different: the user's evaluation of the portlet also included setting it up on an instance of uPortal, 'configured and customized in exactly the same way as the University production portal'. The portlet was expected to be easy to install, undemanding of resources when in use and similar in its interface to other portlets on the portal.

User 3 found that the portlet installed easily, but would have welcomed more transparency about some of the configuration options, and information on how to alter them. For example, the harvester is set to start at 35 minutes past the hour; it would be desirable to be able to change this, so that harvesting could be tested quickly during the installation, and so that a resource need not come under excessive strain once an hour in cases where different installations of the harvester all used it. Other needs included information on how to port to other databases such as Oracle and MySQL.

The installation bundle was felt to be large at 118 mB and Maven 2 (<http://maven.apache.org/>) was suggested as a way of reducing this. A more serious concern was that when the portlet was running, it could be heavy on CPU and bandwidth under certain conditions. This is currently being investigated by the development team.

User 3 requested more documentation, particularly in the areas of how to configure the portlet when it is initially installed, interpretation of the logfiles and a general introduction to the architecture of the portlet.

It was thought highly desirable to have an alternative way of delivering alerts other than email, where the interface to SMTP servers can cause problems.

User 3 also had observations to make about the user interface. Like User 1, they felt that the long list of journals should be made easier to navigate, perhaps by including a clickable A-Z, a search box or an option to jump to a given page. A navigation toolbar should also be included to enable the user to move between different functions such as editing contact details and editing subscription details. From a local point of view, this would also make the portlet resemble others in the University portal.

Some of the terminology ('data source' and 'subscription') was thought to be potentially confusing.

Finally, User 3 suggested POST: the Portlet Open Source Trading site <http://portlet-opensrc.sourceforge.net/> as a place to deposit the portlet.

The portlet was found to be generally satisfactory, with some minor reservations concerning its installation procedure and more serious ones about its resource consumption when in use. With the addition of a toolbar for navigation it would fit tidily alongside other portlets in use on the portal.