ELUNA: Ex Libris Users of North America
Milwaukee, Wisconsin
May 11, 2011

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From Installation to Evaluation

18 months of bX at K-State Libraries

Agenda

- What is bX?

- bX at K-State Libraries

- Examining bX usage data

- K-State faculty respond to bX

- Conclusions and questions

What is bX?

Concept

- Scholarly article recommendations

- Based on article usage

- Comparable to online retail recommendations

- Based on LANL research

Software

- Software as a Service

- Subscription

- Available for:
  - SFX Services Menu
  - Primo
  - bX API
  - Serials Solutions' 360 Link

bX at K-State Libraries:
Early enthusiasm

"On May 5, [2009,] Ex Libris rolled out the shiny new fabulousness that is bX…turning the [SFX] Services Menu into a point-of-need discovery tool. I think this is awesome."

--Jamene Brooks-Kieffer, May 8, 2009

http://ksulib.typepad.com/conferences/2009/05/eluna-09-bx.html

bX at K-State Libraries:
Fast action

- Production: July 2009

- Subscription model: Contributor

- bX Presence: SFX Services Menu

bX at K-State Libraries:
Customization

Configuration options:

✅ Display SFX button for all recommendations

❌ Recommend only full text articles

❌ Display "full text available" image

❌ Direct link to full text articles

Appearance:

- Heading text

- Images

- Background color

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Source: American Journal of Political Science [0092-5853] yr:2008 vol:52 iss:2 pg:344

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Publicity

Implementing bX:
Knowledge and skills

- To get bX:
  - Communicate with Ex Libris
  - bX documentation

- To bring up in SFX:
  - Access to command line or Unix File Manager
  - Services Menu customization documentation
  - Non-production SFX instance for testing

- To make it your own:
  - Skills with HTML and CSS
  - Browser web development tool

Examining bX usage data:
Metrics of interest

- How often do users see bX recommendations?

- How often do users act on available recommendations?

- What services does bX offer users?
  How do users use those services?

- What publications does bX recommend?

How often do users see bX recommendations?

Get it @ K-State

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Source: American Journal of Political Science [0092-5853] yr:2008 vol:52 iss:2 pg:344

Get it online from JSTOR

Get it online from Wiley Online Library

Full text – 56%

Check for a print copy in K-State Libraries Catalog

Catalog lookup – 87%

Save/Edit citation in RefWorks

Save/Edit citation in EndNote

Citation export – 87%

Need help? Ask a librarian

Help – 98%

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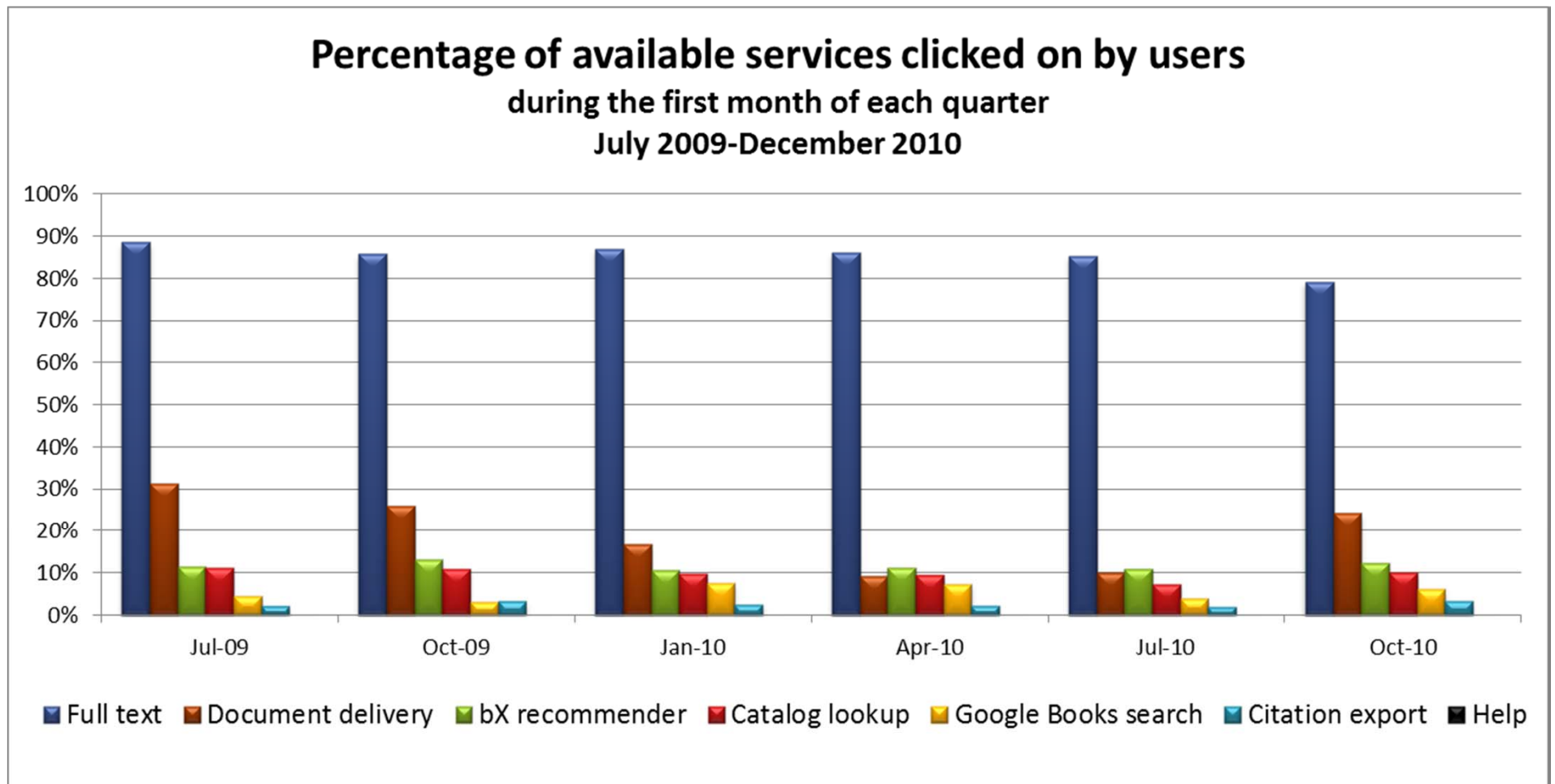
bX recommender – 34%

