

How many Primo scopes/slots/tabs do you really need?

Report to CSU ULMS Discovery Functional Committee
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Definitional Review



Scope

Scope is a general concept that is used to create groups of resources.



Slot

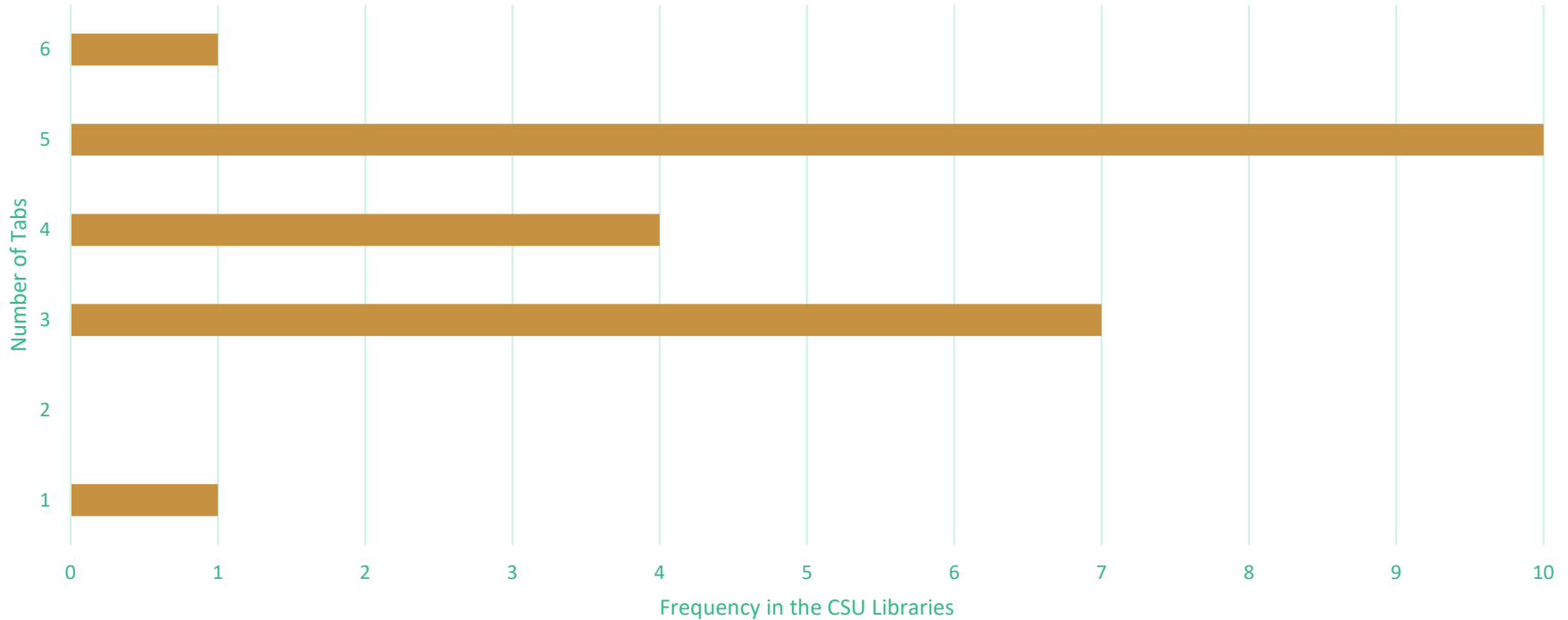
A selectable grouping of search scopes in the Primo VE UI.



Tab

A selectable grouping of search scopes in the old Primo (w/ Primo Back Office) UI.

Tab Frequency at August 2021



The Data Set (all CSU libraries)*

Primo Analytics Data Calendar Years 2017 - 2019

- Institution Name
- Action Sub Group
- Action
- Search Scope Type
- Active Tab
- Referrer
- User Group
- Signed In [numeric]
- Actions (searches) [numeric]
- Sessions [numeric]
- On Campus [numeric]

Synthetic Variables

- Searches per session
- Used: advanced, browse, journal, newspapers search “Exploration”
- Various Referrer descriptors
- ActionANDScopeANDTabMatchLibraryHomepageDefault





Expectations & Caveats



Issue

- Primo Analytics has several product defects/bugs
 - Blank values: blank tabs fixed Aug. 2021, blank user group open bug
 - Ex Libris Codes
- Primo Analytics does not paint full picture of usage
- Lack of standardized Tab/Slot names among libraries
- Lack of standardized User Groups among libraries

