

# Two roads, one destination: a journey of discovery

Karen Joc -Presenter

Peta Hopkins, Jessie Donaghey and Wendy Abbott

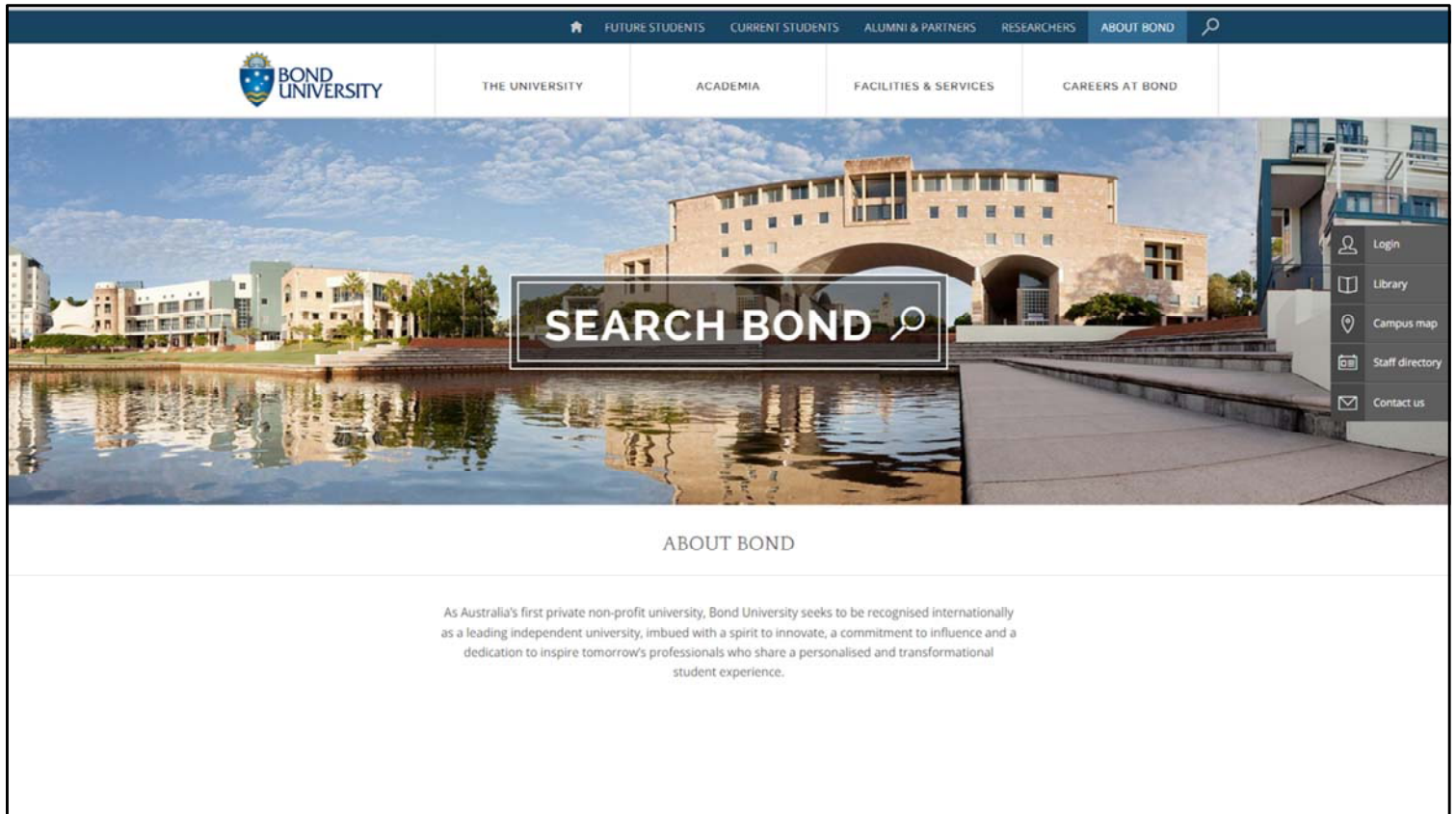


Thanks for coming along to our presentation.

Today we will be describing our findings from a usability study we undertook in 2015 as part of the project to transition from Summon to Primo as our discovery layer.

Karen Joc and I will be presenting the paper today but I would like to acknowledge our co-researchers and co-authors Peta Hopkins and Jessie Donaghey who are unable to be here today.

To give you the context for our research, I will give you a brief overview of Bond University -



Bond University was founded in 1989 and is Australia's first private not-for-profit independent university with a current student enrolment of around 4,000 students,

As a small, diverse private institution, the University is highly focussed on creating a transformative student experience hence the Library's unwavering commitment to delivering an outstanding customer experience including convenient discovery and use of scholarly information.

In 2014/15 the Library simultaneously implemented Alma to replace Aleph as the Library's management

system and Primo to replace Summon as the discovery layer.

While our instance of Aleph was end of life and had to be replaced, there was no dissatisfaction with the existing implementation of Summon, however, the decision was made that in replacing Aleph with Alma, implementing Primo and Alma as a matched pair would be advantageous, as they are tightly integrated products.

The Alma/Primo implementation team wanted to make the transition from Summon to the new platform as easy as possible for end users, and therefore planned to conduct a comparative analysis of student experience of using both Primo and Summon. We were fortunate to have both Summon and Primo available for a short window of time during the Alma/Primo implementation.

The comparative analysis was done through focus groups and usability testing based on searches typically conducted by undergraduate students in both Summon and Primo. The overall user experience in both discovery platforms was evaluated and the results of the study informed further customisation of the Primo platform.

The image shows the Socrative website interface. At the top, the Socrative logo is on the left, and navigation links for 'Apps', 'Resources', 'Help', 'STUDENT LOGIN', and 'TEACHER LOGIN' are on the right. The 'STUDENT LOGIN' button is circled in red. Below the navigation bar is a large banner with the text 'Visualizing student understanding has never been clearer' and a 'GET A FREE ACCOUNT' button. In the center of the banner is a tablet displaying a bar chart with a 'WATCH DEMO' button. To the right of the banner is an inset showing the student login form with the Socrative logo, the text 'STUDENT', a text input field containing 'VALADISCOVERY', and a 'JOIN ROOM' button. Below the banner, the website URL 'www.socrative.com' is displayed.

www.socrative.com

Later in the presentation, we are going to ask you to use Socrative to garner your opinion in relation to the 2 discovery layers Summon and Primo to see how that correlates to our Focus Group results –

So please take a minute to take out your devices and be ready to go to the site [www.socrative.com](http://www.socrative.com).

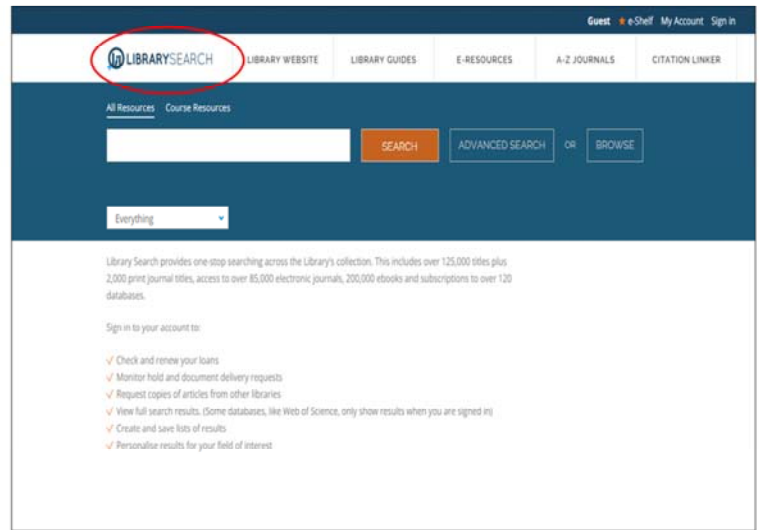
This information will displayed again before we ask you to make your choices online.