Percentage of menus offering a service averaged over 18 months, July 2009 – December 2010.

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How often do users act on available bX recommendations?

Percentage of available services clicked on by users
during the first month of each quarter
July 2009-December 2010

Legend: Full text | Document delivery | bX recommender | Catalog lookup | Google Books search | Citation export | Help

What services does bX offer users?

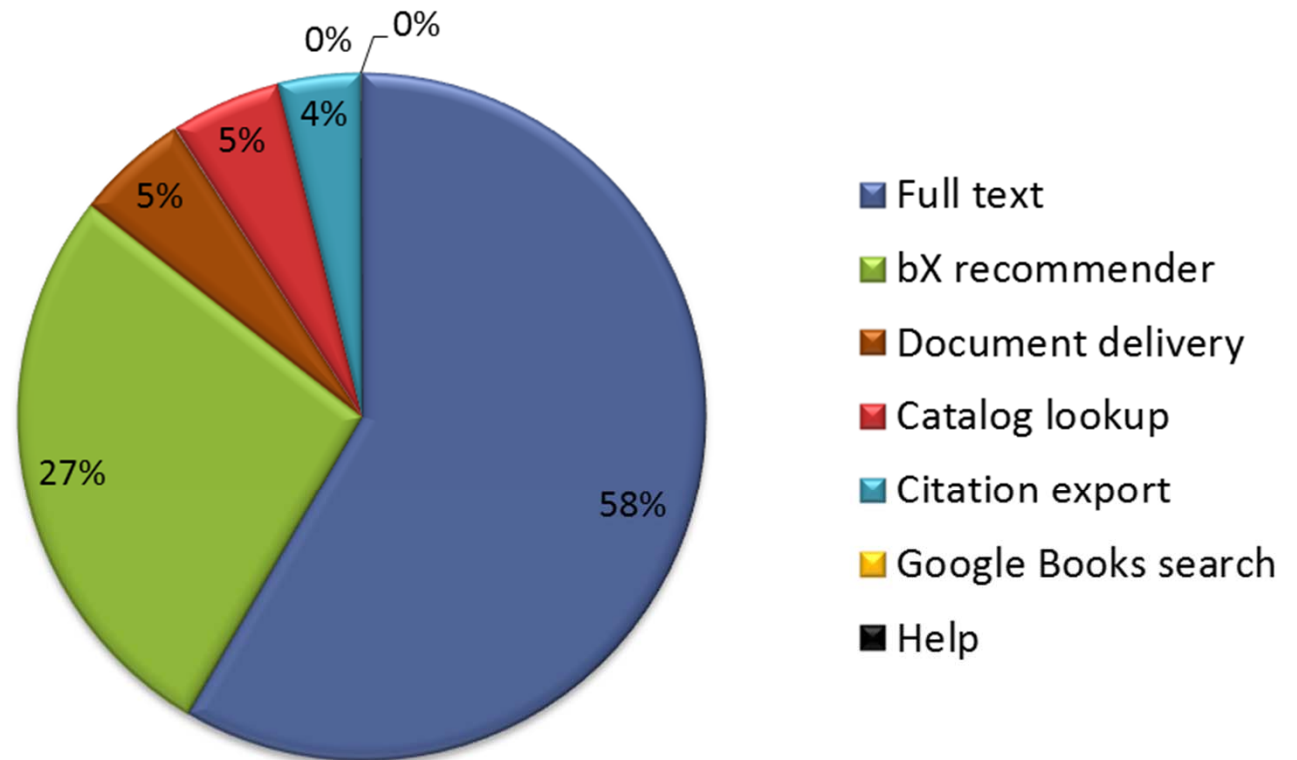| Presence of selected services on SFX Menus generated by bX July 2009-December 2010	
Full text	70%
Document delivery	47%
bX recommender	94%

Top 10 full text targets offered by bX July 2009-December 2010
Galegroup Academic OneFile
Sage Journals
ProQuest Research Library
ProQuest Nursing & Allied Health Source
Springer Link Journals
Elsevier ScienceDirect
Wilson Education Full Text
ProQuest ABI/INFORM Global
EBSCOhost CINAHL with Full Text
CSA PsycARTICLES

How do users use those services?

