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What do Primo users want?

or finding evidence to understand user behaviour in Primo

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Monash University

IGeLU 2019 Conference (27-29 August 2019) #igelu2019

PROJECT DRIVERS

Most important	Rank
Library staff provide accurate answers to my enquiries	1
I can get wireless access in the Library when I need to	2
I can get help from Library staff when I need it	3
The Library Search facility enables me to find Library resources quickly (PRIMO)	4
Access to Library information resources has enabled me to perform better in my studies	5
Online resources (e.g. ejournals, databases, ebooks) meet my learning and research needs	6
When I am away from campus I can access the Library resources and services I need	9

USER FEEDBACK

- The online portal for accessing journal articles is **very slow** and bulky.
- Accessing articles through the library search portal takes way **too many steps**.
- Online resource availability tends to be very good although search results can be **hard to navigate**.
- Some links online for certain articles link to a different article, it makes it hard to find the actual journal article you need when the **links don't work**

STRATEGIC OBJECTIVES

- Develop discovery and access pathways to information
- Enhance the online Library environment

PROJECT OBJECTIVES

- Investigate if Primo user interface usability is improved by focusing on heavily used screen elements
- Investigate if Primo user interface usability is improved by simplify the number of elements present in the Primo screen design
- Based on user feedback, investigate if Primo search results are more relevant when search metadata is simplified
- Improve Primo search results by analysing zero search results
- Investigate user acceptance of FRBRisation
- Investigate user acceptance of application plug-ins to extend Primo functionality, eg Browzine integration at detail results screen

SUCCESS FACTORS

- Improved feedback on Primo usability in 2019 Library user survey (in progress)
- Improved Primo user search metrics in 2019 Library Annual Report (in progress)
- Improved user feedback collected either directly during three month post implementation survey or via ask.monash
- Positive feedback from Road Shows conducted at various branches, reported to IRSC and LMC as a result of Primo usability review
- Data collected from embedded feedback utility, as a basis for the three month post implementation review

PROJECT MILESTONES

Primo UX Review timeframe

2E+07

		Preparation		Analysis	Communication		Testing	Maintenanc	Development		RELEASE
2017	August										
	September	[illegible] availabl Primo user behaviour									
	October			Analyse past user behaviour log data	Report on Primo user patterns in log analysis to SDS &						
	November	Build Primo beta test environments									
	December	Build Primo beta test environments	Develop user testing scenarios					Install November Primo Service Pack			
2018	January	Build Primo beta test environments	Develop user testing scenarios								
	February		Develop user testing scenarios								
	March	Test and evaluate third party plug ins									
	April						Implement First round of user testing				
	May			Analyse First round of user testing	Report on first round user testing to SDS &						
	June								Update Primo configuration based on first round of	Add in third party plug in for user testing	
	July						Implement second round of user testing	Install May Primo Service Pack			
	August			Analyse second round of user testing	Report on second round user testing to						
	September						Test new Primo User Interface in Innovation Studio		Update Primo configuration based on second		
	October				report on results of Innovation studio testing to				Update Primo look & Feel based on Innovation		
	November				Implement user communicati on plan to alert all users to upcoming changes to Primo UI	Run Staff focused user roadshows to alert all staff to upcoming changes to Primo UI			Embed user feedback tool in new Primo UI		
	December	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE	RELEASE
2019	January							Install November Primo Service Pack			
	February										

PRIMO USER BEHAVIORAL TRENDS

- a year's worth of Primo usage logs from our Primo server
- Primo and Alma analytics and
- Google analytics

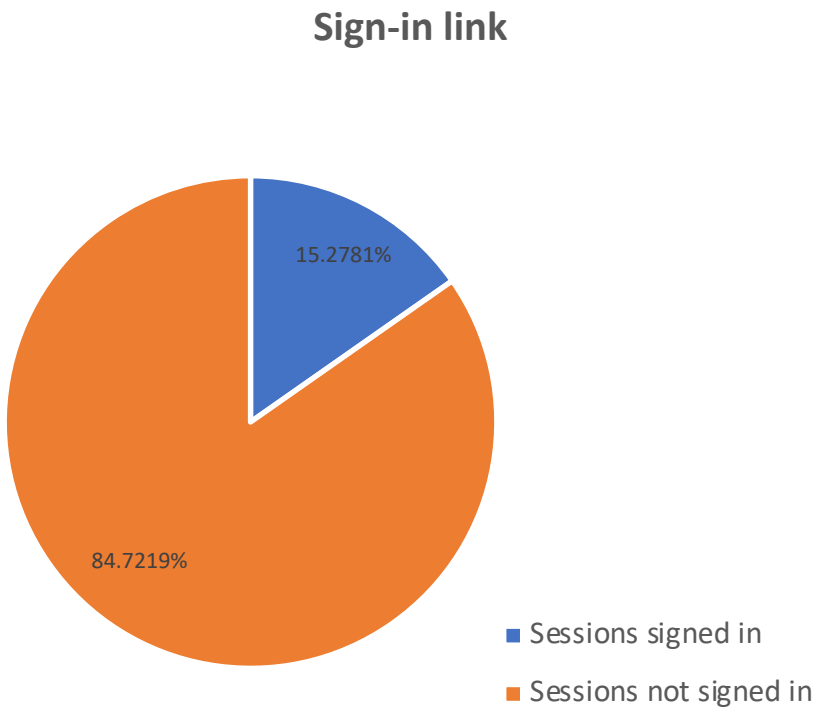
RESEARCH DATASET 1

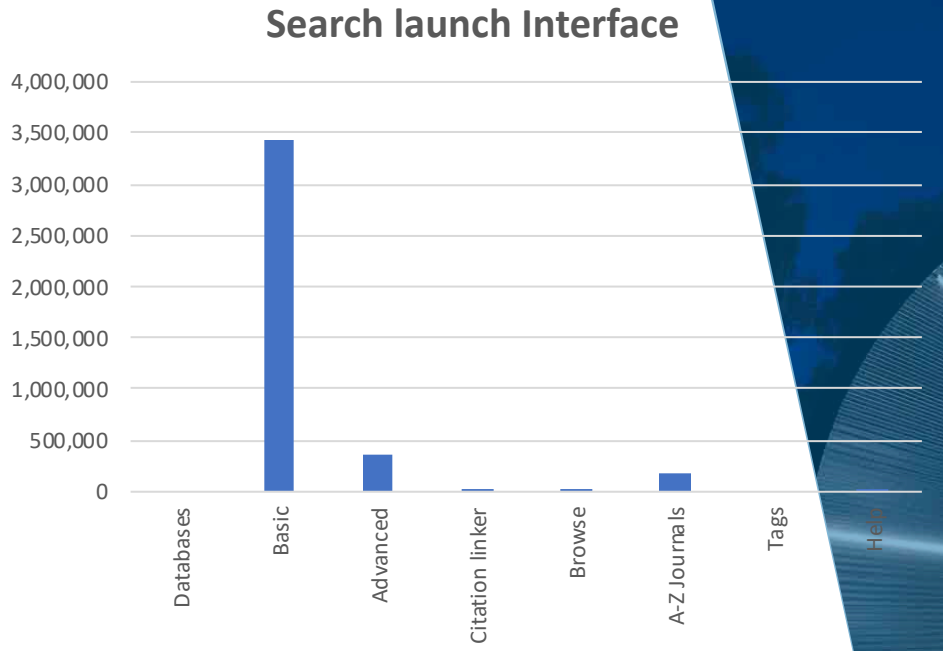
https://tinyurl.com/y5k4nzr4

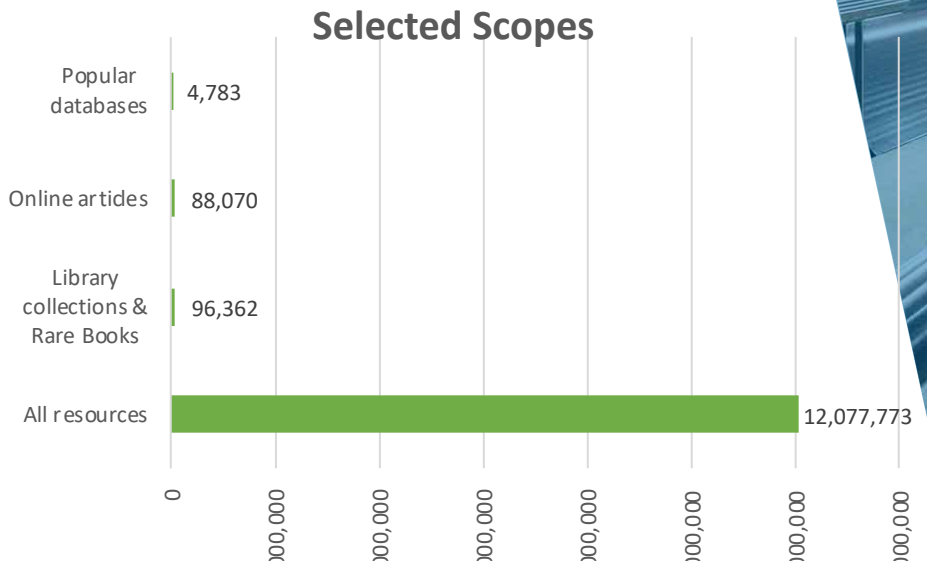
RESEARCH QUESTIONS

- How do users search in Primo?
- Where do they start their searches?
- Which screen elements do they use most heavily, and which they ignore and
- What can we understand from how users structure their searches?

Primo landing page







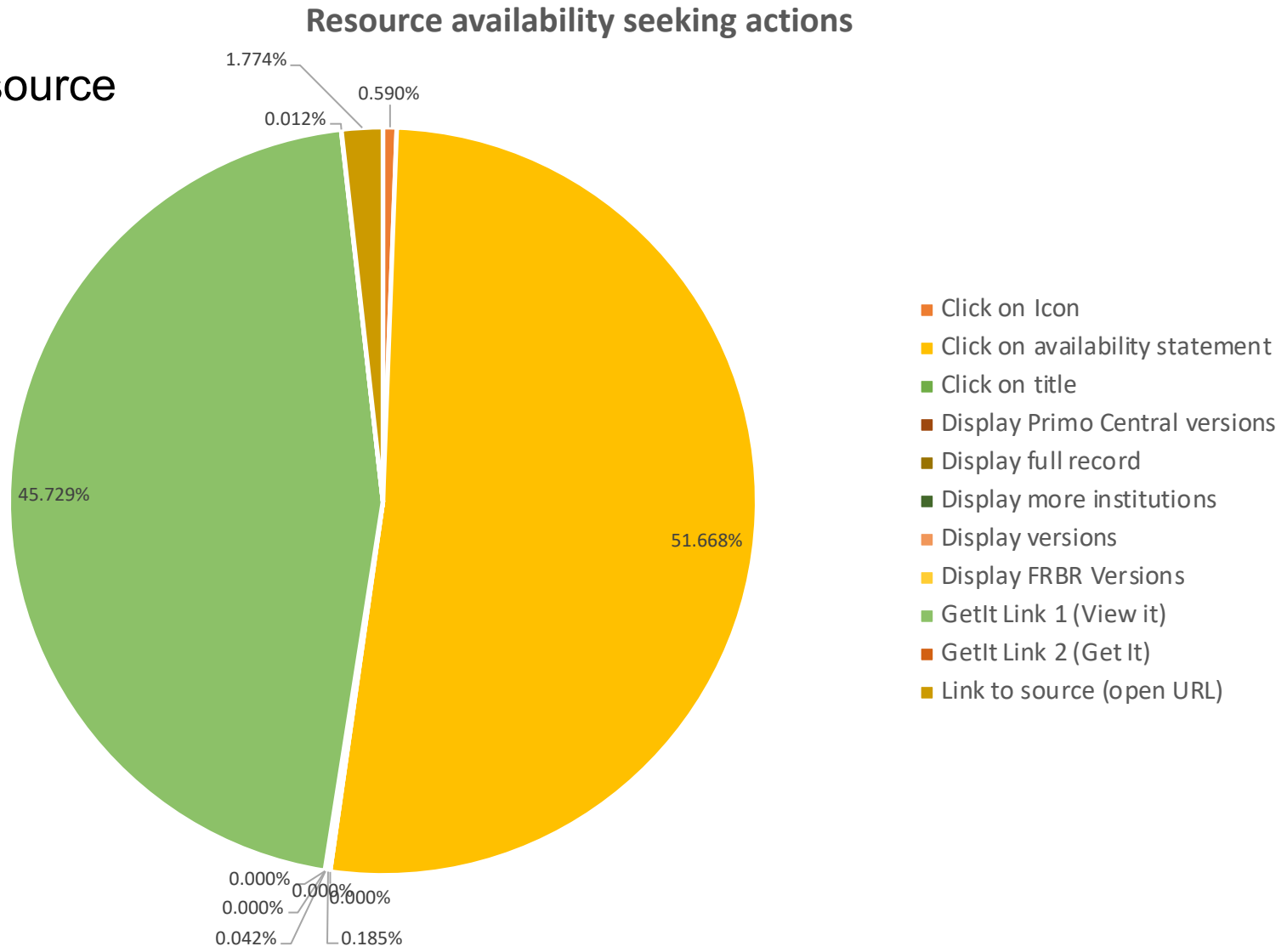
Source Primo analytics

Primo result refining function categories

1. Narrowing search results
2. Broadening search results
3. Personalising search results and
4. Saving search results or user information for reuse

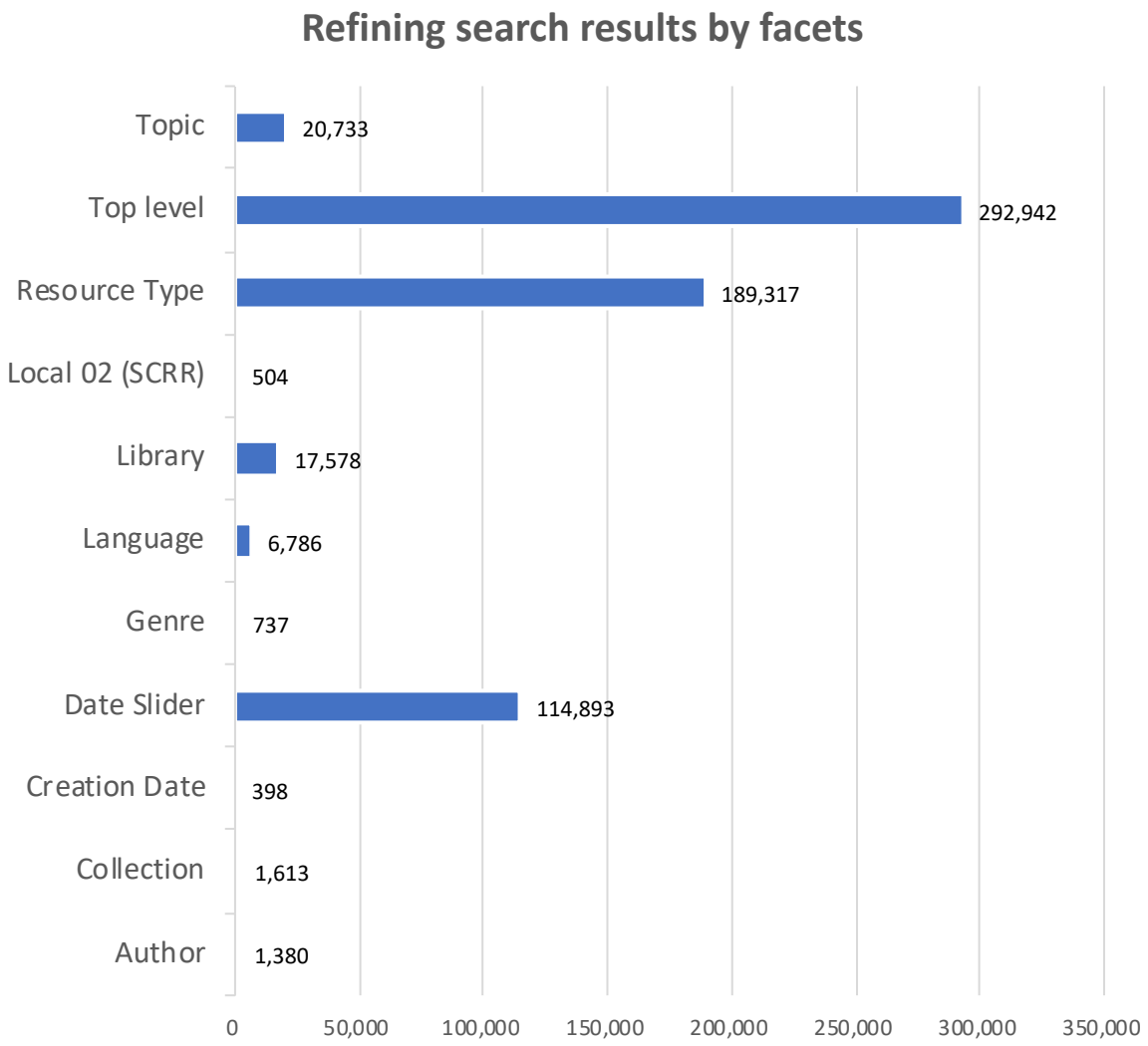
Navigating brief results

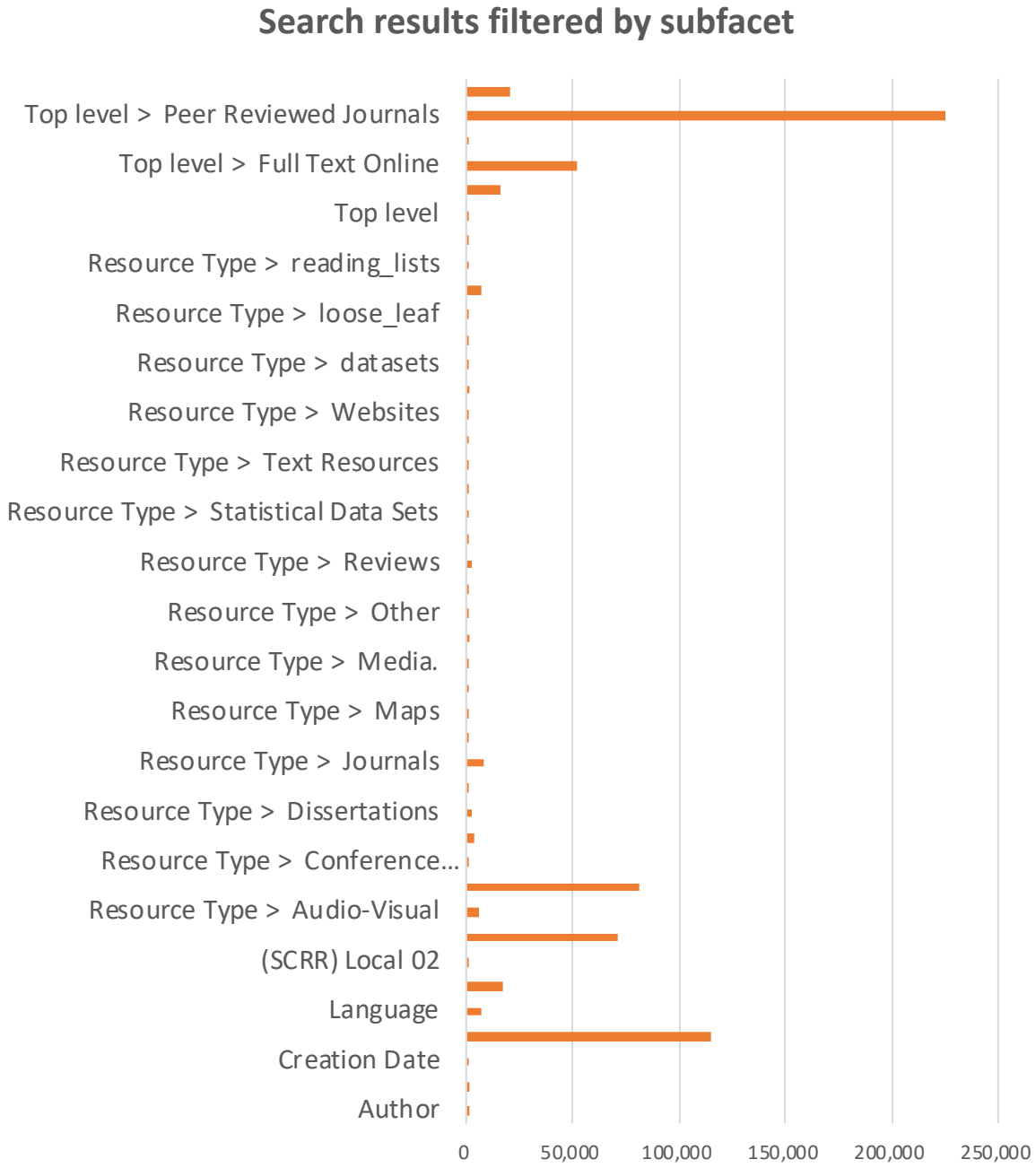
45% of Primo actions were Resource availability seeking actions