I will now hand over to Karen who will describe the customisation of Primo and the Focus Group exercise

## Summon



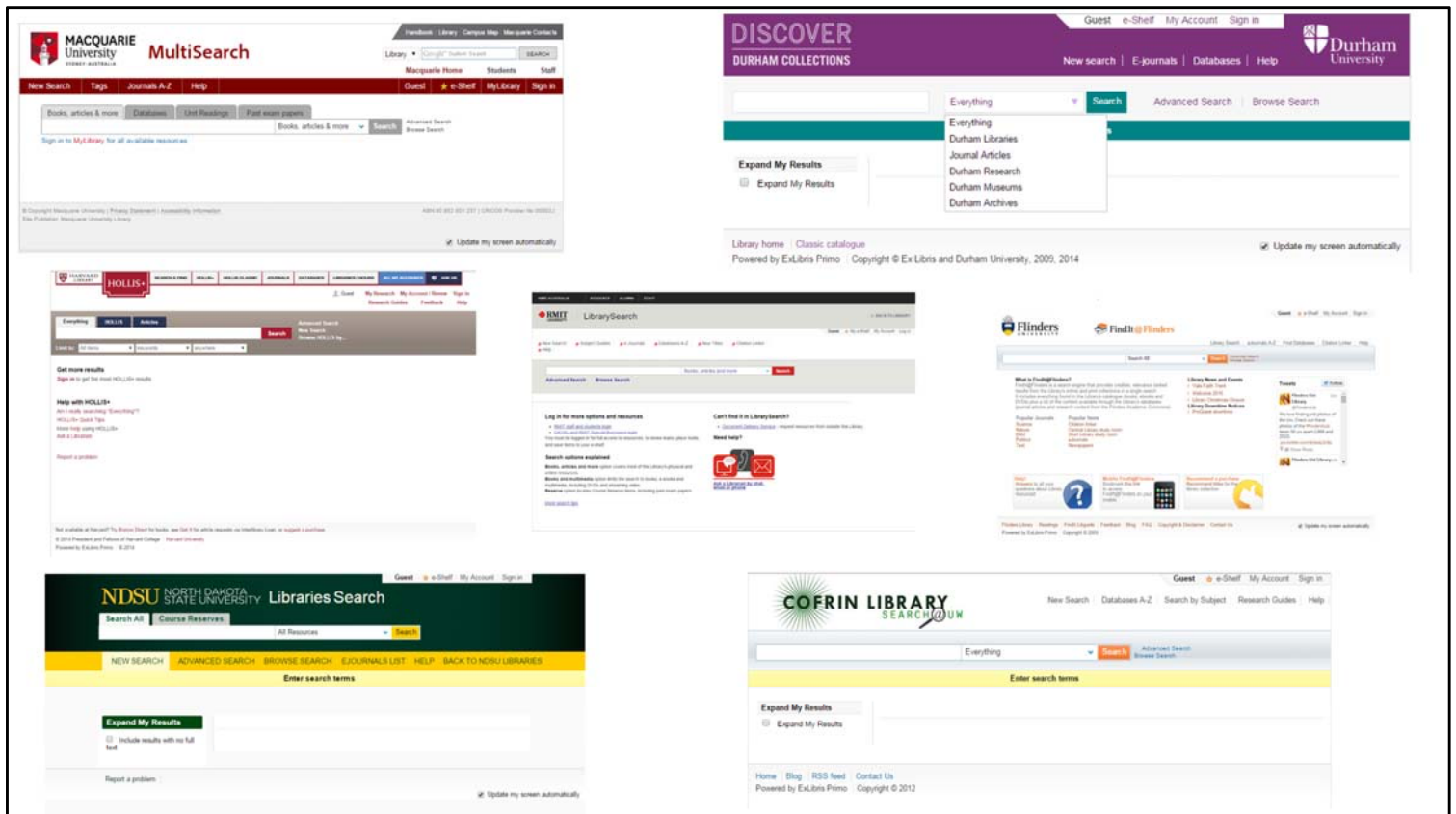
## Primo



Summon in was first implemented at Bond in 2011, the version that we used in this study Summon v2.43 (on the left) has had minimal customisation to the out-of-the box interface

However the version of Primo which we have branded LibrarySearch has had significant customisation prior to its launch in May 2015 (on the right)

PRIOR TO ANYONE GETTING A NEW LOOK AND FEEL YOU GET INSPIRATION FROM YOUR FAVOURITE HOLLYWOOD STAR ... FRIENDS ETC THE SAME GOES FOR YOUR NEW DISCVOERY LAYER



Naturally prior to implementation we looked at libraries both within Australia and Internationally who had implementations of Primo  
for some inspiration these are just a few of the implementations we looked at.

Name each:

Macquarie

Durham

RMIT

Harvard

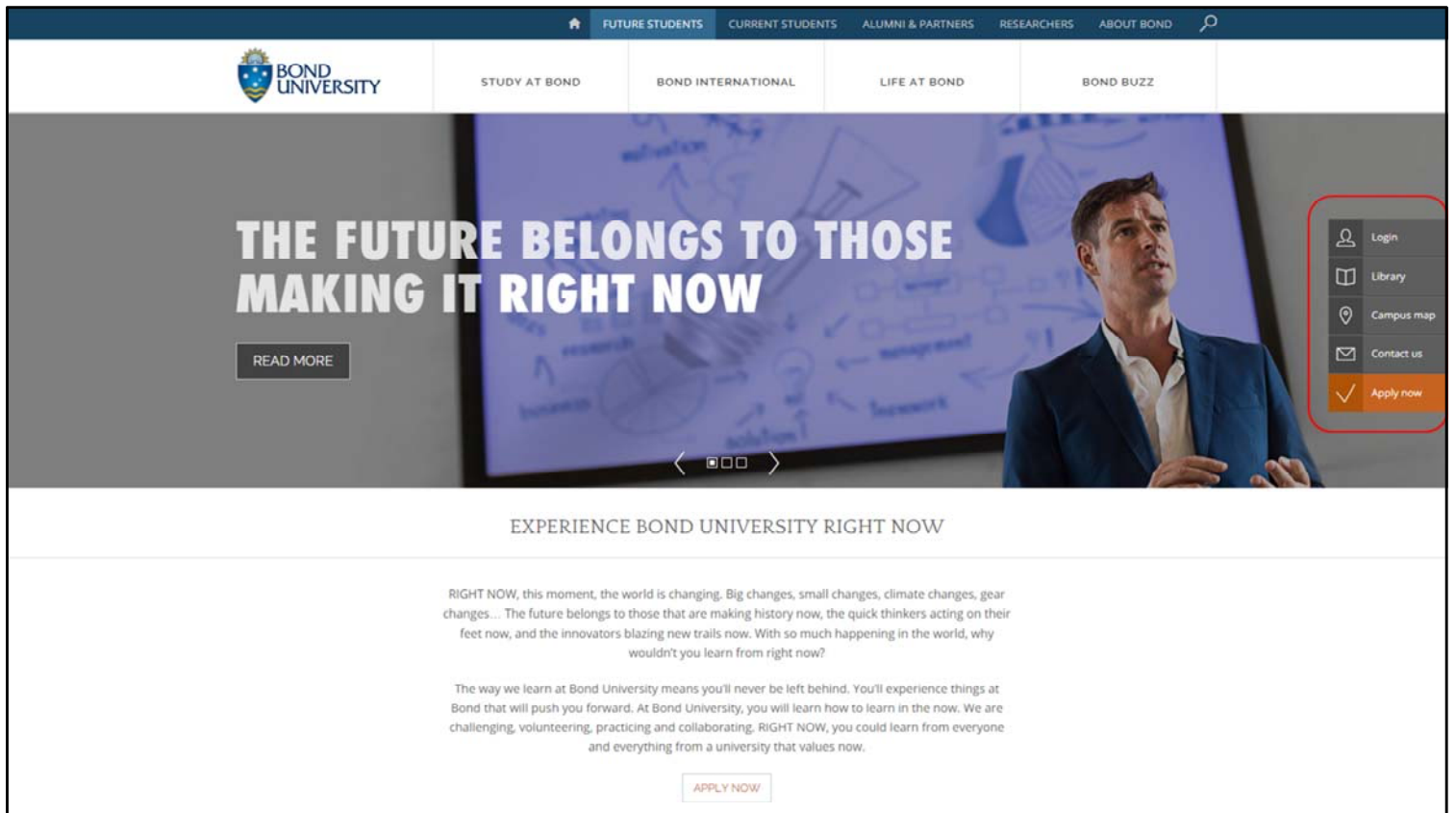
North Dakota Sate University

University of Wisconsin – Green Bay

Flinders

As you can see there are some very different implementations out there to get ideas from.