Distribution of total clickthroughs among all available services
from SFX Services Menus generated by bX
July 2009-December 2010

Pie chart showing:
- 0%
- 0%
- 4%
- 5%
- 5%
- 27%
- 58%

Legend:
- Full text
- bX recommender
- Document delivery
- Catalog lookup
- Citation export
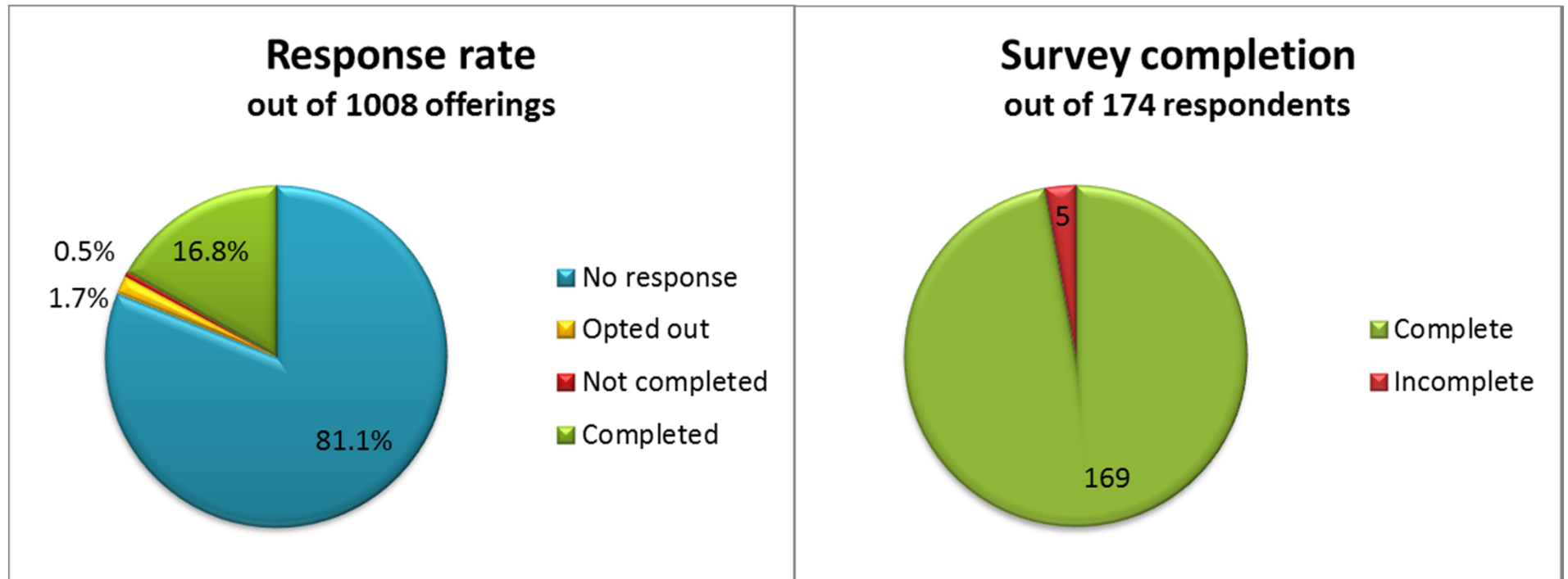- Google Books search
- Help

What publications does bX recommend?

Of 100 publications most often requested through bX between July 2009 and December 2010:

- 99 are peer-reviewed

- 98 are academic journals

- Top subject headings:
  - Psychology (31)
  - Medical Sciences (17)

