



▼ **Using Qualtrics to proactively
collect user feedback**

IGelu 2022

Matthew Black, Discovery & Systems Librarian
Libraries & Cultural Resources, University of Calgary

Background and Context

- University of Calgary
- Libraries & Cultural Resources (LCR)
- Implemented Primo in late 2018



Primo Working Group

- In early 2020, formed an internal Primo Working Group (PWG) to focus on library search functionality and experience
- The PWG discussed how to collect feedback on what users thought of our library search
- PWG sub-group formed to investigate options

Exploratory

Obtain a baseline sense of user opinion on the search tool

Develop a continuous method of collecting data for review

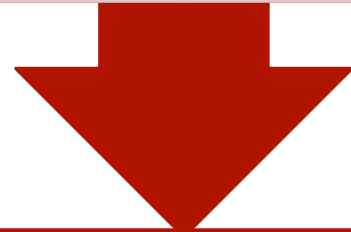
Share feedback among Library stakeholder groups

Compare feedback to other data (analytics)

How to collect feedback in meaningful way?

Timing

Validity

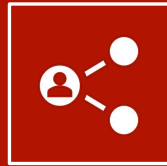


Intercept users with a survey after searching

- Decided to use institutional license for Qualtrics to design a survey which would:
 - Ask users for open-ended feedback on their perception of search success or failure
 - Ask users to identify the "user group" they belong
 - Proactively intercept users after search using Web/App feedback functionality

Survey Design

Survey Questions



What user group do you belong to?

