A large green bracket graphic that frames the title text on both sides.

Baking a Cake with No Recipe: Mixing Methods for Discovery Layer Assessment

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TEAM



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CHARGE



“The team will be responsible for the assessment of the discovery tool. An **initial baseline** for all parameters in which the library will be able to evaluate the **performance** and **usefulness** of the discovery tool will be established. The time frame and frequency of tracking and reporting results will be established through this team.”

INGREDIENTS



COUNTER/OpenURL
(circulation, ILL)
Google Analytics



Usability testing
Chat transcripts &
helpline reports





COUNTER/OPENURL

Goal: Identify Summon's impact on resource use

Data sources:

- COUNTER and non-COUNTER usage data (9/2013-5/2014; 9/2014-5/2015)
 - Full-text
 - Search and discovery
 - Balance of disciplines, types of resources, products & vendors
- OpenURL resolver data
- In-house print circulation and ILL data



COUNTER/OPENURL FINDINGS

Full-text content use increased, except for reference books and streaming media

- Not consistent across platforms; larger publishers had higher percentage increases in use of products
- Increased use of content *not* in discovery tool index

Search and discovery tools use decreased, except for newspapers

- Not consistent across platforms; larger, multidisciplinary tools were more affected
- Use of other search tools still high overall



ADDITIONAL FINDINGS

Summon implementation had:

- No impact on print circulation
- Significant impact on ILL requests



GOOGLE ANALYTICS

Goal: Determine Summon's impact on user behaviour and preference for search tools

Data Sources:

- Catalog statistics, pre- and post-implementation
- Summon statistics, post-implementation

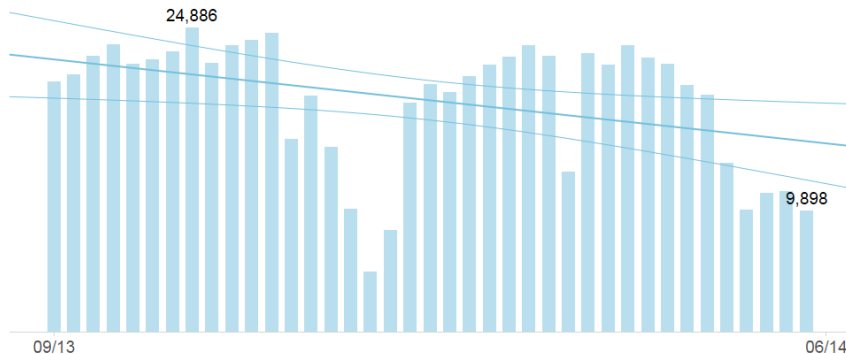
Metrics:

- Pageviews & Top referrers
- New and returning users & Top search terms
- Summon sessions & events