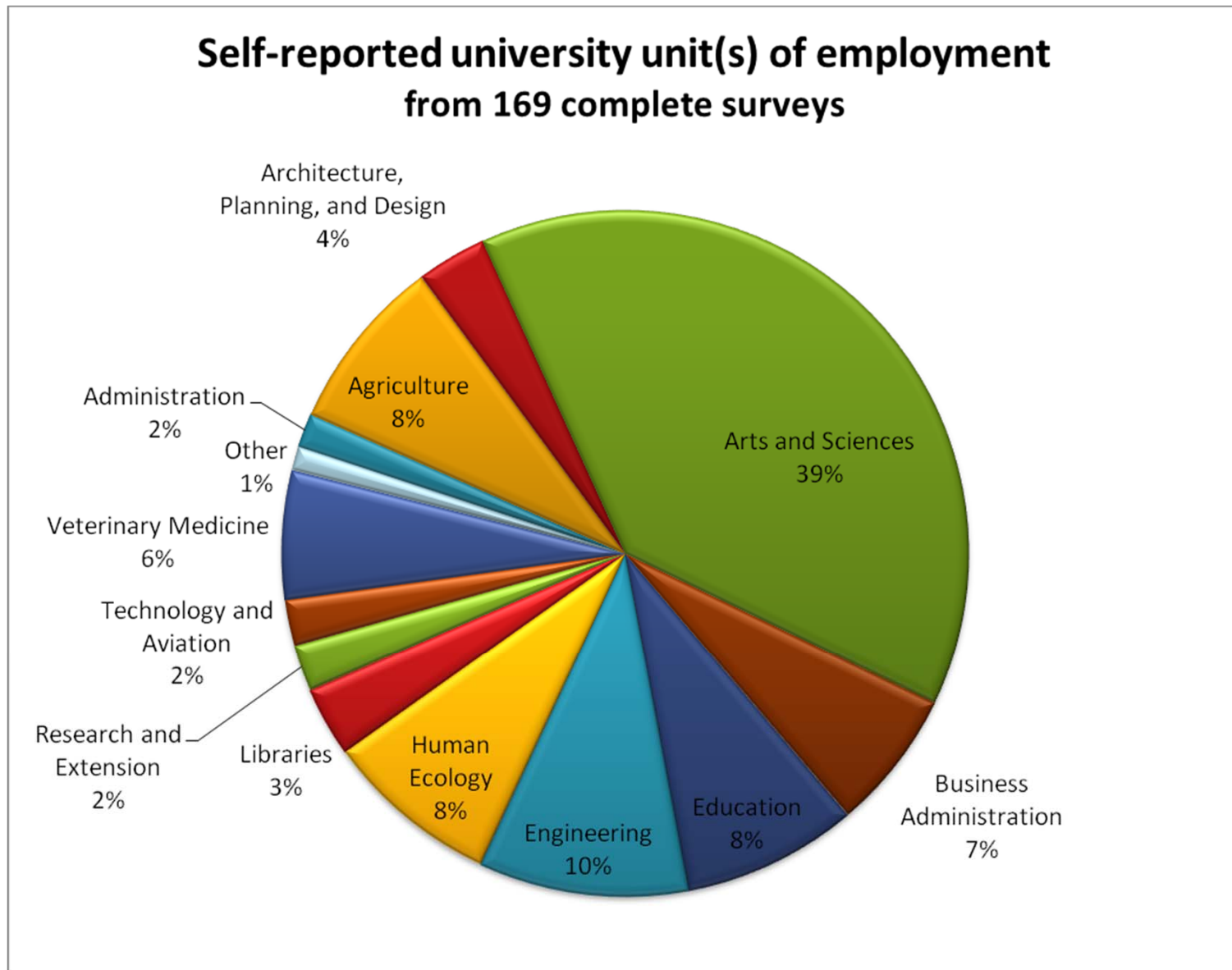- 100 are accessible at K-State

(Some) Faculty respond to a bX survey

Distributed to 1008 Kansas State University faculty
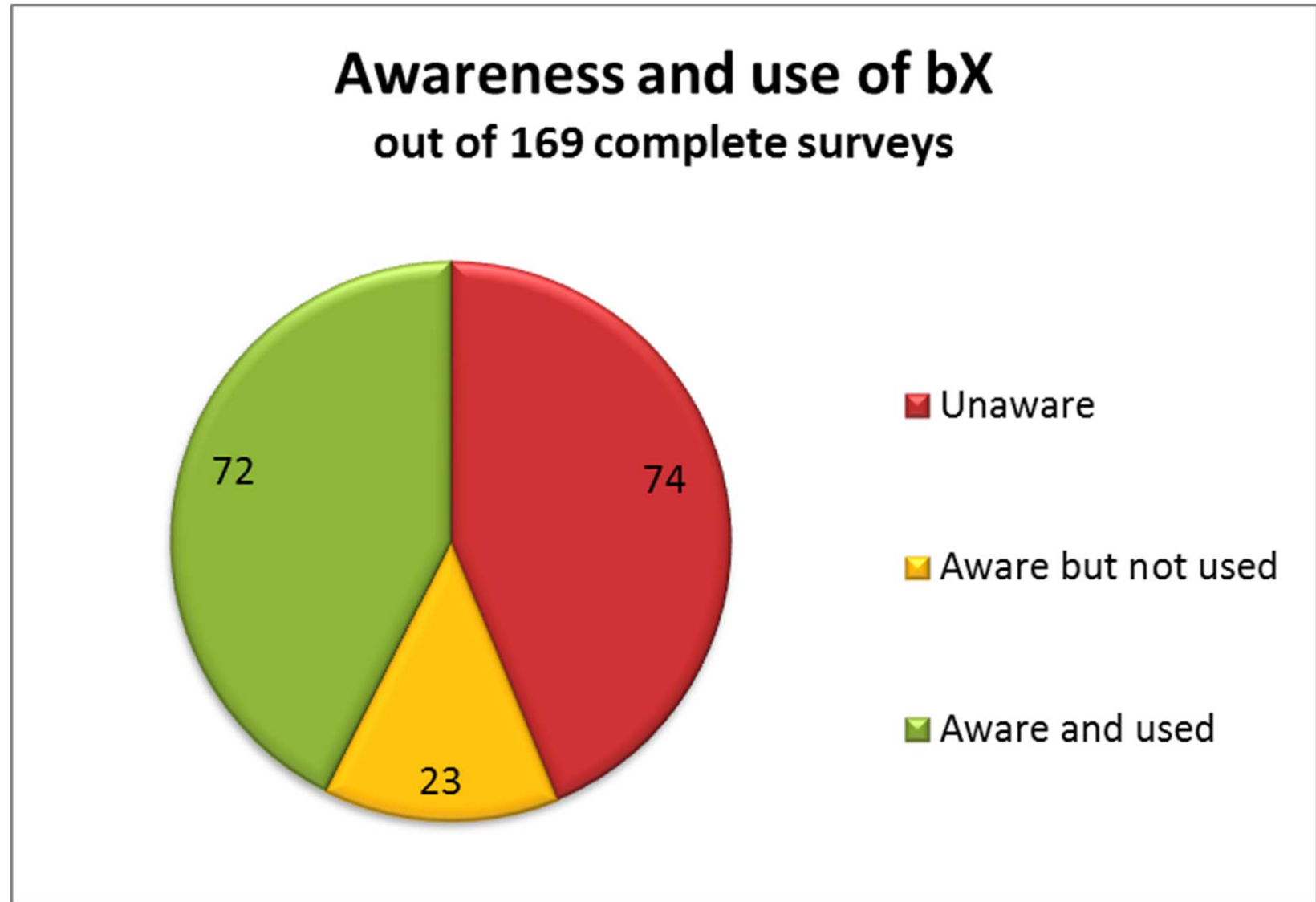November 30 – December 10, 2010

