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How Do Librarians Prefer to Access Collections?

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Abstract

The University of Kansas (KU) Libraries first made the discovery tool, Primo (Ex Libris), available to their users in the fall of 2013. Since that time, in spite of many improvements and updates, librarians still prefer to use other resources. In an effort to facilitate open and honest discussion about the Primo discovery tool and to make recommendations to improve the functionality of the instrument, librarians at KU were asked to complete a survey that helped them compare Primo to their favorite database and to Google Scholar. The survey included a known item search, a prescribed topic search, and the opportunity for them to search for a topic in their subject expertise specialty. The librarians were asked the following questions about each resource they used:

- Looking at the first ten results, how many of them are relevant?
- Did you change your search strategy or use the facets in Primo or other methods of narrowing in on a topic to find more relevant results?
- What was your reaction to the results in each resource?
- Was it obvious the results included books, articles, or other resources?
- Were the results easily accessible?

In this session, KU librarians will share their survey instrument. They will discuss, in detail, the results of the survey and the comments made by librarians while completing the survey. They will also share the recommendations for improvements they made to IT staff who administer Primo. Audience members will be asked to share their experiences with discovery tools at their libraries.

Background

The University of Kansas (KU) Libraries has a long history of developing and making discovery tools available to their users. In 2002, as part of the KU Digital Library Initiative, the KU Libraries reached an agreement with Endeavor Information Systems to implement the ENCompass system for managing, organizing, and linking KU's digital library collections and providing a search for all of these resources using a single search box.

The expectation that ENCompass would become the primary search mechanism on the Libraries' web site quickly faded. Not only was the ENCompass search extremely slow, often the searches in some of the databases would time out before they were completed. Once the results were retrieved, KU users had to figure out what to do with them. Some of the results would link directly to full-text, but most of the results would

only display the record for the article or book. KU librarians soon realized that it was essential to teach ENCompass searching in all of their library instruction sessions, since students were drawn to the search box, whether they were successful in using it or not.

A great deal of planning and thought went into the subsequent discovery tool. A large group of library staff, representing all areas of the library, was formed to make recommendations on how to design the new "Information Gateway." The large group was split into several small groups, each of which was assigned a persona who represented a typical KU Libraries' user, including faculty, undergraduates, and graduate students in the sciences, social sciences, and humanities. Each small group was asked to brainstorm together to form a list of the resources that their individual persona would want to see on the library web site. Every group reported that their persona

wanted a single search box that was similar to Google, which would search all of the resources in their subject area.

The next-generation federated search tool that KU developed was Serial Solutions' 360 Search. 360 Search was highly customizable, so IT staff, with the aid of an advisory group of librarians, spent several months in 2007 and 2008 preparing the search for a soft rollout in the summer of 2008. The advisory group felt that it was very important to get the support of the Libraries' staff, so they attended many meetings and gatherings to get feedback about the resource, with the hopes that IT could customize 360 Search to be a much more functional resource than ENCompass had been and more popular with staff. KU's customized version did permit the user to choose databases other than the three default general databases, allowing users to search across almost all the databases that KU users could access through the Libraries' web site. The results when users did this mimicked Google, in the respect that it brought back thousands of results.

Over time, Libraries' staff became increasingly disenchanted with 360 Search. Librarians were not impressed with the results students were getting with this tool and sentiments began to suggest that a resource that could search Libraries databases as well as local collections was needed. In the fall of 2011, a task force was formed to research and review the many new discovery tools that had become available on the market, both commercial and open source products. After talking to colleagues at other schools and inviting vendors to demonstrate their products, KU librarians chose Ex Libris' Primo because of the ability to customize the look and feel and functionality.

It took IT and cataloging staff almost a year to get Primo up and running. All of the catalog records in the Voyager local catalog had to be loaded into Primo as well as digitized local collections. A second small task force of collections librarians had to decide what collections to turn on in the expansive Primo Central index provided by Ex Libris. The Primo development group worked to customize the search tool to the specifications

identified by the task force who had earlier reviewed all of the discovery products.

The Primo development group, with the help of instructional services librarians, conducted a series of workshops during the summer of 2012 to introduce Primo to the rest of the Libraries' staff. During these sessions, librarians were asked to search Primo for specific topics and provide feedback on their results and ask questions. The development group took copious notes and made changes based on the feedback they heard from Libraries' staff who attended the workshops. Finally, Primo went public at the start of the fall semester 2013.

The promise of Primo was that it would allow users to search a Google-like search box and then provide facets that would help users narrow their search by peer-reviewed journal articles, format, date ranges, and more. Primo offers suggested new searches and the ability to access full-text and images. If an item is available in Voyager, users can check the availability and location, recall the item if it is checked out, and use the retrieval system to have the book pulled from the shelf and put on hold for them at a circulation desk.

