# A Conceptual Framework for Evaluating and Designing Information Discovery and Curation Web Tools

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#### **ABSTRACT**

UPDATED—June 30, 2015. Everyday life revolves around the discovery and curation of digital information. People search the Web continuously, from quickly looking up the information needed to complete a task, to endlessly searching for inspiration and knowledge. A variety of studies have modeled information seeking strategies and characterized information seeking and curation activities on the Web. However, there is a lack of research on how existing Web applications support the discovery and curation of information, especially concerning the motivations behind them and how different approaches can be compared. In this paper, we present a study of information discovery tools and how they relate to the nature of information seeking. We propose a conceptual framework that deals with Web application design elements that support different aspects of information discovery and curation. This framework can be used when designing, evaluating or updating Web applications.

# **Author Keywords**

#### **ACM Classification Keywords**

H.5.m. Information Interfaces and Presentation (e.g. HCI): Miscellaneous; Seehttp://acm.org/about/class/1998/ for the full list of ACM classifiers. This section is required.

# INTRODUCTION

Web technologies help people satisfy their information needs. People research their interests and hobbies using various online resources, shoppers search online stores for product characteristics to make purchasing decisions, and travelers visit online booking sites to find information about flights and hotels. In order to accommodate diverse and evolving user needs, Web applications continuously introduce new features and services, empowering information discovery and curation.

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The term "information discovery" has been used by many researchers to define or explain various information behaviour paradigms, such as information exploration [32] and serendipitous information seeking [10]. However, the definition of information discovery itself is difficult to articulate.

Lynch describes resource discovery as a complex collection of activities ranging from locating a well-specified information to iterative research activities, that can involve the identification of potentially relevant resources, organization and ranking of resources, and resource exploration [23]. Proper and Bruza apply the term "information discovery" in the context of the identification and retrieval of relevant information from electronic sources [29].

In the field of cognitive psychology, Jerome S. Bruner [4] defines information discovery as "all forms of obtaining knowledge for oneself by the use of one's own mind." We build on Bruner's definition to underline the importance of the cognitive processes that govern information discovery. Therefore, we consider *information discovery* as a process of obtaining knowledge from digital sources that can involve complex mental tasks and information behavior.

Information behavior refers to the totality of ways in which humans interact with information [37]. It can enable and support information discovery when targeted at information maintenance and augmentation. This type of information behavior is also known as *digital curation*.

Similar to the term "information discovery", the term "digital curation" is perceived differently across disciplines and among researchers. In this paper, we use the definition proposed by Giaretta [13] and adopted by the Digital Curation Centre<sup>1</sup> which states that digital curation is a process of maintaining and adding value to an existing body of information to improve its future use and retrieval.

Information discovery can take on many forms. Web users might be hoping to find particular pieces of information, such as show times and phone numbers, to satisfy specific information needs [29]. Alternatively, they might be lacking well-articulated information needs, so they engage in opportunistic browsing [22]. Sometimes people discover information online without even looking for it [1]. The nature of information discovery can vary, and therefore, it requires elabo-

<sup>&</sup>lt;sup>1</sup>The Digital Curation Centre is a UK-based organization established to support expertise and practice in digital curation and preservation across communities of practice.

rate tool support. The functionality required for information discovery and curation can also be distributed among multiple applications, which often leads to tools that provide integrated solutions. With people having such diverse information needs and methods of looking for information, designing for information discovery is a challenging task [6, 24].

Our research goal is to gain an understanding of how existing tools support digital information discovery and curation addressing the problem of designing Web applications for information discovery. While several researchers propose frameworks targeted at designing information discovery systems [29, 19], the importance of information curation in the realm of information discovery has been largely overlooked despite the rapidly increasing popularity of socially-curated information spaces. Moreover, much of the existing work that focuses on how people look for and discover information online [1, 5, 7, 17, 22, 26, 31] fails to examine concrete features of existing Web-based information discovery applications that empower real-world users. More research is necessary to determine how different tools and their features provide fundamental support for information discovery and curation.