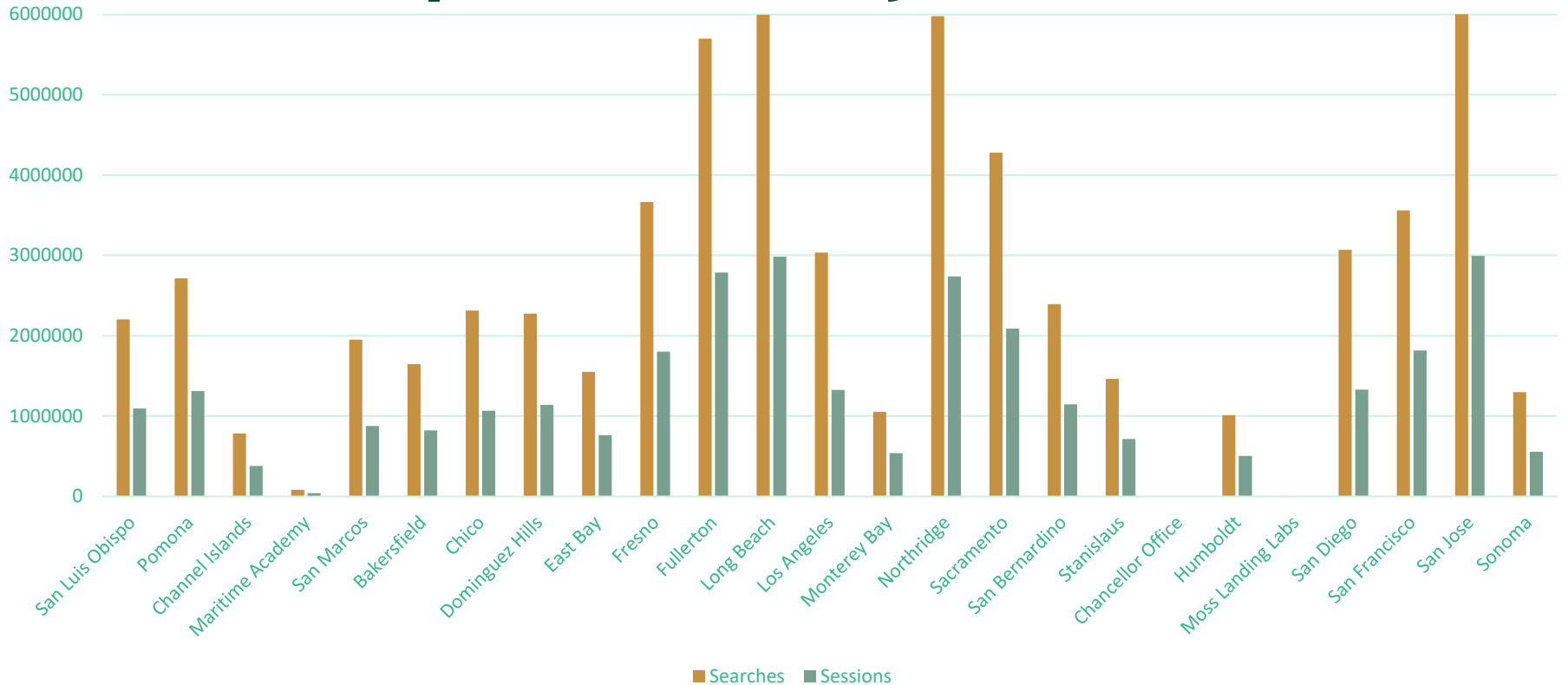
Our Take

- Despite bugs, the large sample gives clear picture
 - We got creative
 - We asked Ex Libris
- We only ask questions the data can answer
- We manually reconciled names based on behavior*
- We manually reconciled groups based on communications with campuses and common sense