Much to the chagrin of the development group, many librarians complained bitterly that the resource was not what they had anticipated. Librarians did not understand that Primo is not a federated search tool like ENCompass or 360 Search, but it is actually searching the large Primo Central index. Usability testing was conducted with students and Libraries staff. Students were mostly satisfied with the results they received when searching Primo, but Libraries staff were not as accepting. The negative sentiments kept some librarians from promoting Primo in the classroom and to individual users.

In the meantime, the development group continued to seek out input from collections, instruction, and reference staff to make improvements to Primo. Content was added to Primo Central on a regular basis and Ex Libris scheduled multiple upgrades. Upgrades included a browse search, which greatly improved known item searching and title searching, and the ability to search by ISBN, ISSN, OCLC code, and publisher,

which were not included in the original version of Primo. Users can now “shelf browse,” which enables them to view the books in call number order that surround a book they discovered using Primo. The capabilities of Primo have improved greatly since it was made public a year ago, but the development group continues to encounter problems and bugs that must be fixed.

The development group also monitors the usage of Primo and has watched this usage gradually increase over time. By monitoring Google Analytics in Primo, they have been able to make improvements based on what links and facets are being used most. One of the most recent improvements to Primo is the ability to search for database titles in the Articles and Databases tab. Previously, this search limited the user to searching for articles only, but after the developers exported the Databases A-Z list into this search, users can now search for database titles and get a link to the database in the results.

The Survey Instrument

In order to gain even more information to make improvements, the authors of this paper decided to design a survey that would provide feedback from their librarian colleagues. The survey was designed as a comparison of searching in Primo to searching in Google Scholar and favorite subject databases. Librarians were given a known item search and a topic search and were asked to compare their results, provide positive feedback, and provide suggestions for improvement to Primo. Then they were asked to search their favorite subject database for a typical topic in their subject area and compare their results to their experiences with the other resources. The results that follow identified more ideas for improving Primo.

Results

Known Item Search

Librarians were asked to compare the results of Primo and Google Scholar when conducting a search for “Tennessee Williams—A Streetcar Named Desire.” Four of the searchers expressed a preference for Primo, citing the better

facets/delimiters available in Primo. For this known item search, one participant preferred Google Scholar. Two of the librarians expressed no preference. Three of the searchers indicated that they typically would not have used Primo or Google Scholar for such a search, but would have selected either the online catalog or Google Books.

The authors crafted this known item search to be deliberately vague. They did not specify whether participants were meant to find a copy of the play itself or criticisms of the play. The intention behind this was to allow for the greatest flexibility in the search. Many of the librarians reported that they were surprised by the range found in the results. Indeed, one searcher reported a number of results that were related to musical versions, leading to the concern that this might mislead a novice student into thinking that the play was a musical. Another searcher noted that none of the first ten results linked to the actual play, but rather literary criticisms and scholarly articles about the play. These ranges of results were reported when using both Primo and Google Scholar, and may have contributed to the preference for Primo’s results, since Primo offers superior facets and delimiters to further narrow the search. Several of the searchers reported using the facets to narrow down the results and ultimately find a copy of the play.

“My first reaction to these results is that they are probably less useful to most undergraduates who might be doing a search on both Primo and Google Scholar. The Primo results look to be a) almost immediately useful, and b) less scholarly. I would add that Primo allows more options along the left side for refining the search.”

And

“In comparing the two searches, I would feel somewhat frustrated that I did not locate the play ‘A Streetcar Named Desire’ easily in either search interface. However, in the Primo search, I did eventually get a call number and location after narrowing by format, then by author. In the Google Scholar, I never did find a digitized version.”

Prescribed Search

Using Primo and Google Scholar, librarians were asked to compare and rank the first ten results for the topic: treatment for attention deficit disorder. The searchers were asked to rank the first ten results of both searches, with a ranking of 1 being the most relevant and a ranking of 5 being not relevant at all. For overall averages, Google Scholar scored 2.13 and Primo 2.69.

Seven of the searchers of the prescribed search preferred the results found in Google Scholar, although often this appeared to be a slight preference, which is reflected in the rankings. One searcher wrote:

“With respect to ADD, both were relevant and useful in their own ways. The top ten Primo results were more recent, but the top Google Scholar results perhaps got at the topic better.”

Two of the participants preferred the results found in Primo, with one searcher noting that the facets/delimiters in Primo made the results similar to those found in Google Scholar.

“I believe that Google Scholar gave a better concentration of relevant items. I did not use the facets to improve the results until I read this question [Please describe any changes you made to get better results]. When I eliminated reviews, newspaper articles, AV, etc., the results were more on a par with Google Scholar.”

