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Managing User Needs and Librarian Expectations: Results of a Survey of User Behaviors in Summon

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ABSTRACT

Since 2016, the University of Mississippi Libraries has used ExLibris' Summon for their discovery service, locally known as One Search. During the implementation, customizations for the search results page were determined by a committee of librarians. As new settings and customizations were implemented over the years, librarians began to question if certain settings were appropriate or if the patrons were actually using them. An IRB approved survey was distributed asking library patrons about their use of One Search while library employees were asked to answer how they perceived patrons used it. Results showed the differences between library employee perception of use and how library patrons used specific facets and settings. This paper seeks to investigate the similarities or differences between library expectations regarding patron use of One Search versus those revealed by library patrons themselves.

KEYWORDS

discovery, Summon, user behaviors, librarian expectations, discovery customization

INTRODUCTION

Discovery systems allow for local customization to the results page, which includes: search facets, links to chat with a librarian, recommended databases, and the integration with LibGuides to recommend specific librarians. Since 2016, the University of Mississippi Libraries (UML) has used Ex Libris' Summon for their discovery service, locally named One Search. During the implementation, the search results page customizations were chosen and set by a committee of librarians. The Summon User Experience Task-Force conducted two focus groups, one prior to and one after implementation, to see how students navigated One Search and if any adjustments needed to be made. As new settings and customizations were implemented over the years, librarians began at UML to question if certain settings were appropriate or if the patrons were actually using them. This paper seeks to investigate the similarities or differences between library expectations regarding patron use of One Search versus those revealed by library patrons themselves.

LITERATURE REVIEW

When implementing discovery systems, many librarians are tasked with reaching out to patrons to see how available features are being used and understood. Over the years, studies have looked at the locations of facets and features, what types of materials are included, and how patrons were using them.

Facets

In 2008, a representative with ExLibris worked with the University of Minnesota on a user study to evaluate how specific tasks were being completed using the Primo discovery system. The study showed that using facets to narrow search results was one of the major features offered by Primo that their library catalog and other resources did not (Sadeh, 2008). In 2015, the University of Kansas (KU) used Google Analytics, discovery statistics, and server logs to look at three semesters of use for twenty-seven specific users. The study at KU focused on the use of facets not available in the traditional online catalog and showed that over half of the participants used facets to complete assigned tasks (Hanrath & Kottman, 2015). Neither study reported what specific facets were used, just that they were used.

In 2014 and 2017 respectfully, the University of Vermont (UV) and Washington State University

(WSU) conducted usability tests to evaluate functionality in Primo. UV tested usability after implementation while WSU tested during the implementation process. Both studies reported that patrons were able to understand and use simple limiters but more advanced limiters were being misused. WSU had one participant who believed that facets gave the option to “exclude” and not narrow down (Galbreath, Johnson & Hvizdak, 2018). UV found that though “some functions are hidden and difficult to navigate, this did not prevent most participants from accomplishing most tasks and finding resources” (Nichols, Bailey, Spitzform, et.al., 2014). Neither library made any changes to their Primo customizations; UV was looking at how well students were using the available facets while WSU decided not to continue their study due to the considerable pending changes to the Primo faceting functionality (Galbreath et al., 2018; Nichols et al., 2014).

The University of Houston (UH) implemented Primo in the spring of 2014 and conducted two focus groups to look at potential changes to be made in customizations for a relaunch of the product in 2015. What these studies showed, that others did not, is the differences between internal users (library employees) and external users (end users). The results page included terminology that end users either did not understand or use correctly. This prompted the librarians to remove the facet “digital library” as end users confused this with the “newspaper articles” facet and renamed the “Peer-Reviewed Journal” facet to “Peer-Reviewed Article.” Comments from library employees showed that the facets to limit by full-text and peer-reviewed articles were helpful when assisting end users with research and that the most used facets were resource type and date (Brett, Lierman & Turner, 2016).