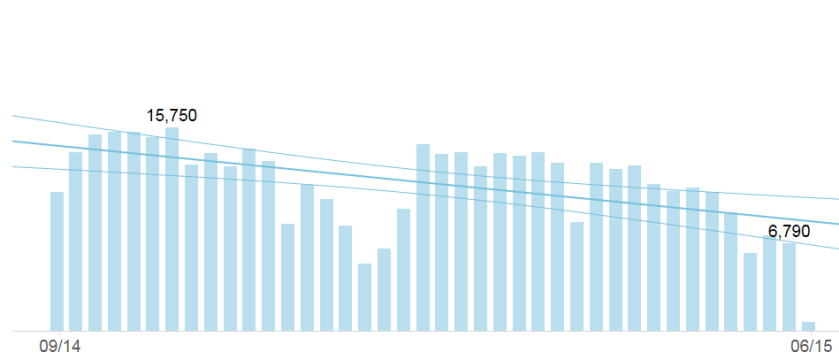


GA: PAGEVIEWS & REFERRERS

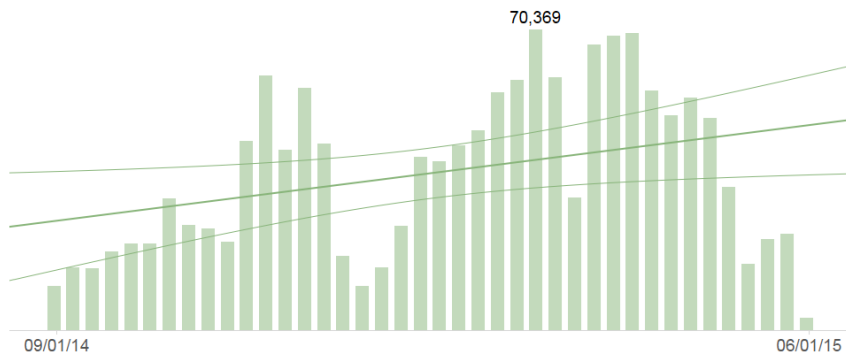
Catalog pageviews, 9/1/13-5/31/14



Catalog pageviews, 9/1/14-5/31/15



SearchPlus pageviews, 9/1/14-5/31/15



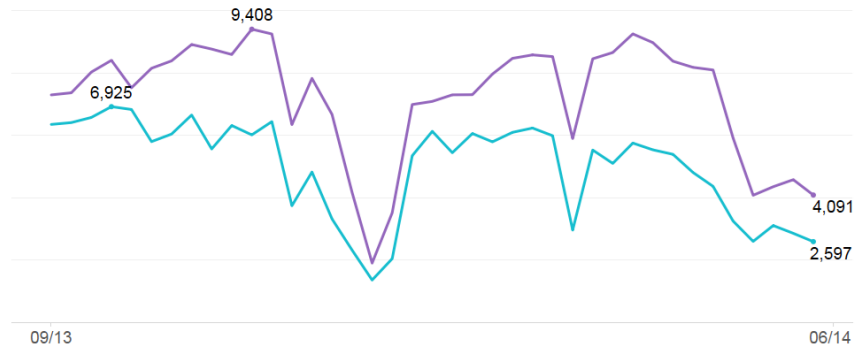
- Library main page is Summon's top referrer
- Catalog loads more results per page
- Summon employs infinite scroll