Some of the searchers created more advanced searches for this prescribed search. One searcher, searching Primo, did a subject search for “attention deficit disorder” coupled with a keyword search of “treatment,” and limited the results to the last 20 years. In Google Scholar, the searcher did “attention deficit disorder” as an exact phrase search in the advanced search feature, combined with “therapy, treatment” in the “with at least one of the words” field, and also limited the results to the last 20 years. The searcher reported a slight preference for the results found in Google Scholar.

Several of the searchers expressed frustration with the high number of duplications found in the Primo results.

Searchers were also asked to share three positive comments and three suggestions for improvement in Primo. A number of the positive comments remarked upon the benefits of the facets and filtering options. A typical comment was: “I like the filtering options for Primo and that you get different types of media. I also like that you can use the browse-the-shelf feature.”

Primo searches over 110,000 journals, KU Libraries’ catalog, digital images, and open access research from KU ScholarWorks. One searcher noted:

“I am always surprised at what Primo produces. I would NOT rely on it as a primary search tool but it can be useful in coming up with information resources one might not have actually thought to seek, or added resources of potentially tangential interest.”

One of the more common concerns voiced by librarians has to do with an uncertainty about what information is being indexed in Primo, particularly regarding wanting to know which databases are searched in a Primo search. This concern was addressed in one of the comments:

“I’m never certain what universe I’m looking at in Primo . . . Also, as a commercial database, it is subject to market influences. What’s in there today is not necessarily going to be there tomorrow, depending on what info has been licensed for inclusion.”

Suggested improvements were more varied, with comments about relevancy ranking and duplication elimination. Others noted more specific areas for improvement, such as:

“When a result points to multiple ‘versions’ of something, they’re often completely different things (movie vs. book vs. translation), so I’m not sure that collapsing them into one result makes sense since a user might glance at the first ‘version’ presented in the results list and think that all the ‘versions’ would be movies, etc.”

Subject-Specific Database Search

Participants were asked to search for resources in their favorite subject-specific database using a typical research question in their subject areas. They were then asked to rank each for relevance on a 1-5 scale, with 1 being most relevant and 5 not being relevant at all. One searcher gave the subject-specific database an overall rank in the 3 range. Two of the librarians' overall ranking for the subject-specific database was in the 2 range. The remaining participants all ranked their favorite subject-specific database results in the 1 range. They were then asked to discuss their reactions to the results from each resource: Primo, Google Scholar, and favorite subject-specific database. They were further asked to identify which resource gave the best results. And finally, the participants were asked whether there was anything outstanding about the resources to note.

Six of the searchers preferred the subject-specific database results over any they had found in Primo or Google Scholar. One of the participants noted:

"I think it is clear that using the proper subject database is much more effective IF you have an idea of what you need to retrieve AND realize that kind of question needs a sophisticated, built-over-time tool."

Several of the searchers clarified that they did not find useful results in any of the databases, indicating that an online catalog would have been the resource most appropriate for the research need.

"I wasn't happy with the results with any of these three sources—[humanities database], Primo, and Google Scholar. There are obviously very little contemporary articles on this subject, so it would be necessary to go to other sources, including the online catalog."

One participant expressed surprise at the quality of the results in Primo.

"I was surprised that Primo compared more favorably than Google Scholar for the prescribed searches in 1 & 2. I still got the best search results by going to my subject-

specific database to search for materials on a typical topic for [the discipline]."

Another searcher had the opposite experience:

"I found Primo to be frustrating to use. There were many duplicates which decreased efficiency and the results were less relevant and less scholarly when compared to using Google Scholar."

Recommendations and Conclusions

One of the most common complaints among the librarians who took the survey was too many duplicated results. This is an issue that Ex Libris continues to work on and hopefully, a future upgrade will take care of this problem. Collection librarians may be able to alleviate this problem to some degree by turning off some of the duplicative content available in Primo Central.

The librarians are still not satisfied with the relevancy ranking of Primo results, even though there has been much improvement since Primo was first introduced and Ex Libris and the KU development team continue to make tweaks that will improve results in the future.

The survey will be most beneficial to the development group by serving as a benchmark. Developers can use the search terms from the survey in Primo after upgrades and compare their results to those in the surveys to find out if the upgrade improved the results.

Finally, the results from the surveys drove home the need to educate the librarians and engage them in using Primo on a regular basis. After becoming so accustomed to federated search tools, KU librarians are having a hard time understanding that Primo does not provide a federated search. Librarians continually ask for a list of what Primo is searching, expecting to get list of databases, but databases are the smallest number of resources that Primo is searching. The Primo Central index provides content from individual publishers, scholarly societies, institutional repositories, and local collections. A better understanding of what Primo is searching will help librarians understand their search

results. Primo is a good resource for discovering local collections, so educating librarians to use Primo for searching special collections, digitized

local collections, archives, and image collections should improve overall support of Primo.