REPORT: SharePoint Tree Test 2021

Executive Summary

The main goal of this test was to test the information architecture with real tasks. This was the natural extension of the Sharepoint Closed Card Sort 2020-12 test as the information architecture matures. We had 48 test participants sourced from the general staff. That makes this the most robust study on the SharePoint tool to date. Participants were asked to find the page title in the site that would best help them complete 10 common tasks including: Contacting the IT Service desk, finding salary structure, compass minutes, nominating someone for a star award and several more.

Most of the tasks were completed with very high accuracy. Participants were able to find the right place in a large majority of cases. The only task that dipped below 70% success rate was the task to update the emergency alerts. In this case there were several paths that participants thought would solve their problem. Providing cross linking should help solve for those issues.

As it stands, given the tasks presented this site architecture is likely to be very successful. No additional tests of the information architecture are needed unless major changes are made to the architecture.

Report Date	08 Apr 2021
Date / Event of Test	11 Mar 2021 - 25 Mar 2021
Report Author	@ Nick Mosher
Request	SharePoint Tree Test 2021
Application	Staff Site
Grade (SUS)	n/a
Score (SUM)	n/a
Participants (N)	48

Prepared for:

@ Sara Brunsvold , @ Debra Hopkins , and @ Gretchen Schultz

Questions

Questions or comments about this report and it's findings can be made in the comments section below or to @ Nick Mosher

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Methodology

What Participants Did

1. Clicked the pages/paths they think would solve real life tasks
2. Filled out surveys

What Data We Collected

1. Clicks and final selections
2. Success rate
3. Ease of use opinions
4. General questions
5. Demographic data

Participants by Segment

Segment	Count	%
Education	17	35%
HOPS	5	11%
Advocacy, Practice Advancement and Policy	6	13%
Enterprise Support	11	23%
Strategic Support	5	11%
External Support	4	8%

Office	Count	%
Leawood, KS	43	90%
Washington, D.C.	3	6%
Remote Worker	2	4%

Major Findings and Recommendations

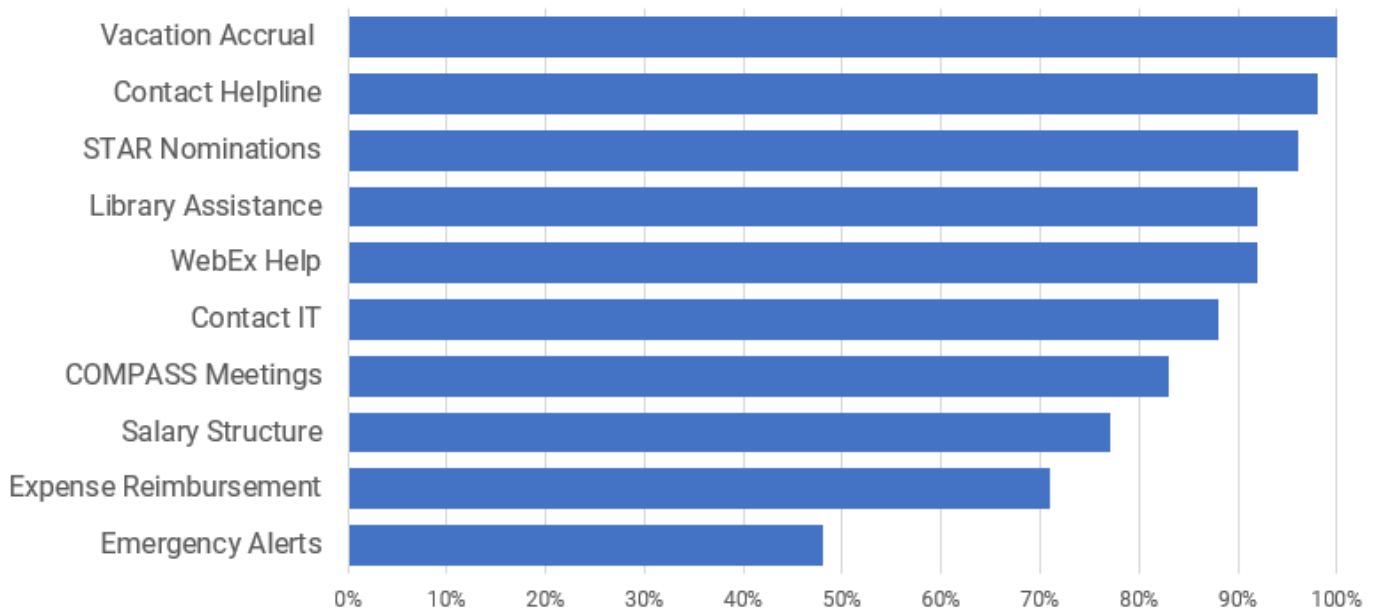| Major Issues	Recommended Solutions
None	See below for minor possible issues.

Information Architecture

The following architecture was what was tested.

IA mapped to Current Source (1).xlsx
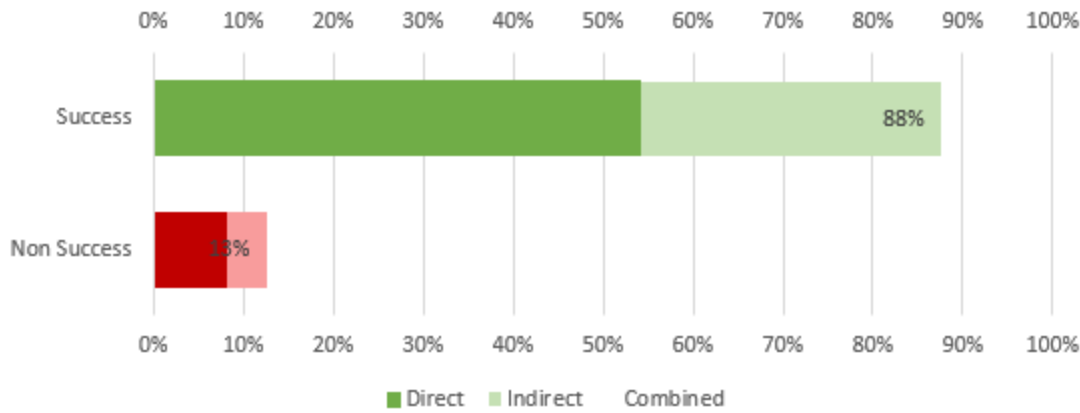
Detailed Findings and Recommendations