Source Primo analytics

Narrowing by facets

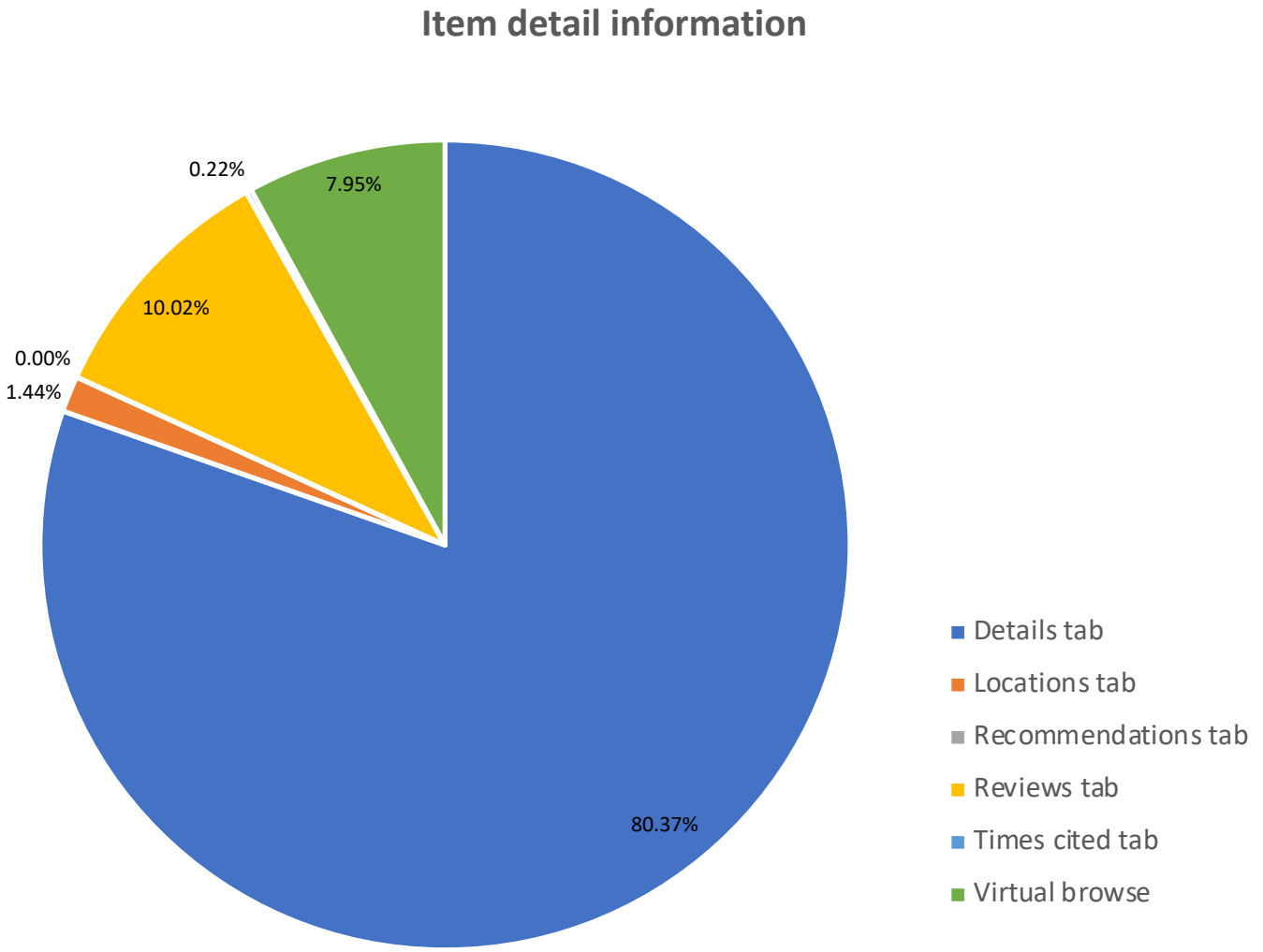




Source Primo analytics

Narrowing by Item details

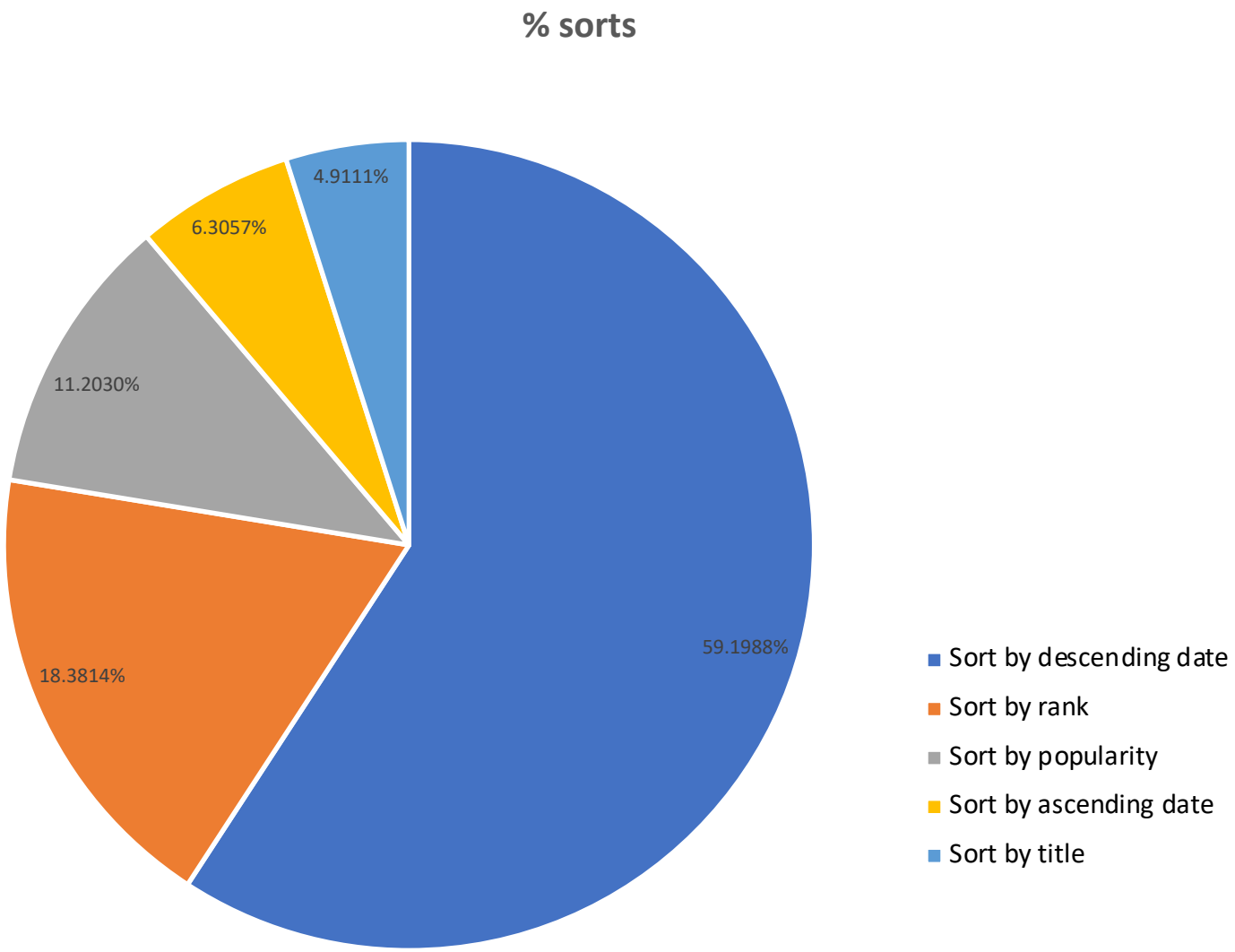
5% of Primo search actions were “Item detail” refining actions.



Source Primo analytics

Navigating by sorting

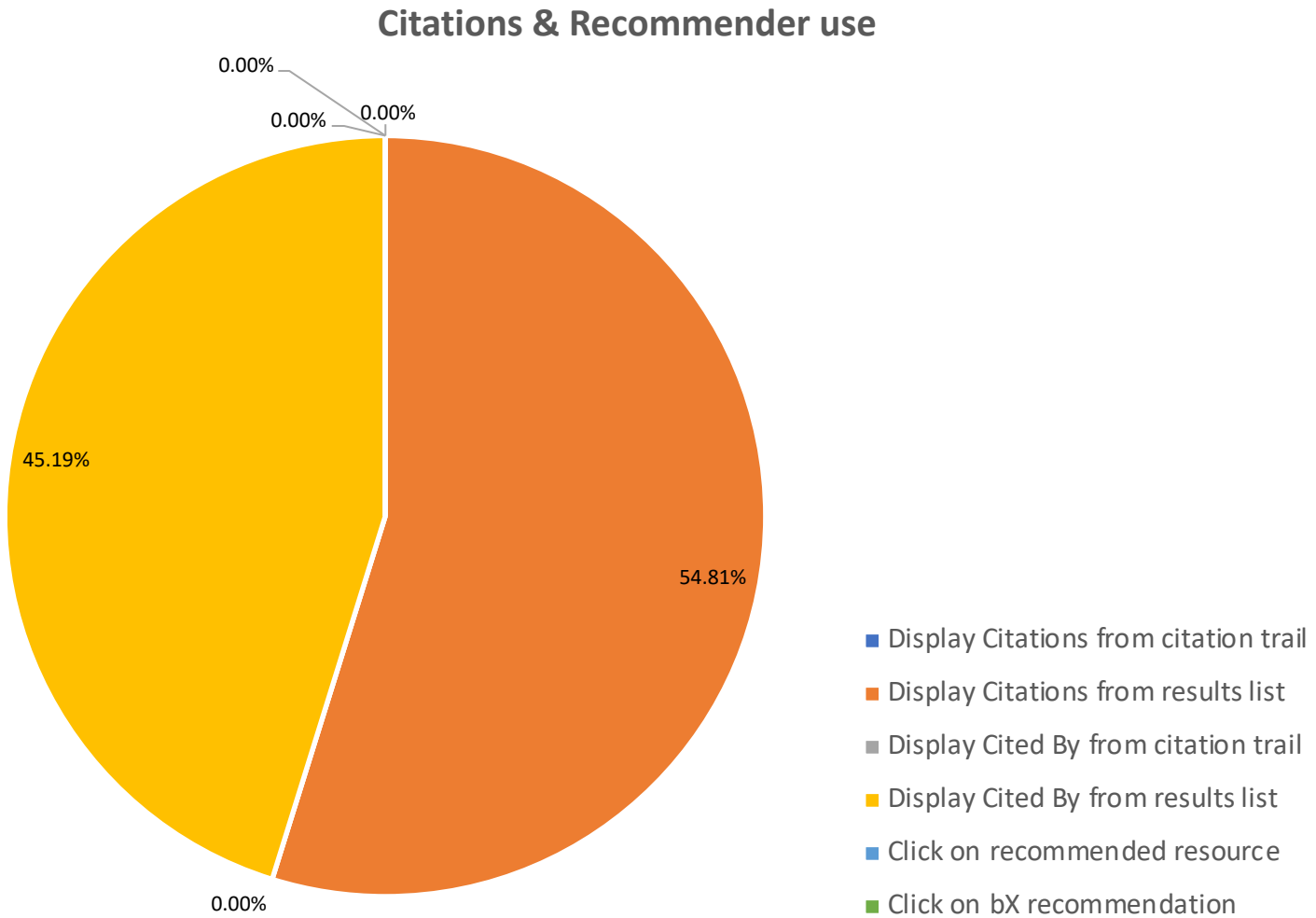
0.35% of Primo search actions were “sort by” actions.



Source Primo analytics

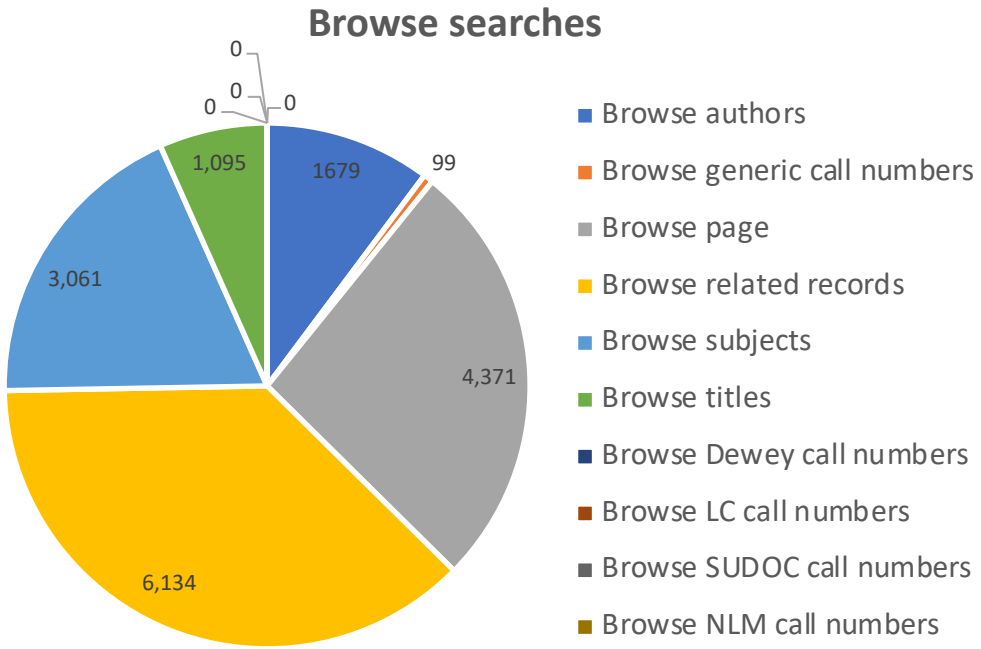
Narrowing by citations & recommender

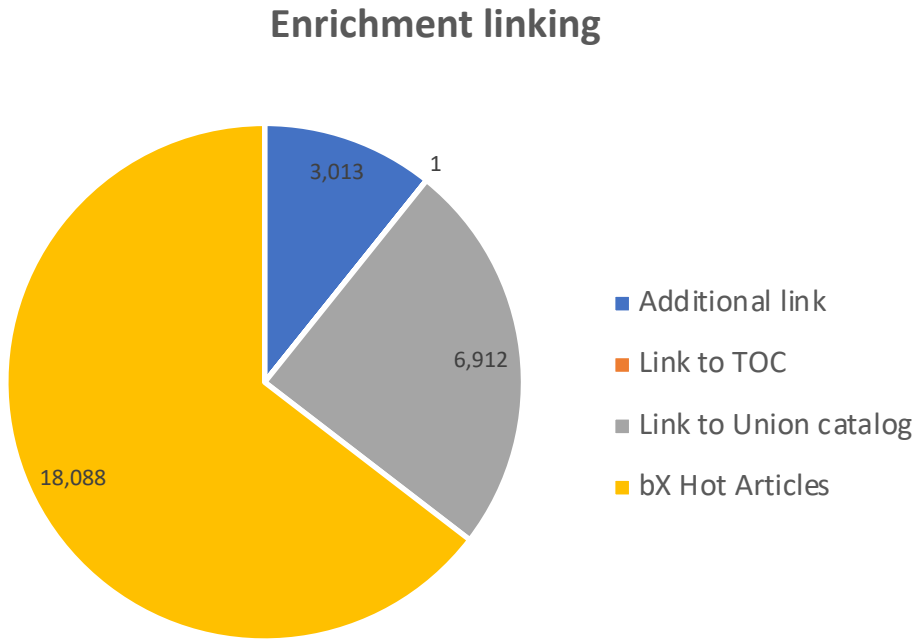
0.1% of Primo search actions were Citation & recommender activity