Location

One decision that has to be made when applying interface customizations is where to place facets and other applicable information. The University of Houston (UH) in 2014 and Rutgers University (RU) in 2016 looked at what to include on the right and left sides of the search results pages. Results of the usability testing for both libraries found that the search results page was too cluttered. While implementing Primo, the UH library chose to list facets by use, resulting in the most used facets moving higher on the list and lesser used facets being removed (Guajardo, Brett & Young, 2015). Participants in the study about EBSCO Discovery Service (EDS) at RU communicated that while the right column was cluttered and distracting, the features available were useful. RU removed the dynamic right sidebar and replaced it with an EBSCO placard, or call-out box. The added placard included database recommendations, research guide recommendations, and the ask-a-librarian function (Deodato, Gambrell & Frierson, 2016).

In 2017, The University of Wisconsin-Milwaukee (UWM), asked visitors of the library to answer two questions when given a screenshot of Primo, which they were calling “the new search engine.” The first question asked if the visitor could see how to limit the results, and the second if they preferred the search limits on the right or left side of the results page. Prior to the study, librarians thought that having the search limits on the right side of the results page was the better option. When results of the study showed the opposite; participants preference was to have the search limits on the left side, UWM moved the facets from the right side to the left. In conclusion, the study said that “any progress would be impossible without at time making changes” (Hubbard, 2017, p. 3). Librarians need to understand that to sustain the usability of the discovery service, changes, updates and adjustments based on patron studies will have to be made at some point (Hubbard, 2017).

Types of resources available in search results

Bowling Green State University (BGSU) implemented Summon in 2011 using the default “out of the box” settings and later conducted a survey in the spring of 2012 about the service (Fyn, Lux & Snyder, 2013). Librarians made three assumptions about what students wanted from a basic search: that newspapers appear in the initial search results, that only items at the home institution should be included, and that the recommending of subject-specific databases be automatically based on keywords and search results (using Summon’s Database Recommender). The majority of undergraduates that were surveyed indicated that the preference would be to not include newspapers nor be given the option to

add them to search results. Librarians at BGSU recommended, however reluctantly, to not include newspapers automatically and give users the option to add “on demand” (Fyn, Lux & Snyder, 2013). The study done by the University of Houston showed the same results about newspapers; however, the researchers reported that no consensus was made whether to keep them as part of the initial results (Brett, Lierman & Turner, 2016).

The survey at BGSU showed a very slight majority of participants who wanted results to only include items available in their home library collection. As a result, the researchers were not comfortable recommending that items not included in the collection be added to the results. The Database Recommender, one of the favorite features among librarians during beta testing, was kept as a feature at BGSU after survey results showed almost all participants were in favor of it (Fyn, Lux & Snyder, 2013).

Other

A study of discovery services used by libraries in the Alabama higher education system over a five-year period gave insight into customizations and changes over the years. Researchers looked at what discovery system was being used, what customizations were made in 2013, and what changes had been made since 2013. The researchers found that “tracking the WSDTs [wide scale discovery tools] in the surveyed libraries over time also reveals that, with a few exceptions, the customizations did not remain static but underwent changes of varying degree, from small cosmetic changes such as the name to larger, more substantive changes involving content such as scope notes and user aids” (Nuttall & Wang, 2017, p. 7). These types of changes are inevitable and it is the job of librarians who manage discovery systems to determine what changes need to be made. User studies help in the investigation of similarities or differences between library expectations regarding patron use of discovery systems versus those revealed by library patrons themselves.

METHOD

An Institutional Review Board (IRB) approved Qualtrics survey was posted on the UML website, Twitter page, Facebook page, and in a custom box on the right sidebar of the One Search results page. The survey consisted of fourteen questions about user needs and behaviors in One Search. Questions referring to a specific feature of One Search included a screenshot so survey participants would know what was being asked about. The survey was then distributed to UML employees, who were asked to answer the questions with how they thought One Search is being used by library users and not how the employee themselves use the resource. The survey was available for a two-week time period. Participants were given the option to submit their e-mail address to be included in a drawing for a Starbucks gift card.