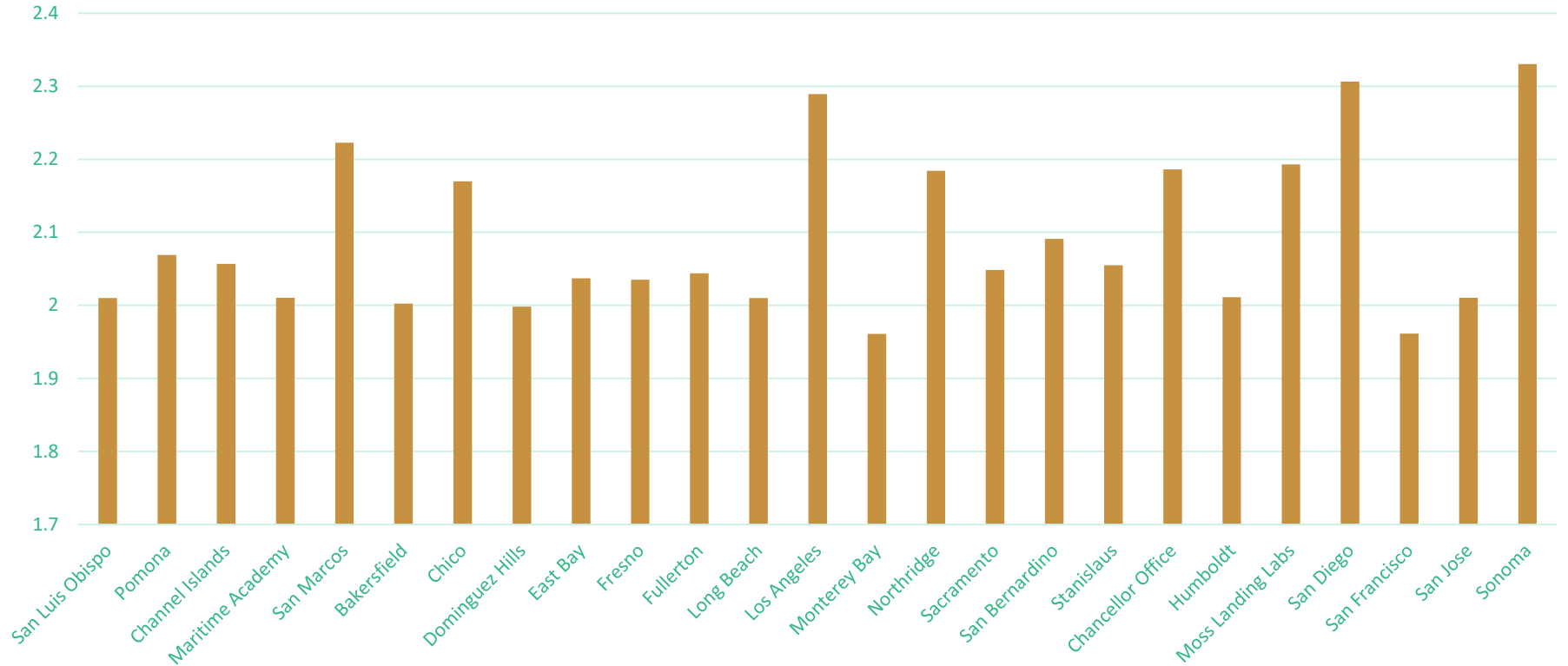


Usage Patterns Across All Libraries and Groups

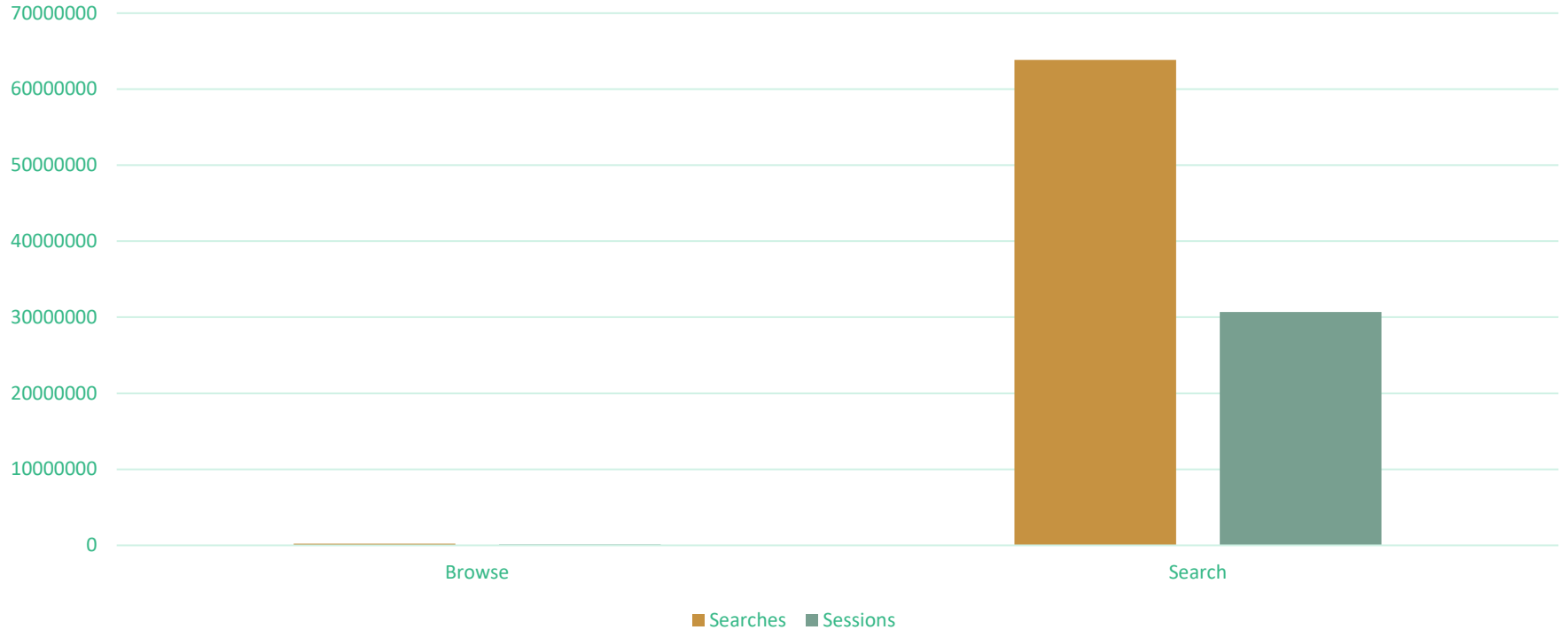
Campus Activity '17 - '19



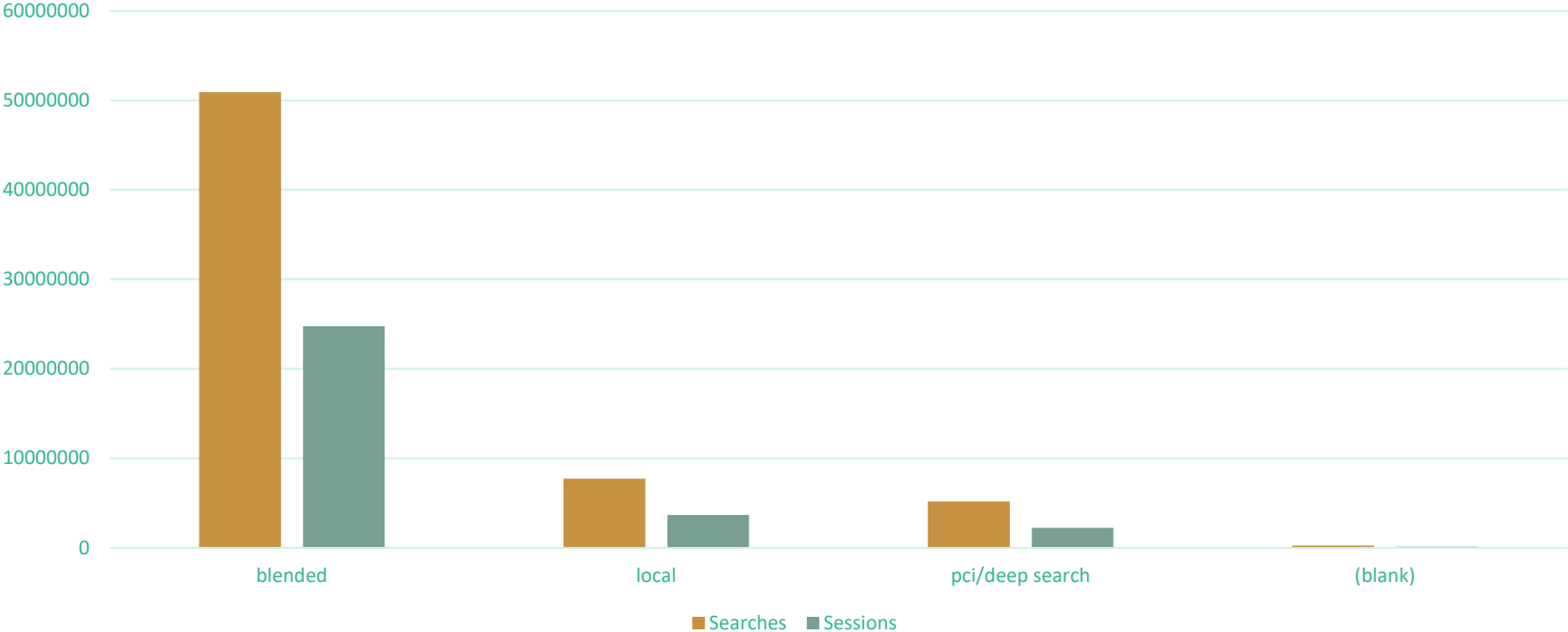
Search to Session Ratio '17 - '19