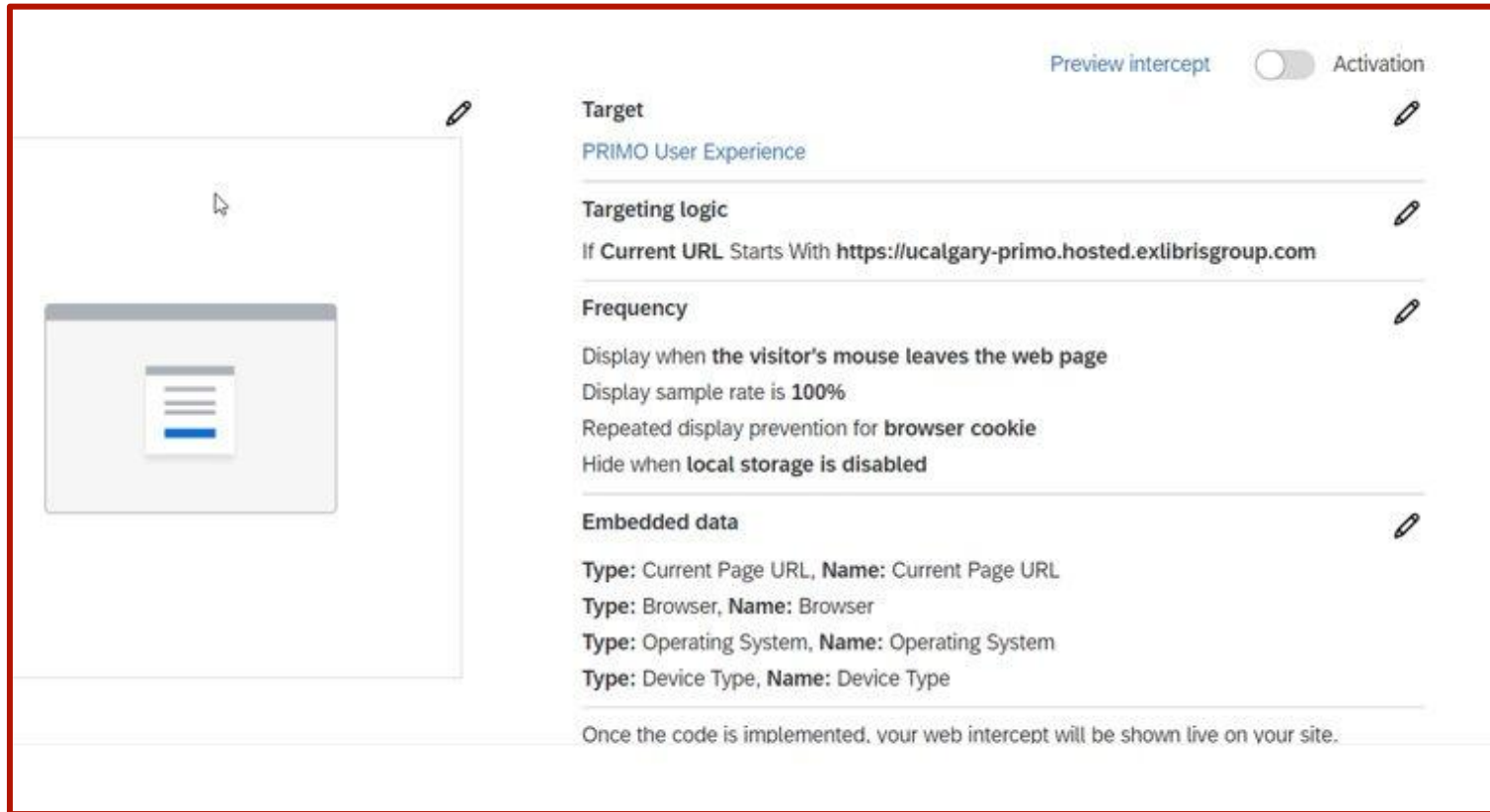


Did you find what you needed?



Survey Delivery

Seven empty rounded rectangular boxes stacked vertically, likely for notes or data entry.




The screenshot displays a configuration interface for a web analytics project. On the left is a preview window showing a mouse cursor hovering over a document icon. On the right, the configuration details are as follows:


- Preview intercept:** **Activation:**
- Target:** PRIMO User Experience
- Targeting logic:** If **Current URL** Starts With `https://ucalgary-primo.hosted.exlibrisgroup.com`
- Frequency:** Display when **the visitor's mouse leaves the web page**
Display sample rate is **100%**
Repeated display prevention for **browser cookie**
Hide when **local storage is disabled**
- Embedded data:**
 - Type:** Current Page URL, **Name:** Current Page URL
 - Type:** Browser, **Name:** Browser
 - Type:** Operating System, **Name:** Operating System
 - Type:** Device Type, **Name:** Device Type


Once the code is implemented, your web intercept will be shown live on your site.


Create "Website/App feedback project"


Creative 

Preview intercept Activation

Target 
PRIMO User Experience

Targeting logic 
If **Current URL** Starts With `https://ucalgary-primo.hosted.exlibrisgroup.com`

Frequency 
Display when **the visitor's mouse leaves the web page**
Display sample rate is **100%**
Repeated display prevention for **browser cookie**
Hide when **local storage is disabled**

Embedded data 
Type: Current Page URL, **Name:** Current Page URL
Type: Browser, **Name:** Browser
Type: Operating System, **Name:** Operating System
Type: Device Type, **Name:** Device Type

Once the code is implemented, your web intercept will be shown live on your site.
Author Matthew Black

Size & Style

Message

Buttons

Logos & Images


Animation

Translations

Size & Style


Display survey directly in the dialog


Content spacing Medium ▾

Color  ▾

Border shape Slightly rounded ▾

Drop shadow Light ▾

Preview 

 **UNIVERSITY OF CALGARY**

Help us improve your library experience.
Would you be willing to answer a few questions about your experience?

Provide Feedback

No Thanks

Create a “Creative”

Pick how often the responsive dialog will display

Intercept display event
Determine when the intercept is displayed to qualified visitors.

Display when the visitor's mouse leaves the web page (On Exit Intent) ▾

Display Sample Rate
Changes the frequency in which the intercept is displayed to those who qualify for an impression.

100 %

Repeated display prevention

Browser cookie
Prevent an intercept from showing up multiple times by placing a cookie on the browser.