About the respondents

Self-reported university unit(s) of employment from 169 complete surveys

- Architecture, Planning, and Design 4%
- Administration 2%
- Other 1%
- Veterinary Medicine 6%
- Technology and Aviation 2%
- Research and Extension 2%
- Libraries 3%
- Human Ecology 8%
- Engineering 10%
- Education 8%
- Business Administration 7%
- Arts and Sciences 39%
- Agriculture 8%

3 groups of respondents

Awareness and use of bX
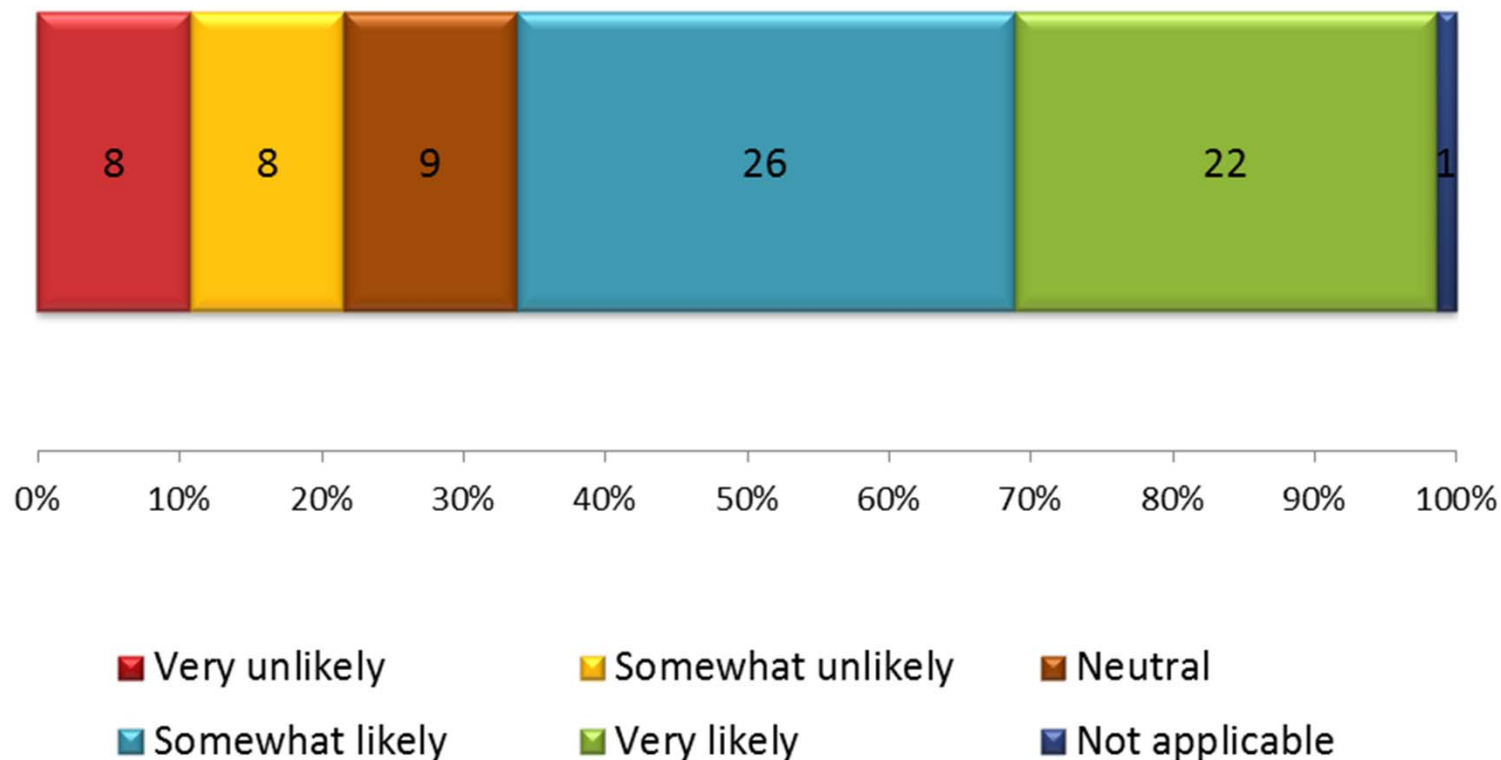out of 169 complete surveys

