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From Usability Studies to User Experience: Designing Library Services at the University of Kansas

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Abstract

The University of Kansas (KU) Libraries first made their discovery tool, Primo (Ex Libris), available to their users in the fall of 2013. Since that time, in spite of many upgrades and improvements, most librarians and library staff are still not using the tool for their own research. Last year, librarians from KU presented their findings at the Charleston Conference using a survey given to KU librarians that asked them to compare Primo to Google Scholar and their favorite databases. Librarians were asked to compare the three and make recommendations for improving Primo. This year, KU librarians designed a much briefer survey and asked all library staff to participate, including student assistants. Library staff were asked to use Primo to conduct research on a topic of their choice and use all aspects of Primo to find relevant results. They were then asked to describe what they used in Primo to lead them to helpful information resources and rank the first 10 results from their final search.

The purpose of this survey is to discern how our colleagues use Primo and how successful they are in retrieving the information they need when using this search tool. This study will help KU Libraries develop training for library staff in the use of this new mode of discovery and access. The search terms used in this study will also be useful in helping the discovery implementation team recreate the searches to test Primo in the future, after scheduled upgrades, in order to detect noticeable improvements or problems with the search results.

In 2014, University of Kansas (KU) librarians conducted a survey asking invited participants from the KU Libraries's staff to test the usability of the discovery tool, Primo. The participants were instructed to perform a known item search, a search for a designated topic, and a search for a topic of their choosing using Primo, Google Scholar, and their favorite database. They were then asked to compare and rank their results on a Likert scale of one to five, with one being very relevant and five being not relevant at all. Most of the participants had little success with Primo in finding relevant results, particularly with the known item search. Participants expressed frustration with the duplication of their results and little understanding of what was being searched. Furthermore, the survey took several hours to complete, which caused even greater frustration given the fruitless results. With only twelve participants, the results were not conclusive, but they did provide search terms to be used for testing Primo after upgrades throughout the last year.

In 2015, KU librarians redesigned the usability survey for Primo into a much shorter version. A call was sent out library-wide for participation in taking the survey, asking respondents to search Primo for a topic of their choice, something they would typically research. They were asked to describe the steps they took to get the best results and to rank the first ten results using a one to five Likert scale, similar to what was used last year. They were also asked to share three positive comments and three suggestions for improvement. They were instructed not to search more than thirty minutes. The returns from this survey were much more useful by addressing the positives of the Primo discovery tool and making suggestions for changes to Primo. To increase participation, there was a drawing of the participants for a fifty dollar gift certificate. Thirty five library staff members from across all library departments participated in the survey.

During the intervening year between the two surveys, Primo received two upgrades that

improved its usability immensely. A “Browse e-shelf” was added, allowing users to browse thumbnails of the book jackets surrounding their Primo search results. Also added to Primo were advanced search options such as the ability to search by publisher, music publisher, resource type, and OCLC number. Users can now “Personalize their results” by choosing a preferred discipline and newer results to appear first. The “Did you mean?” option was also improved. Relevancy ranking and duplication were also refined. Due to these improvements, library staff members were much more successful this year in finding relevant results in Primo.

Some of the positives about Primo expressed by library staff were its user friendliness and ease of use. Survey participants found the relevancy of their results much improved overall and narrowing down results was made simple by using the facets on the left side of the results screen. Participants liked the mixture of formats that appeared in the results and were happy to see the format clearly labeled, taking the guess work out of deciding whether the item was a book, journal article, or another format. Other positive feedback included the ease of saving results to the e-shelf and ease of seeing the availability of an item. Participants found the option to “expand beyond library collections” extremely useful. They also found it easy to make adjustments to their original search, and overall they liked the seamless one-stop shop for scholarly resources.

Along with the many positives, library staff were able to give positive criticism and suggestions for improvement to Primo. Several of the participants would like to have the advanced search option as the default search box on the main library website. They would like to be able to sort their results from oldest to newest and wish there was a “mark all” option to save their search results. A few participants expressed their frustration with not understanding what Primo was searching and that known item searches, particularly for author and title combined, continued to be problematic. They also felt that the “print, e-mail, and export”

options were too hidden in “Locations and Availability.” In addition, participants found too much duplication in their results and reported that primary resources were displayed too far into the results. Several participants thought the login option was not obvious enough, and they were frustrated when they lost the filters chosen prior to logging in. One staff member suggested a rollover option so the user could see the abstract without clicking on the detailed record.

The survey designers shared a detailed report, which described the searches and feedback, with the discovery implementation team and provided a list of suggestions for improvement. The discovery implementation team worked through the list of suggestions, letting the survey participants know that their recommendations would be used to make further improvements to Primo when possible. They promised the survey participants that they would work with Ex Libris to improve duplication and relevancy rankings. They also began investigating methods making the advanced search more visible and labeling more understandable, particularly the e-shelf label. The discovery implementation team is also planning to make the “print, e-mail, and export” options more visible, as well investigate a way to sort results from oldest to newest. They also agreed that the option to mark all items to save on the e-shelf was a great suggestion. The suggestions also gave the team new topics for training library staff to use Primo successfully.

In summary, the Primo discovery tool continues to improve over time. Results from the surveys have been particularly instrumental in this process because they identified the concerns of the library staff, as well as the positive aspects of the tool. The discovery implementation team has successfully engaged the library professionals, assuring them that their input was essential and acting upon their concerns to improve the discovery tool. While the surveys continue to solicit a variety of suggestions for improvement, they also document greater overall support of the discovery tool.