GA: USERS & SEARCH TERMS

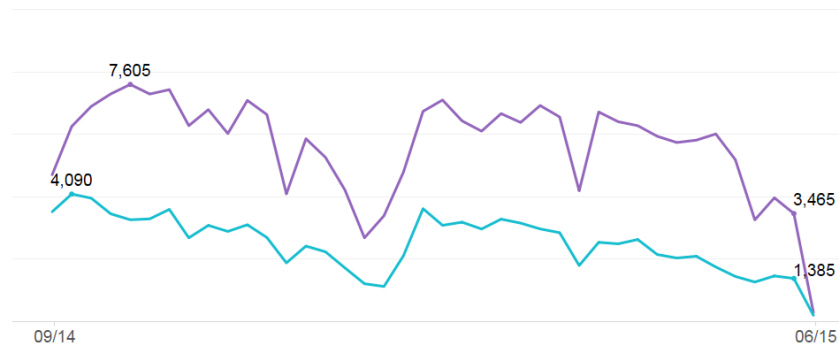
Catalog users, 9/1/13-5/31/14

New
Returning



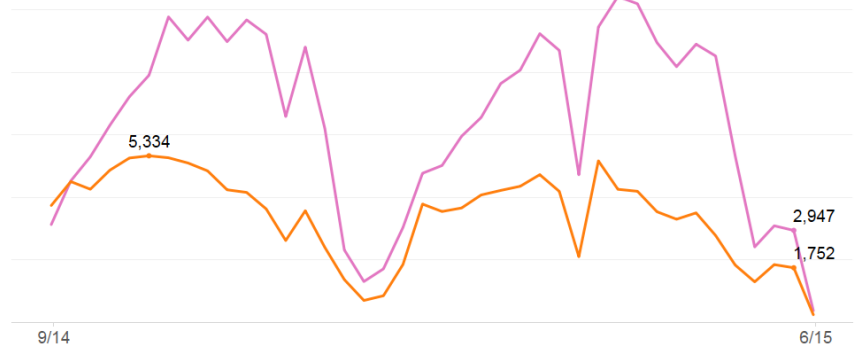
Catalog users, 9/1/2014-5/31/2015

New
Returning



Summon users, 9/1/14-5/31/15

New
Returning



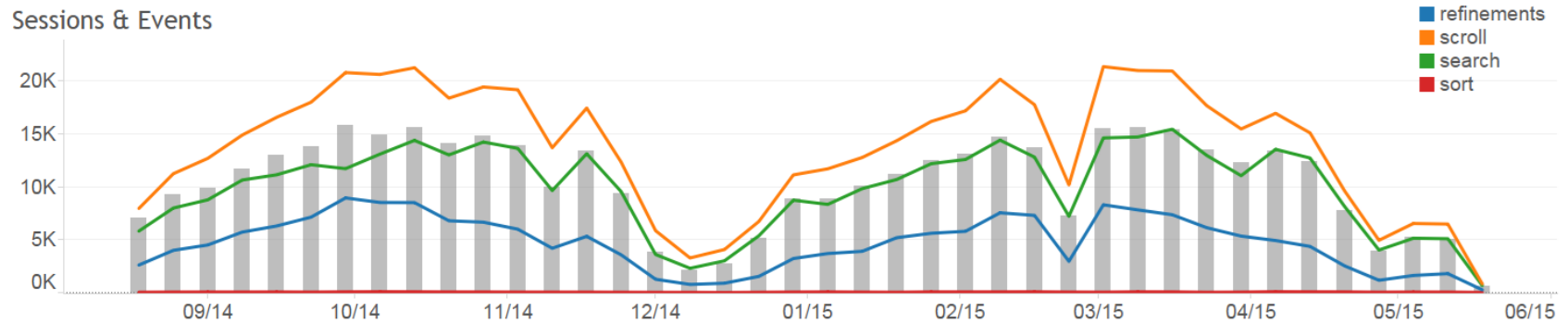
Search terms

- Catalog: known item searching
- Summon: broad disciplinary or topical keywords

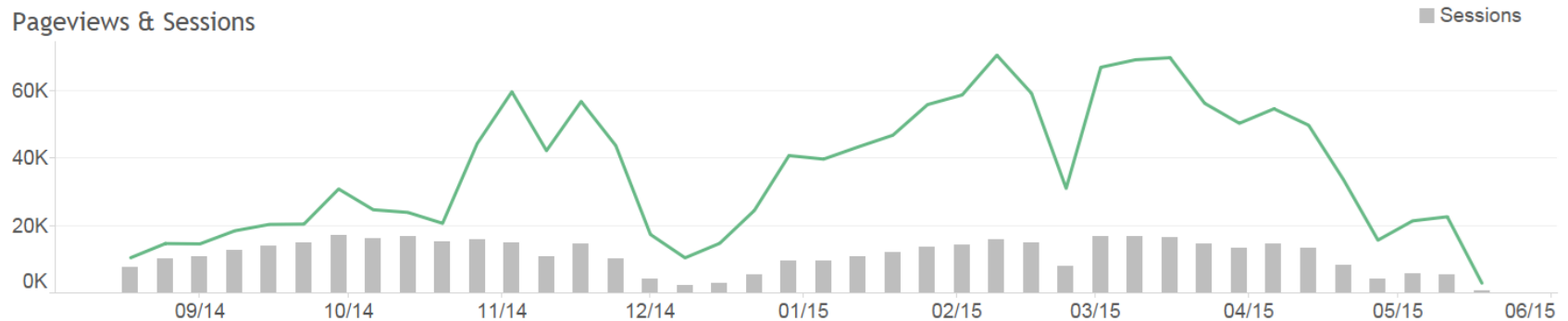
GA: SUMMON SESSIONS & EVENTS



Sessions & Events



Pageviews & Sessions





USABILITY TESTING

Goal: Identify pain points for users interacting with Summon and improve the usability of the tool

Methods:

- Three users
- Seven scenarios and tasks
 - Scenario 2: You're taking a summer class on the environment. The topic of the first paper is on climate change
 - Task 2: Find and identify a peer-reviewed source on climate change that was published in 2014 to use for your paper

USABILITY TESTING FINDINGS



1. What *is* SearchPlus?

“Well, okay. My first thought is to go ahead and put the number right here in the search box. See if the search works this way, because I don’t know.”