72 · 74 · 23

Unaware
Aware but not used
Aware and used

Might you use it in the future?

Likelihood of using bX in the future
from 74 respondents unaware of bX

Value	Count
Very unlikely	8
Somewhat unlikely	8
Neutral	9
Somewhat likely	26
Very likely	22
Not applicable	1

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Very unlikely   ■ Somewhat unlikely   ■ Neutral
■ Somewhat likely ■ Very likely   ■ Not applicable

How would you like to learn more?

Preferred sources for more information about bX
from 74 respondents unaware of bX

- K-State Libraries' Web site — 24%
- Email sent by K-State Libraries — 22%
- A contact at K-State Libraries — 20%
- Colleagues — 11%
- University-distributed publications — 9%
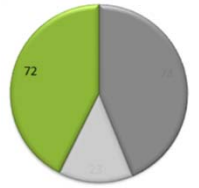- Peer-reviewed publications — 9%
- Other — 3%
- Students — 2%
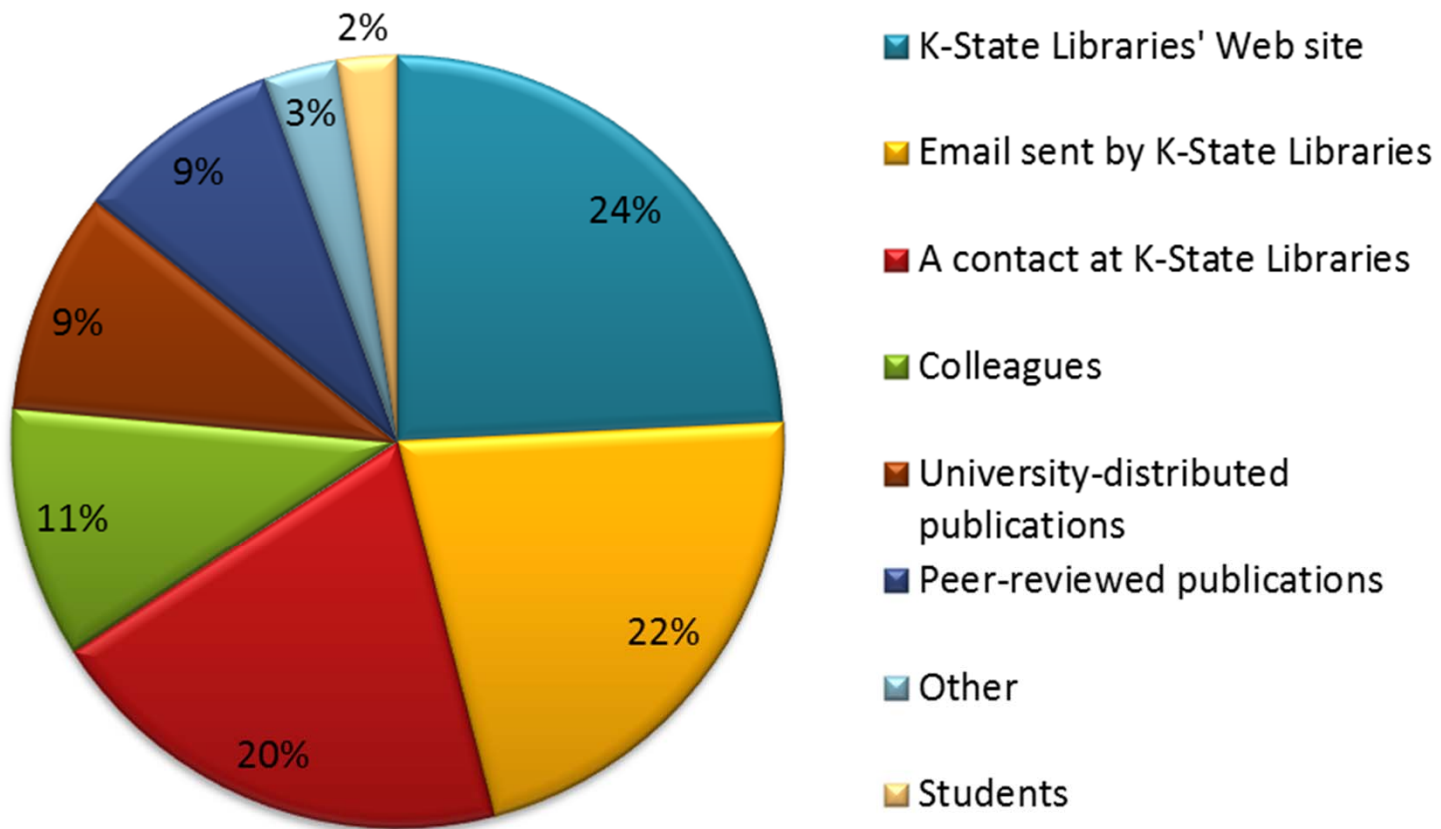
Why haven't you used it?