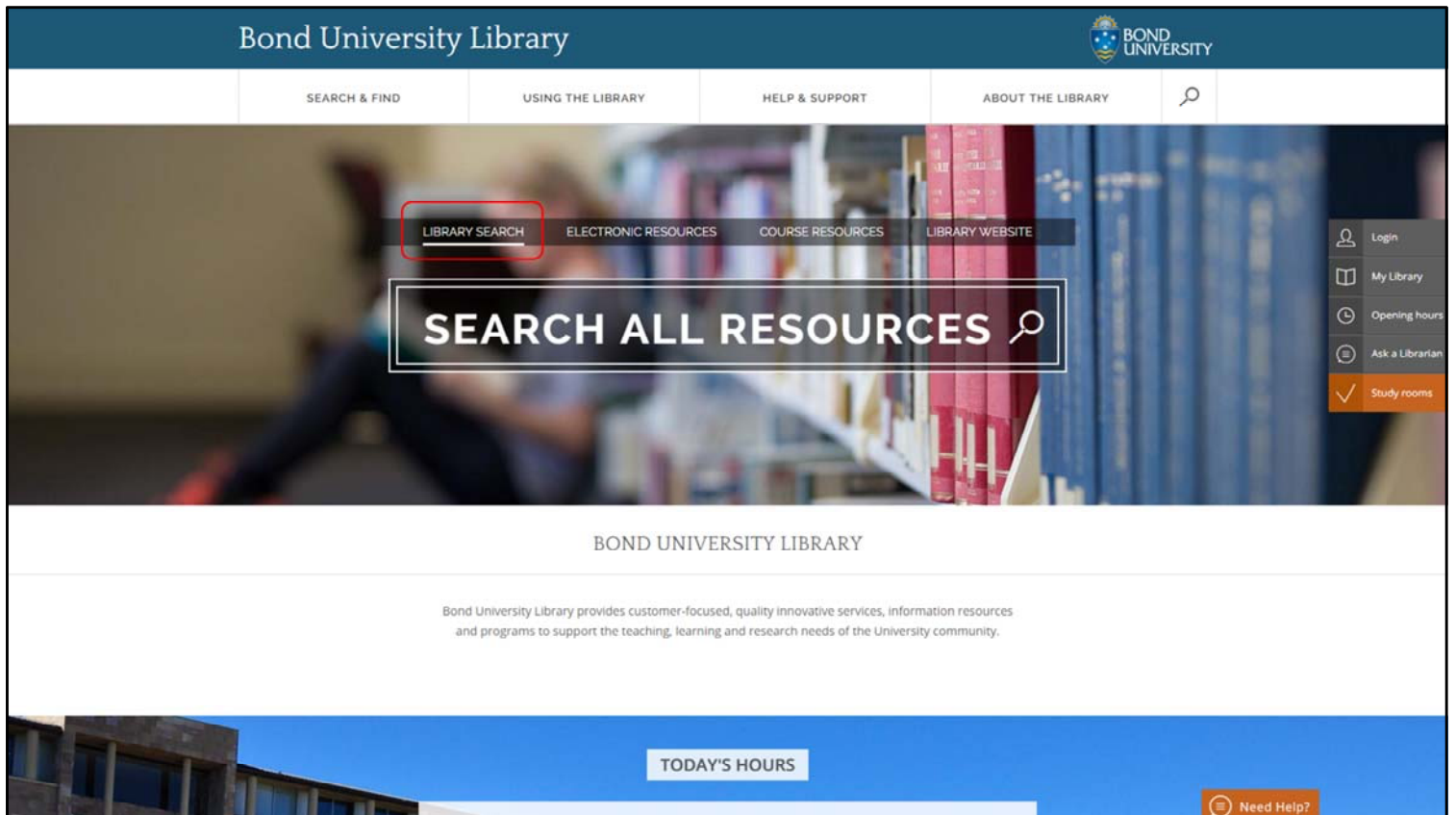


## Bond's Primo customisation had 2 key influences

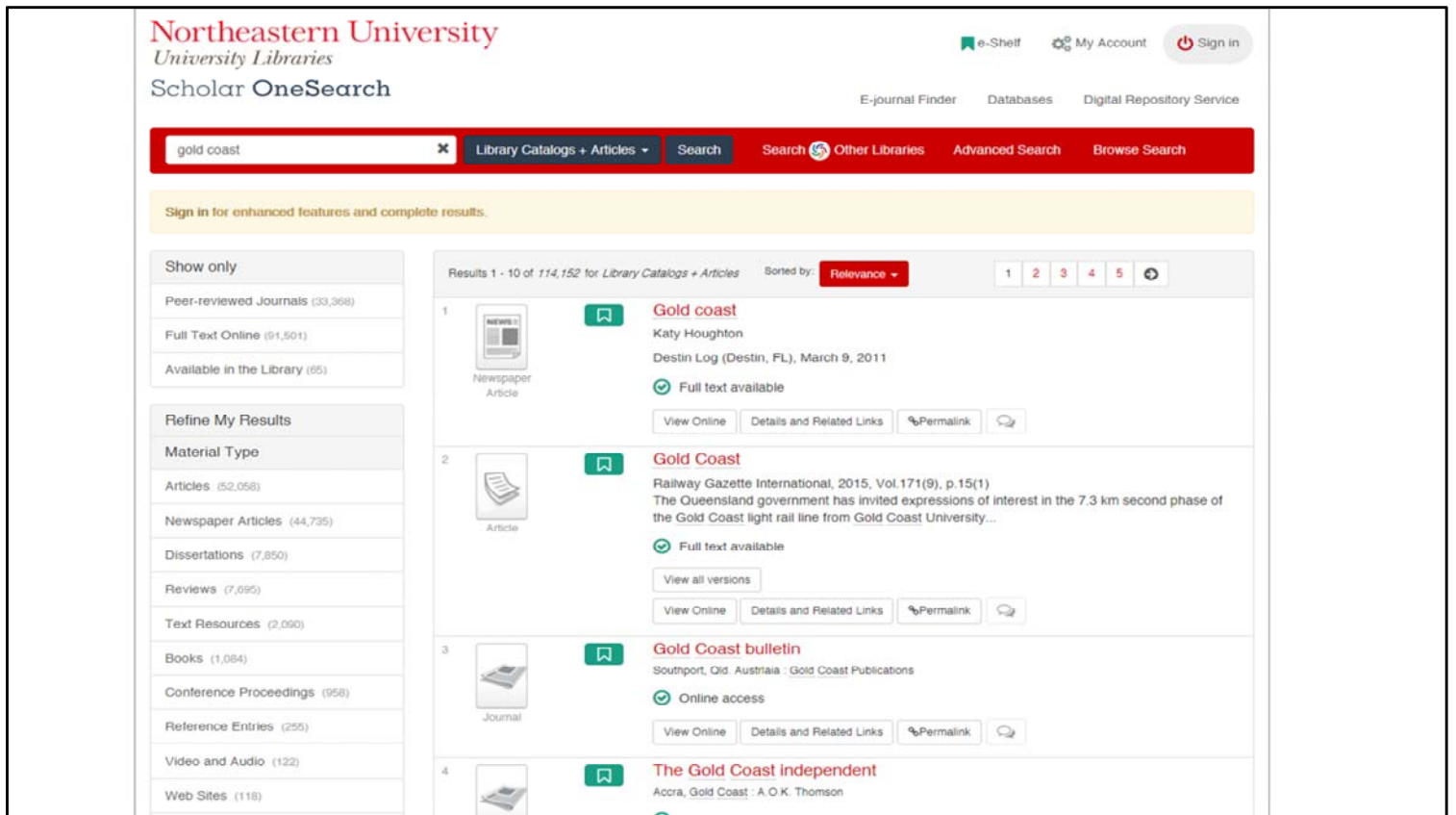
The first being the look and feel of Bond University's new website,

This determined the colour palette and style buttons  
Additionally the navigation to the right hand side influenced the implementation team to place the facets on the right hand side also.





Library Search also needed to fit seamlessly into our new Library Website which is a micro-site of the main website



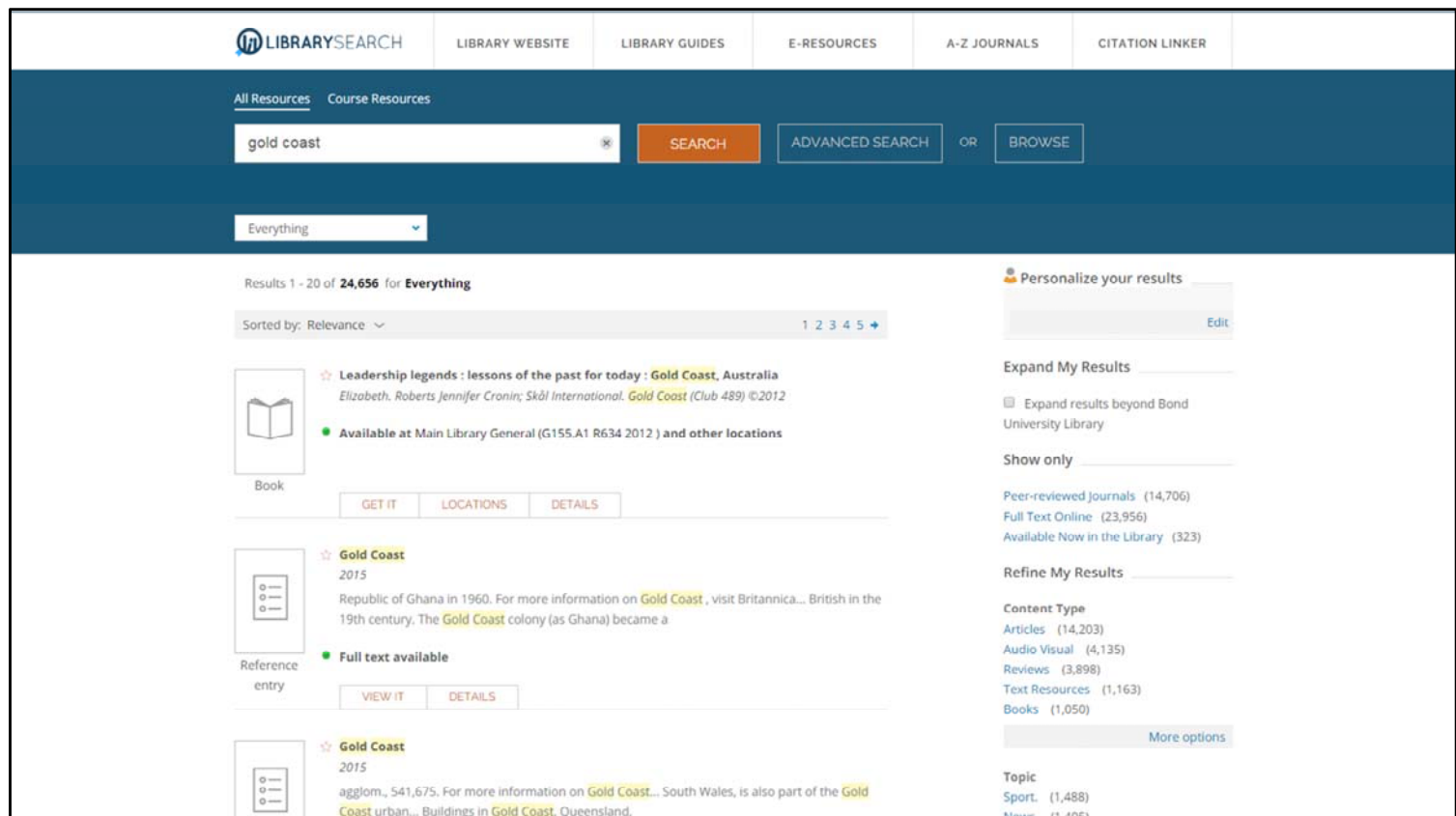
Second key influence was Northeastern University's implementation of Primo

It has a contemporary aesthetic

And a great use of white space

So we mixed our website and Northeastern's design and came up with

.



Lets move into the nitty gritty of the project.

The usability study was conducted in 2 phases:

Phase 1 - 2 small focus groups including both current and new students.

Phase 2 - hands-on usability testing

Recruitment of participants was undertaken through the daily student news - with the incentive of a \$10 coffee voucher.