Select duration for repeated display prevention

1 day ▾

Add the domain where you want to place the cookie ⓘ

(Optional)

Decide when your responsive dialog appears

[Learn how to set up conditions](#)

If ▾ ▾ ⓘ ⓘ

Create an "intercept"

Intercepts Statistics Settings

Search [Get code snippet](#)

Name	Last modified ↑	Status
Primo User Experience Feedback Dialog	Jul 27, 2021	Inactive

Get code snippet

The snippet includes all intercepts associated with your Website / App Feedback project. If you've already deployed this snippet, then all you need to do is activate your intercepts to display them to website visitors. [Learn about snippet deployment options.](#)

```
<!--BEGIN QUALTRICS WEBSITE FEEDBACK SNIPPET-->
<script type='text/javascript'>
(function){var g=function(e,h,f,g){
this.get=function(a){for(var a=a+"=",c=document.cookie.split(";"),b=0,e=c.length;b<c;b++){for(var d=c[b];
" "==d.charAt(0);)d=d.substring(1,d.length);if(0==d.indexOf(a))return d.substring(a.length,d.length)}return
null};
this.set=function(a,c){var b="";b=new Date;b.setTime(b.getTime()+6048E5);b="";
expires="+b.toGMTString();document.cookie=a+"="+c+b+"; path=/; ";
this.check=function(){var a=this.get(f);if(a)a=a.split(":");else if(100!=e)"v"==h&&(e=Math.random())>=e/100?
0:100,a=[h,e,0],this.set(f,a.join(":"));else return!0;var c=a[1];if(100==c)return!0;switch(a[0]){case
"v":return!1;case "r":return c=a[2]%Math.floor(100/c),a[2]++,this.set(f,a.join(":"));c}return!0};
this.go=function(){if(this.check()){var
```

Copy snippet

Done

Generate the code snippet

```
/*-----below is the code for qualtric-website-feedback-----*/  
(function () {  
  var fb = document.createElement('script');  
  fb.type = 'text/javascript';  
  fb.async = 'true';  
  fb.src = ('https:' === document.location.protocol ? 'https://' : 'http://') +  
  'libapps.ucalgary.ca/primo/qualtric-website-feedback.js';  
  
  var sfb = document.getElementsByTagName('script')[0];  
  sfb.parentNode.insertBefore(fb, sfb);  
  
  var dfb = document.createElement('div');  
  dfb.setAttribute('id', "ZN_doNXmvvhIXkdN9s");  
  document.body.appendChild(dfb);  
})();  
/*-----qualtric-website-feedback code ends here-----*/
```

Add the code snippet to custom.js and update customization package

The screenshot shows a configuration interface for a web intercept. On the left, there is a 'Creative' section with a placeholder image of a document. The main configuration area includes several sections: 'Target' (PRIMO User Experience), 'Targeting logic' (If Current URL Starts With https://lucalgary-primo.hosted.exlibrisgroup.com), 'Frequency' (Display when the visitor's mouse leaves the web page, Display sample rate is 100%, Repeated display prevention for browser cookie, Hide when local storage is disabled), and 'Embedded data' (Type: Current Page URL, Name: Current Page URL; Type: Browser, Name: Browser; Type: Operating System, Name: Operating System; Type: Device Type, Name: Device Type). At the top right, there is a 'Preview intercept' section with an 'Activation' toggle switch, which is highlighted with a red box and a red arrow pointing to it. At the bottom right, there are two buttons: 'Save and close' and 'Publish', with the 'Publish' button highlighted by a red box and a red arrow pointing to it.

Activate the intercept



Survey Pilot

- Survey active for two weeks from 2021/03/09 to 2021/03/23
- 313 responses
- Analyzed text responses for themes

Pilot Results

- Approximately 83% of respondents felt they were successful or partially successful in searching
- Approximately 17% of respondents felt they were not successful
- Approximately
 - 47% undergraduate students
 - 22 % graduate students
 - 22% Faculty/Academic staff
 - 5.5% Support Staff
 - 3.5% other

Results

Successes	Challenges
Filters (especially title and peer review)	Community users' awareness of licensing and access restrictions
Search boxes (basic and advanced)	Navigating search interface
Use of databases	Items not available
Real-time reference assistance (chat)	Browser security warning issues
Librarian information literacy efforts	

**What did we
learn?**

- Ask one question per question
 - Follow up questions for "Somewhat" asked two questions in one question

Did you find what you needed?

Somewhat



**Follow up question:
What helped?
Why partially unsuccessful?**

What did we learn?

- Make sure survey design segments answers you want to analyze independently
 - Survey did not segment responses from internal and external user groups.