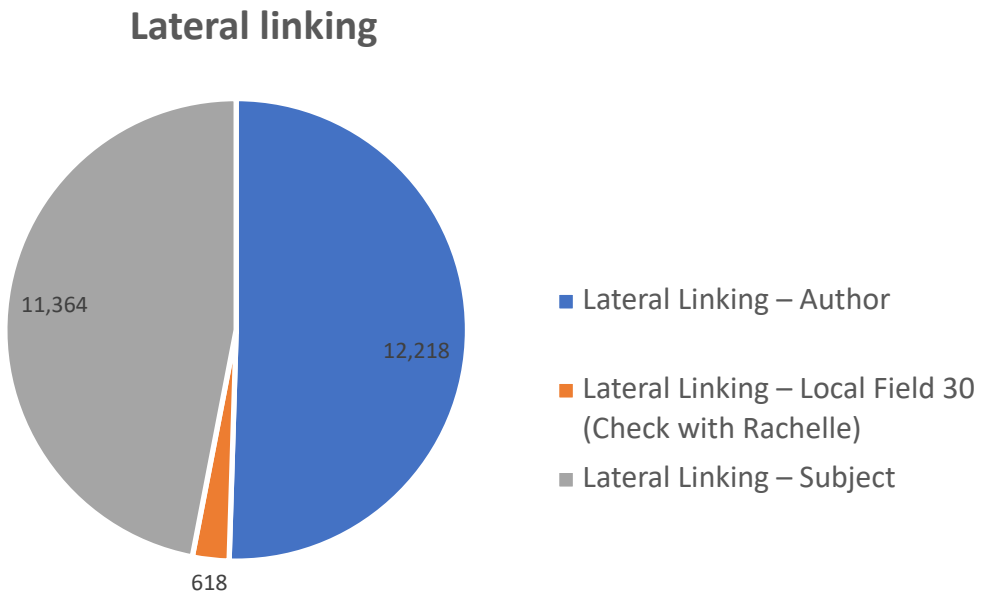


Source Primo analytics

Broadening search results

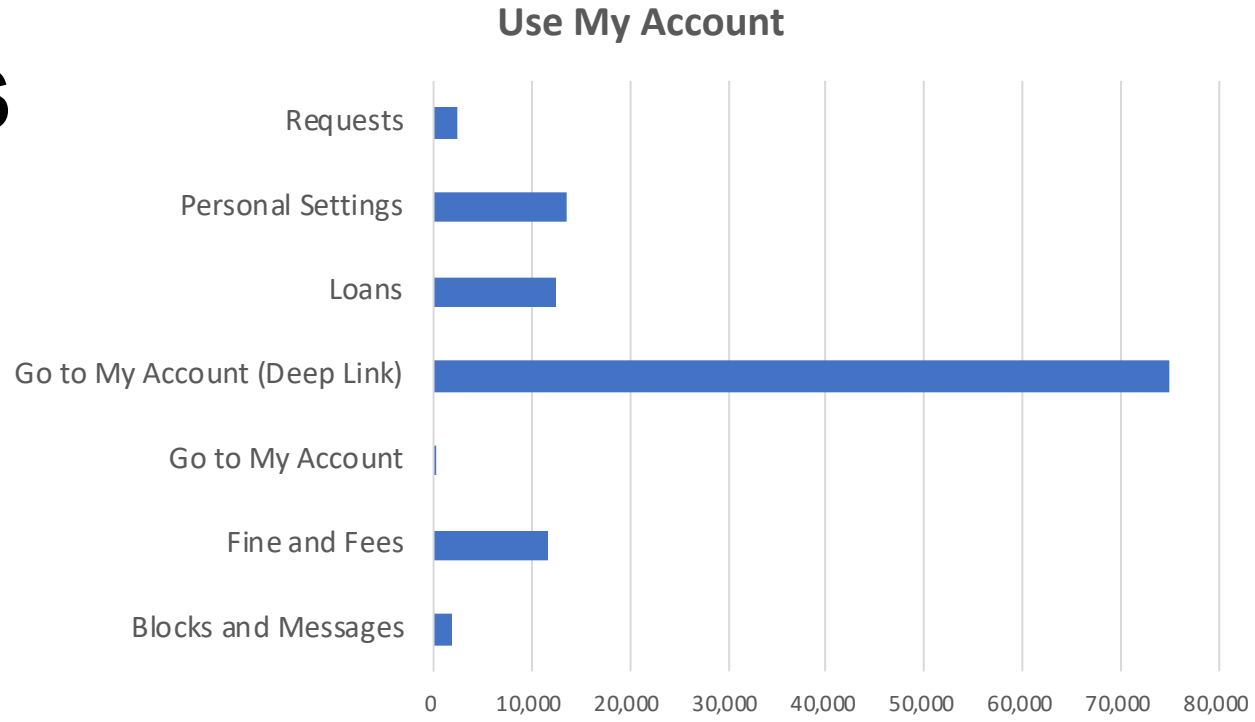


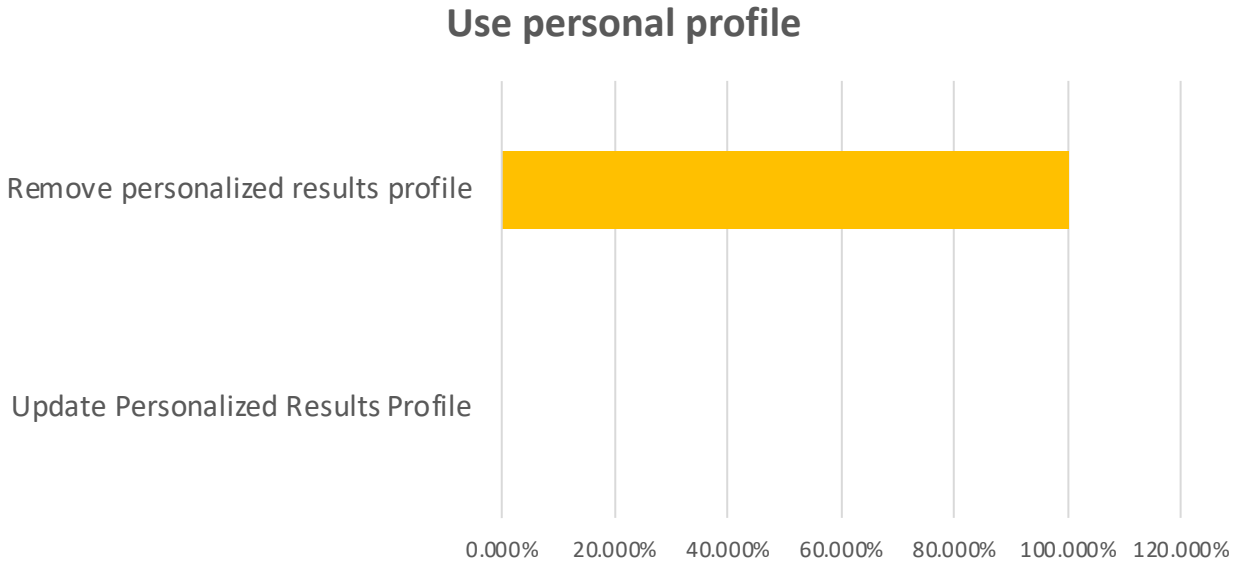




Source Primo analytics

Personalise search results

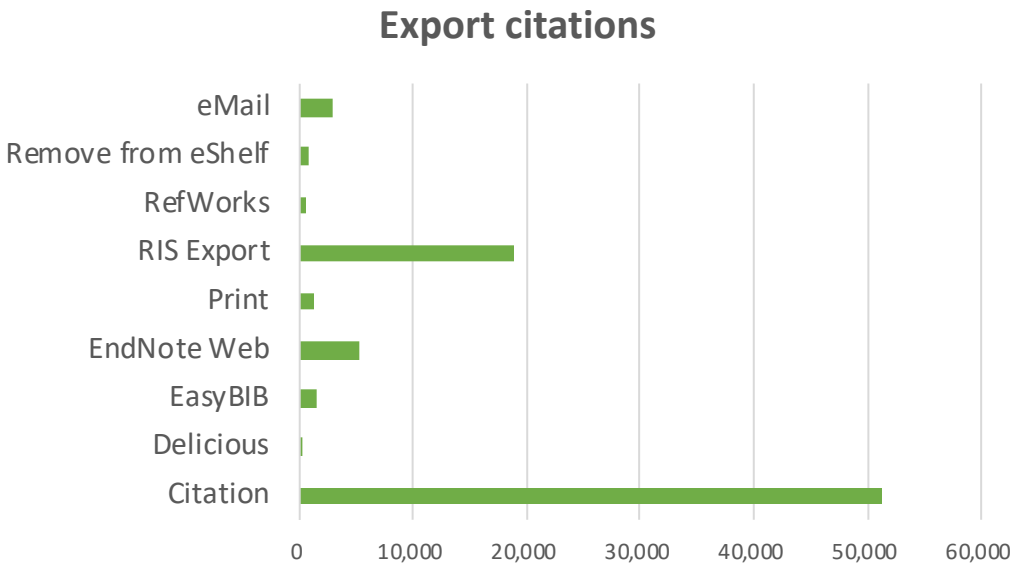


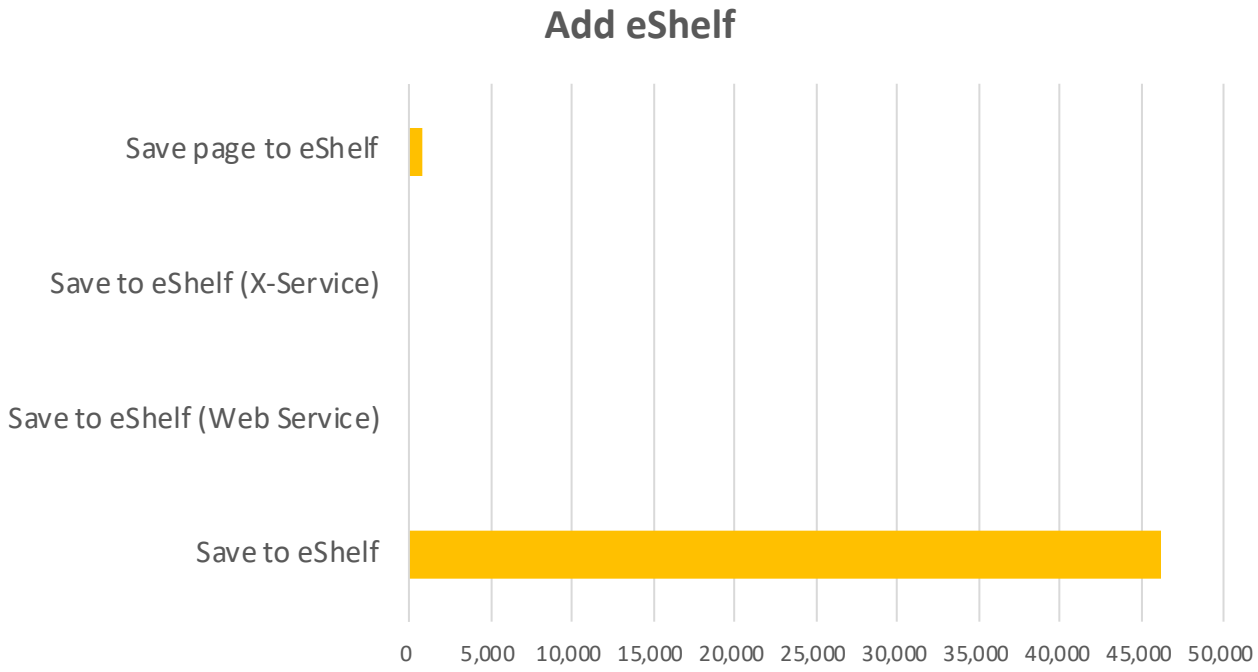


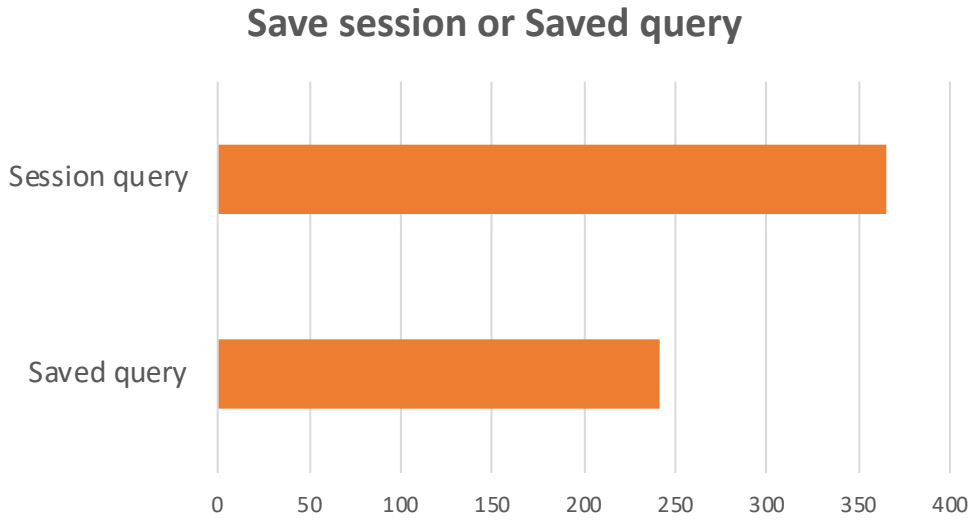
Source Primo analytics

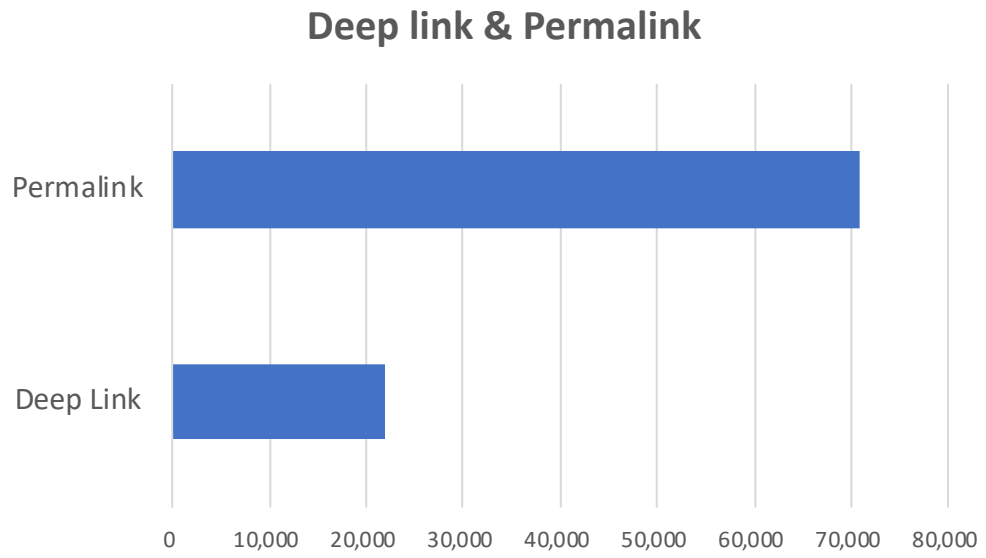
Source Primo analytics

Reusing search results





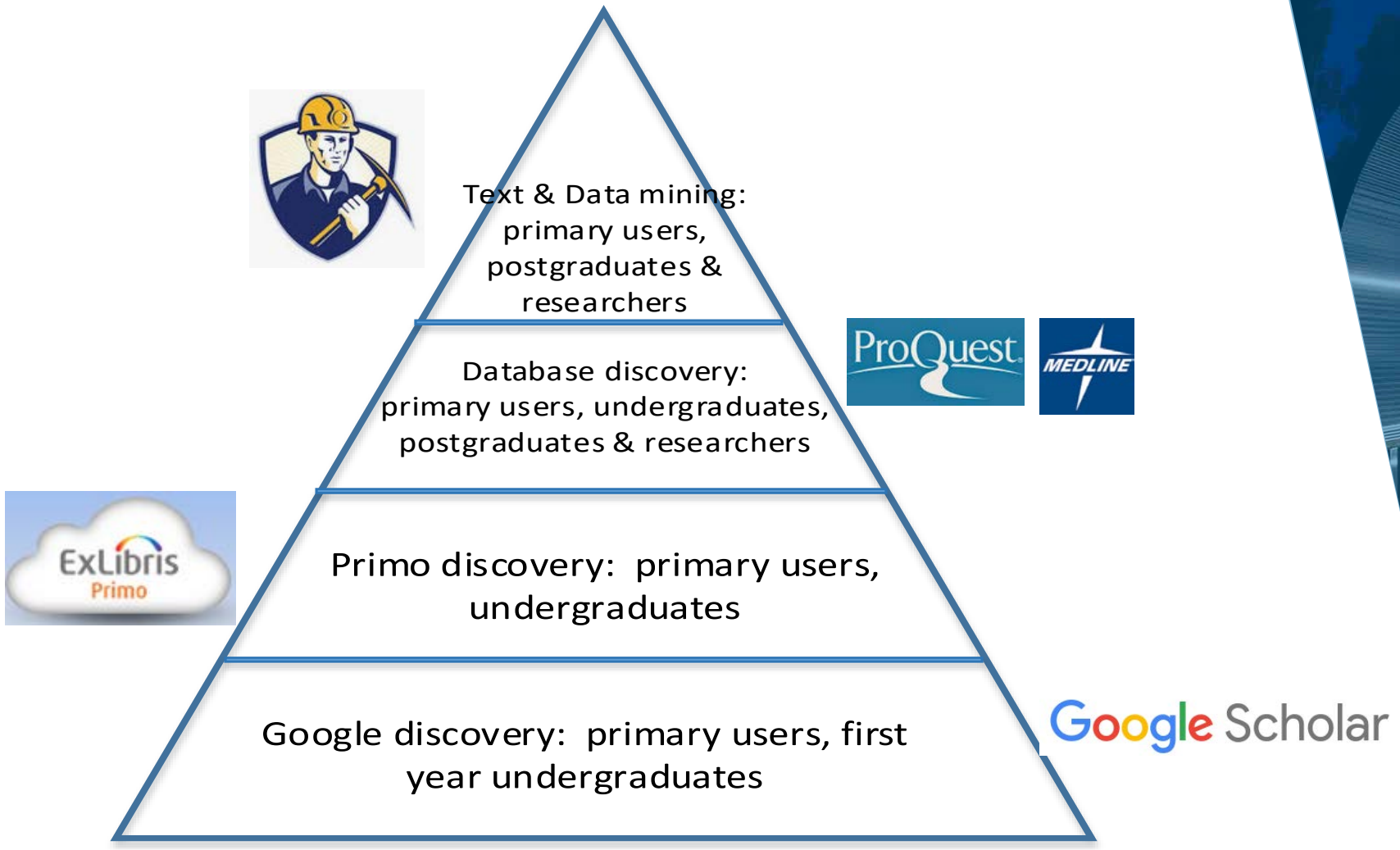




Analysis of user search strategies

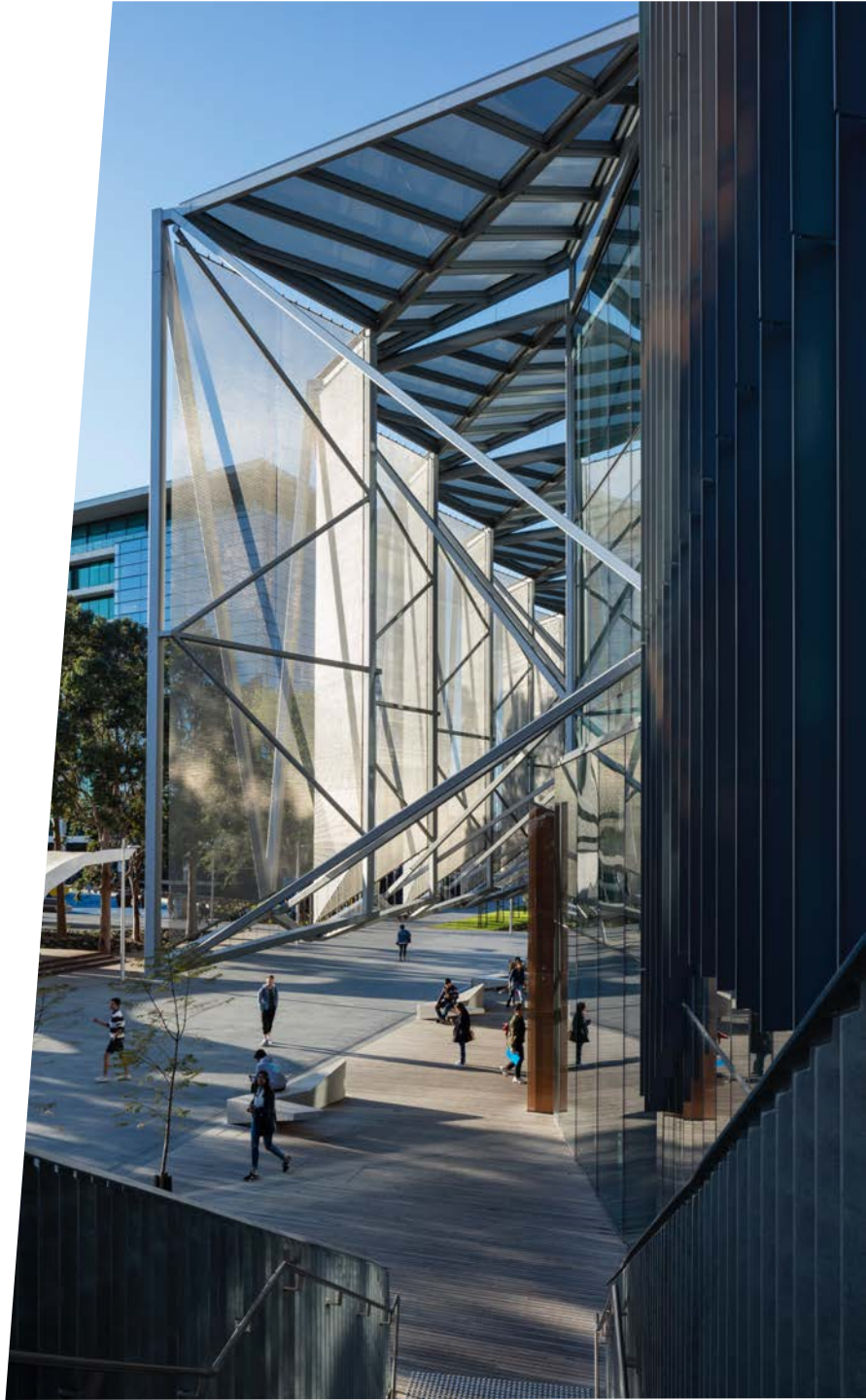
- 44% of user searches are two to four words long.
- 69% of searches are either under seven words long
- 14% of searches include more than fifty words
- Most searches are fairly simple, eg ‘marketing mix’ is the most commonly occurring search term
- 1.13% of all searches were unsuccessful

Library discovery application hierarchy



PRIMO ENVIRONMENT

- Primo since June 2010
  - Direct Hosted Back Office (can SSH),
  - 3 Alma Institutions and 1 Primo Instance with 3 Views
  - Multi-search scopes
  - Alma & PCI + 3 additional local data sources
  - Authentication: SAML Okta (Multi-factor authentication)
- 2.1M Electronic + 1.6M Print Bibliographic Records
- 78K Students, 17K Staff, 206 Library staff
- 4.1M physical visits to the Library



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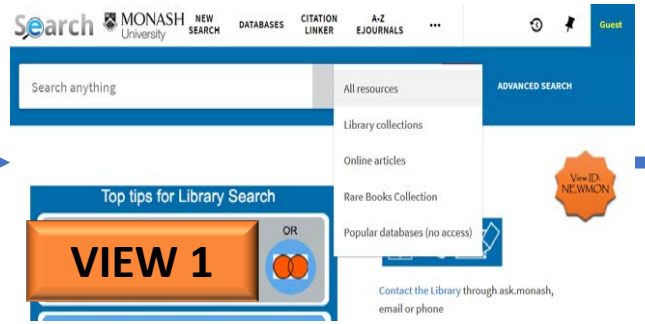
PRIMO UX TESTING PROCESS

1