Recruitment of students was challenging due to:

We has a small cohort of students

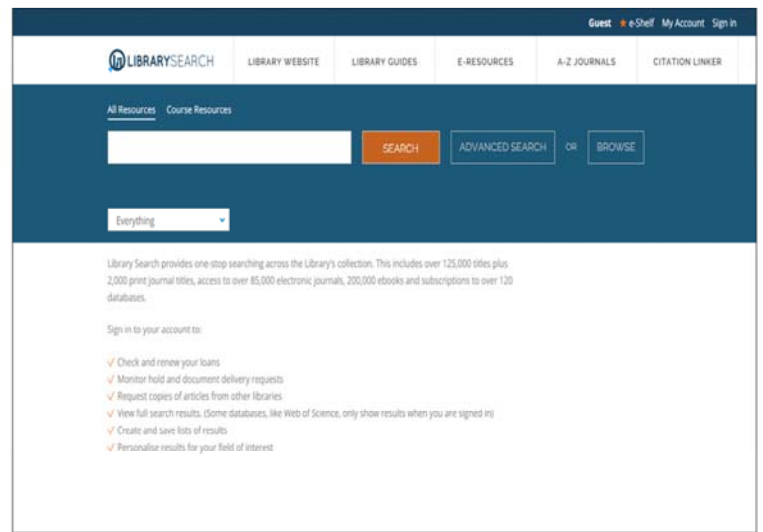
Tight semester timings

The May semester is our smallest intake of students.

<http://www.socrative.com/>

Click on Student Login and room name is:

VALADISCOVERY



Two small focus groups were conducted within the first few weeks of semester 2.

Prior to joining a focus group, each participant was required to sign an ethics approval form.

To ensure as much consistency as possible, the facilitator of each focus group, used a set script for the five questions that would be asked.

Members of each focus group were encouraged to talk about what they liked or did not like about each interface.

Participants were shown a series of slides illustrating aspects of both interfaces.

So that you don't feel left out We would like to go through a few of questions with you that we asked our focus group participants .... Can you please bring out your mobile devices and go to the following:

Let the audience take the 3 questions and then show the results live on the screen

Is there a preference for one over the other? In the focus group there wasn't

Some liked the simplicity of Summon, while others preferred library search's styling

What about facets – there were no clear preferences for left or right

One feature they did like in Summon was the ability to scroll through the results rather than having to go page by page

Which one do like better?

Search Results: Your search for **journal of sports medicine** returned **1,421,820** results

Relevance

Refine your search

- ☐ Items with full text online
- ☐ Limit to articles from scholarly publications, including peer-reviewed
- ☐ Limit to articles from peer-reviewed publications
- ☐ Exclude Newspaper Articles
- ☐ Items in the library catalog
- ☐ Add results beyond your library's collection

Content Type

- ☒ Any
- ☐ Newspaper Article (548,262)
- ☐ Trade Publication Article (543,566)
- ☐ Journal Article (536,385)
- ☐ Book / eBook (131,824)
- ☐ Magazine Article (82,091)
- ☐ Newsletter (36,582)
- [more...](#)

Subject Terms

- ☒ Any
- ☐ research (103,002)
- ☐ health (73,879)
- ☐ universities and colleges (61,740)
- ☐ united states (57,137)
- ☐ reports (51,365)
- ☐ obesity (47,832)
- [more...](#)

Publication Date

Any

2016 Quick Find | Powered by Summon™

Recommendation: We found one or more specialized collections that might help you.

- ProQuest Nursing & Allied Health Source
- Health Reference Center Academic

**International Journal Of Sports Medicine**

Wilderness & Environmental Medicine, ISSN 1080-6032, 03/2014, Volume 25, Issue 1, p. 114

Journal Article: Full Text Online

**The American Journal of Sports Medicine**

Wilderness & Environmental Medicine, ISSN 1080-6032, 09/2015, Volume 26, Issue 3, pp. 434 - 435

Journal Article: Full Text Online

**The long-term consequence of anterior cruciate ligament and meniscus injuries, osteoarthritis**

by Lohmander, LS

Am J Sports Med. ISSN 0363-5465, 10/2007, Volume 35, Issue 10, pp. 1756 - 1769

1756 Clinical Sports Medicine UpdateThe Long-term Consequence of Anterior Cruciate Ligament and Meniscus InjuriesOsteoarthritis SAGE Publications, Inc... rupture, osteoarthritis (OA), outcome, anterior cruciate ligament (ACL), meniscus

Journal Article: Full Text Online

**International Journal of Sports Medicine: Walking program of low or vigorous intensity during pregnancy confers an aerobic benefit**

by Sopper, M M, Ruchat, S M, Mottola, M, Hillier, M, Groux, I, Hammond, J A ... (more)

Journal of the Australian Traditional-Medicine Society, ISSN 1326-3390, 03/2013, Volume 19, Issue 1, p. 50

Background. Walking is the most popular activity during pregnancy and may confer an aerobic

Results 1 - 50 of **55,372** for **Everything**

Sorted by: Relevance

1 2 3 4 5

**Journal of sports medicine (Hindawi Publishing Corporation)**

2013:

Online access

Journal

VIEW IT DETAILS

**Asian Journal of Sports Medicine.**

Dönatigünç Üstün-i Pınarlı-i Tihren. *Sports Medicine Research Center*. 2010

Online access

Journal

VIEW IT DETAILS

**Open access journal of sports medicine**

2010

Online access

Journal

VIEW IT DETAILS

**British journal of sports medicine (Online)**

British Association of Sport and Medicine. 1969

Online access

Journal

VIEW IT DETAILS

Personalize your results

Edit

**Expand My Results**

☐ Expand results beyond Bond University Library

**Show only**

Peer-reviewed Journals (53,258)

Full Text Online (55,368)

**Refine My Results**

Content Type

- Articles (54,603)
- Reviews (2,363)
- Text Resources (2,109)
- Conference Proceedings (736)
- Journals (851)

[More options](#)

**Topic**

- Sports Medicine & Exercise Sport Science (14,790)
- Sports Medicine (10,606)
- Sports (10,320)
- Exercise (8,127)
- Athletes (7,884)

[More options](#)

**Creation Date**

From To

REFINE

1000



## Where do you like the facets located?

Search Results: Your search for **girl on a train** returned 1,129,101 results

Relevance

**Refine your search**

- ☐ Items with full text online
- ☐ Limit to articles from scholarly publications, including peer-review
- ☐ Limit to articles from peer-reviewed publications
- ☐ Exclude Newspaper Articles
- ☐ Items in the library catalog
- ☐ Add results beyond your library's collection

**Content Type**

- ☒ Any
- ☐ Newspaper Article (895,230)
- ☐ Book / eBook (302,744)
- ☐ Journal Article (58,881)
- ☐ Magazine Article (56,214)
- ☐ Book Review (25,326)
- ☐ Trade Publication Article (5,581)
- [more...](#)

**Subject Terms**

- ☒ Any
- ☐ history (47,266)
- ☐ electronic books (38,878)
- ☐ multi-user (32,558)
- ☐ united states (23,638)
- ☐ athletes (20,325)
- ☐ ebrary (17,558)
- [more...](#)

**Publication Date**

Any

**The girl on the train**

by Hawkins, Paula  
2015. ISBN 0657522329. 316 pages  
... Now Rachel has a chance to become a part of the lives she's only watched from afar. Now they'll see: she's much more than just the girl on the train. Commuters. Witnesses. Murder victims. Alcoholics  
Book: DUE 21-02-16 OFF CAMPUS, PR8108.A963G57 2015, Dubai Library