Reasons for not using bX recommendations
from respondents who had seen bX but had not used it

Pie chart with the following values:
- 36% — Articles not relevant
- 32% — Prefer finding articles on own
- 16% — Don't know how recommendations are generated
- 4% — Recommendations are difficult to use
- 12% — Other
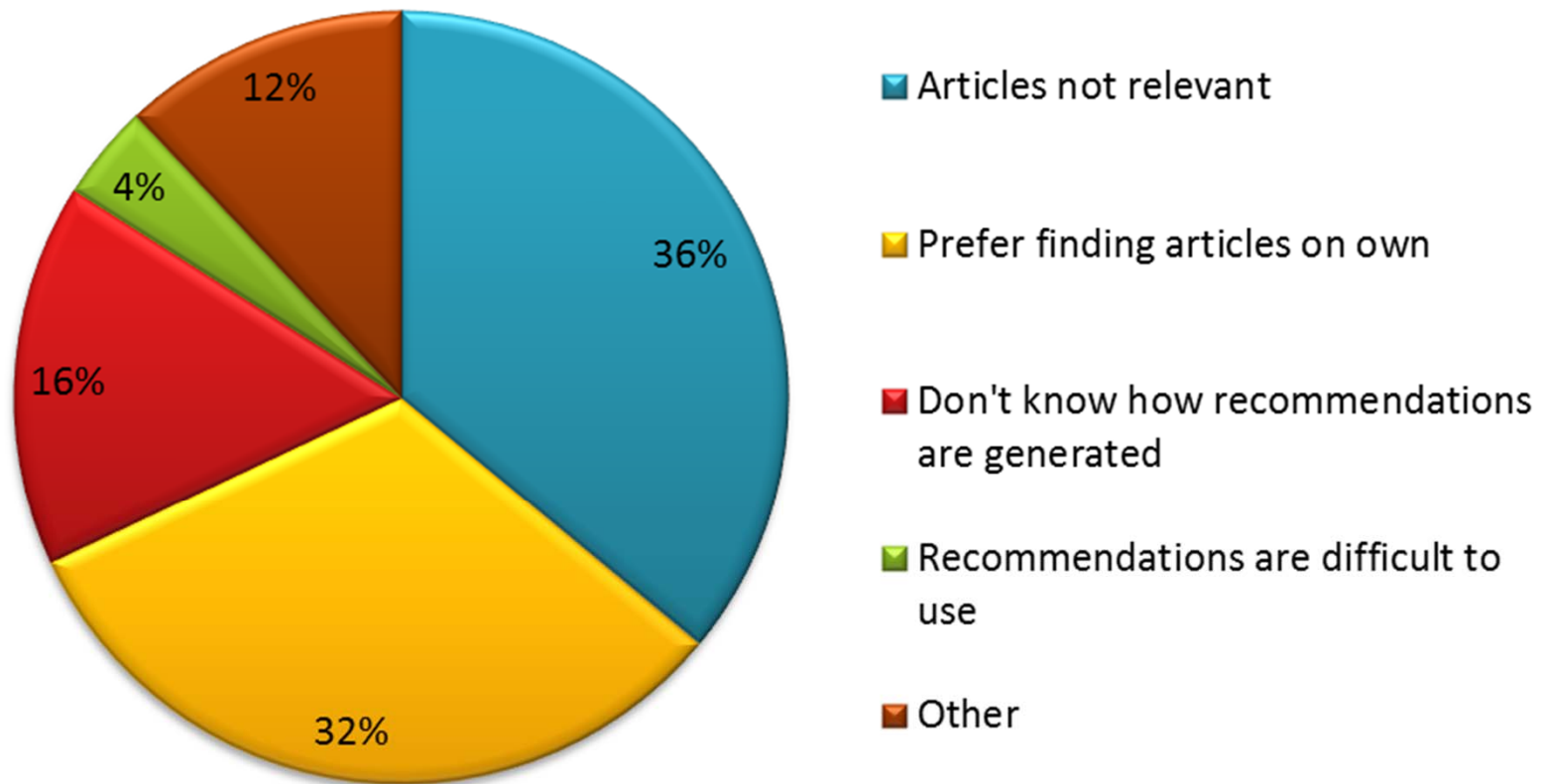
You used it; how did you like it?

| Statements about bX	Somewhat or strongly agree
Easy to use	92%
Useful for me	82%
Useful for my students	60%
Would recommend to my colleagues	74%
Would recommend to my students	72%