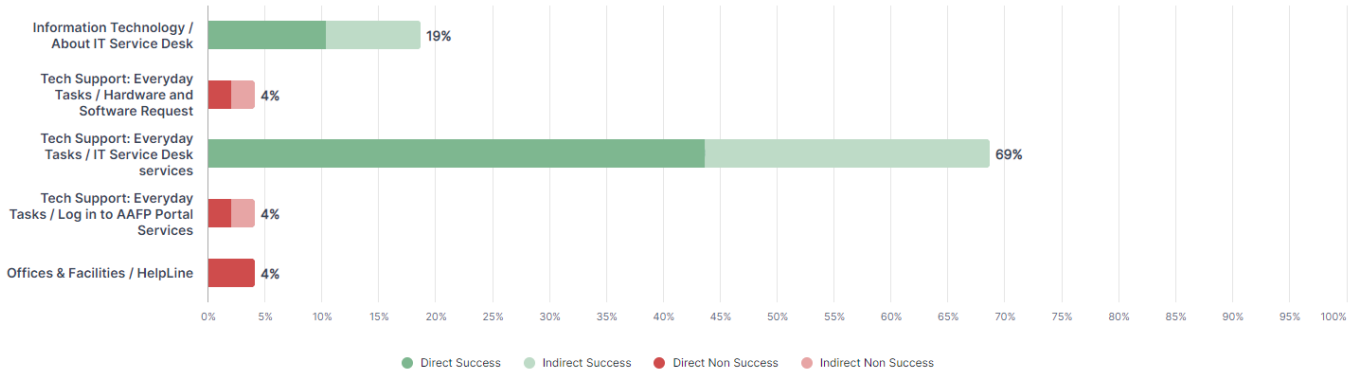Success by Task

Note: All tasks were assigned in a random order

Scenario/Task 1: Contact IT

Task Instructions	You are having trouble with your computer. Please find the page where you could contact IT about getting help with your computer problems.
Success Locations	• Business Areas \ Information Technology \ About IT Service Desk • How To \ Tech Support: Everyday Tasks \ IT Service Desk Services

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	88%	31s	5	5	5

	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

Success 88%

Non Success 13%

| 0% | 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100% |

■ Direct ■ Indirect Combined

Selections

Information Technology / About IT Service Desk	19%
Tech Support: Everyday Tasks / Hardware and Software Request	4%
Tech Support: Everyday Tasks / IT Service Desk services	69%
Tech Support: Everyday Tasks / Log in to AAFP Portal Services	4%
Offices & Facilities / HelpLine	4%

● Direct Success ● Indirect Success ● Direct Non Success ● Indirect Non Success

First Clicks:

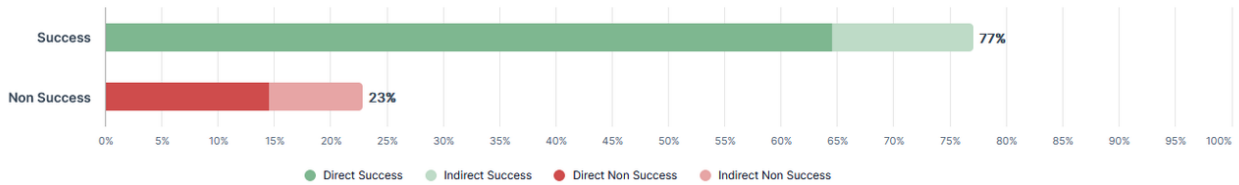|	Clicks
Business Areas	10
How To	29
Offices & Facilities	9

Additional Comments:

- overarching topics were too vague C553S149_19
- Sorry, this was my fault. I forgot exactly what I was supposed to be looking for! Something with printing. My bad. C553S149_22
- Should be less clicks to get to IT service desk. C553S149_29
- I have no idea whether I selected the correct link because computer problems wasn't in any of them. I may not have been in the correct menu at all. C553S149_33
- I could never find a list for the Service Desk C553S149_43
- My first instinct was to think of a computer issue as something related to Offices and Facility (because my computer is part of my office set-up) rather than approaching IT as a business area and then looking for a support function. C553S149_53
- There should be an IT Help button right at the first menu. I feel it would be a common thing people look for. C553S149_54
- It would be nice to have a prominent "IT Help" button instead of burying it multiple levels in the given menu. C553S149_60
- not sure if computer trouble is an "everyday task" C553S149_66
- The "everyday tasks" kind of threw me but only for a minute C553S149_68
- This belongs in How To in my opinion. I don't expect to find service information in the business unit descriptions. C553S149_77
- IT Help desk would be a better name C553S149_79
- Looked in Business Area / It first. C553S149_89
- The list of options was fairly long C553S149_94
- I would expect a general staff equipment heading to be less buried in the hierarchy. C553S149_102

**Scenario/Task 2: Salary Structure**

Task Instructions	A new job was recently posted and you are curious about the pay range available to that position. Please find the page where you could see the pay ranges by pay grade.
Success Locations	Pay & Benefits \ Pay \ Salary Structure