**The lowdown Girl on a Train**

by Helen Rumbelow  
The Times (London, England). ISSN 0140-0460. 11/18/2015. p. 3  
... So, is this THE lowdown? Yes. The lowdown. It's just that now I need to check. I bought **Girl on a Train**. Wanted to find out what the bestselling novel... Novels  
Newspaper Article: Full Text Online

**The lowdown Girl on a Train [Eire Region]**

by Helen Rumbelow  
The Times. ISSN 0140-0460. 11/18/2015. p. 47  
Roughly 30,000 people have made the same mistake, propelling **Girl on a Train** to the top of the Amazon and Kindle bestseller charts. Novels  
Newspaper Article: Full Text Online

**Representación socio-discursiva de los actores implicados en el ataque a una joven ecuatoriana en un tren de cercanías de Barcelona: Estudio de caso Socio-discursive representation of the actors involved in the attack against a young Ecuadorian girl on a suburban train in Barcelona: A case study**

by Francisco Rodríguez and Julia Williams  
Revista Signos. ISSN 0718-0934. 12/2011. Volume 44. Issue 77. pp. 275-294  
Este trabajo presta atención a la representación socio-discursiva de los actores implicados en una agresión de tipo racial en un tren de cercanías de... Press, estudios críticos del discurso. Language and Literature. Literature (General). Prensa  
Journal Article: Full Text Online

**Hawkins, Paula. The Girl on the Train**

by Oliver, Phillie

Results 1 - 50 of 1,489 for **Everything**

Sorted by: Relevance 1 2 3 4 5

**The girl on the train**

Paula. Hawkins 2015  
Currently Unavailable from Main Library General (PR6108.A963 G57 2015)

Book

GET IT LOCATIONS DETAILS

**The Italian Girl**

Rebecca. Hundley 2012  
Online access

Book

VIEW IT DETAILS

**The Girl on the Train**

Raggarid, M  
Library Journal, 2014 Oct 15, Vol. 139(17), pp.80-80  
Full text available

Review

VIEW IT DETAILS

**The Girl on the Train (vol 20, pg 72, 2010)**

Vincentideau, G  
Sight And Sound, 2010 Aug, Vol.20(8), pp.96-96  
Full text available

Article

**Personalize your results**

Edit

**Expand My Results**

- ☐ Expand results beyond Bond University Library

**Show only**

- Peer reviewed Journals (5,78)
- Full Text Online (1,481)
- Available Now in the Library (6)

**Refine My Results**

**Content Type**

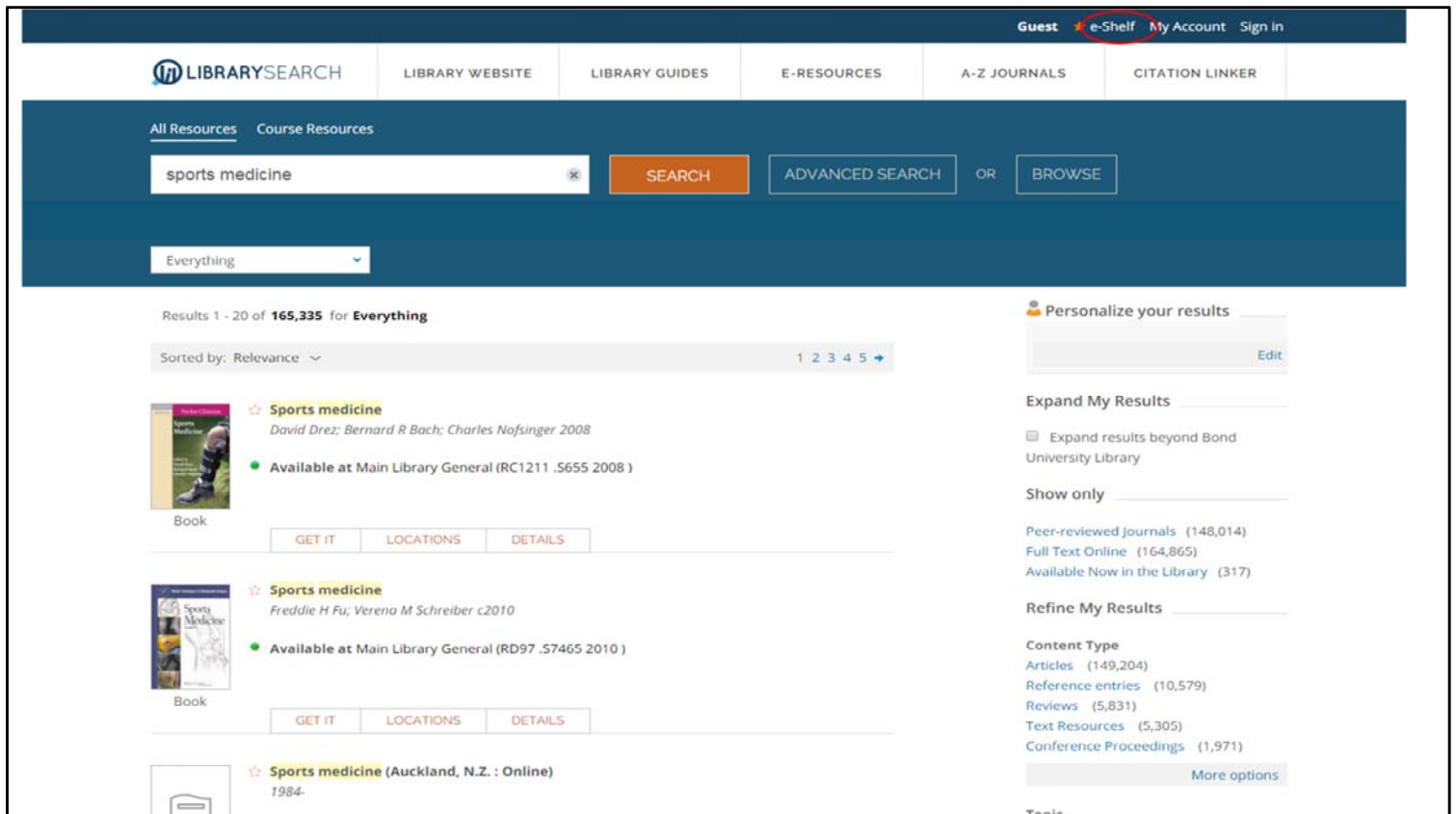
- Books (760)
- Articles (605)
- Audio Visual (63)
- Reviews (55)
- Images (11)
- [More options](#)

**Topic**

- Fiction (105)
- Article (99)
- 1900-1999 (64)
- Novel (40)
- Sociology (39)
- [More options](#)

**Creation Date**

From To [REFINE](#)