Usage Data

splunk> Google Analytics

2



3

Observe Users

Pre-Test

Post-Test

Observation & Survey Data

4

analyze

5

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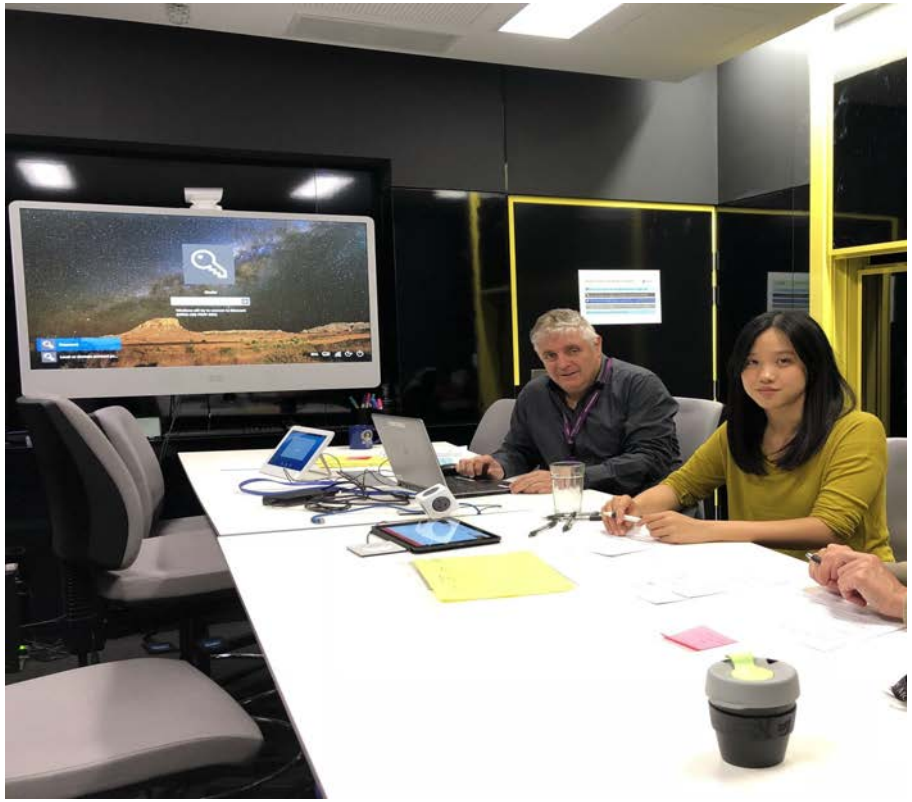
VENUE OF UX TESTING SESSION



The observation setup at the [Monash University Innovation Studio]
& [Monash University Caulfield Library.]

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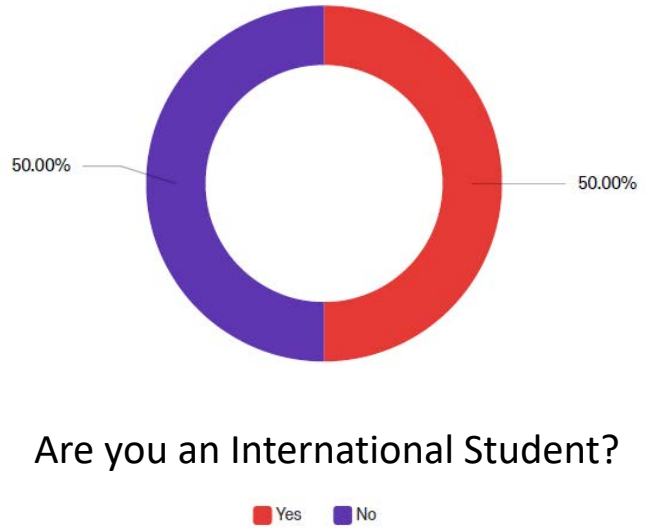
USER DEMOGRAPHICS

- Faculties
- Year levels
- Local and International Students
- English as their first language
- Years at Monash



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UX TESTING KITS:

- **Test scenarios:**
  - Known title
  - Subject
  - Journal article
  - Resource Type
  - Call Number
  - Availability
- Qualtrics **Pre-testing** Survey
- Qualtrics **Post-testing** Survey
- **User Consent Form**
- **Observers questions**

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https://tinyurl.com/y4fgwhhx

PRE-TESTING SURVEY

qualtrics

Q. WHERE TO SEARCH FOR **AUTHORITATIVE INFORMATION?**

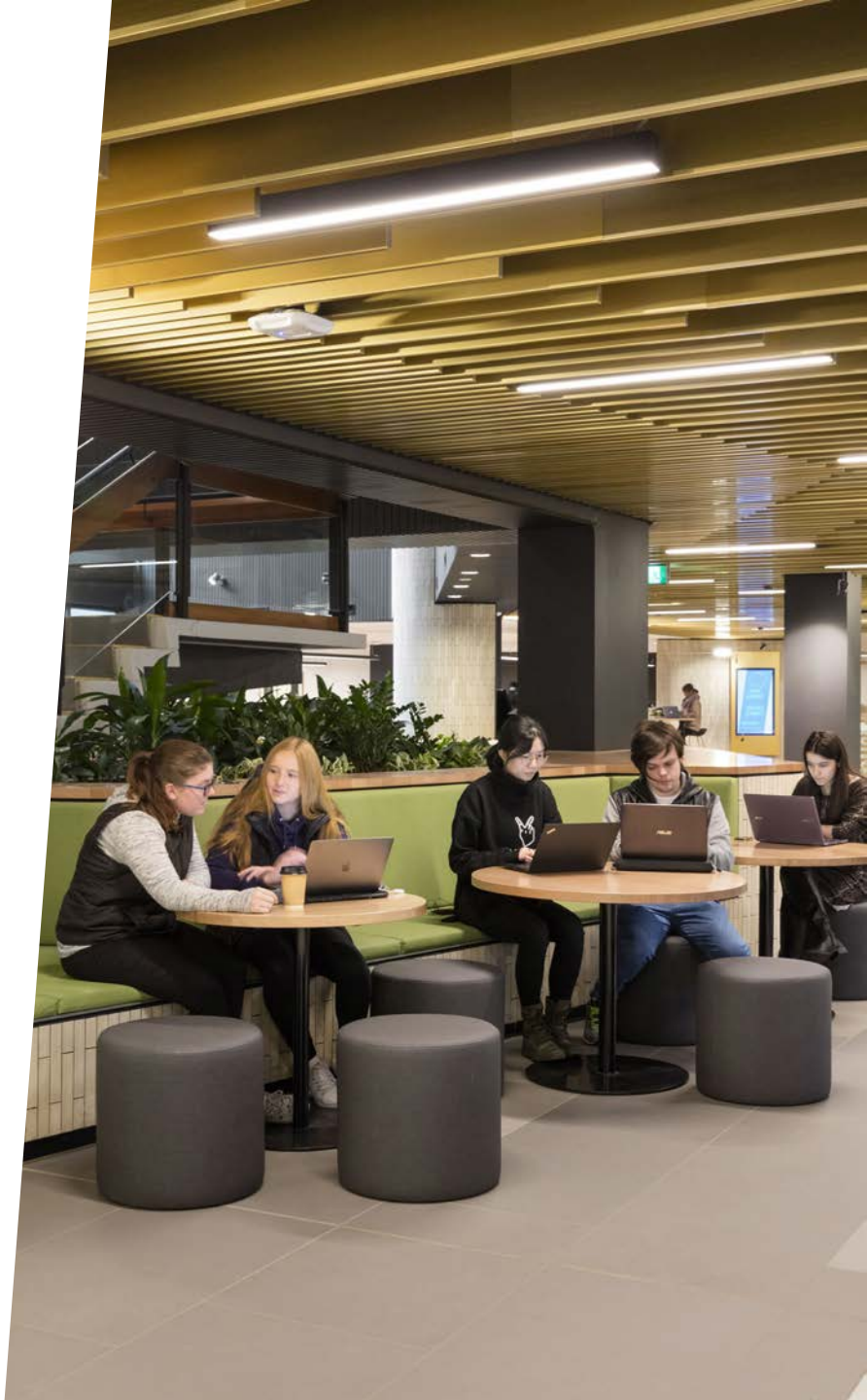
1. First preference Google Scholar
& discipline specific databases:

ProQuest ScienceDirect EBSCO HOST MEDLINE

2. Then Primo: Search

3. Discipline specific databases:

MEDLINE ProQuest EBSCO HOST ScienceDirect



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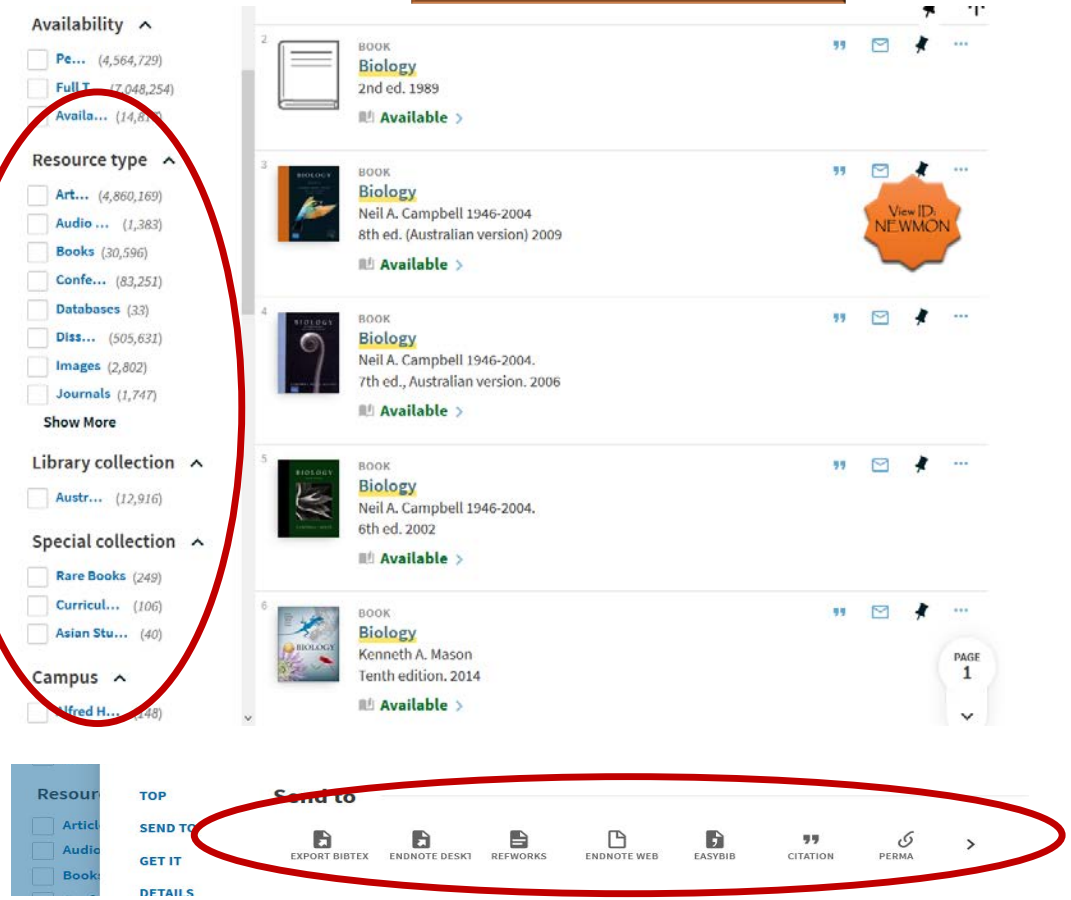
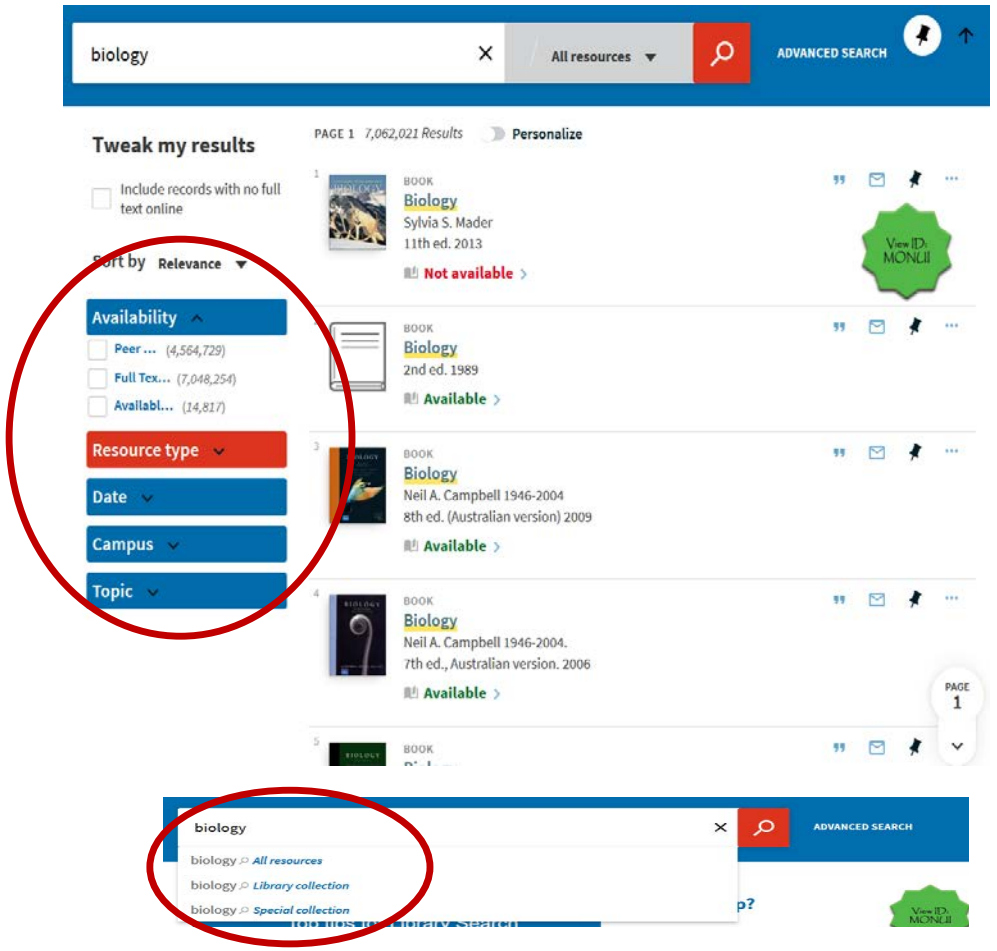
POST-TESTING SURVEY