Once the survey closed, the results separated into two groups: library employees and library users. The results from each question were evaluated and compared between the two groups. There were 92 surveys completed: 13 library employees (14.5%), 11 university employees (12%), 28 graduate students (30%) and 40 undergraduates (43.5%). Survey questions were not required and not all participants answered every question. The percentages evaluated are based on the number of responders for the specific question.

SURVEY RESULTS

Q1: How many times a week do you use One Search?

	Library Employees	Library Users
None	2	2
1 Time	1	16
2-5 Times	2	30
6-10 Times	2	14
> 10 Times	6	15

Q2: When using One Search, do you use any of the filters, suggestions or various options on the side-

bars and top toolbar?

	Library Employees	Library Users
Yes	11	69
No	1	5

The first two questions of the survey asked the respondents if they use One Search and if they have used the various options available when searching. Ten participants exited the survey because of either not using One Search or not using filters and available options. Those who exited included three library employees and seven library users. Eighty-two participants, ten library employees and seventy-two library users continued with the survey. Answering each question was optional and not all participants answered every question.

Q3: Choose all left-sidebar filters that you have used in One Search.

Library Employees		Library Users	
Refine Your Search	89%	Refine Your Search	100%
Content Type	100%	Content Type	95%
Publication Date	100%	Publication Date	82%
Subject Terms	44%	Subject Terms	36%
Language	56%	Language	20%
Time Period	44%	Time Period	38%
Genre	0%	Genre	15%
Library Location	44%	Library Location	8%
Author	11%	Author	31%
Region	11%	Region	8%
Discipline	11%	Discipline	26%
None	0%	None	2%

The top three used filters were the same between the library employee’s perception and how library users actually filter. The use of the remaining filters shows that library users are not filtering the way library employees perceive that they are. The data shows that the order the filters are listed on the search page does not significantly impact whether filters are used or not.

Q4: Rank the following filters by numbering them from 1-11 (1 being the most important and 11 being the least important). Enter a number into each box, using each number once.

Rank	Library Employees	Library Users
1	Refine Your Search	Refine Your Search
2	Content Type	Content Type
3	Publication Date	Publication Date
4	Subject Term	Subject Term
5	Discipline	Language
6	Language	Time Period
7	Library Location	Genre
8	Author	Author
9	Time Period	Discipline
10	Genre	Region
11	Region	Library Location

Library employee’s perception and library users four most important filters were the same while the remaining seven filters had differing levels of importance. These results reflect the results of the question above. These features are not being used the way library employees expect.

Q5: Choose all right-bar suggestions that you have used in One Search.

Library Employees		Library Users	
Encyclopedia Entry	22%	Encyclopedia Entry	18%
Suggested Librarian	33%	Suggested Librarian	9%
Related Topics	44%	Related Topics	46%
Recommended Research Guides	44%	Recommended Research Guides	20%
None	44%	None	33%

On the Summon results page there is a right sidebar called topic explorer. Topic explorer offers four suggested additional information boxes to users based on their keyword search. These suggestions include: an encyclopedia entry, a suggested librarian, information on related topics, and recommended research guides. Survey participants were asked which of these suggestions they have used. Eighty-five participants, nine library employees and seventy-six library users, answered this question.

Related Topics was the highest used suggestion by library users and was one of the highest ranked for library employees. Library employees perceive that the encyclopedia entry is used the least by library users; however, this suggestion is the third highest just behind recommended research guides. This question shows that the two lowest used suggestions (Encyclopedia entry and Suggested Librarian) are listed above the two highest used (Related Topics and Recommended Research Guide) should be evaluated.

Q6: Rank the following suggestions by numbering them from 1-4 (1 being the most important and 4 being the least important). Enter a number into each box, using each number once.

Rank	Library Employees	Library Users
1	Recommended Research Guides	Related Topics
2	Related Topics	Recommended Research Guides
3	Suggested Librarian	Suggested Librarian
4	Encyclopedia Entry	Encyclopedia Entry

The only difference between library employee's perception and library users was that Recommended Research Guides and Related Topics were switched. The results show that the two least important suggestions are the same.