Labelling was a big issue indentified in the focus groups ..... we tend to name things that students don't understand

for example

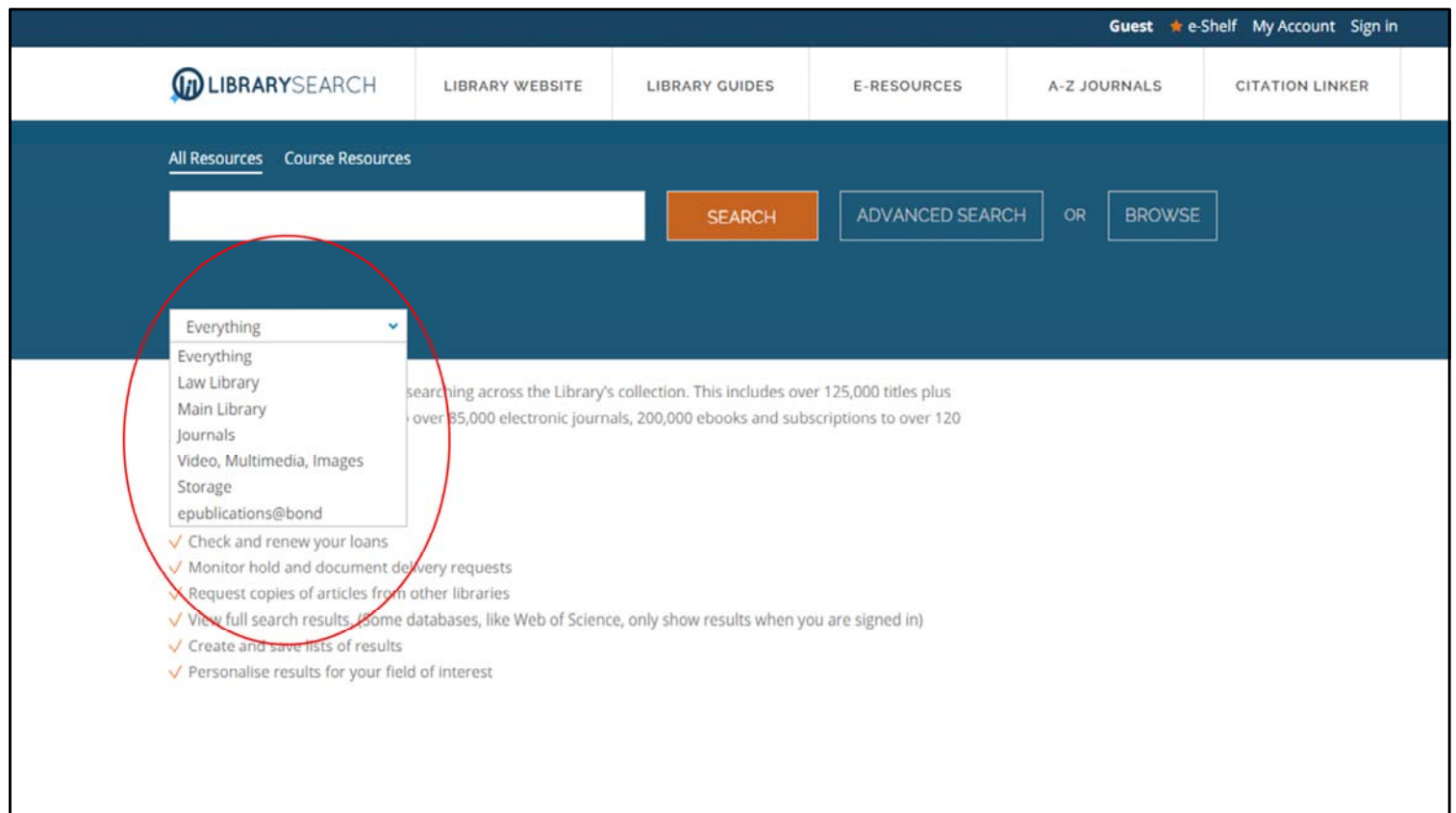
When students were asked what they thought was the purpose of the “E-shelf” feature (save selected search results), there were various responses:

Bookmarks to look at later  
Temporary bookshelf

Saving citations

Saving books

Saving PDFs.



One of the features in Library Search when using Basic Search is the drop-down menu is that enabled pre-search limits to be set to define options such as 'library' and 'collection'.

When it was demonstrated in the focus group none of the students had been aware of this feature and students also misconstrued what is actually did.

Two of the students assumed that if the drop-down menu were used to refine to Law Library it would also include all electronic resources relevant to this search.

However this feature actually only shows items which are physically held in the Law Library.

## Results of the Focus Group

Interface	Likes	Suggested Improvements/Dislikes
Summon	<ul style="list-style-type: none"><li>• Right-side panel displaying additional information when hovering over search result</li><li>• The 'cite' function to produce a citation that can be copied</li><li>• Simplicity of design</li></ul>	<ul style="list-style-type: none"><li>• Easier way to distinguish if an item was available or if it had full-text, e.g. green text for available and red text for unavailable.</li><li>• Styling to distinguish more between the right panel and the centre panel of results</li></ul>
Library Search	<ul style="list-style-type: none"><li>• Deduplication of book editions in initial results list - editions are grouped together</li><li>• "Available in the library" facet</li><li>• Styling and layout</li></ul>	<ul style="list-style-type: none"><li>• Delay in display of "Get It" tab resulted in signing in unnecessarily</li></ul>

These were the overall results from both focus groups – after the facilitator had demonstrated searches in both platforms

The participants were then asked to do some individual searching using pre-defined terms before their final impressions were sought.

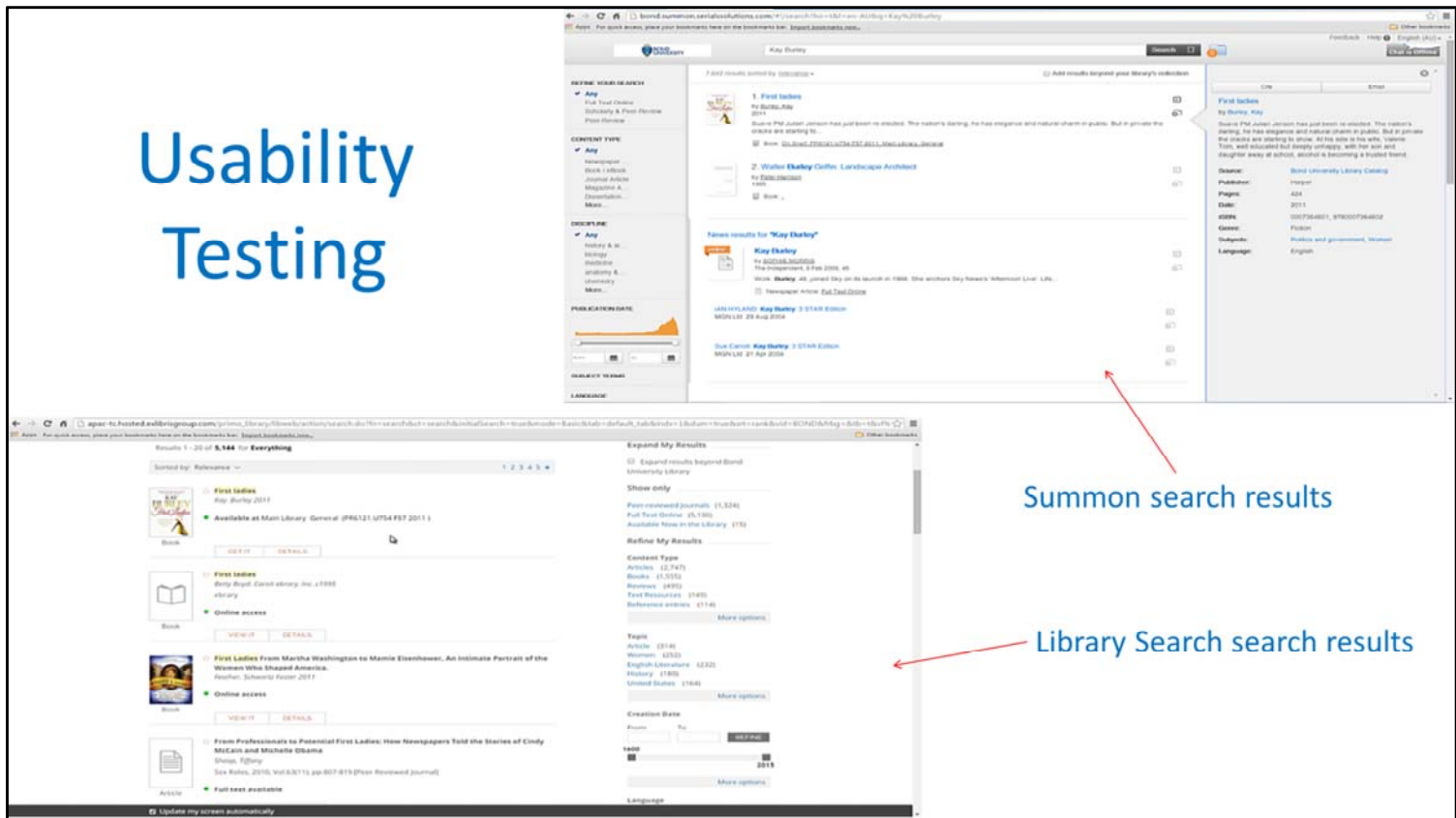
By the end of focus group, a couple of the students changed their original preference from Summon to Library Search.