VIEW 1



VS

VIEW 2



- Facets, Scopes, design similar to Classic UI
- Simplified & striped down view

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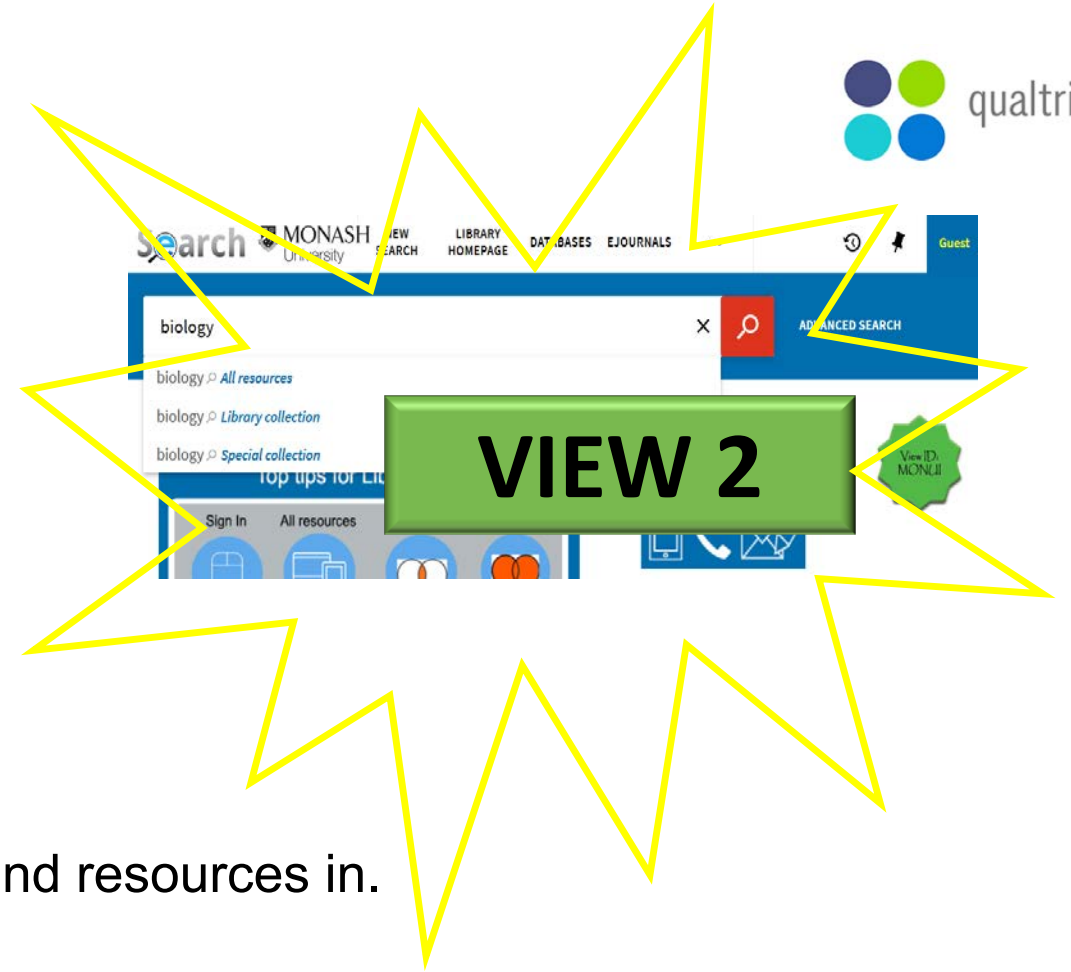
POST-TESTING SURVEY

VS



Feedback on the views ….

- 6 users noticed the difference
- 5 users strongly agreed that **View 2 was easier** to find resources in.
- **Most useful features**:
  - Advanced search
  - Favourites;
  - and Citation Link to Styles (e.g. APA/MLA etc)

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QUANTITATIVE + QUALITATIVE

Google Analytics

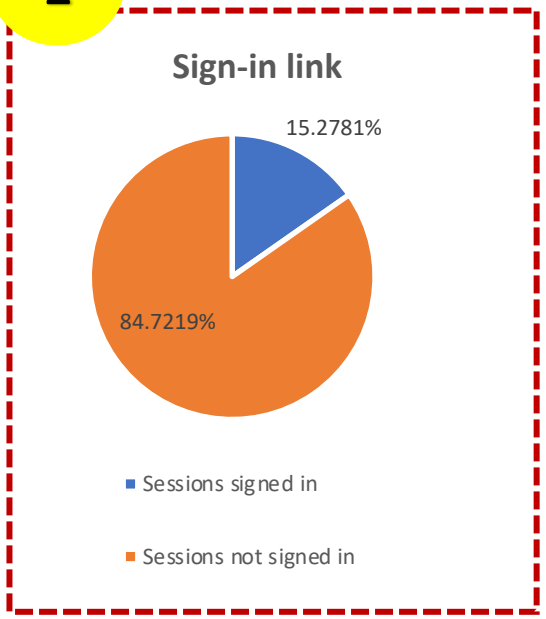
splunk>

Primo Analytics

+

USAGE DATA + OBSERVATION (Sign-In)

1



2

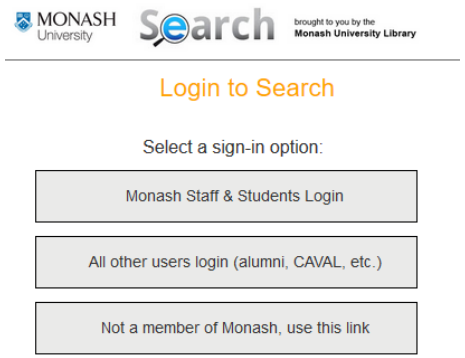
UX Observations:

- Users did not sign-in unless they needed too (e.g. check loans, read an article)

3

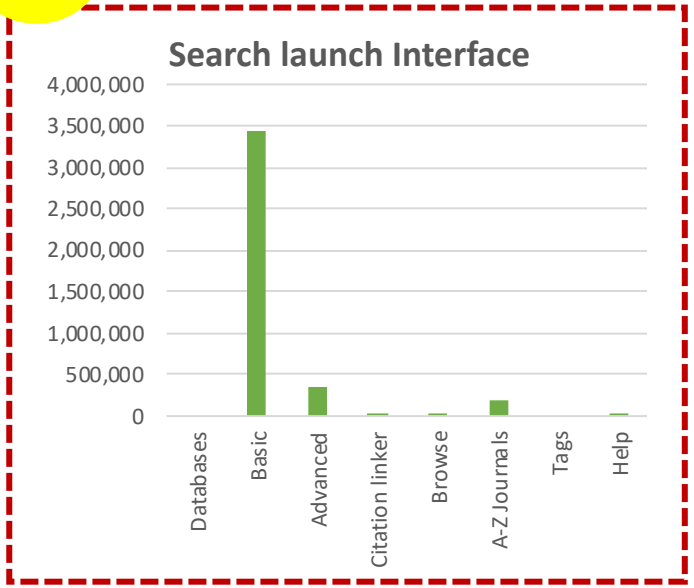
Recommendations:

- Educate users to sign-in
- Auto-login users when clicking on Primo.



USAGE DATA + OBSERVATION

1



2

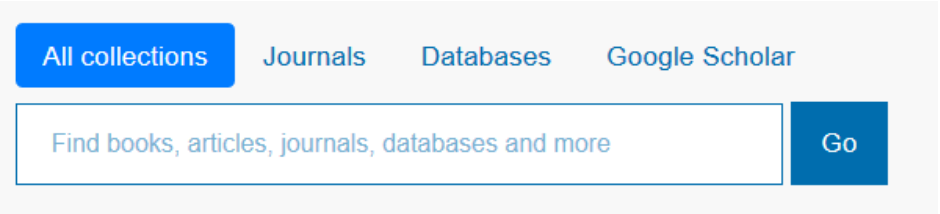
UX Observations:

- Basic search was mostly used by users
- There were a few individuals who used Advanced Search.
- However Google Scholar is their preferred searching tool.

3

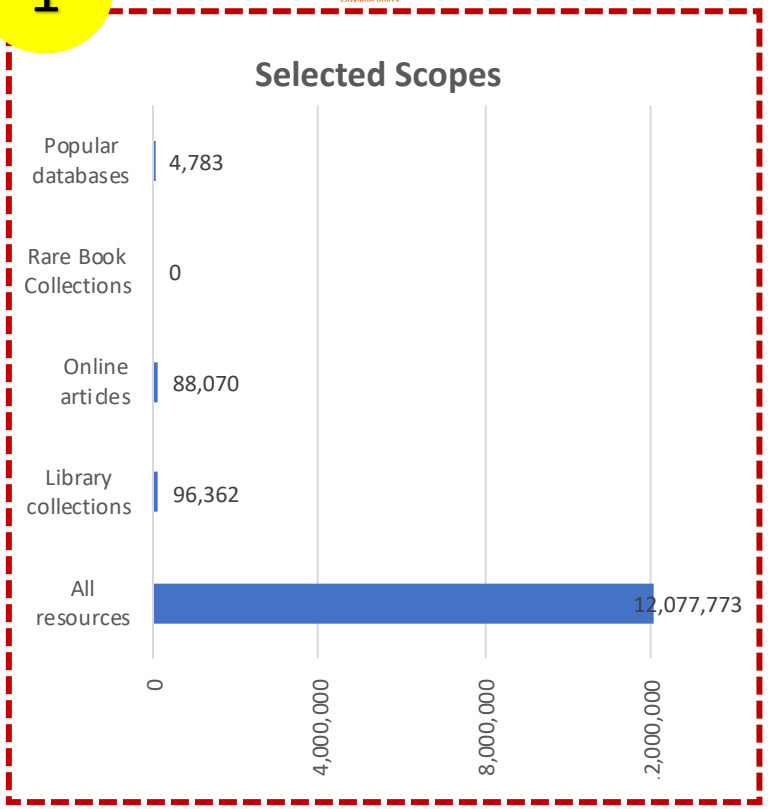
Recommendation:

- Modify the embedded search box in the Library homepage to allow multiple ways users can run searches



USAGE DATA + OBSERVATION (Scope)

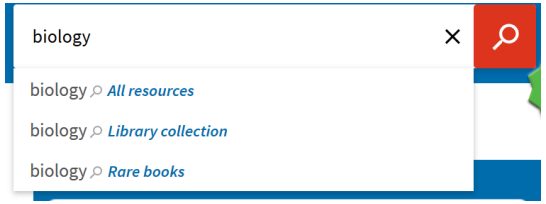
1



2

UX Observations:

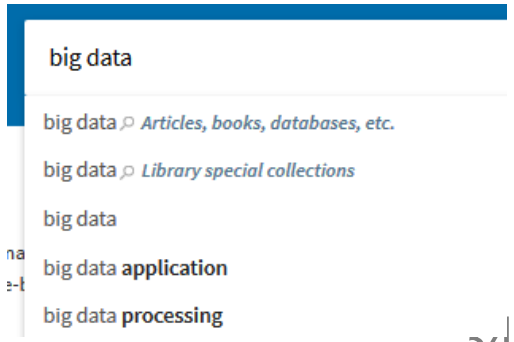
- Most users use the default All Resources scope.
- The auto complete search box helped make the scopes visible.



3

Recommendations:

- Use the auto complete search box to make scopes more visible
- Rename labels to make the scope clearer



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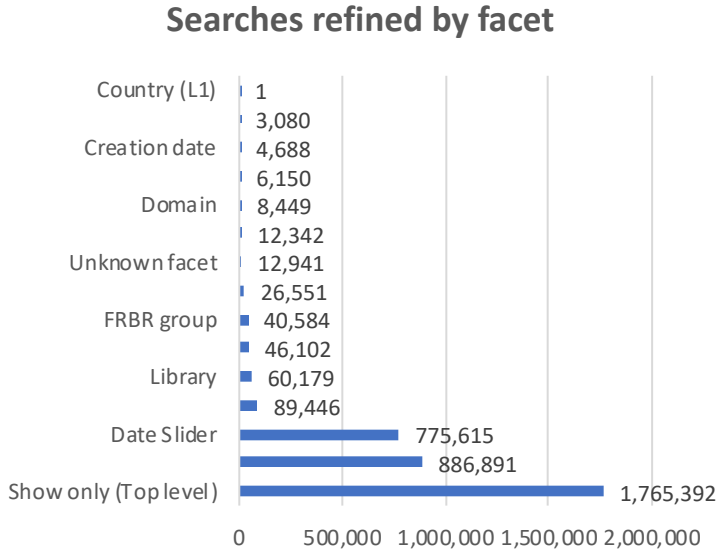
USAGE DATA + OBSERVATION (Facet)

1

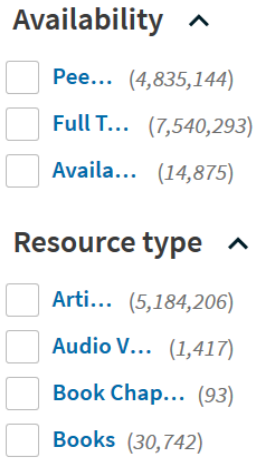
Primo facets that narrow search results *(Usage logs):*



2

UX Observations:

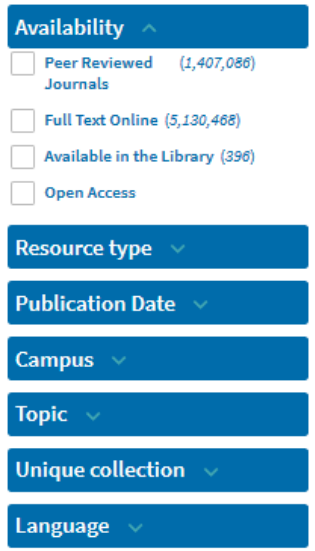
- Users preferred the expanded list of facets
- However facet navigation was limited



3

Recommendations:

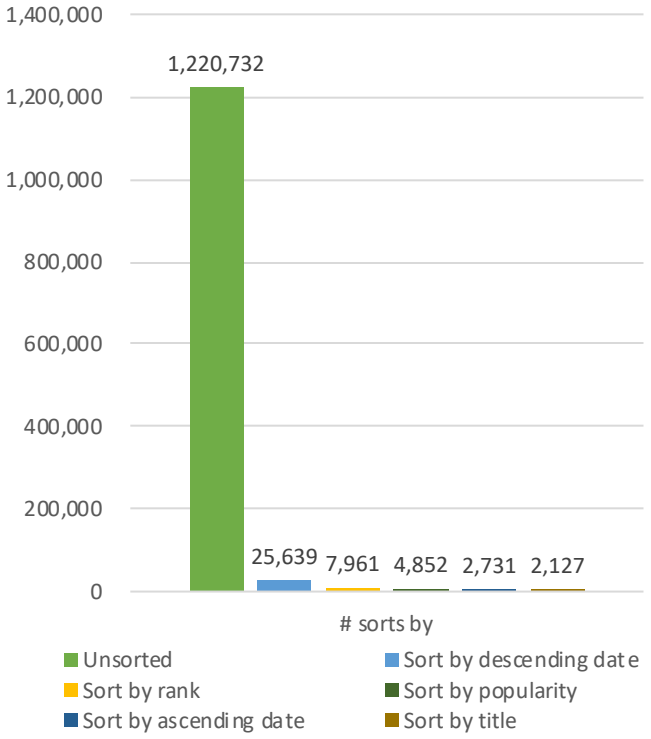
- Strip down the facet list but keep it expanded.
- Use the top 5-6 used facets.



