

Primo Usability Study, Spring 2018

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New features added to Quick Search (Primo), besides the new interface, include a choice to search Partner Libraries (TRAC consortium) and a search scope choice of Library Collections + Articles; Library Collections; ISU Digital Collections; and Special Collections.

Tasks in the interview scripts were written to explore volunteers' usual methods of searching for articles and/or books, and to see if they are aware of and use features such as Advanced Search; facets; scope dropdown inside the search box; options to save results such as email, Favorites (pin icon), citation or Endnote; Partner Libraries search; My Library Card; and if they can find items from ISU Digital Collections or Special Collections. If they are not already aware of these features, can they find them?

In another task, volunteers were asked to rank the facet groups by importance on a printout of search results.

Three graduate students and six undergraduates participated in the usability testing, with majors in Sociology, Supply Chain Management, Chemical Engineering, Event Management, Animal Science, Agronomy, Ag Business & Political Science, English/Applied Linguistics, and Mechanical Engineering/Spanish.

Action Items:

- Rearrange facet group order. Move Format Type up, under Availability.
- Make the Advanced Search link more visible on the home page, where we have more control.
- For a search with no results, suggest Partner Libraries or ILL.
- Too many reviews (from Primo list): "apply a sticky "exclude Reviews" facet when searching from our Library homepage. An example can be seen when searching from here: <http://www.otago.ac.nz/library/index.html>"
- Scope dropdown non-use: facets or Advanced Search were more popular ways to filter out articles. ISU Digital Collections and Special Collections are more difficult to test for, as there are fewer users actively searching for something from those collections. A bigger problem is that no one knows what Digital Collections are.

Facet Usage

All but one person used facets to filter their results. This person, a sophomore, never searches for articles, but mostly for specific books, using title and author. The Format Type and Availability groups were used most during the test. In Primo Analytics, 8% of non-search actions are facet filtering (September through February).

One person (grad student) used both Include and Exclude for several choices under Format Type, clicking the boxes, then used the Creation Date selector, clicking the Refine link beside that selector. She then noticed that only the Creation Date filter was applied and not the Format Type choices. Apparently the choices are only automatically applied if the text is clicked, but if the boxes are clicked, then the "APPLY FILTERS" button shows and that must be clicked for the choices to take effect. Another person used the boxes to choose more than one facet in a group and did click the "APPLY FILTERS" button.

Participants were asked to rank the importance of each facet group on a paper printout, with usable results from eight participants. Availability was ranked first by three while Format Type was ranked first by three. Of those who did not rank Format Type first, three ranked it second.

Sorted by the participants' average rank, with percentage of use obtained from Primo Analytics:

- Availability – 40%
- Format Type – 32%
- Creation Date – 13%
- Topic – 8%
- Author/Creator – 2%
- Collection – 2%
- Library/Classification LCC/Language (tied) – 2% (Classification LCC – 1%)

Availability is constrained to be at the top by Primo.

Scope Dropdown

Two people used the scope dropdown, one choosing “Library Collections” while searching for a print item, the other also choosing “Library Collections” while searching for our seed catalog Digital Collection after finding one in the National Biodiversity Heritage Library. Another person stated “I never tinker with those.” Primo Analytics has no statistics on scope use.

Advanced Search

Two of the three graduate students and two of the six undergraduates used Advanced Search. One undergrad became aware of Advanced Search for the first time during the usability test and suggested we highlight it.

Another undergrad uses Advanced Search a lot because she learned about it in Library 160, searching for subjects rather than specific items, using the Subject field.

One grad student usually starts with Advanced Search and picks Title to search but uses it as a keyword search as Any Field gives too many results. She said she would like it to be like Web of Science where you can search both the title and the abstract. She also did Boolean searches.

Another grad student prefers Exact searching in Advanced Search or "" in the Simple Search. Sometimes this does not work well, as she said that she found no results with a 10-word title, but did find the item using just the first three words.

Primo Analytics statistics (averaged September through February) of search types, including Basic, Advanced, A-Z List, and Browse types, show 85% Basic searches, with 10% Advanced Search.

Getting to Full-Text Online

One undergrad expressed confusion with the new tab that opens displaying the list of sources for full-text online; another clicked on the ILL link rather than one of several options available.

Finding Location of Physical Item

Availability facets ISU Collections (Books & More) and Physical Items; Library facet Parks Library; and Format Type facets Books and Text Resources were used to filter for a print book. Six people expressed a strong preference for a print book over an e-book, with one person strongly preferring an e-book.

Partner Libraries

Only two participants saw the Partner Libraries scope choice on their own, either in the search box dropdown, the suggestions while typing, or the choice in Advanced Search. One had used it before. Five others were aware of and found other methods of using ILL, including WorldCat.

At the time the study started, the link to request from Partner Libraries had disappeared during a Primo update, so it was not possible to look at the usability of it, even if more participants had seen the option.

Features to save results

Seven found the Pin button, four found the Email button, three found either the Citation or Endnote button. Another uses Zotero.

My Library Card

Participants were asked to find a list of books they had checked out. All nine found My Library Card, with one having quite a bit of trouble finding it, and another having quite a bit of trouble finding the Loans section after she had gotten into My Library Card.

Finding a Digital Collection and Special Collections example

This task didn't work so well for its purpose – testing the scope dropdown to find ISU Digital Collections and Special Collections. Most of the participants were at least vaguely aware of Special Collections after I explained what that was and explained that some collections have been digitized and are available online. The example used was the Seed Catalog collection. None of the participants used the scope dropdown. Seven of the participants found the digital collection and the location for Special Collections.

One participant had accidentally found a historical photo of a distillation column while searching for articles about distillation columns and found it interesting.

AID page

Participants were not asked to use the Article Indexes and Databases page, but four undergraduates and one graduate student either made a comment about it or used it as they demonstrated how they search for articles.

1. Used the Types dropdown to choose Articles, then the Subject dropdown to choose Chemical and Biological Engineering. Put 'glucoamylase' in the search box; no results.
2. Subjects dropdown - chose Business. Types dropdown - Articles. Next dropdown (Vendors) – “I don't know what that means.” Put 'finance' in the search box then chose one of the databases.
3. Went to the AID page and said “I never use this, it's too chaotic.”
4. “I'd look at the AID page. In classes (ENG 250 & SP COM), we were shown Academic Search Complete - it's the big one to find articles. I also use Access World News, depending on what I'm looking for.” She pointed those out as they were visible on the first page.
5. PhD student: her subject is interdisciplinary and none of the subject choices really fit. She would like a help page for how to use choose a database, similar to the Quick Search Tips page.

Tally scores: colored by individual

Feature Used	Graduate	Undergraduate	Total
Search for articles in QS	111	111	111111
Search for articles in AID		1111	1111
Used AID search box		11	11
Prefers Google Scholar	1		1
Search for books	111	11111	1111111
Prefers print	11	1111	111111
Advanced Search	11	11	1111
Facets (any)	111	11111	1111111
Format Type	1	1111	11111
Availability	11	1111	111111
Topic		11	11
Any other	1	111	1111
Exclude	1		1
Personalize		1	1
Author link in Details	1	1111	11111
ISU Collections, etc. scope dropdown	1	1	1
ISU Library/Partner Libraries scope dropdown (without extra probing)		11	11
ILL other method	11	111	11111
Email option	1	111	1111
Pin / Favorites	11	11111	1111111
Endnote/Citation	1	11	111
Uses Zotero	1		1
Found seed catalog Digital Collection	111	1111	1111111
Found seed catalog Special Collections	111	1111	1111111
Found My Library Card	111	111111	111111111
Too many reviews, irrelevant items comment	1		1