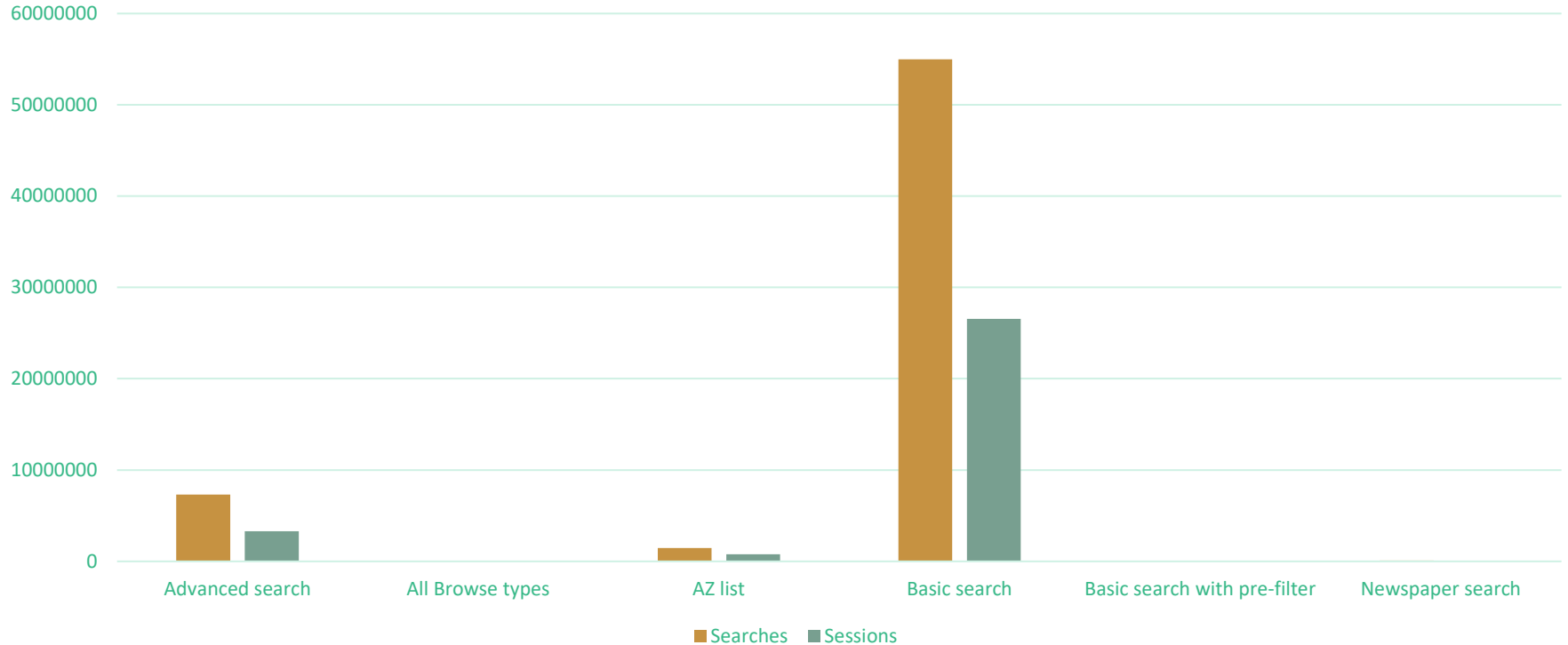
Action Group Activity '17 - '19



Scope Type Activity '17 - '19



Action (Search Type) Activity '17 - '19



Unsurprising Findings

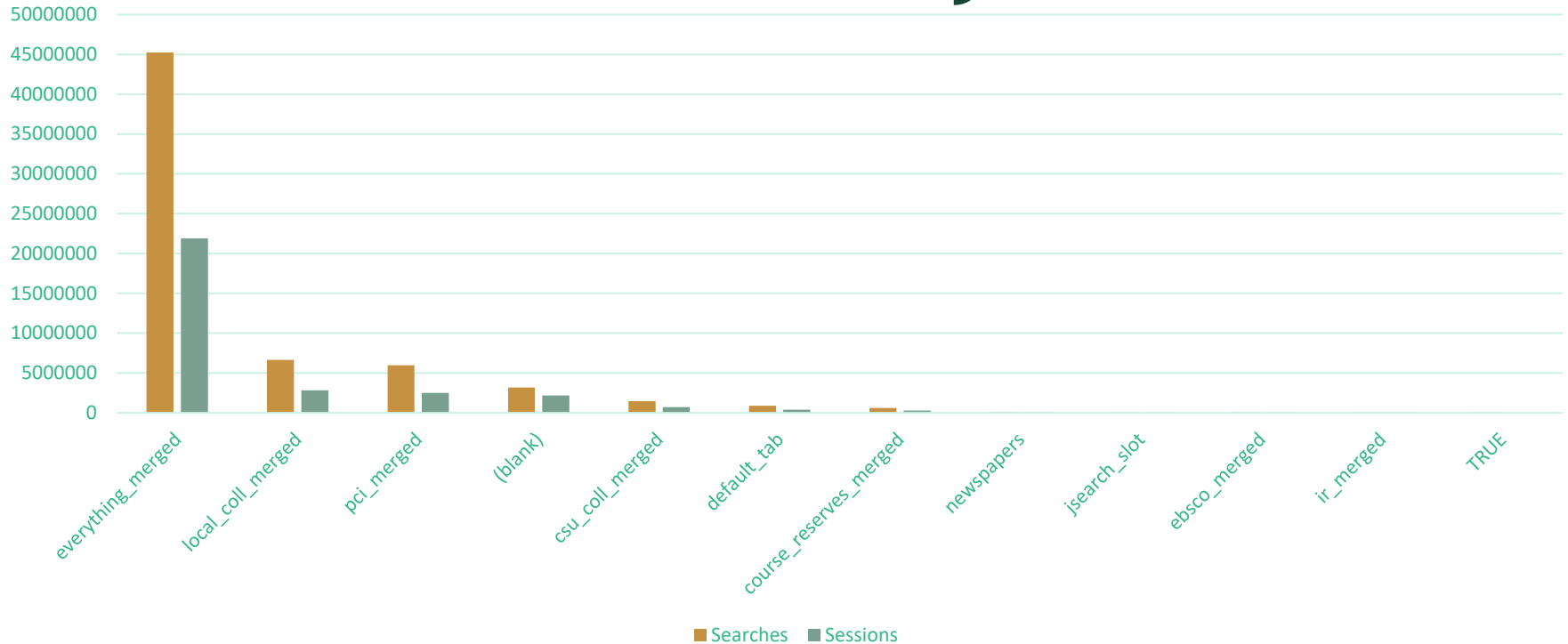
Differences Between Active Tabs

ANOVA: Active Tab

		Sum of Squares	df	Mean Square	F	Sig.
Searches	Between Groups	164718602477.311	16	10294912654.832	11.451	<.001
	Total	28047539705773.496	31030			
Sessions	Between Groups	38152162973.796	16	2384510185.862	12.220	<.001
	Total	6090204014385.499	31030			