USAGE DATA + OBSERVATION (Sorting)

1

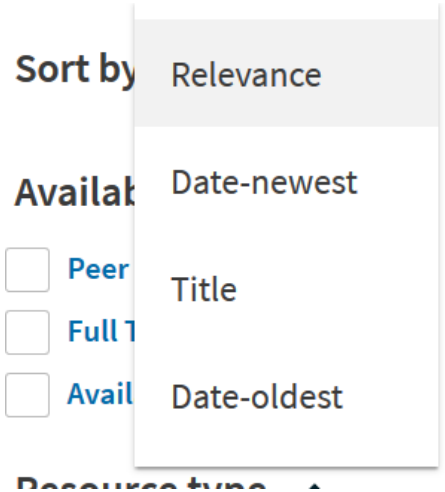
Primo sort-by options to narrow search results (*Usage logs*)



2

UX Observations:

- Confirmed that users do not change sorting order
- Default location wasn't visible



3

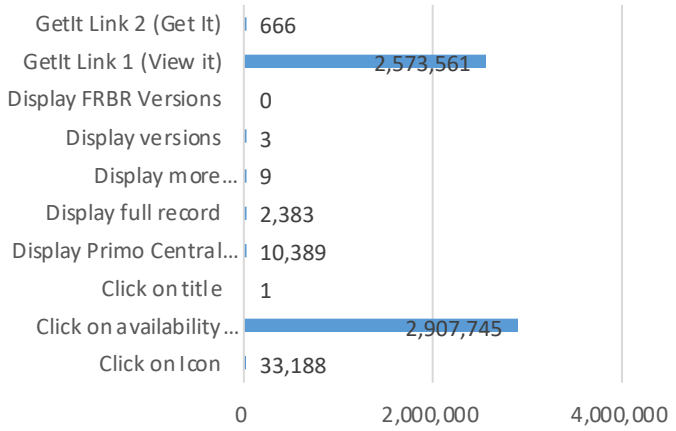
Recommendations:

- Move the location of sort-by so it is visible
- Educate how to use sorting feature
- Understand what relevance ranking means
- Educate how to identify new materials

USAGE DATA + OBSERVATION (Availability)

1

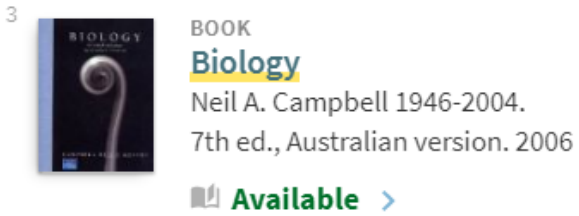
Primo availability information (*Usage logs*):



2

UX Observations:

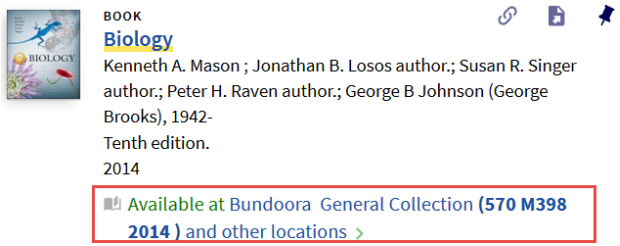
- The lesser the clicks the better
- Have location & availability on the brief results page



3

Recommendations:

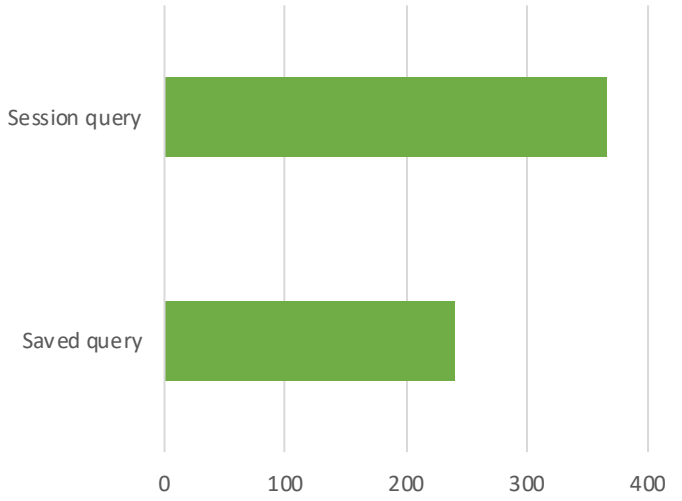
- Display location & availability information on the same page
- Educate users about Sign-in to make better use of this function.



USAGE DATA + OBSERVATION (Saved Query)

1

Primo saved queries *(Usage logs):*



2

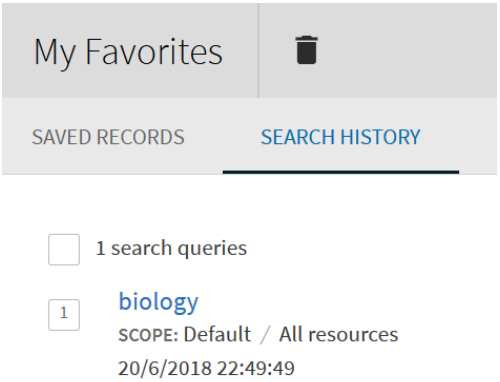
UX Observations:

- Users are not familiar with the Saved Queries & Session Searches feature.

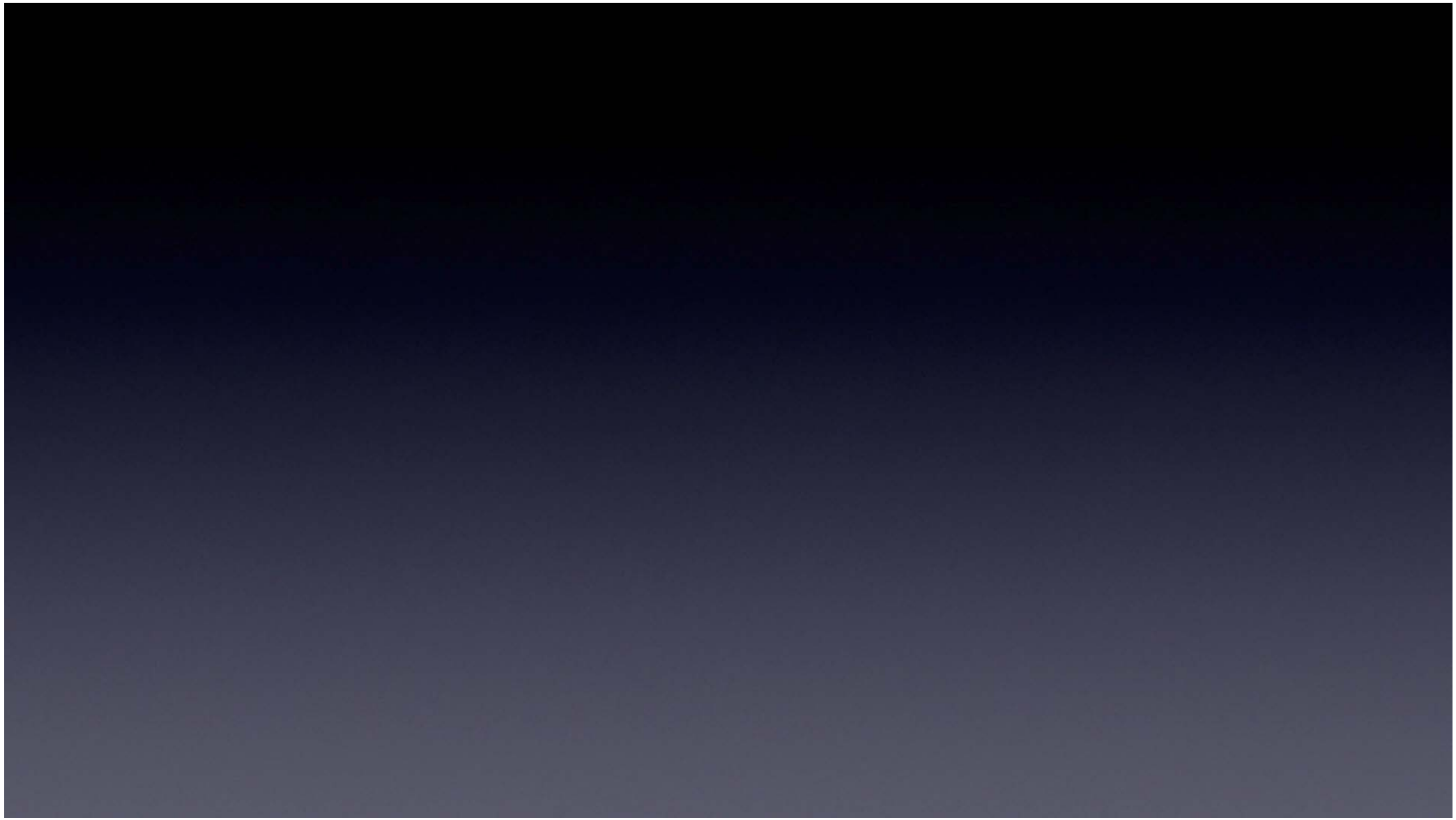
3

Recommendation:

- Educate users on how these features can help them.



UX TESTING: OBSERVER'S PERSPECTIVE



UX TESTING (2nd ROUND)

CHANGES MADE INCLUDED:

- Location information
- Browzine plugin
- FRBR
- Normalization Rule changes particularly for search fields

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UX TESTING (2nd ROUND)

CONFIRMATION OF INITIAL FINDINGS

- ✓ SIMILAR SURVEY responses to 1st round
- ✓ SIMILAR OBSERVATIONS to 1st round
- ✓ POSITIVE response to Browzine Plugin, FRBR, & Location information

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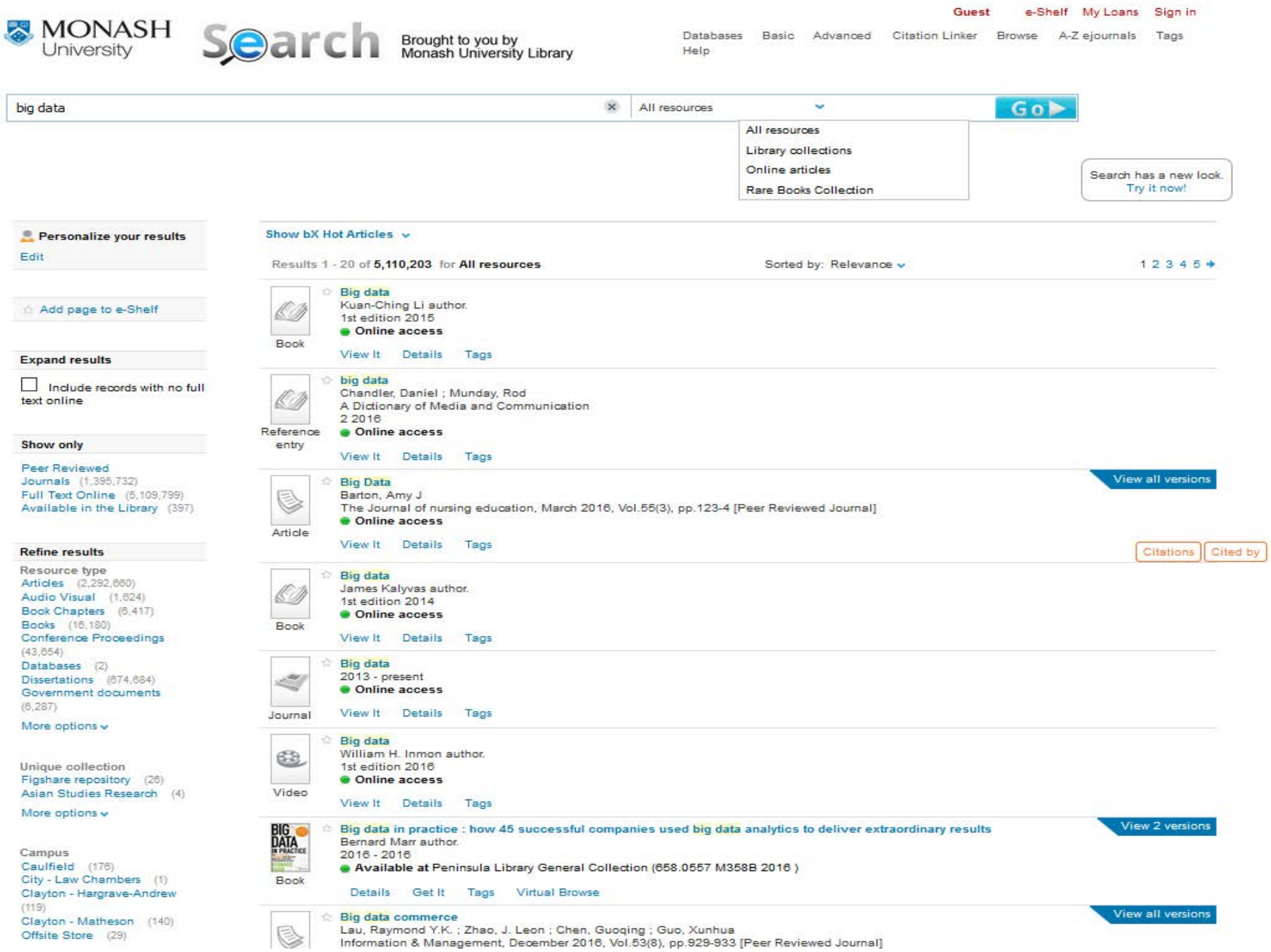
UX TESTING (2nd ROUND)

Q. WHAT ATTRIBUTES DID YOU **LIKE** ABOUT ANY OF THE VIEWS?

From the busy Classic User Interface



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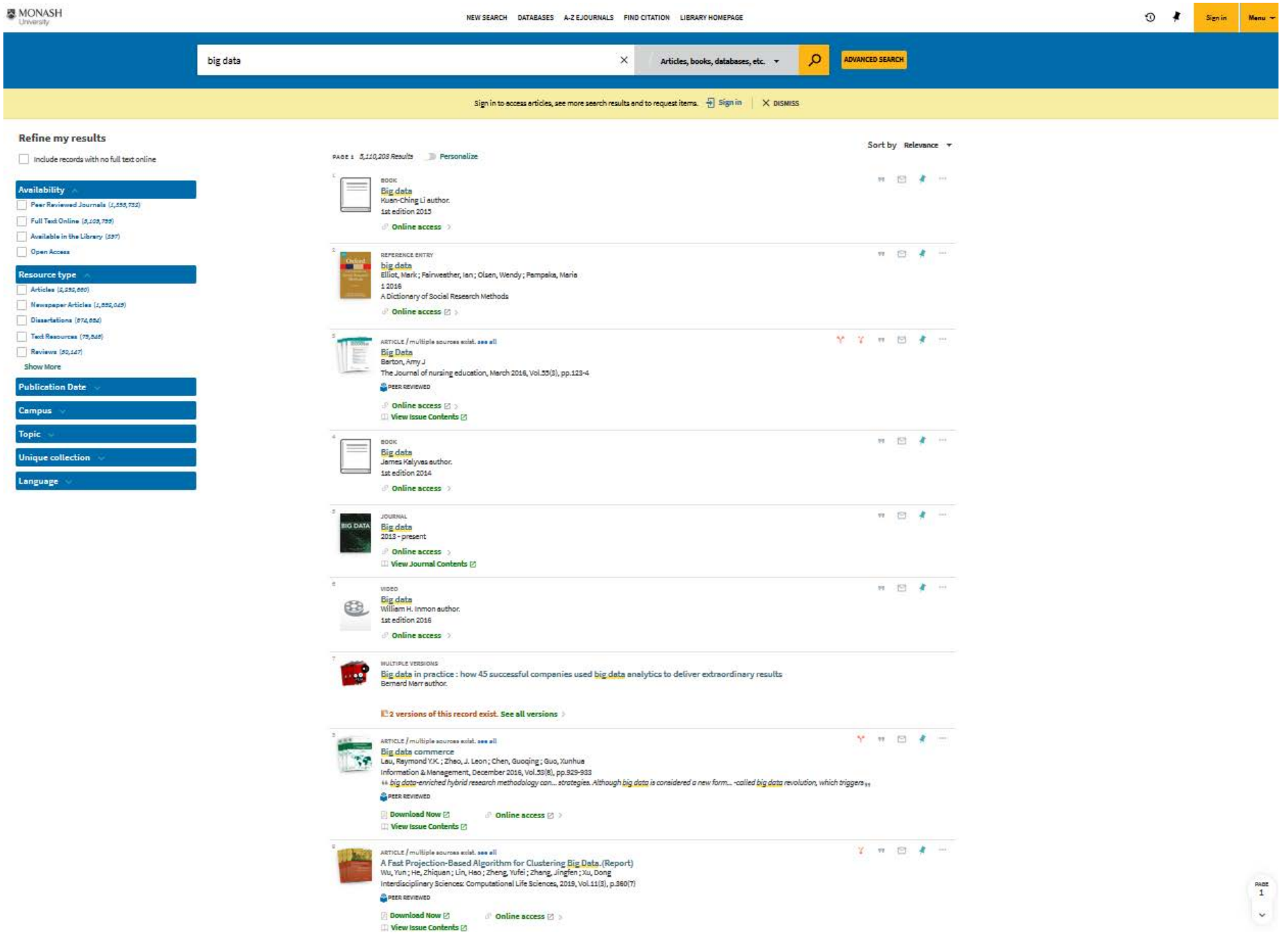
To the new simplified User Interface



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IMPLEMENTATION PROCESS

- BETA: Dec & Jan
- PROD: Feb 2019
- Roadshows: Jan & Feb 2019
- Monthly Communications via Staff Blog