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	77%	29s	5.1	5.1	5.1

Effectiveness

Selections
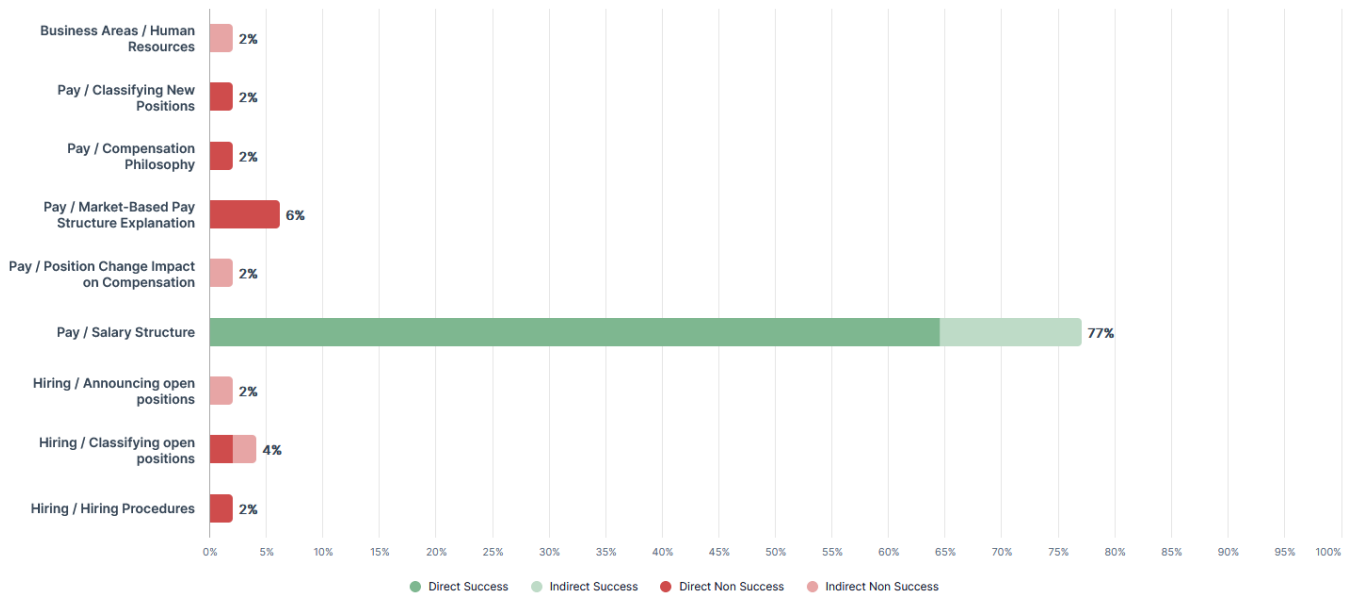
First Clicks:

	Clicks
Business Areas	2
Pay and Benefits	40
Policy Documents	4
Professional Development	2

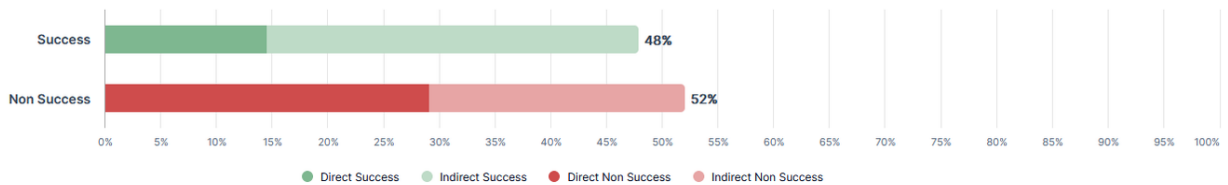## Additional Comments:

- Should be clearly defined C553S149_20

- Salary structure seemed to be closest, but there were a couple of others that might've made sense, too. I'm pretty sure I was in the correct menu, though. C553S149_33
- Familiar with structure of existing pages. C553S149_48
- I hesitated at first when I saw just Pay, but once I clicked on it, I knew I was on the right track. C553S149_56
- the salary page names have always confused me, I generally click on a few before I pick the right one. C553S149_61
- "Pay" is pretty clear, it was more difficult in the past to find pay ranges (without someone showing you) as you had to search for the terms used (which you may not have known.) C553S149_62
- I think something with Open Positions would be good. Are pay ranges shared in general? If so, maybe a section just named Pay Ranges would be good. C553S149_68
- I'm confident that Salary Structure is the correct place to go (probably because I've been here a long time and know that). But Position Change Impact on Compensation gave me pause. I don't know what that is about but it definitely affects me in this scenario. So I would make note to go back and read it after I leave Salary Structure. C553S149_77
- Looked in Policy/Employment C553S149_89
- the one I picked said Pay Structure Explanation...is that the actual tables of the the pay ranges? I frequently pass on job postings...so this is one of the pages I access most on the Source. I hope we can favorite it to make access as fast as possible. C553S149_94
- I think I found the general information, not specific information on a posted position. I'm still a little confused. C553S149_102

## Scenario/Task 3: Emergency Alerts

Task Instructions	There is a snow day forecasted later this week but you aren't sure if you are set up to receive text message alerts. Please find the page where you could get signed up for text message alerts and office closings.
Success Locations	Offices & Facilities \ Emergencies \ Emergency Alert System Sign-Up

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	48%	43s	4.2	4.1	5.4

Effectiveness

Selections
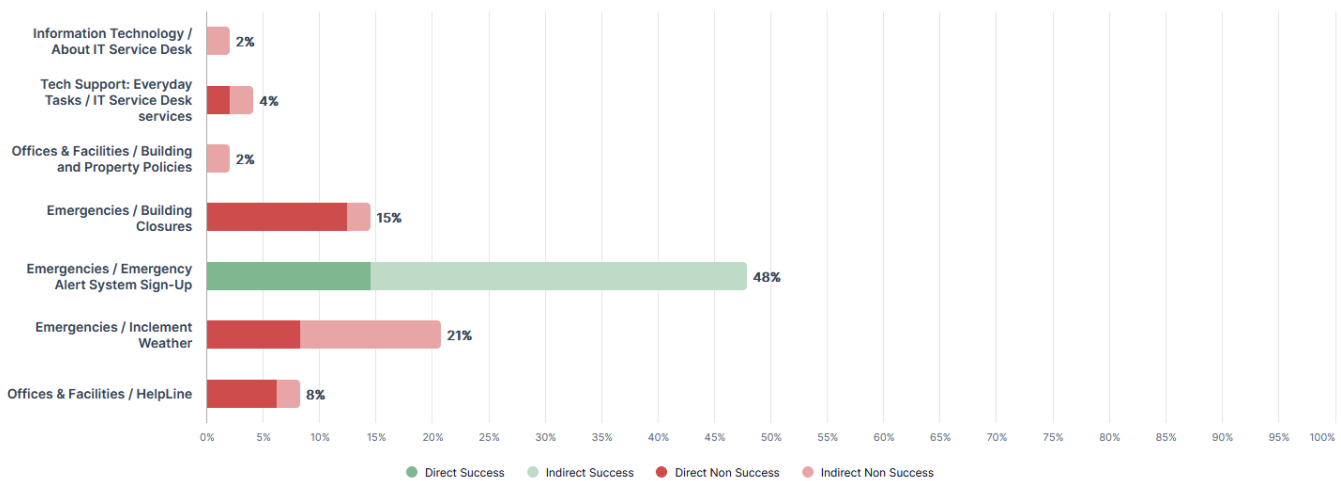
First Clicks:

	Clicks

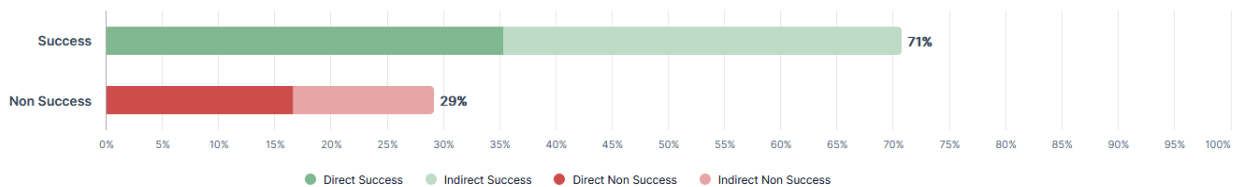|	
How To	19
Policy Documents	1
Offices & Facilities	28

Additional Comments:

- For those who have been at the Academy for at least a few years it was easy, but new staff will have a harder time finding it. C553S149_29
- I looked under How to, thinking that would give me instructions on how to sign up for building closure alerts and subsequently check my settings. C553S149_33
- I didn't think of a snow day as an emergency C553S149_43
- I typically set it and forget it. C553S149_48
- I would not think the building being closed due to weather a building emergency. C553S149_51
- I thought it would be in How-To. C553S149_56
- based on the previous question, I assumed it would be in the How To section. C553S149_61
- Easy! C553S149_62
- i don't know if i would consider a snow day an "emergency" C553S149_66
- I didn't mind poking around to find it...and now that I did, it makes sense for it to be where it is C553S149_68
- I went to How To first because that made more sense to me. When that was a deadend, I went to the Building menu. Even then, I hesitated about clicking Emergencies. Is snow considered an emergency? My hesitation wasted time. C553S149_77
- Looked in How To first. C553S149_89
- I first looked under How to and didn't find it, so tried Offices & facilities C553S149_94
- I went to the "How to" menu first thinking it would be there. C553S149_96
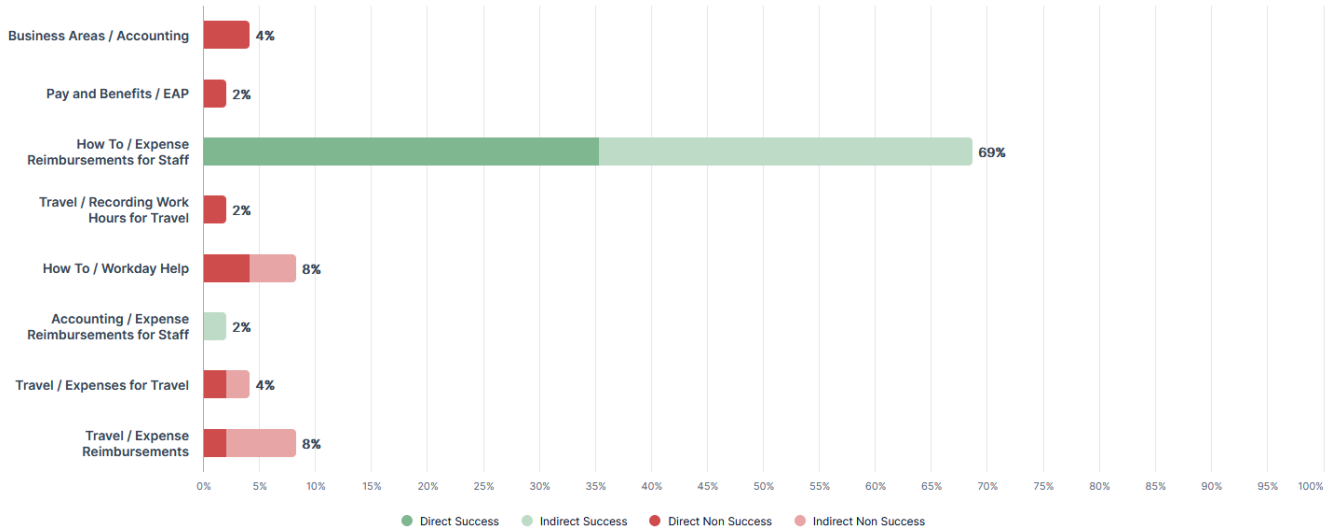
Scenario/Task 4: Expense Reimbursement

Task Instructions	You just returned from a business trip and are ready to submit your receipts. Please find the page where you would go to learn about submitting your travel receipts.
Success Locations	• Policy Docs \ Finance/Accounting \ Expense Reimbursements for Staff • How To \ Expense Reimbursements for Staff

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	71%	20s	5.5	5.6	5.7

Effectiveness

Selections

Selection	%
Business Areas / Accounting	4%
Pay and Benefits / EAP	2%
How To / Expense Reimbursements for Staff	69%
Travel / Recording Work Hours for Travel	2%
How To / Workday Help	8%
Accounting / Expense Reimbursements for Staff	2%
Travel / Expenses for Travel	4%
Travel / Expense Reimbursements	8%

● Direct Success ● Indirect Success ● Direct Non Success ● Indirect Non Success

First Clicks:

	Clicks
Business Areas	6
Pay and Benefits	10
How To	22
Policy Documents	6

Additional Comments:

- menu didn't go deep enough for submitting receipts/expenses. stopped at accounting C553S149_19
- Should have something under Accounting. Not easy to find for a new person. C553S149_20
- I clicked Pay and Benefits, probably because that's related to Workday, and receipts are submitted through Workday, but I quickly found it in the other menu after that. C553S149_33
- I'm usually a little shaky when searching for something on our site, so I'm likely to be one of your more challenging study participants just bc I rarely have to find things like this on our site for my job. C553S149_35
- One has to know that you submit travel receipts via Workday. For someone who has not traveled for the AAFP before, this may be a more challenging exercise. C553S149_60
- Logical placement- it's just getting used to the new directory. C553S149_62
- I am getting used to the How To option...and I like it! C553S149_68
- The How To menu is long and it was not easy to quickly find what I was looking for. My eye fell on Travel, probably because it's short - so I tried that. When I hit the deadend, I went back to the list and finally found the item about reimbursements. Perhaps there is a better way to name them, group them...make topics easier to find without having to read every one. C553S149_77
- you would have to know we use workday to submit receipts C553S149_79
- I wasn't sure if I needed to look under HOW TO or Business area > Finance policies. I think maybe either path was OK C553S149_94

**Scenario/Task 5: COMPASS Meetings**

Task Instructions	A colleague just told you about something that was discussed in COMPASS last week. Please find the page where you would go to find the notes from the last COMPASS meeting.
Success Locations	Vision & Strategy \ Leadership Team Meeting Notes \ Compass

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	83%	31s	4.1	4.2	5.9

Effectiveness
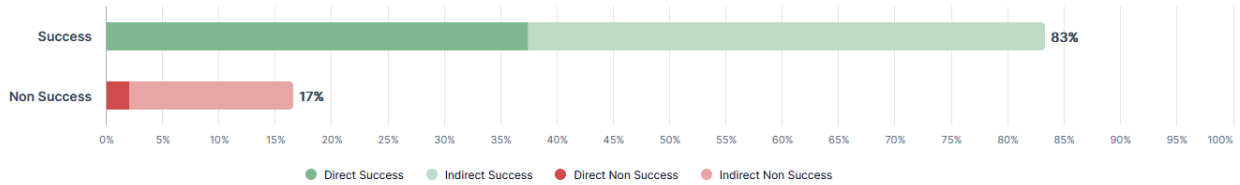
Selections
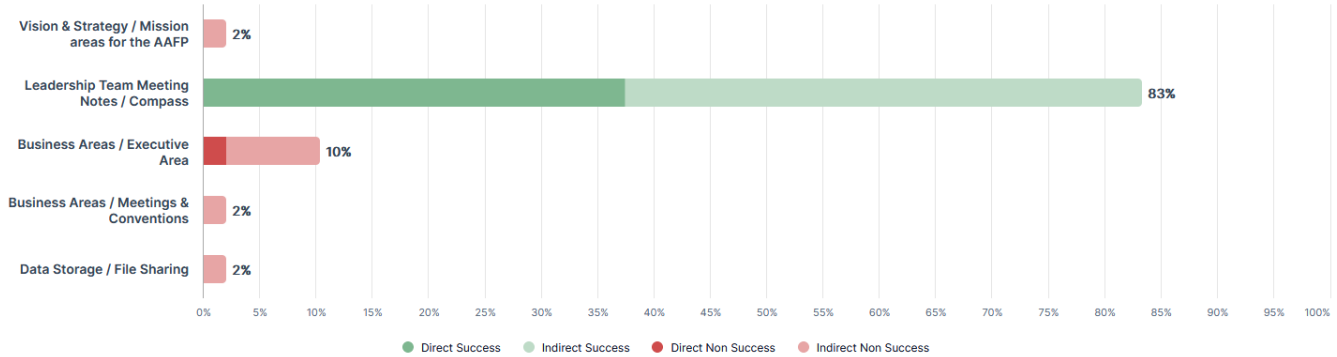
First Clicks:

	Clicks
Vision & Strategy	28
Business Areas	14
How To	1
Policy Documents	2
Professional Development	1
Offices & Facilities	2

Additional Comments:

- This one made no sense to me. C553S149_31
- While I found the right page, I was not sure at all that I was on the right track. That could be because I'm not familiar with what Compass actually does--do they set vision and strategy for the organization? Perhaps in the new Intranet, we can include a guide to what the various AAFP committees are responsible for. C553S149_33
- I typically use the pulse email to access meeting notes. C553S149_48
- I wouldn't expect to have to drill down as much into the site to find things like Compass minutes. C553S149_53
- I didn't select the correct menu at first, but when I saw what was available in the menu I selected, I knew I was on the right path. C553S149_56
- Obviously not where I expected to find it. C553S149_60
- Eeep! Meeting minutes weren't easy to find. C553S149_62
- had to think but it wasn't too painful C553S149_68
- I don't know what COMPASS Is, and nothing had the word compass or notes in it, so I just picked the first one so I could move on to the next question. C553S149_73
- There was no obvious path to that information. C553S149_77
- I really didn't know which heading to start looking under C553S149_94
- If you don't know what COMPASS is, you will have no idea where to look. Minutes for all staff consumption are a type of communication. I wouldn't know if it should be listed in a business area or more of a staff communications area. C553S149_102
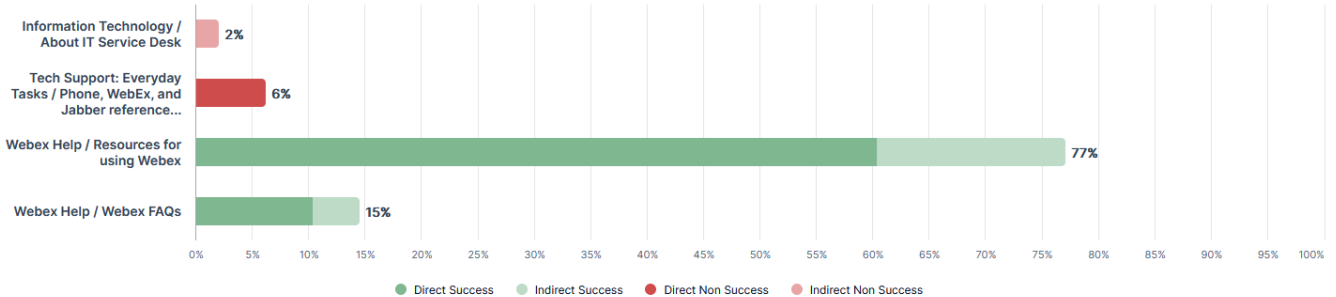
Scenario/Task 6: WebEx Help