Active Tab Activity '17 - '19



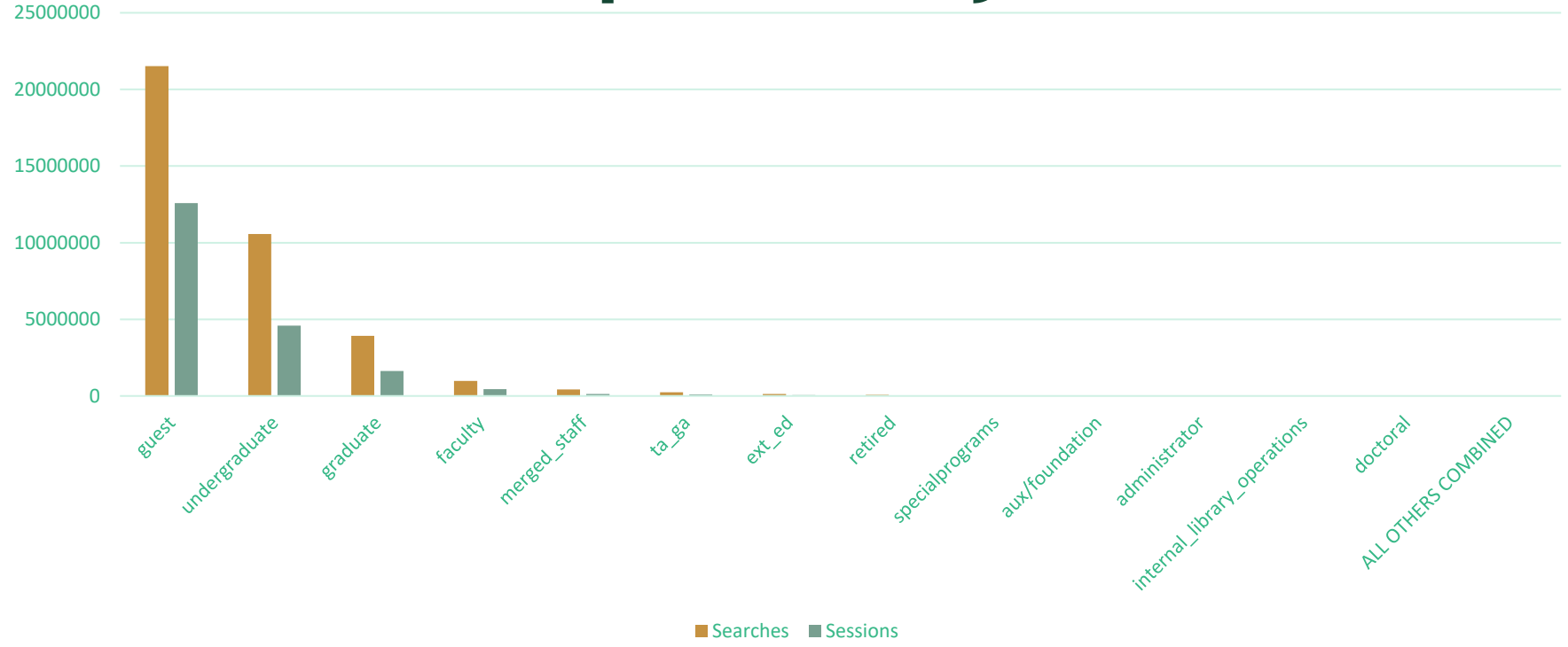
Differences Between User Groups

ANOVA: User Group

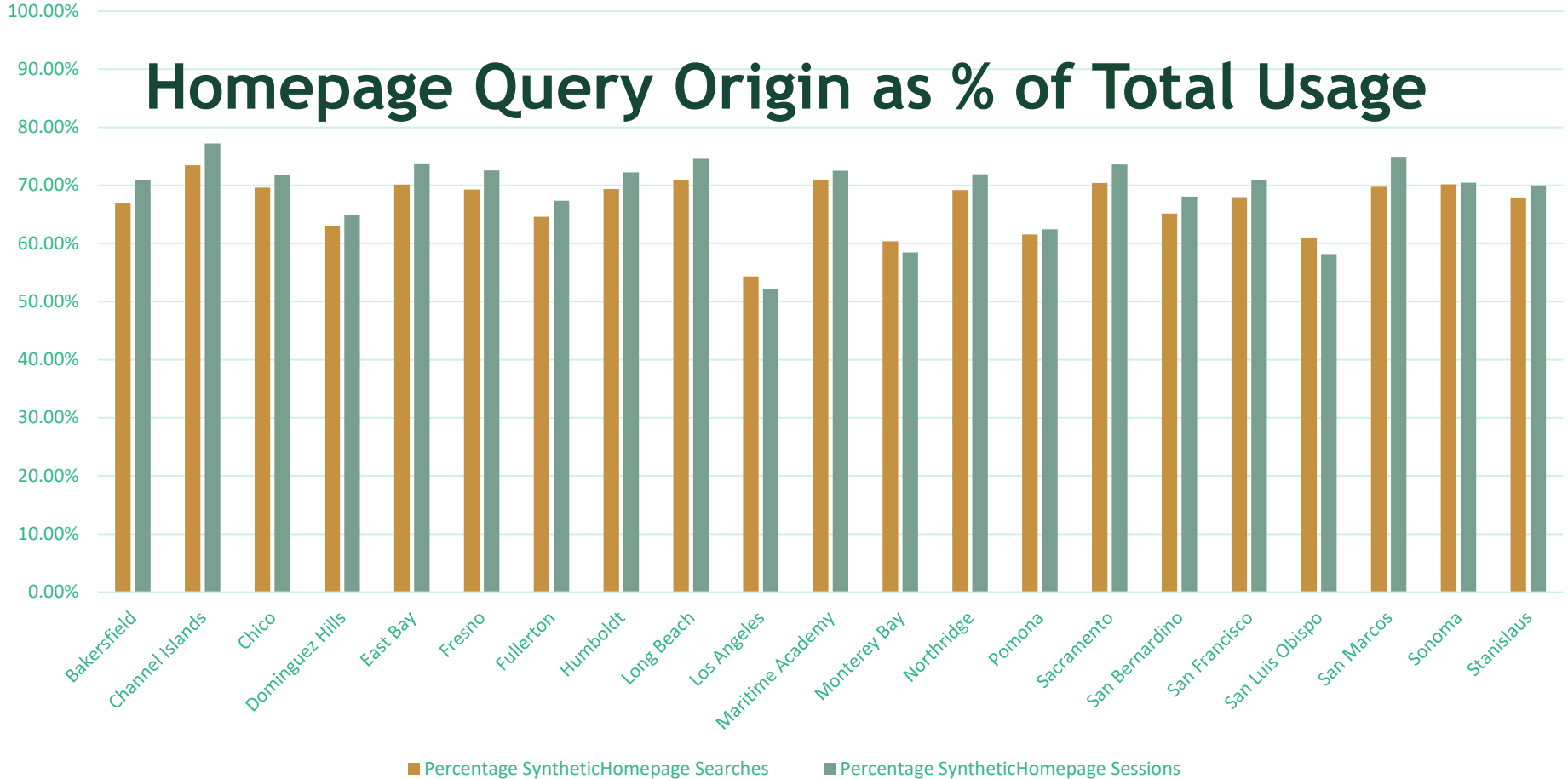
		Sum of Squares	df	Mean Square	F	Sig.
Searches	Between Groups	846998058401.018	50	16939961168.020	19.294	<.001
	Total	28047539705773.438	31030			
Sessions	Between Groups	153969752837.709	50	3079395056.754	16.071	<.001
	Total	6090204014385.519	31030			