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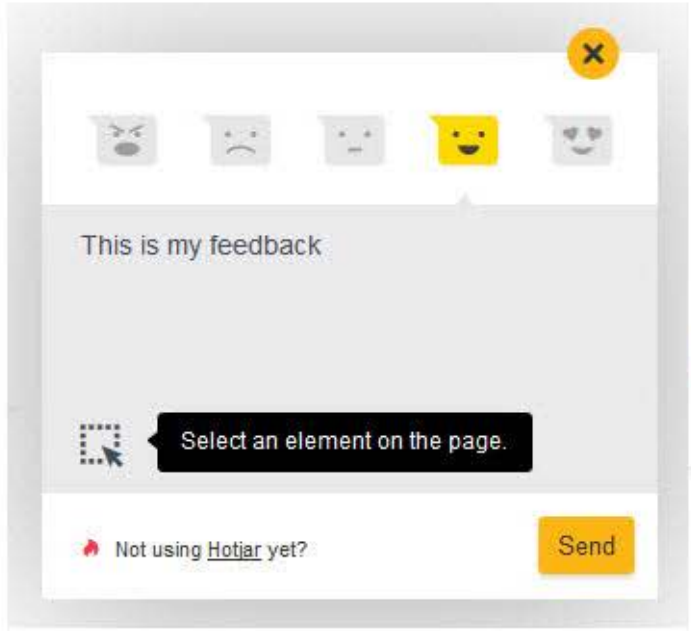
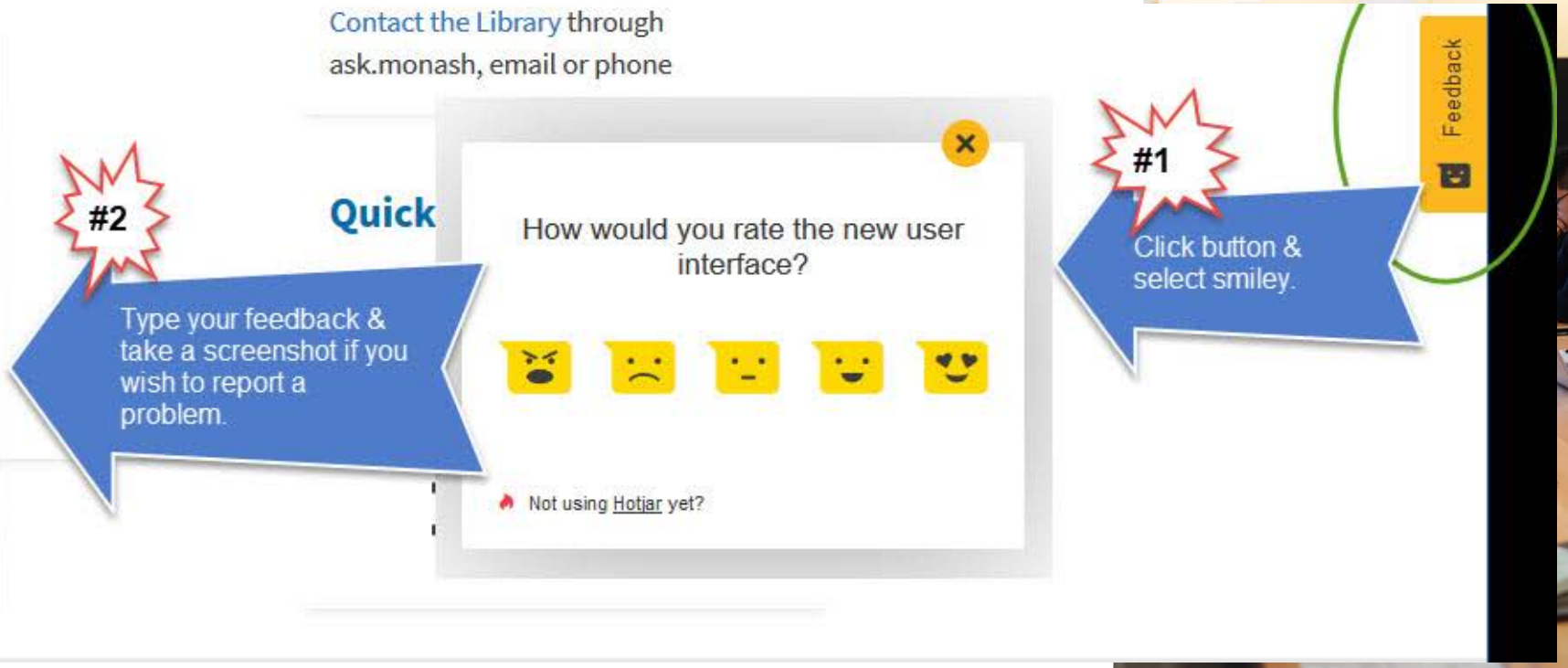
POST-IMPLEMENTATION FEEDBACK

- Feedback from users from: Dec 2018 to May 2019 via Hotjar on Primo New UI





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HOTJAR LIMITATIONS:

- Visitors not using one of the **supported browsers**
- Visitors with **disabled JavaScript**
- Visitors that have **opted out** from our opt-out page.
- Visitors with **disabled cookies**.
- Visitors using **Private mode** in some browsers, such as Firefox and Safari - or when localStorage and sessionStorage are not available
- Visitors who run browser **plugins such as Ghostery, unlock or Adblock** which explicitly excludes them from loading tracking scripts such as ours
- Visitors that have **DO NOT TRACK enabled in their browser**
- Visitors have their IP blocked within the Hotjar settings
- Visitors live in country, like UAE, where **government blocks** the use of Hotjar.
- **NOTE:** Data is stored in EU & are in full commitment to GDPR Compliance

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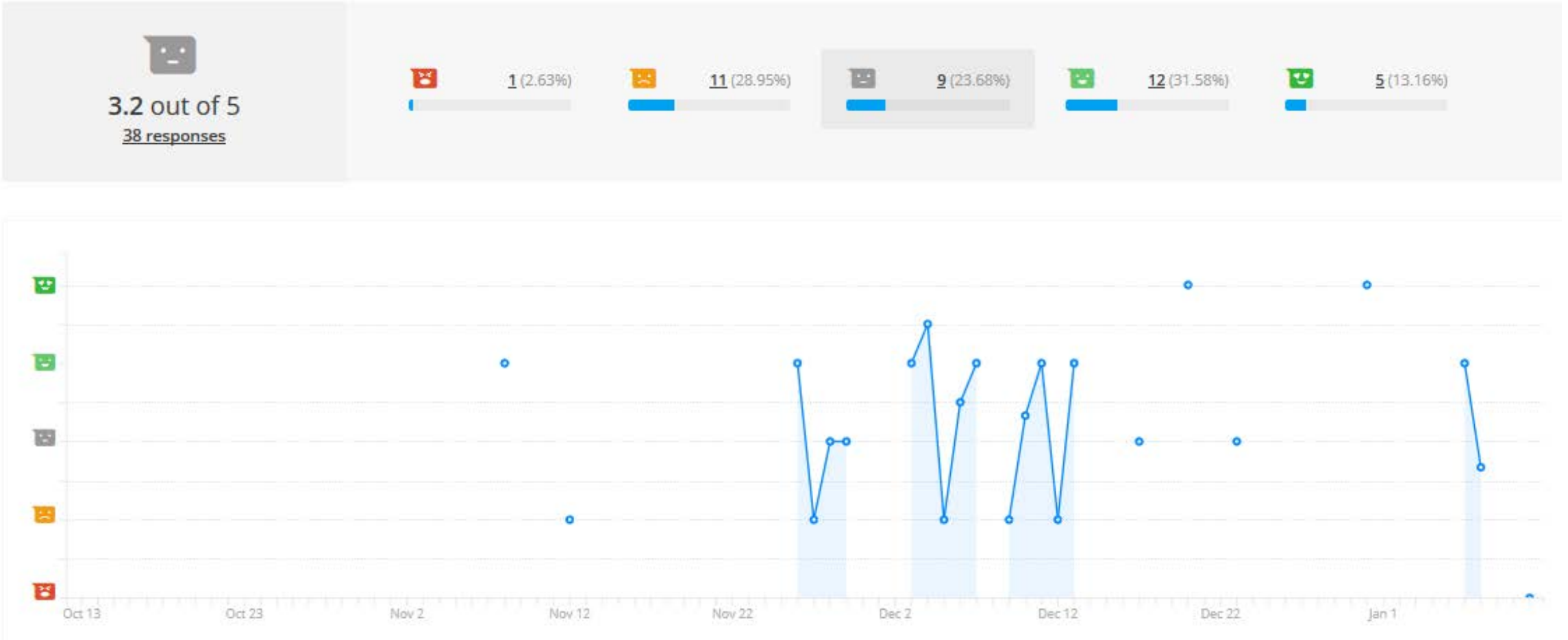
BETA RELEASE FEEDBACK

User feedback collected through HotJar from Dec 2018 to Jan 2010.



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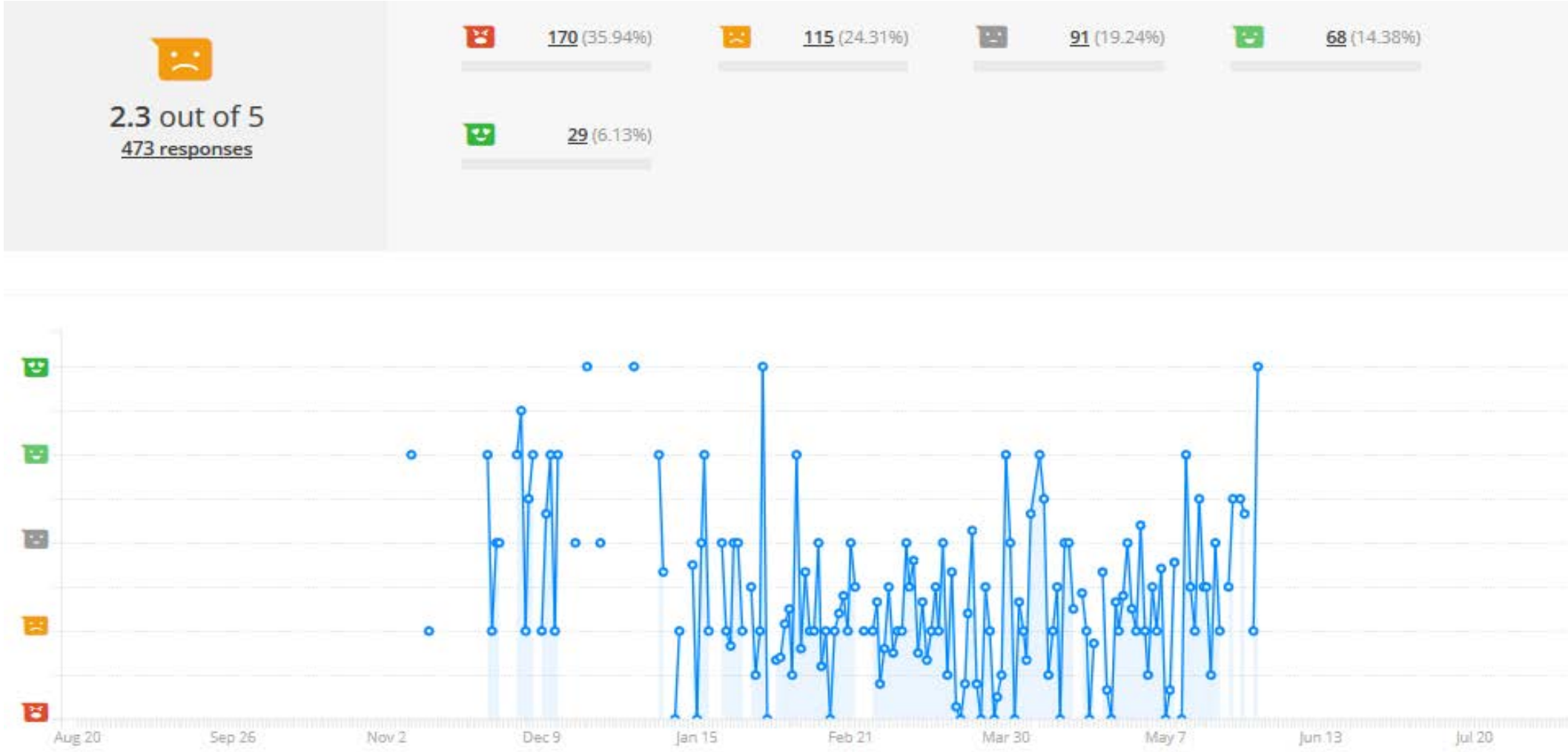
PROD FEEDBACK

User feedback collected through HotJar from Dec 2018 to early May 2019.



hotjar

INCOMING FEEDBACK FEATURE

/primo-explore/search?qu...

" too slow! Slowness makes it feel clunky. Not obvious how to delete from favourites.... "

/primo-explore/search?sor...

" What is with "library special collections" as a drop down option? How confusing. How will a patron be able to differentiate between rare books (now special collections), and all the other special collections available at Monash (which aren't searchable). "

/primo-explore/search?vid...

" Could you please change eBook to ebook in the drop down option: "Books, eBooks, multimedia & more" It doesn't need an upper case B as none of the other options have an initial upper case apart from the words at the beginning of the phrases.
"

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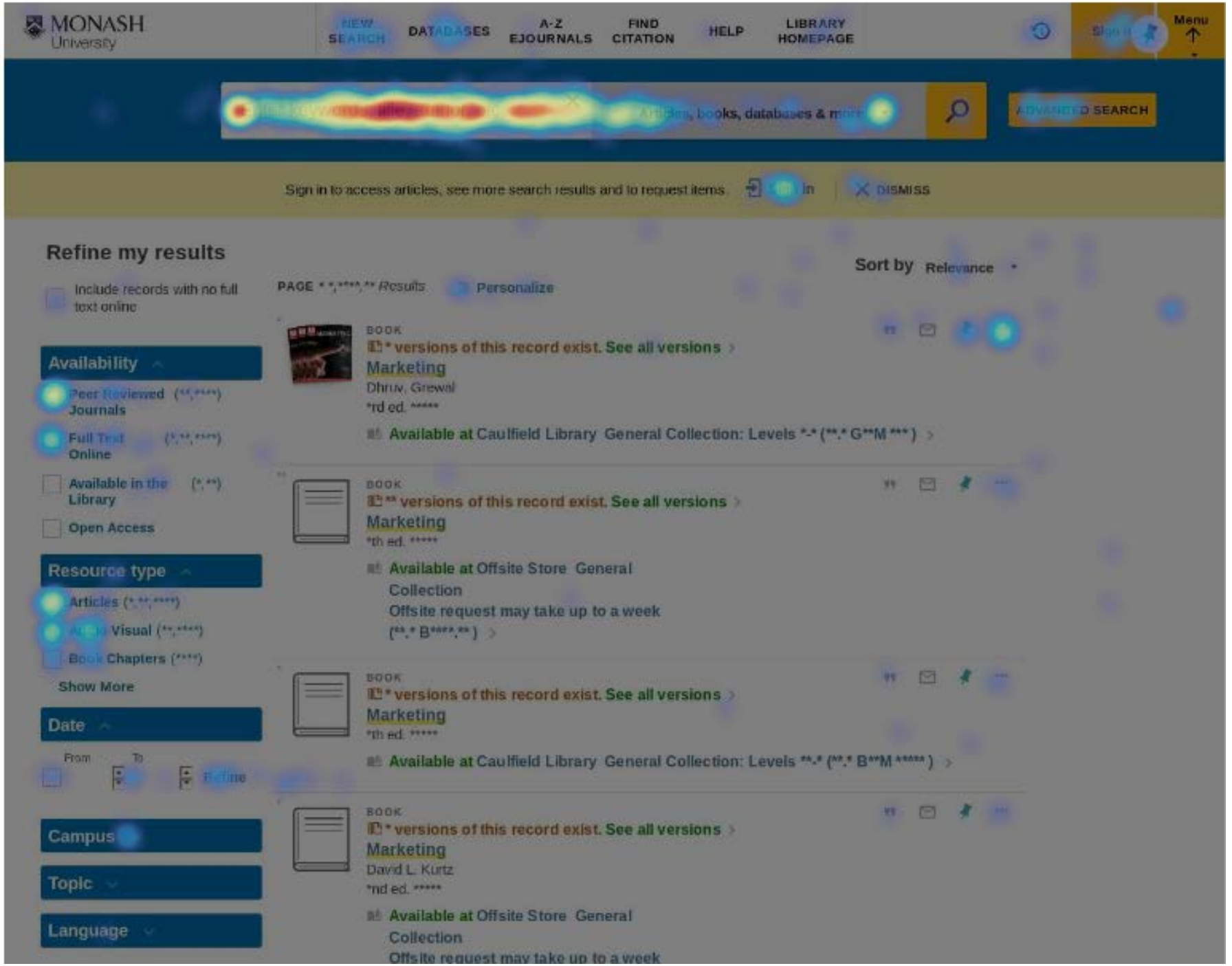
hotjar

HEATMAPS FEATURE



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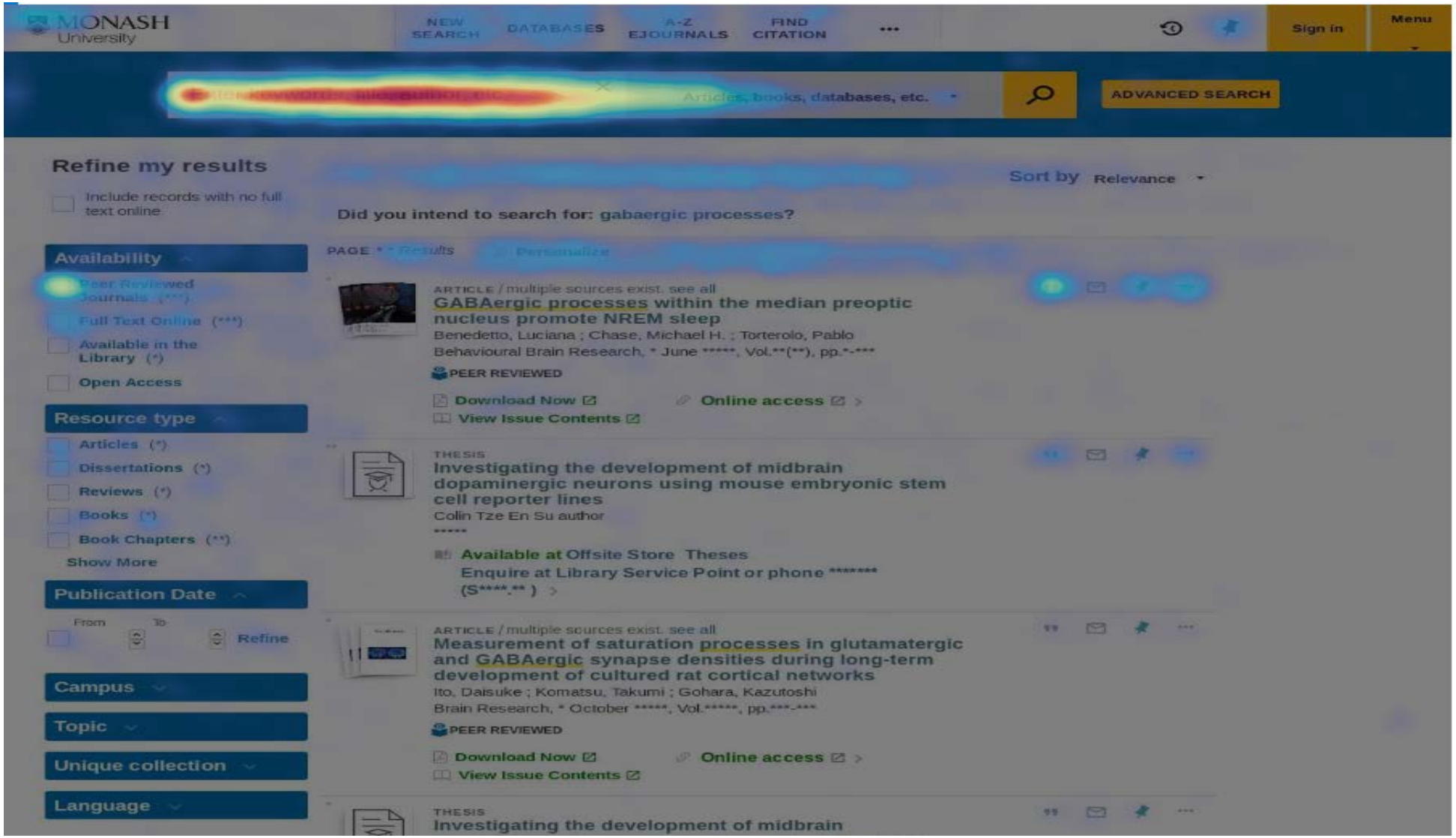
SEARCHING