Recommendations in the library
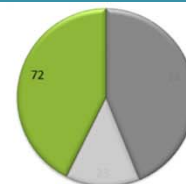
Expectations regarding recommendations

from 72 respondents who had used bX

I am curious about how article recommendations offered through the Get It menu are generated.
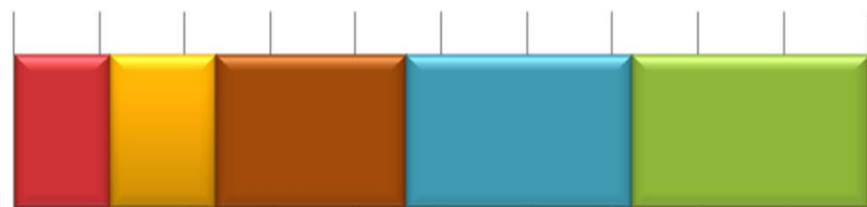
I am concerned about how article recommendations offered through the Get It menu are generated.
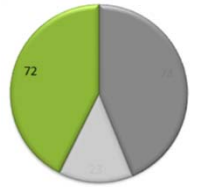
I expect the library to be able to recommend to me materials that are relevant to my work and research interests.

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Strongly disagree ■ Somewhat disagree ■ Neutral ■ Somewhat agree ■ Strongly agree ■ Not applicable

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bX, discovery tool

Perceived quality of bX-recommended articles

from 72 respondents who had used bX

Recommendations offered through the Get It menu are for high-quality articles.

This service has recommended to me articles that are relevant to my work.

This service has recommended to me articles of which I was already aware.

This service has recommended to me articles of which I was not already aware.

This service has recommended to me articles I might not otherwise have found.
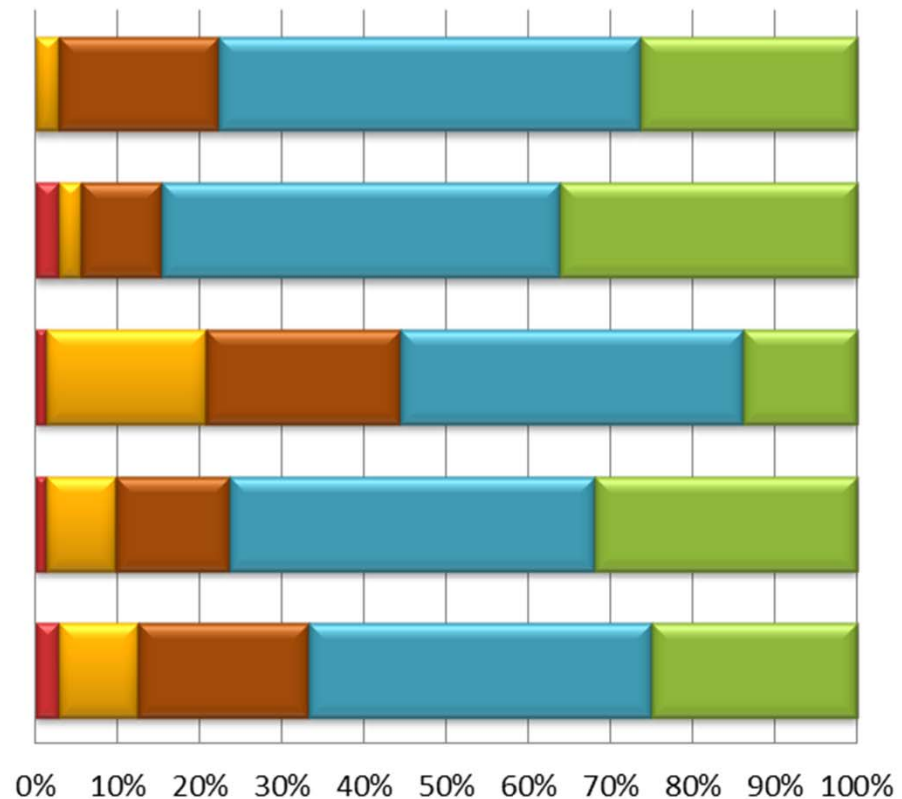
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Strongly disagree ■ Somewhat disagree ■ Neutral ■ Somewhat agree ■ Strongly agree ■ Not applicable

Conclusions: Installation choices

- Made sense at the time (Summer 2009)

- Completed with Public Services input

- Tested before production

- Never revisited

- Benefit from usability testing

Conclusions: Usage data

- SFX data methodology not ideal for bX
  - Clickthrough counting
  - Article-level vs. journal-level Services Menus

- K-State's available data suggests:
  - bX is used; perhaps not as intended
  - bX tends to be self-referential
  - bX sends users to reliable targets/journals

Conclusions: Faculty survey

- ## Survey:
  - Probably too long
  - Distributed at a busy time
  - Produced valuable data

- ## Respondents:
  - Value their time
  - Trust known research methods
  - Want to understand new tools
  - Want more information from the library
  - Skeptical about students using a "magic" tool

Conclusions: Communication

- At least 1 person:
  - Thoroughly understand bX
  - Explain bX to staff in plain language
  - Create information for users

- Public-facing staff:
  - Understand where/why bX appears
  - Explain bX basics to users
  - Watch public use and transmit feedback

- Users:
  - Know that bX is a service of the library
  - Know that recommendations are based on usage

Questions and discussion

Thanks for attending!

Contact me:

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