Task Instructions	You heard about a feature of Webex that you don't normally use. Please find the page where you would go to find out more about Webex.
Success Locations	How To \ Webex Help

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	92%	19s	5.6	5.6	5.6

Effectiveness
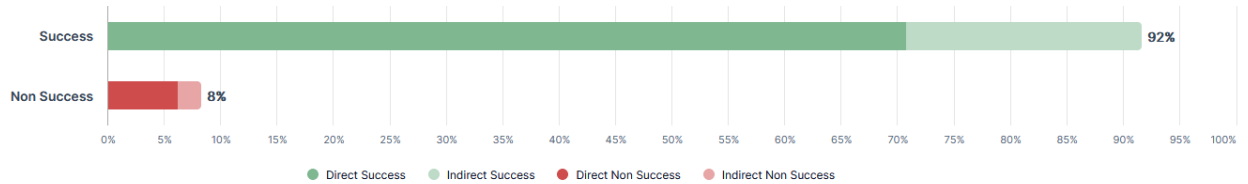
Selections

First Clicks:

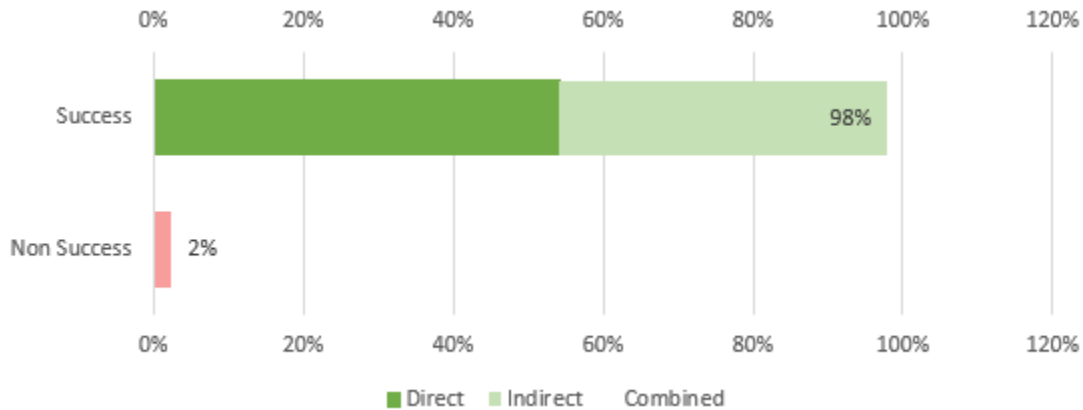|	Clicks
Business Areas	3
How To	40
Professional Development	2
Offices & Facilities	2
Keep It Fun	1

Additional Comments:

- I'd google it rather than look on the staff page. much faster C553S149_19
- What's the difference between Resources and FAQ? C553S149_31
- I picked the Webex FAQs page, but maybe should have picked the other one. W/o seeing the content, it's hard to know whether I found the right one. C553S149_33
- Wasn't confident that How To was the best option. Was looking for IT Resources. C553S149_48
- I wasn't sure which page would have new info. I guessed on the FAQ page. C553S149_56
- I tend think of Webex as part of the facilities, which is why I went there first. Putting it under How To makes sense. C553S149_60
- Not sure if the info would be in the Webex resources or FAQ, but landing in this area was easy. C553S149_62

Scenario/Task 7: Contact Helpline

Task Instructions	The light above your desk just burned out. Show me where you would go to contact someone to come and fix it for you.
Success Locations	• Business Areas \ Administration \ HelpLine • Offices & Facilities \ Helpline

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	98%	18s	5.1	5.1	5.1
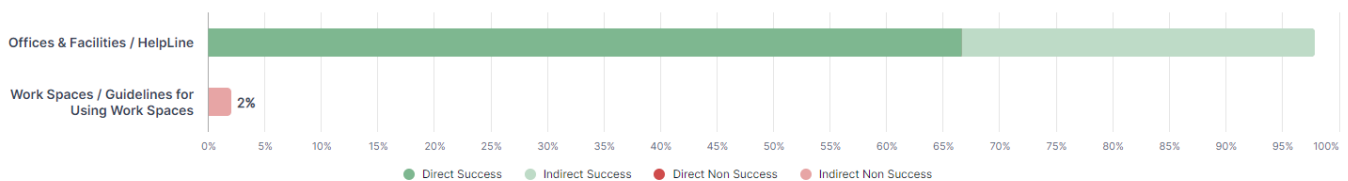
First Clicks:

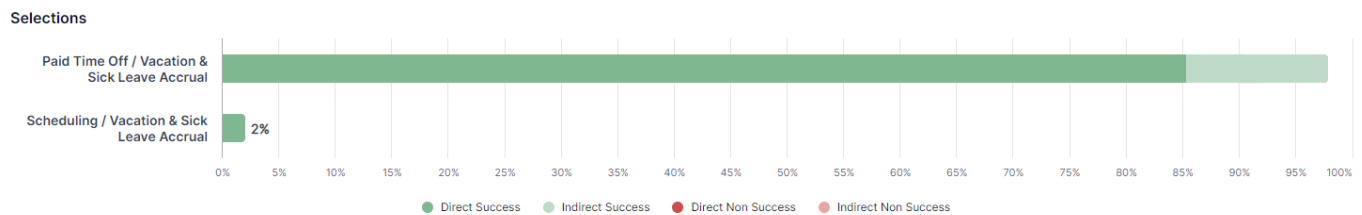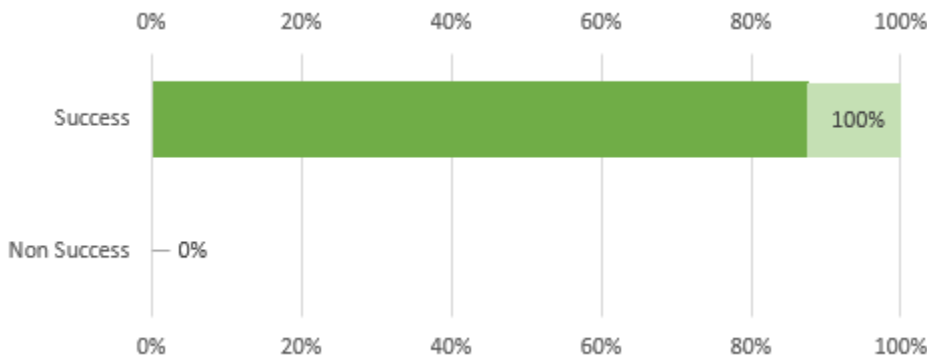|	Clicks
How To	3
Offices & Facilities	45

