Primary user motivation: What brings them here?

Active Registrants

Active registrants represent users who have explicitly chosen to follow a call to action to 'register' or 'create' or 'sign up'. Examples of these users are:

1. A well informed library patron who has read site messaging, email, or in-library notifications about the migration of the system and recognizes that they need to follow some special steps to be able to use the new site.
2. A new library patron who is using the Bibliocommons site for the first time
   a. On their own
   b. With the assistance of library staff
3. A summer reading or biblio schools participant creating a new account as part of a special program

Passive (transitional) registrants

Passive or transitional registrants represent users who do not realize that there has been an underlying change to the library system. These patrons will encounter a system barrier whenever they try to:

1. Sign on to the library website after the transition to Bibliocommons
2. Initiate an operation on the website that requires them to be signed in (place hold, view shelves, contribute UGC).

In these cases the patron may or may not know or understand why they are being asked to 'register' for a new account when the clearly already have an account.

Service Challenges

While a new user registration flow for active registrants will be able to follow established design patterns, the transitional user will provide a greater challenge for a number of reasons:

1. FUD - fear, uncertainty, doubt. Consider that the patron has arrived at a library website that has probably undergone a visual change. They are already trying to re-orient themselves with the new presentation of the catalogue, new navigation elements, and new content (reviews, lists, etc). The reaction may be positive or negative or neutral based on this, but in any case, as soon as they try to do something active, they must suddenly process a set of information, make decisions they had not anticipated, and then continue with their task in this new website space
2. Resistance to change: our natural inclination is to fear change. Our brains are wired to recognize patterns. We are uncomfortable when something familiar is altered and it triggers our instinctive defense mechanisms. In addition, there may be biases like "if it ain't broke, don't fix it" and "don't change for change's sake"
3. The 3rd party factor: patrons may be resistant to the idea that the library has switched to a 3rd party private company for their service.

4. The social factor: patrons may be resistant to the inference that the 'new site' is primarily a social network.

The transitional registration path must take seriously each of these factors to provide reassurance, and clarity through the process.

Onboarding

For all new registrant types, the system should provide contextual guidance through the registration process and beyond, embedded into the application itself. This is especially important if the patron is in the middle of a transaction and is enabled to complete the transaction following their sign up.

This onboarding should be conceived as an inline product help/tour that helps users familiarize themselves with the various screen elements in the same context in which they will be using them (rather than in a standalone tour). For example,

- a patron clicks "Place a Hold"
- they view the modal sign-in form
- they provide their credentials and are walked through the account migration process
- once they complete the migration process, they are taken to the holds list, which displays their newly placed hold but includes dismissable help messages about where to go next, how to cancel their hold, etc.

Design Goals

- Provide clear and understandable context for the account creation process (keywords: migration, transfer)
- Provide a clear value proposition to all user types. Clearly separate core library function from social contribution
- Expose valuable user settings at registration time as optional processes

Context Scenarios for Registration

#	Persona	Scenarios
1	A library patron who does not understand that the catalog has changed and attempts to sign in as usual (transitional passive)	- Learn about the change - Learn about privacy - Complete registration - Migrate content - Orientation/onboarding
2	A library patron who knows that they have to register with the new catalog (transitional active)	- Complete registration - Display library card holder name and date of birth - Create username with live validation - Acquire email address and/or notification email - Optionally change preferred language

		- Optionally select preferred location - Optionally select Interest groups - Agree to terms and conditions
3	A library patron from a SOPAC who is registering and selects an existing username or a username that does not meet our format standards	- Clear explanation about migration and username rules - Suggestions provided for alternative usernames
4	A library patron who has used the legacy webpac but doesn't have	- Display value-proposition - Display features/benefits
5	A library patron who is worried about sharing credentials with a 3rd party	- Display security statement
6	A library patron who forgets their PIN	- Allow user to retrieve PIN via email
7	A library patron who attempts to access a feature which requires an authenticated user	- Display a login/registration panel - Display a reminder of what they were trying to do before they were prompted with login and registration until they complete the process - Return the user to where they left off before they were interrupted
8	A student participating in BiblioSchools with simple registration	- Sign in > Register - Display messaging to provide recommendations - Create username with selection lists or randomizer - Acquire month and year of birth - Acquire email address - Create password and confirm it
9	A minor participating in the summer reading program	- Sign in > Register - Display library card holder name and date of birth - Create username with selection lists or randomizer - Acquire email address - Select to enable recently returned - Select preferred location/branch - Agree to terms and conditions
10	A library patron who doesn't know how to get started with BiblioCommons	- Provide getting started information

1) A non-migrated library patron who attempts to log in (passive registration)

Mary is a long time patron of the library and has been using their online system to find books, place holds, and manage her renewals for several years. She visits the website and sees that the overall design and navigation have changed from the last time she visited. She tentatively tries a couple of searches to find the book that she's interested in borrowing. Once she finds the

book, she clicks the "Place a hold" button and the website displays a login form and a registration button. She notices a message about the library having changed its catalog, and a sign up button, but she knows that she has a barcode and pin and she enters these into the login boxes and clicks "Sign In". Mary is a bit surprised to be taken to a new screen. The screen explains that the library's new catalog is run by Bibliocommons, and that the catalog will provide better search and discovery services while still giving her all the capability she had before, but before she can use the catalog, she will have to complete a few extra steps. Mary continues to the next step and reviews the information retrieved from the library. She creates a username based on suggestions made by the system, provides her email address for notifications from the library, provides other information such as language preference, and reviews the terms of service before clicking to complete the process. Once she clicks complete, Mary is informed that she is successfully registered and that her hold has been made, and her place in the queue. Mary is asked if she wants to migrate her existing lists and borrowing history to the new system. She says yes and the content migration begins. Mary is redirected to her dashboard where she sees her hold is registered and that her For Later and completed shelves are populated.