To enhance information seeking and curating experiences and support users' interactions, we extend existing research by (1) deriving factors that enable information discovery and curation and relating them within a framework, (2) using the framework to establish a set of questions that can be used when evaluating and designing new applications, (3) iteratively evaluating the framework by using it to study and describe current Web applications as well as to design a new application, which in turn helped refine the framework of factors and questions, and (4) relating the framework to user information discovery and curation motives that drive the underlying usage of many Web-based applications.

# WEB-BASED INFORMATION DISCOVERY AND CURATION

Given the complexity of Web-based information discovery and curation tasks, a variety of research topics are examined to gain an understanding of how current Web tools support these tasks, including information-related Web usage characteristics, current information behavior models, and other aspects of information discovery and curation. This section outlines the key background literature that contributed to the development of the conceptual framework and helped answer the research questions.

# Information Behavior

Information behavior refers to the totality of ways in which humans behave in relation to information [37]. A number of models and frameworks have attempted to represent human information behaviour in its entirety or to represent some of its components, such as information seeking and searching, information retrieval, information discovery, and information curation.

One of the early information behavior models was proposed by Wilson [34] in 1981. It states that information seeking behavior results from the user trying to satisfy a perceived information need, and consequently, the user makes demands on information systems. Success or failure of such demands dictates whether the process is repeated or, if the information need is satisfied, it is used or communicated with other people.

These underlying ideas remained in the revision of Wilson's model [35] in 1997. In the new model, however, Wilson defined possible barriers (psychological, environments, demographic, etc.) that can impede information seeking. Additionally, the model recognizes that information seeking behaviour can take on many forms and is not limited to active searching. Saracevic [30] and Ingwersen [15] derived comparable models that focus on human behaviour when interacting with information retrieval systems.

### Information Seeking Models

Information seeking refers to "the purposive seeking for information as a consequence of a need to satisfy some goal [37]." A number of researchers have tried to identify what different modes of information seeking behaviour may entail.

According to Kellar et al. [17], information seeking is composed of browsing, fact finding, and information gathering. Although the authors categorized information gathering as part of information seeking, it appears to be more closely related to digital curation [3, 33].

Bates [1, 2] proposed a model of four information seeking modes: being aware, monitoring, browsing, and searching. Bates differentiated the modes based on the user's level of attention being active or passive, and information needs being directed or undirected. Thus, browsing can be characterized as undirected active information seeking because users do not know exactly what information they are looking for, but they are actively looking. Searching falls under active directed information seeking because the information need is clearly defined and the search is directed. Finally, monitoring and being aware are passive modes of information seeking although monitoring is directed and being aware is undirected.

Ellis et al. [7, 8, 9] proposed a model of information seeking characterized by six different patterns: starting, chaining, browsing, extracting, monitoring, and differentiating. Ellis' model complemented Kuhlthau's work, which correlated stages of information seeking with feelings, thoughts, actions, as well as anticipated information tasks [21].

Finally, Wilson also proposed a "problem solving model" of information seeking behavior [36]. The model reflects on the idea that people engage in information seeking and searching in order to resolve some uncertainty that stands in the way of solving, defining, or identifying a problem.

# Information Exploration

Information exploration, or exploratory search, does not have a single definition in the realm of information behavior. Waterworth highlights that exploration is a "broad" activity and identifies browsing as an example of exploration [32]. According to Marchionini [24], exploratory search involves learning (knowledge acquisition, comparison, comprehension, etc.) and investigating (analysis, synthesis, evaluation,

discovery, etc.) Similar to Janiszewski [16], in terms of information exploration, our focus is on the visual aspects of information exploration, specifically visual and spatial data representations.

#### Information Foraging

Information foraging theory is another approach towards understanding how people adapt their strategies of interacting with technology when seeking, gathering, or consuming information, depending on the environment [28]. The theory resonates with explanations of human behavior in the context of food foraging.

The underlying assumption of the information foraging theory is that people, similarly to when they forage for food, adopt their foraging strategies to the environment in order to gain the maximum amount of valuable information. The theory states that "natural information systems evolve towards stable states that maximize gains of valuable information per unit cost."