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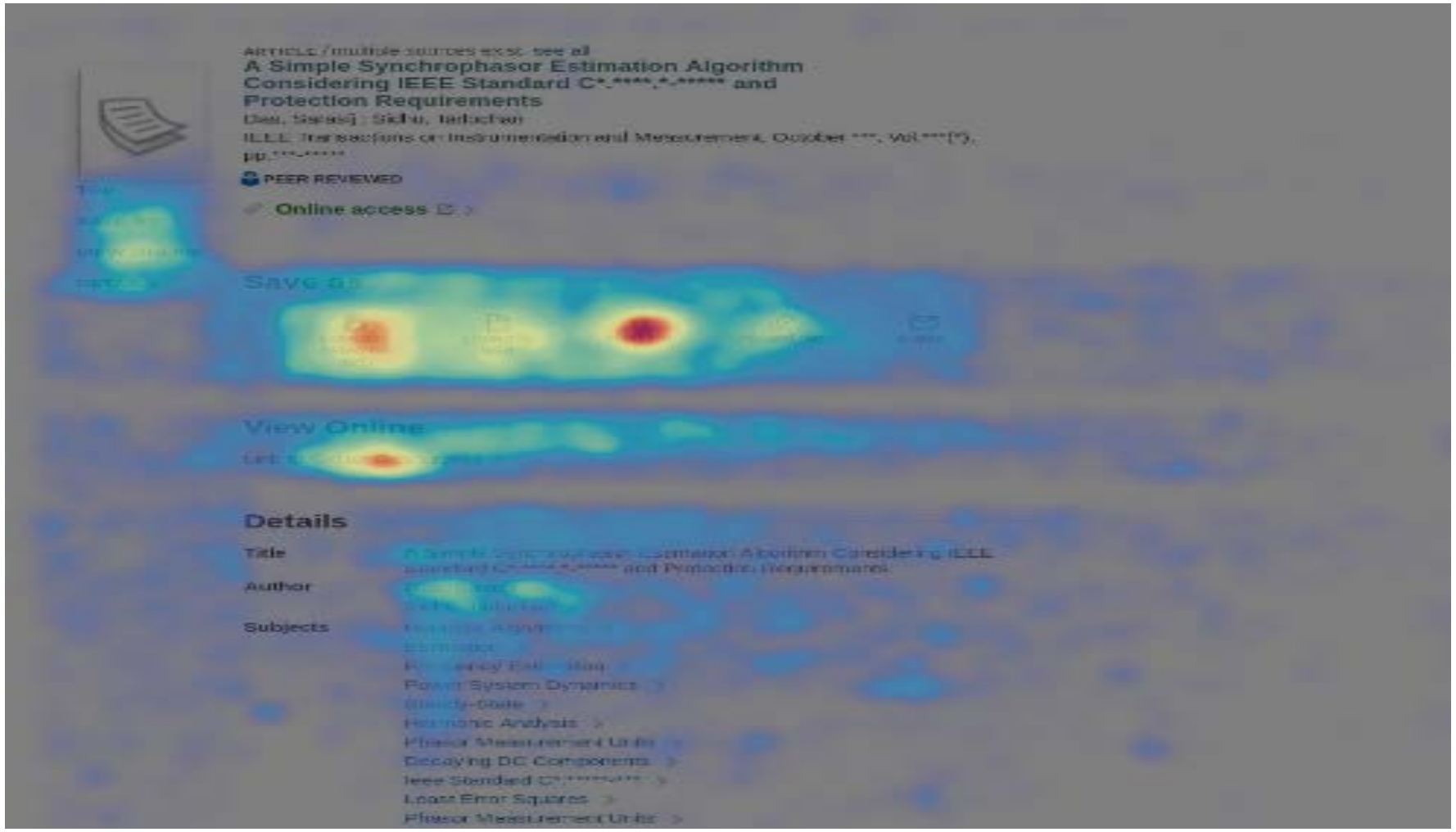
Heatmap showing mouse movements.

FULL DISPLAY



Heatmap showing mouse movements.

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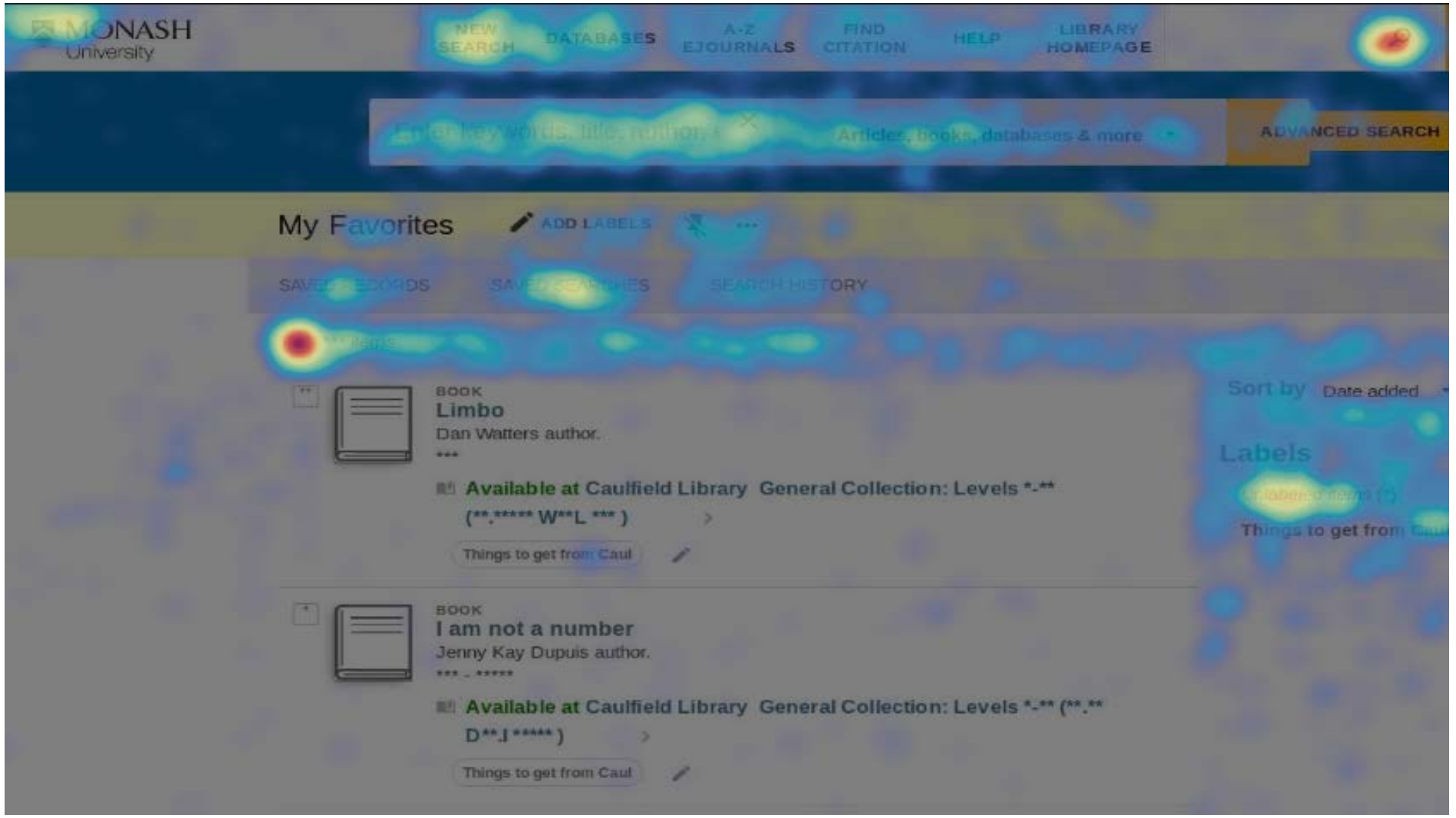
FAVOURITES



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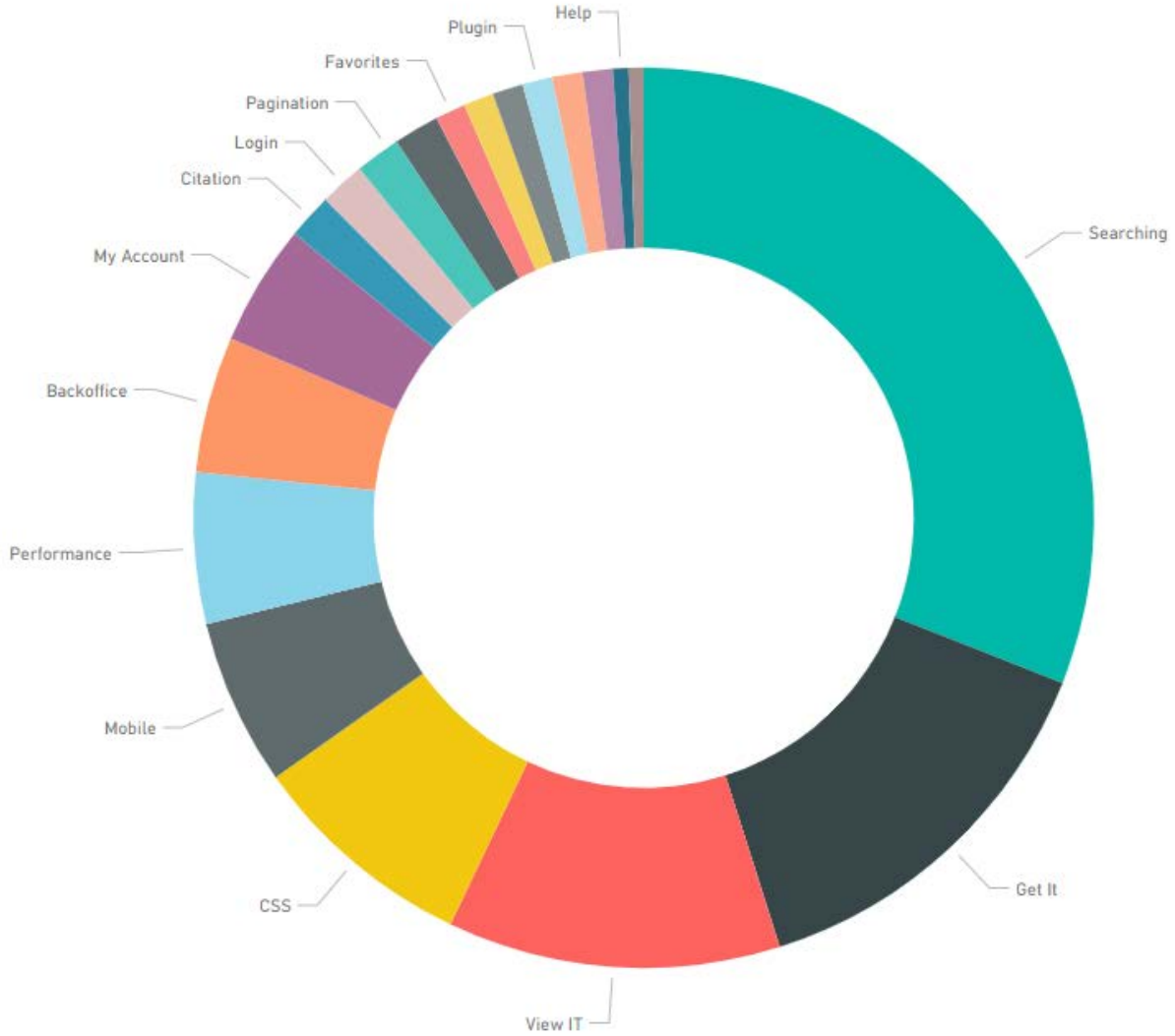
Heatmap showing mouse movements.

CITATION LINKER

Heatmap showing mouse movements.

Feedback themes



Themes	Total Count
Searching	57
Get It	26
View IT	22
CSS	15
Mobile	11
Performance	10
Backoffice	9
My Account	8
Citation	3
Login	3
Pagination	3
Scope	3
Favorites	2
FRBR	2
Full Display	2
Plugin	2
Time Out	2
Virtual Browse	2
Help	1
Metadata - PCI	1

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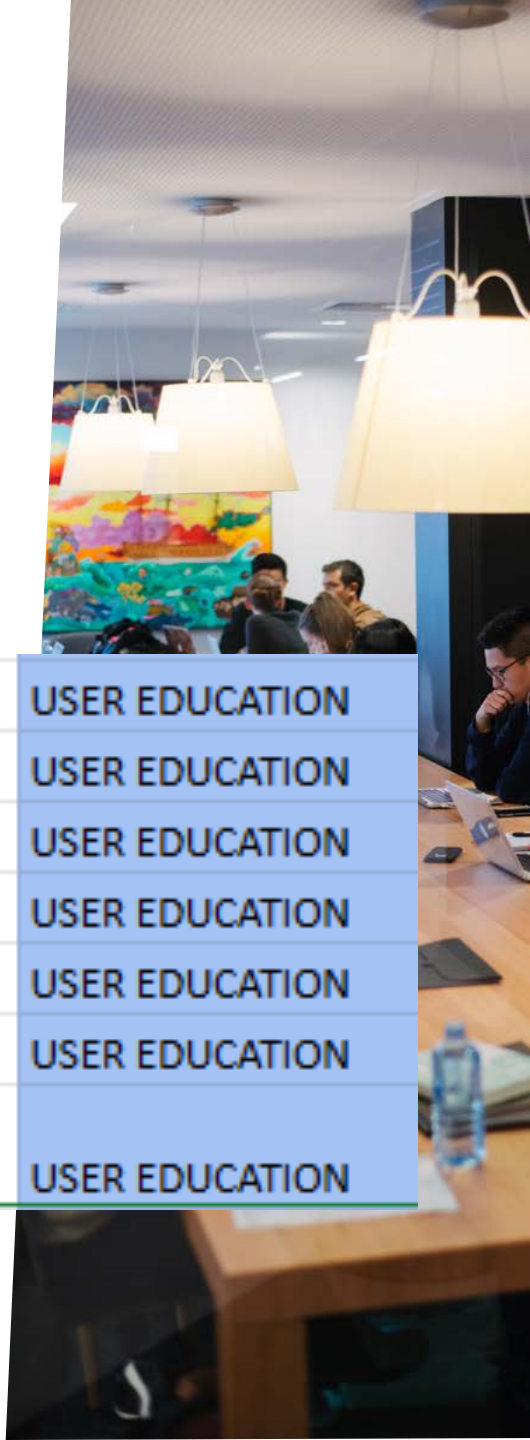
SAMPLE FEEDBACK

Status	Total Count
No Action	269
Reviewed Done	58
User Education	53
Reviewed No Action	46
Review Further	21
Reviewed Action Required	16
System Limitation	6

2	Having difficulty accessing my loans record		USER EDUCATION
1	Where's the "request purchase" button?		USER EDUCATION
1	where can I place my request?		USER EDUCATION
1	where is docdel hidden?		USER EDUCATION
1	I can't request to on hold the books. I don't know what happened		USER EDUCATION
1	not user friendly, doesn't even have a renew button		USER EDUCATION
2	I have a lot of trouble finding a book - there may be 50 reviews in journals but separating books from journal articles is awkward		USER EDUCATION



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REFLECTIONS

Library expectations of Primo

a SHOWCASE for Library resources

SIMPLE to search

provide INTUITIVE search results

offer a SEAMLESS experience from searching to access

EMPOWER our users

If Primo doesn't meet our users needs

They'll look for a solution outside of Primo & the Library

CONTACT US:

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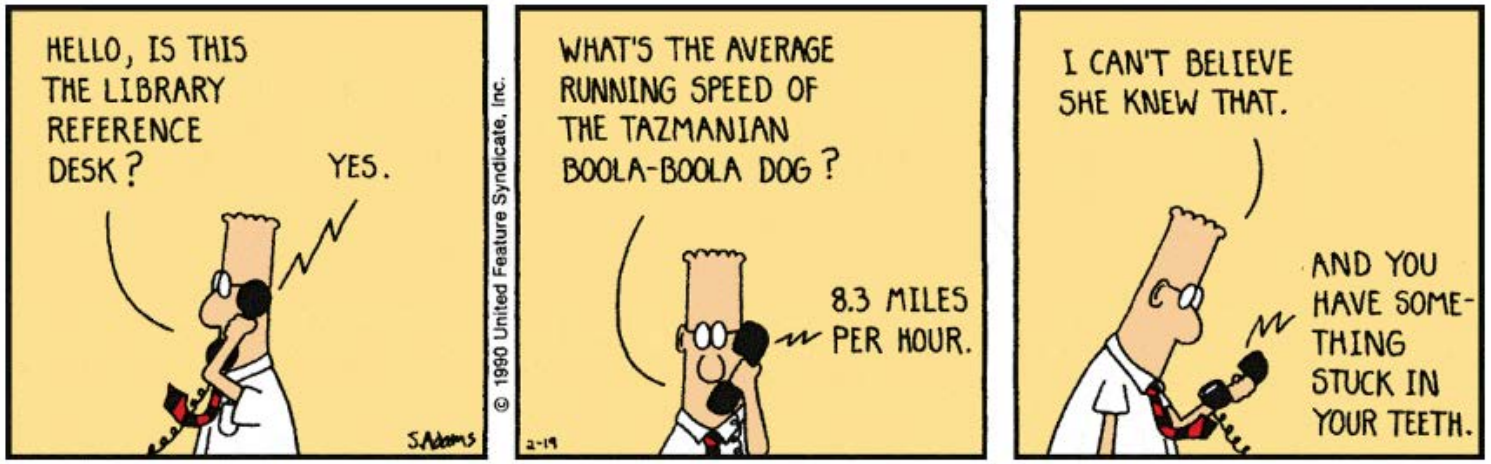
Rachelle.Orodio@monash.edu



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