Scenario Text	Requirements
Mary is a bit surprised to be taken to a new screen.	● Detect whether the user is migrated and, if not, present an interstitial to explain the need for migration
and reviews the information retrieved from the library	● Inform the user that this information has been retrieved from the library, that it is private and safe ● Inform the user that if the information is incorrect, they should contact the library and provide contact information. ● Assure the user that they can complete registration prior to correcting name or d.o.b. information
She creates a username based on suggestions made by the system	● provide onscreen help text on picking a username, as well as an explanation of what the username is for ● provide a username recommendations if the chosen username is unavailable
She provides her email address for notifications from the library, provides other information such as language preference, and reviews the terms of service before clicking to complete the process	● provide onscreen explanation for how email address is used ● validate email format ● include inline terms of service ● include terms of service acceptance clause or checkbox
Mary is informed that she is successfully registered and that her hold has been made, and her place in the queue	● commit hold and get system response ● display hold message and confirmation information (username, email address saved)

Mary is asked if she wants to migrate her existing lists and borrowing history to the new system.	● detect whether user has lists/shelves in ILS ● provide option to migrate lists/shelves ● detect whether user has borrowing history ● provide option to migrate borrowing history ● execute migration on user trigger
Mary is redirected to her dashboard where she sees her hold is registered and that her For Later and completed shelves are populated.	● Onboarding messaging/confirmation

2) A library patron who wants to register based on features/benefits (active registrant)

After Anne's last visit to the library she discovered that their website has attractive benefits. When she gets home she visits the library website on her laptop. She sees a call to action to login / register and, since she's never used the site before, she chooses the latter. On the first time user registration screen, Anne provides her barcode and PIN from her library card. The system displays back her full name, birth month, and birth year, explaining that this information has been retrieved from the library's system and that she should check for errors. It provides secondary instructions for contacting the library to correct any errors in the existing record. Next, she reads that she needs a username for her account as an alternative to her barcode (she likes this) but also as her online identity if she wishes to use any of the social features. Anne isn't interested in the social features, but she's assured by the site content that they are completely optional. The text next to the field suggests how to create a username. Anne enters a username but the name that she tries wants is taken, so the screen gives her some suggestions for how to fix that. Next, Anne is asked to optionally provide her email address so she can receive updates about holds and checkouts, which she does. She selects her preferred language of communication, accepts the terms of use, and continues.

The system informs Anne that she has successfully registered, and asks if she wants to have her borrowing history available on the website? She likes this idea so she says yes. Finally, Anne is redirected to her dashboard where she can see her shelves and her borrowing status. A series of help bubble overlays helps her to understand where things are.

Scenario Text	Requirements
She sees a call to action to login / register and, since she's never used the site before, she chooses the latter.	- Display register as an explicit call to action
On the first time user registration screen, Anne provides her Anne is shown her full name and DOB as the information associated with her library card. She begins creating a username and as she types the	- Ability to sign in using library credentials - Ability for first-time users to register with ease - Display clear value proposition to reduce friction - Display messaging about secure login make users feel safe sharing their library information with a third

validation occurs in real-time helping her understand the character requirements of her username and if the name is available. The name that Anne wants is taken, so she selects a name from the list of suggested usernames.	party - Display clear value proposition to reduce friction - Ability to capture registration information
She is then prompted with an optional onboarding which she chooses to go through, it introduces her to key features and allows her to provide additional information to enhance her library experience.	- Optional onboarding experience which guides the user through key features of the site - Ability to enter additional information to enhance site experience
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3) A library patron who wants to use a feature exposed to unauthenticated users

Scenario Text	Requirements
David attempts to place a hold and the system prompts him to enter his library card number and pin. David has never signed into the library website, he notices that he's on a third party website but feels safe due to the messaging that reinforces security measures taken to protect his account. He gets his wallet and finds the credentials to login.	- Ability to place a hold - Ability to login - Display clear value proposition to reduce friction - Display messaging about secure login make users feel safe sharing their library information with a third party
After entering his barcode and pin, he is taken to a page which reminds him of what he was trying to do, place a hold, and asks him for additional information to complete his library profile registration. The	- Remind the user of where they were before they started registration - Ability to capture registration information - Display clear value proposition to reduce friction

registration is reinforced with a value-proposition which makes David feel like the form is worth his effort.	
David is shown a confirmation message indicating that the hold has been successfully placed.	- Display a success message indicating the users action has been performed by the system
He is then prompted with an optional onboarding which she chooses to go through, it introduces him to key features and allows her to provide additional information to enhance her library experience.	- Optional onboarding experience which guides the user through key features of the site - Ability to enter additional information to enhance site experience