2. Facets are useful, but not necessarily used

“So, I guess I could probably find ebooks or books (clicks on facets) oh that’s cool. Oh, that’s a lot of different types of stuff. I don’t even know what some of these are. That’s a lot of information.”

3. Confusion when no results found

“When I didn’t know if something was there or not, then I was a little concerned because I felt like I didn’t know if I had checked everywhere I possibly could... with that last one, I wasn’t sure if there was some where I still could look or if I’d just given up.”



TEXT ANALYSIS

Data Sources:

- Distance Learning Services (DLS) library-related reports, pre- and post-implementation

Incident Area	Ticket #	Open Date	Assignee	Source	Call Back Number	Summary
DLS.E-RESOURCES.ACCESS.HOWTO	471288	09/07/2013 05:11:28 PM	[REDACTED]	LC&T	[REDACTED]	How to Locate Articles
<p>Caller had several citations and needed assistance locating the articles.</p> <p>I verified that he was authorized for proxy access, then walked him through accessing the first article through the e-resources page. He was successful. He said he thought he could do the next one on his own. I reminded him that we are open 24 hours and invited him to contact us if he needed further assistance.</p>						

- Reference chat transcripts, Jan-May 2014 & Jan-May 2015 (50% coded)



TEXT ANALYSIS

Goal: Identify changes in resource discovery questions and pain points

- Iterative process
- Initial steps:
 - Created codebook: action, patron, object, tool, format categories
 - 5 team members coded chat and DLS transcripts with Nvivo
 - Analyzed and discussed coding; revised codebook
 - 3 team members coded both data sets



TEXT ANALYSIS: METHODOLOGY

Analysis:

- Identified 3 coded nodes with substantial changes before and after discovery implementation
- Identified 2 additional nodes for further analysis
- Reviewed items coded under the 5 nodes to identify themes
 - Access, Misunderstanding, General Reference, Searching and SearchPlus
- Reviewed themes to get overall picture



TEXT ANALYSIS: FINDINGS

- Primarily supported findings from other assessments
- Increase in access issues
- Still request help with navigating web site, databases and searching



RECOMMENDATIONS

Improvements in the local implementation

- Interface
 - Fix facet options so they are always visible
 - Add “Ask A Librarian” chat widget
- Instructional and Informational
 - Link or video to help users select most appropriate system for task



RECOMMENDATIONS

Benchmarking and Further Analysis

Resource and Service Usage and User Behavior

- Impact on full-text content use
- Impact on other search and discovery tools
- Impact on print circulation and ILL
- More detailed analysis of search terms and user behavior in discovery tool
- More usability tests, as needed



RECOMMENDATIONS

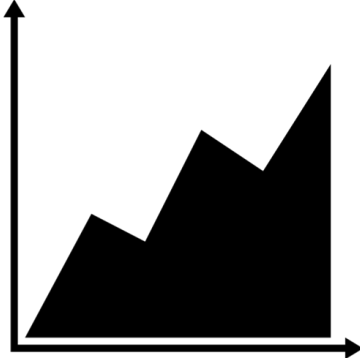
Driven by stakeholders; supports decision-making and action on multiple levels

- Public services
- Collection management
- Library-wide

Constraints

- Political/Technical
- Resource availability

LESSONS LEARNED



Thank you!



ICONS

chef by Andrey Vasiliev from the Noun Project

Scroll by Yorlmar Campos from the Noun Project

comfortable by khaleel from the Noun Project

books by Alison Iven from the Noun Project

Bowl by Ashley Ma from the Noun Project

Cake by Yazmin Alanis from the Noun Project

Checklist by Demograph™ from the Noun Project

clock by Michael Thompson from the Noun Project

Calendar by Lorena Salagre from the Noun Project

Graph by Pham Thi Dieu Linh from the Noun Project

Happy by Tina Abi Hachem from the Noun Project

Applause by Arthur Shlain from the Noun Project

Light Bulb by Ian Mawle from the Noun Project