Additional Comments:

- I wouldn't navigate the staff page for this situation. I'd pick up the phone and dial the HELP line or send an email. C553S149_19
- I hope this is correct. In DC, they would contact Lorlita who would put in a Service Request with the Building Engineer. C553S149_20
- Assuming that I was supposed to be locating the HelpLIne request for a light bulb replacement, I found it okay. However, one has to know what the HelpLine is and what they do exactly. I've worked here 18 years and I'm not 100% clear. To me, a help "line" is something /someone who answers questions, NOT a facilities maintenance thing. For some reason, I can't get over that and never feel confident about calling "the helpline." I definitely think this is a cultural thing - if you're in the AAFP know, you know. Otherwise, it's a little confusing. Maybe it's just me, LOL. C553S149_22
- This was easy to find if you have been at the academy a few years. If new they would come to me the division coordinator to find out where to go for this problem. C553S149_29
- I don't know why this particular "how to" would be in a different place from the others. You enter tickets into the same web page, unless you've changed that. C553S149_31
- Helpline gives no clues as to what it is. The only reason I knew to select it is that I have submitted lots of requests to them for things that have needed to be fixed in the office. I was confident I was in the right menu, though. C553S149_33
- Not 100% certain that Help Line is the right solution C553S149_43

- So silly of me to have clicked the wrong menu- that was very clear and easy to find. Please remove one faulty statistic! C553S149_62
- Not sure if "helpline" was the right choice but I always think of them as IT related. I feel confident that it would be in the facilities menu but not sure which page C553S149_66
- I'm assuming the Help Line fields these kinds of requests. C553S149_71
- Helpline is where I would go typically, but I saw the section on Work Spaces so I went there first to see if there is a specific options for work space repairs. There wasn't so I went back to Helpline. C553S149_77
- you would have to know help line is who you contact for that kind of thing - something a newer employee might not be aware C553S149_79
- wasn't sure if it was common use area, Help Line, or maybe even workspace. Help Line didn't say "place a request" or "report on issue" if I'd seen some action like that I would have been certain. C553S149_94
- Fairly confident it's the "HelpLine" but this is one in which I've often end up a little confused by the title. HelpLine to me could mean a lot of things (for instance, IT/tech support). C553S149_96
- If you don't know what "HelpLine" is, you won't find the right information. other clarifying information in the option is needed. I've been for years and still get HelpLine and HelpDesk confused. C553S149_102

Scenario/Task 8: Vacation Accrual

Task Instructions	You are approaching a new milestone year at the AAFP and are curious about the amount of time off you would be getting. Please show me what page you would go to figure out how much time off you can get in a year.
Success Locations	• Pay & Benefits \ Paid Time Off \ Vacation & Sick Leave Accrual • Policy Documents \ Work Time/Scheduling \ Vacation & Sick Leave Accrual

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	100%	18s	5.1	5.1	5.1

First Clicks:

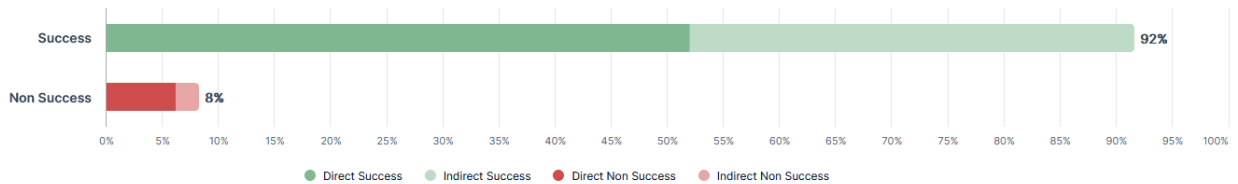|	Clicks
Business Areas	1
Pay and Benefits	44
How To	1
Policy Documents	2

Additional Comments:

- Pretty sure that the time off page will tell me how much I get for years in service. C553S149_22
- This was the easiest one to find because I knew it had to be about benefits. :) C553S149_33
- I knew this one so maybe it doesn't count C553S149_68
- I think this used to be under a "life and career" section...this heading will be a change, but it made sense. C553S149_94
- Some people don't consider PTO a benefit. I can see where it might be confusing to determine if it is a pay POLICY or a BENEFIT. C553S149_102

Scenario/Task 9: Library Assistance

Task Instructions	You are working through some difficult research and thought that it might be useful to get the AAFP library to help with the research. Please show me what page you would use to get that help.
Success Locations	• How To \ Library Usage • Business Areas \ AAFP Library

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	**92%**	21s	**5**	**5.1**	**5.6**

Effectiveness

Selections
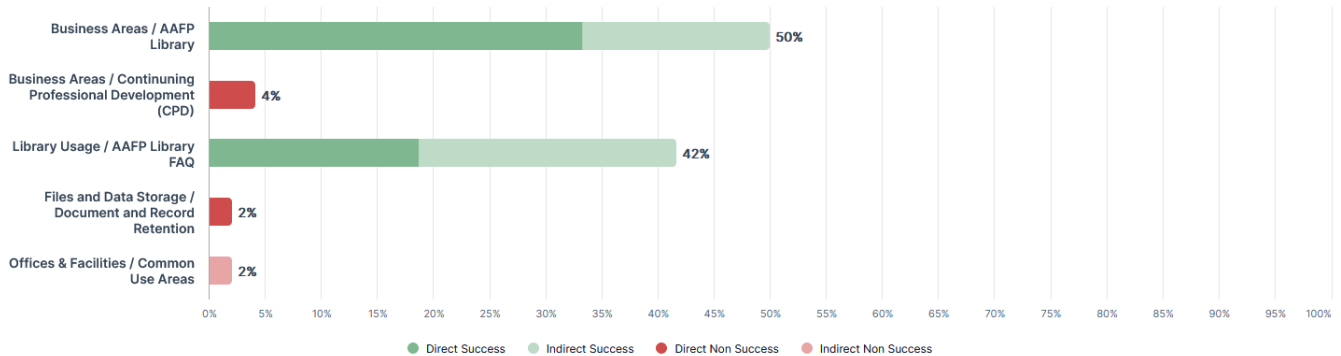
First Clicks:

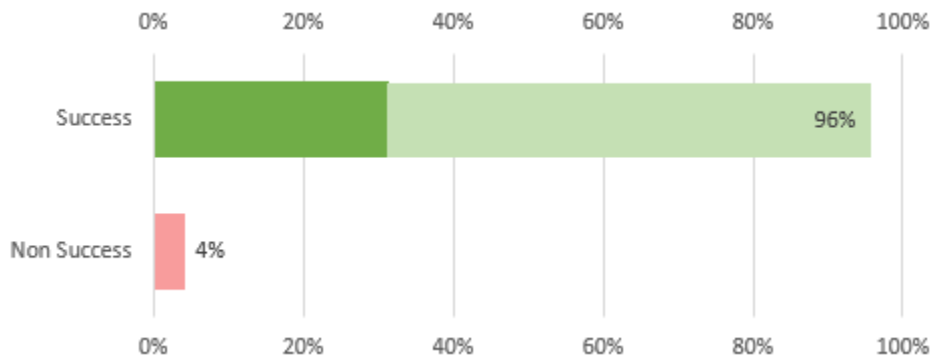|	Clicks
Business Areas	27
How To	11
Policy Documents	2
Professional Development	3
Offices & Facilities	5

Additional Comments:

- Should have a tab for research under library C553S149_20
- When looking through the list of business areas, I automatically looked down at the L's for "library." Calling it "AAFP Library" puts it at the top of the list, and that threw me off. C553S149_24
- I'm not sure that asking for help re: library research really falls under business areas. I'd be more likely to look under How to first. I'd expect that defining what the library is and services offered would be under a business area, but how to get help would be under how to. Probably nit-picking, though. C553S149_33
- Selecting Business Area was not my first inclination to find the Library C553S149_43
- Not sure, business areas would have been my first guess. But using the link to answer other questions made me more confident. C553S149_48
- Because I've been at the AAFP for a while, I happen to know that the Library falls under CPD, so that's how I'd look for it. I'm not sure newer employees would approach it in that way. C553S149_53
- I'm hoping Library FAQ will answer my question, but I'm not certain it will until I see the actual Library FAQ. C553S149_60
- "Business Areas" isn't very descriptive and could refer to lots of things besides internal resources C553S149_66
- I looked for Library. Is it necessary to call it AAFP Library? C553S149_68
- This was easier because i'd already been clicking around the menu so much I remembered where it was. C553S149_73
- I went to "Business Areas" first but didn't see anything relevant. I think I eventually got to the correct page but was expecting an option such as "chat with the librarian" vs. just a FAQ page that would have to be searched. C553S149_96
- This is Heather from the Library- thank you for studying the library link! Are we going to put the library homepage there instead of a FAQ? Sending updates to the library pages today.
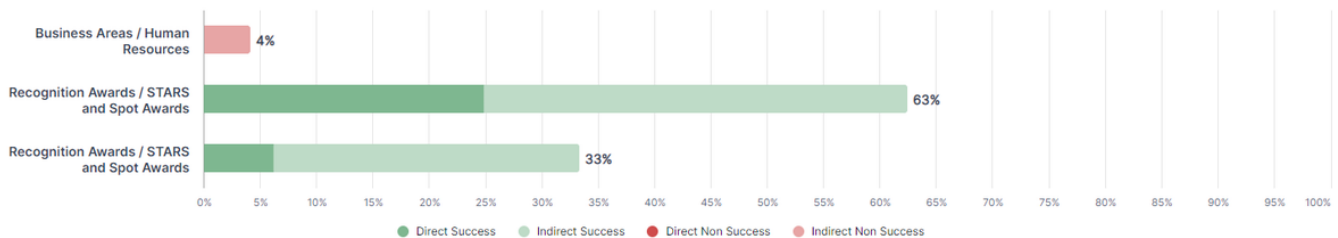
Scenario/Task 10: STAR Nominations

Task Instructions	You would like to send a colleague a STAR award. Show me where you would go to do that.
Success Locations	• How To \ Recognition Awards \ STARS and Spot Awards • Professional Development \ Recognition Awards \ STARS and Spot Awards

	N	Success	Time	Ease of Use	Satisfaction	Confidence
Mean	48	96%	23s	5	5	6.6

First Clicks:

	Clicks

Pay and Benefits	1
How To	18
Professional Development	3
Keep It Fun	26

Additional Comments:

- It took a minute to find Human Resources C553S149_20
- I was looking for STAR after the first drop down and had to go back to it to read the full list to find Awards and then STAR. C553S149_29
- That is where I found it on the current Intranet, so maybe this is cheating. C553S149_33
- I like having "Forms" at the top of the current Source homepage. I find it very easy to find forms such as this under the current configuration. C553S149_60
- i would have first looked under "keep it fun" C553S149_66
- Thought it might be in Keep It Fun but quickly realized it had to be in How To. Again, the lost list of choices took time to navigate but I finally found it. C553S149_77
- Looked thru How To and Keep it Fun first. C553S149_89
- It wasn't obvious that "How to" was were I should look. I looked under ACT Team and then whatever area seems like HR before I noticed "how to" C553S149_94
- I was expecting to find under "Awards" vs. "Recognition Awards" but did find it fairly easily. C553S149_96
- If you don't know what STAR is you will have trouble finding it.I would expect to find recognition an HR type heading for staff. C553S149_102

Next Steps

As the way the site is presented and designed can make a big difference in usability I suggest running a full usability test of the built out website at some point. Before launch is ideal.

Related

- [Staff Intranet Reports](#)