Q7: Have you used the encyclopedia entry (Gale Virtual Reference Library or Wikipedia) to get additional information about your topic?

	Library Employees		Library Users	
Yes	1	11%	20	30%
No	8	89%	46	70%

There is a perceived idea by library employees that library users do not use the encyclopedia entry option available on the right sidebar of the One Search results page. The results show that 70% of the library user respondents do use the encyclopedia entry. Library users do use the encyclopedia entries, showing that the library employees' perception was incorrect. Those who answered that they have used the encyclopedia were routed to question 8 and those who answered no were routed to question 9.

Q8: What is your opinion about Wikipedia being one of the encyclopedia options?

Survey responders were asked an open-ended question and given space for a short answer. The one librarian who answered yes to question seven wrote that library users and researchers "can find that elsewhere." At a meeting of subject liaisons prior to the survey's launch, several librarians disapproved of Wikipedia's inclusion among the encyclopedia options. The responses of library employees to this survey question was parallel to that of the subject liaisons. Twenty library users who answered had used the encyclopedia option on the right sidebar. Out of the twenty library users' comments, sixteen were positive on how Wikipedia was used, one was negative, and three were neutral. The positive responses men-

tioned that Wikipedia offered clarification and could clear up confusing information, but should not be cited in articles. One responder said that “it demonstrates that Wikipedia is becoming absorbed into academic criticism (though it should be treated carefully in terms of verified facts).” Overall the respondents like seeing the Wikipedia entries. Unexpectedly, all six University Faculty/Staff members had something positive to say about Wikipedia.

Q9: Is there a reason why you have not used the encyclopedia entry?

Six library employees and forty-one library users gave explanations as to either why they thought the encyclopedia entry was not used or why they have not used the encyclopedia entry. Library employees responded with reasons they thought library users would not use the encyclopedia entry, including: “I can use Google,” “never noticed it,” and “my research is at a higher level than encyclopedia entries.” One even stated if they needed this type of information, they would go to Wikipedia directly. Most of the responses from library users said that they did not know this suggestion existed or have not had the need to use it yet. One responded that “usually I have a tab open with Wikipedia myself, don’t need a small sidebar preview.”

Q10: Last semester, did you notice any access issue alerts on the top of the right-hand sidebar (example shown below)?

	Library Employees		Library Users	
I have not noticed or seen any alerts	2	22%	44	66%
I noticed there was an alert but did not pay attention to it	2	22%	18	27%
I noticed the alert and it was helpful to know	5	56%	4	7%

The UML uses the option to create custom boxes on the right-sidebar to alert users about any scheduled maintenance when a resource will be unavailable and when there are access issues with a specific database. Library employees answered the question with the impression that library users pay attention to the alerts and that they were helpful; however, 66% of the library users say they have not noticed or seen any of the alerts. Although only a third of the library users responded that they noticed the alerts, putting up alerts are still helpful in the communication of outages and issues that arise. Alerts have not been required very often, and the hope is that those who did not notice the alerts were not using One Search during one of these times.

Q11: Have you used the option to save searches to Google Drive or OneDrive?

	Library Employees		Library Users	
Yes	1	11%	19	29%
No	8	89%	47	71%

The ability to save searches to either Google Drive or OneDrive was released in May 2018. When the survey was conducted, this feature had been available for ten months. Eight of the nine library employees answered that they did not believe that library users took advantage of this feature. Nineteen of the sixty-six, or 30% of respondents said they had used the save feature. The responders who answered NO, they had not used this feature were taken to question twelve while those that answered yes were routed to question thirteen.

Q12: Did you know that saving to Google Drive or OneDrive was available?

	Library Employees		Library Users	
Yes	4	50%	8	17%
No	4	50%	39	83%

The library employees were split fifty-fifty as to whether they thought library users knew that

saving searches was an option. Of the forty-seven library users who said they had never used the save searches feature, only eight knew that this feature was available. The option to save searches requires a personal Google Drive or OneDrive account and can be used by clicking on a star by the search bar. It is unknown how intuitive this feature was to library users.