Internal	External
Current students, faculty, researchers, and staff	Community, Alumni

What did we learn?

- Provide option to contact the library for immediate support
 - Some respondents used the survey to report a specific issue that could have been addressed through chat or email

What did we learn?

Recommendations

Flagged areas the PWG could investigate:

- How to add point-of-need support for searching
- Improvements to results page display
- Review of display labels for:
 - Facets
 - Availability statements
 - Access and licensing
- Support for browser security and linking issues

Second and Third Versions

UPDATED SURVEY
QUESTIONS AND
FLOW

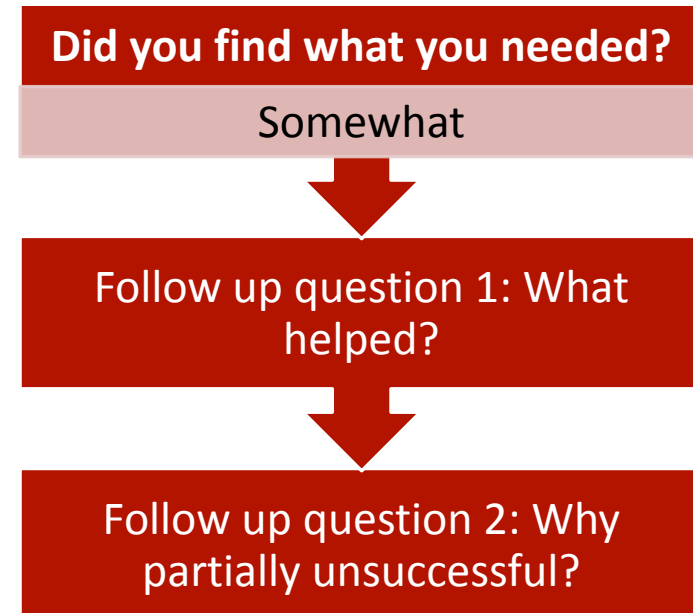
RAN SURVEY IN FALL
2021 & SPRING 2022
TERMS

ANALYZED RESULTS
FOR CONSISTENCY
AND THEMES

Update Survey Questions and Flow

- Updated survey flow to segment responses from internal and external user groups.
- Split follow up questions for "Somewhat" split into two questions

Internal	External
Current students, faculty, researchers, and staff	Community, Alumni



Fall 2021 & Spring 2022 term

	Fall 2021	Spring 2022
Survey period	<ul style="list-style-type: none">• 2021/10/07 to 2021/10/21	<ul style="list-style-type: none">• 2022/03/21 to 2022/04/04
Number of responses	<ul style="list-style-type: none">• 225	<ul style="list-style-type: none">• 217
User group segments	<ul style="list-style-type: none">• Internal – 98% of Responses	<ul style="list-style-type: none">• Internal – 93% of Responses
Did you find what you needed?	<ul style="list-style-type: none">• 61% felt they were successful• 24% felt they were partially successful in searching	<ul style="list-style-type: none">• 61% felt they were successful• 25% felt they were partially successful in searching

Successes and Challenges

Successes	Challenges
Filters (especially title and peer review)	Overwhelmed by results list
Search boxes (basic and advanced)	Linking issues
Use of databases	Items not available
Student awareness of importance of search strategies and terms	Navigating search interface
Database list	Browser security warnings

What helped
you find what
you needed?

Chat/Staff Assistance

Filters

Basic Search

Advanced Search

Other/Unclear

Terms

Databases

Why do you
think your
search wasn't
successful?

Technical issue
Browser Warning
Unclear
Search Results
Linking/Access Issues
Availability Issues
Search Interface
HathiTrust Issue
Other
Information Literacy issue

Lessons Learned and next Steps

Results were consistent over three surveys

- Approximately 60% felt they were successful
- Approximately 25% felt they were partially successful in searching

Intercept surveys can collect a lot of feedback in a short period

- Over 700 responses over six weeks
- Non proactive version of the survey
 - 107 responses over five months (October 2021 and March 2022)
 - Results have not been analyzed yet

Feedback is a good start

- PWG needs to follow up on specific recommendations for specific improvements



Questions

mblack@ucalgary.ca