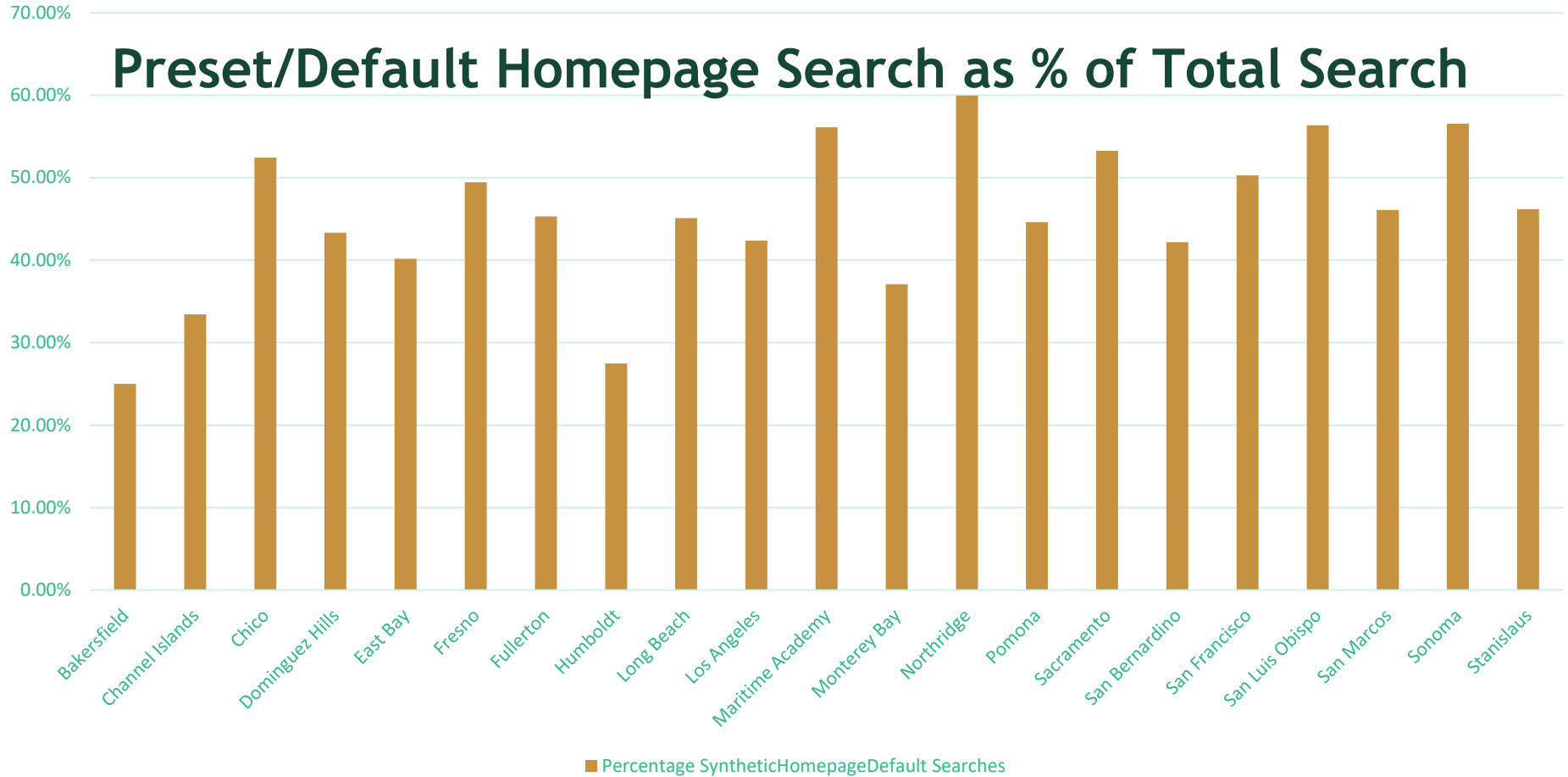
User Group Activity '17 - '19



Homepage Query Origin as % of Total Usage



Preset/Default Homepage Search as % of Total Search



Surprising Findings

No Statistically Significant Differs Between On/Off Campus Behavior

Action Activity

- i.e. basic search, advanced search, browse, journal, newspaper
- Searches (*t*-test) $p=0.48$
- Sessions (*t*-test) $p=0.44$

Scope Type Activity

- i.e. local, pci/cdi, blended
- Searches (*t*-test) $p=0.43$
- Sessions (*t*-test) $p=0.43$

Active Tab Activity

- E.g. everything or CSU+
- Searches (*t*-test) $p=0.39$
- Sessions (*t*-test) $p=0.35$

All calculations exclude
Dominguez Hills



No Statistically Significant Diff's Between Signed In (or not) Behavior

Action Activity

- Searches (*t*-test) $p=0.39$
- Sessions (*t*-test) $p=0.46$

Scope Type Activity

- Searches (*t*-test) $p=0.37$
- Sessions (*t*-test) $p=0.44$

Active Tab Activity

- Searches (*t*-test) $p=0.28$
- Sessions (*t*-test) $p=0.35$



No Statistically Significant Diffs in How User Groups Query

User Group Queried PCI/CDI

- Searches (*t*-test) $p=0.08$
- Sessions (*t*-test) $p=0.09$

User Group Came From Homepage Search

- Searches (*t*-test) $p=0.39$
- Sessions (*t*-test) $p=0.33$

User Group Explored

- i.e. used: advanced search, browse, journal, newspaper
- Searches (*t*-test) $p=0.14$
- Sessions (*t*-test) $p=0.14$



Simplify Search Tools

User Experience

- Reidsma (2013) recommends to prioritize the search experience in response to patrons' confusion when encountering the multitude of library resources.
- Dease et al. (2020) highlight the importance of a consistent interface throughout various platforms and "microsites" as well as the use of a single search bar.
- Muglia & Namei (2017) noted that "more choices often lead to less satisfaction".
- Porat & Zinger (2018) found that several categories in the Scope were completely missed and implemented a static facet which included "most of the collections that used to be under the Scopes drop-down menu".
- Galbreath et al. (2018) confirmed that "users are easily confused by too many interface options and thus tend to ignore them".
- Hamlett & Georgas (2019) discovered that "students are more apt to find and utilize the tool if it is the default search on the library's website".



Relevant Research Studies

ONLINE EXPERIENCE

Usability tests, interviews, task analysis, observations, peer analysis, web analytics, online surveys, defining personas, card sorting, prototyping

KNOWN DESIGN PRINCIPLES

Enhance accessibility, visual consistency, logical organization, facilitated navigation and short paths, quick response to user actions, reduce cognitive load

TECHNOLOGICAL DEVELOPMENTS

Relevance ranking algorithms, balance between privacy and tailored/personalized search results, impact of Google



Student Search Behaviors



Do not understand different source formats and types or library specific terminology



Do not use filters or facets - if they did, only limited use or top choices



Prefer basic to advanced search and do not go beyond the first page of results



Limited use of keywords and no understanding of what is being searched



THANKS!

Any questions?

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