The attractive colours of the Library Search interface received favourable comments from both focus

groups.



# Usability Testing



## Usability Testing

8 participants were recruited once again through the student daily digest.

Usability tests were undertaken individually by participants in library meeting rooms.

At the beginning of each test participants were briefed about the purpose of the study and consent forms were signed

Each participant completed 8 tasks, all tasks were recorded by camtasia and participants were encouraged to talk about issues, general comments whilst searching

Summon and Library Search.

The activities undertaken by participants included

- finding books
- journals
- electronic journals
- Finding peer reviewed articles
- Determining the call number and availability of an item
- Identifying an Authors' name
- And date coverage and source of text.

At the end of each activity participants were asked which interface they preferred.

The Camtasia recordings were analysed for emerging themes, commonly-held opinions and the reasons underpinning them.

A rubric was used to analyse the video recordings, and capture test metrics. This rubric was based on the U.S. Department of Health & Human Services, Planning a Usability Test (n.d.), and was designed to capture metrics on successful task completion, critical and recovered errors, time on task and subjective measures such as the participants' likes and dislikes.

# Usability Testing Results

Features Tested	Usability Test Metrics	Count of Successful Searches	Count of Critical Errors	Count of recovered Errors	Ave. Time on Task (mins)
Search: Identifying Availability	In <b>Summon</b> find a book by Kay Burley (a) What is the title of the book? (b) What year was it published?	9	4	1	3.2
	In <b>Library Search</b> find the book called "first ladies" (a) Who is the Author? (b) Is the book available for loan?	14	0	0	1.2
	Did you prefer Summon or Library Search?	7 Library Search		0 Summon	

The results show a greater success rate in Library Search, with a higher number of critical and recovered errors in Summon. Additionally the time spent on each task was longer for Summon than for Library Search.

Critical errors occurred when the participant found the wrong information and may not have been aware that their answer was incorrect; recovered errors occurred when the participant recovered from an error to find the correct information.

There were a few common errors experienced by the students in the usability testing of Summon. For

example, when beginning a new search, students would forget that they had particular facets selected from their previous search. Often students would not immediately realise this was negatively influencing their search results. In Library Search, each new search refreshes the facet selection, thereby avoiding this issue. Interestingly, for some tasks several students began their searches with facet selection before typing keywords into the search.

## Usability Testing Results 2

Features Tested	Usability Test Metrics	Count of Successful Searches	Count of Critical Errors	Count of recovered Errors	Ave. Time on Task (mins)
Search: Combining keywords & Limit to peer review	In <b>Summon</b> you need to find 2 Peer-reviewed articles on Anorexia Nervosa and Self esteem 1a) Article 1 Title/ Journal/ Date 1b) Is the fulltext of this article available? 2a) Article 2 Title/Journal/Date 2b) Is the fulltext of this article available?	21	6	1	6
	In <b>Library Search</b> you need to find 2 Peer-reviewed articles on Bulimia and Self esteem 1a) Article 1 Title/ Journal/ Date 1b) Is the fulltext of this article available? 2a) Article 2 Title/Journal/Date 2b) Is the fulltext of this article available?	20	4	4	6
	Did you prefer Summon or Library Search?	6 Library Search		1 Summon	

In the task relating to finding full-text peer-reviewed articles, the students clicked all the way through to the database and opened the PDF before being satisfied that full-text was available, not trusting the “full-text available” information presented in Summon or Library Search.

Students commonly misinterpreted labelling used in Summon and Library Search. In using both platforms, there were instances of students selecting the journals/ ejournals facet when they were actually searching for journal articles and vice versa. In Library Search, another possible labelling issue caused confusion between the item information

available in the “View it” tab and the “Details” tab. Four participants went to the “Details” tab first to find the availability information of a journal. For example, one participant looked in the “Details” tab for the availability of a journal and instead of checking the “View it” tab and thought that the author/publisher field listed the availability of the journal, and recorded that information on the task response sheet.

## Students' Platform Preference

Reasons for Library Search Preference	Number of Participants
Ease of Use	5
Presentation of Records	6
Relevance of Results	2
Aesthetics	3

Out of the 8 activities and 8 participants only on 2 occasions was Summon chosen at the discovery Platform of choice

Library Search was seen as the preferred discovery resource in the usability testing in 14 out of 16 opportunities.

These are the reasons for the preference for Library Search included:

Ease of Use

Presentation of Records

Presentation of Results

Aesthetics



## Recommendations

**Have an excellent Project Manager and Plan**



Customisation prior to launch



Labelling and placement of Search Facets and  
Scopes



Usability test design



Mobile Usability testing



Communications Strategy



### Recommendations

#### Customisation

A key component of the discovery layer implementation was the work that went into the styling of Library Search - it resulted in students feeling familiar with the look and feel and navigation as it was similar to the website they were accustomed to.

We strongly recommend reviewing the out-of-box usability and styling of a new discovery layer well before the anticipated launch date

#### Labelling and placement of search facets and scopes

What has become evident is that students do not necessarily understand what “we librarians” label .... Example e-shelf. Work has already been done in this area in relation to the terms we use such as “lost” and “available”, however further modifications still need to take place.

## Usability test design

Needs to be relevant to your student population and tested prior to administering to the students. There was a flaw in our design in relation to questions 7 and 8, if we were to do it again we would randomized the whole design.

## Mobile Usability Testing

We would like to further investigate testing using mobile devices. We only had one test as 3 students turned up at once. However what was interesting was that the facets could not be accessed when in portrait mode.

## Other Key Issues

- Students adapt easily to changing interfaces
- Students need substantial improvements in their search skills
- Be prepared for ongoing fine-tuning of the search interface

A photograph of a dirt road stretching into the distance under a dramatic sunset sky. The sun is low on the horizon, casting a warm glow over the landscape. The sky is filled with clouds, and the road is flanked by tall grass. The text "Any Questions?" is overlaid in the center of the image.

# Any Questions?

Image downloaded from Miriadna website:  
<http://miriadna.com/photo.php?id=551>