Q13: When you click on a full-text article in One Search, have you experienced a white screen with a sidebar on the right?

	Library Employees		Library Users	
Yes	7	78%	40	61%
No	2	22%	26	39%

At the time of the survey, there was an increasing number of resources that were not compatible with the 360Link sidebar, resulting in a blank white screen. Once reported, databases were added to the sidebar exceptions list in the 360Link customizations. Adding the databases to the sidebar exceptions list prompted a link instructing users to “click here to open in a new window.” Those who answered that they had experienced this white screen were taken to question fourteen while those who answered NO were taken to the thank you page and the option to provide their email address to be placed in a drawing for a Starbucks gift card.

Q14: When you experienced the white screen, what have you done? Choose all that apply.

	Library Employees		Library Users	
Nothing, go back to my search and choose another article	5	83%	17	41%
Click on the “report a problem” link in the middle of the right sidebar	1	17%	5	12%
Click on the “Open content in a new tab” link on the bottom of the right sidebar	4	67%	26	63%

Getting a blank white screen when expecting an article can be quite frustrating for library users. The results showed that library employees assume that library users are most likely to do nothing, and return to their search. However, the data shows that users are looking for alternate ways of accessing content that are available by clicking on the link in the 360Link sidebar to “open in a new window.” A small percentage of library employees and users indicated that they use the “report a problem” link. Upon answering this question, respondents were taken to the thank-you page and were given the option to provide their email address to be placed in a drawing for a Starbucks gift card. Survey results and comments can be found in UML’s eGrove (<https://egrove.olemiss.edu/libpubs/16/>).

Summon Customization Updates

The results of the survey indicated that most aspects of the Summon results page had been customized efficiently. The order of filters in the left-sidebar did not need any changes. Library employees did not think that library users were using the save to Google Drive or Microsoft OneDrive option; however, after thirty percent of library users indicated that they had saved searches, no changes were made. Only four library users indicated that they had seen the alerts on the right sidebar and found them helpful. Even though this was a low number, the alerts are necessary to communicate any planned outages or issues. What cannot be determined from this survey is whether or not the users just did not notice an alert or if they were not using One Search during one of these alerts.

The survey showed that Topic Explorer in the right-sidebar was used, but that the order of suggestions needed to be updated. Before the survey the order was Encyclopedia Entry, Suggested Librarian, Related Topics, and then Recommended Research Guides. The survey showed that for library users Related Topics was the most important suggestion, while the Encyclopedia Entry was the least. Thus the new order is Related Topics, Recommended Research Guides, Suggested Librarian, and then Encyclope-

dia entry.

One of the main questions resulting in this survey was whether Wikipedia should be included as one of the options for the Encyclopedia entry. Many of the library employees at UML felt Wikipedia should not be available as a potential option. The results of the survey showed that the large majority of users, both students and faculty/staff, had no issue with Wikipedia being included and were active users. Thus, Wikipedia was kept as an Encyclopedia entry option.

CONCLUSION

The results of the study at UML and other available studies show that discovery services are not meant to be static. The facets, available customizations, features, content, etc. change on a regular basis. Vendors make regular updates to the functionality and appearance of their provided discovery systems. While librarians can make assumptions based on interactions with patrons as to how they are using the discovery system, the need for regular user testing is necessary to help to bridge the potential gap between library expectations regarding patron use of discovery those revealed by library patrons themselves. As hard as librarians try to determine how discovery is being used, they are not the main users of library resources. This survey shows what features currently available in One Search are being used and their importance in research. However, the study did not look at how the available features were actually used by students and if library employees can perceive and predict user behavior. Additional data would need to be gathered on how users interact and use available features for further analysis on how the discovery service is being used. Knowing why and how library users interact with discovery can give librarians a more holistic view of the use of library resources, and better meet the needs of users.

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