The theory introduces three key concepts to formulate an understanding of information foraging: information scent, information diet, and information patch. An *information scent* refers to proximal cues (often visual or linguistic) that people use to identify the value of information. An *information diet* deals with user preferences when it comes to information. At last, *information patches* are clusters of information that an information system presents before the user. The theory with these concepts lays the foundation for existing information foraging models [12, 20] as well as social information foraging models [27, 11].

# Information Discovery

Kerne and Smith proposed an information discovery framework [19] that connects human cognitive processes or states to those of an information system. The framework represents a continuum of information flowing through different system and cognitive states as a result of an iterative reformulation process. The framework consists of five mental states: formulating a problem, evaluating results, updating and forming mental models, running mental models, and discovering solutions. Each mental state has a corresponding interaction with the system. For example, browsing resources (human-system interaction) facilitates evaluation or immediate results (cognitive state). The framework helps to understand the user's cognitive processes and provide affordances that facilitate information discovery.

# Digital Curation

In 2002, Bates extended her research on the topic of information behaviour with the notion of *information farming*, which involves people collecting and organizing information for future use and revisitation [2]. More commonly, information farming is referred to as digital curation.

Wittaker believes that in terms of Web use, a significant shift is happening from information consumption to information curation. People no longer use the Web just to find and consume the information they are interested in, but they also try to save and manage that information so that it can be reaccessed and exploited later [33].

Existing models and frameworks for information seeking, searching, exploration, discovery, and curation all try to explain human information-related behavior using different but comparable terminology. They help establish an understanding of how humans interact with information. However, many of them either fail to address required tool support for information-related activities or address it at a very high-level.

#### Web Tasks and Modes of Web Use

Outside the realm of cognitive models and frameworks for information behavior exists a body of research that examines information discovery, curation, and other Web information behaviours in terms of Web use and corresponding tasks, methods, and modes.

Kellar et al. [17] separated Web tasks into five categories: transactions, browsing, fact finding, information gathering, and other uncategorized tasks. In their later work, Kellar et al. [18] added communication and maintenance as additional Web tasks. Similarly to Kellar et al., Sellen et al. [31] identified six tasks that are commonly performed by Web users: browsing, finding, housekeeping, information gathering, communicating, and transacting. Using different terms, Kellar et al. and Sellen et al. both identified highly comparable tasks, such as fact finding and finding [information], housekeeping and maintenance, etc.

Building on Ellis' model of information seeking [7, 8, 9], Choo et al. [5] derived anticipated Web tasks that correspond to the information seeking patterns in the model. According to the authors, when users *identify* sources of interest, they usually identify which Websites can point to that information of interest. *Chaining* corresponds to users navigating through links on those initial pages. When people *browse*, they scan top-level pages, headings, lists, and site maps. *Differentiating* takes place when people bookmark, print, copy and paste information, or choose an earlier selected site. *Monitoring* occurs when users revisit Web pages or receive updates from previously visited sites. Finally, *extraction* can occur when the user systematically searches sites to extract information of interest.

People often engage in information seeking activities to close some knowledge gap that occurred as a result of not having enough information to perform a task [29]. Therefore, when providing tool support for various information discovery tasks, it is useful to consider the motivations, as they can be different for each task. Morrison et al. [26] make a distinction between methods of Web use and purposes. The authors derived a purpose-based taxonomy of Web use, including three purposes or motivations: finding information, comparing pieces of information or choosing products to make a decision, and using the Web to find relevant information to gain an understanding of some subject. Consequently, methods of finding information identified by Morrison et al. are collecting, finding, exploring, and monitoring. The differences between the two taxonomies suggest that different information seeking tasks may be performed to satisfy more than one information seeking purpose. Therefore, each purpose may require more than one task-supporting mechanism.

Morrison et al. also draw a distinction between finding or looking up information and exploratory search. Whereas information lookup involves tasks such as fact retrieval, navigation, and verification, exploration is more cognitively demanding and involves learning and investigation [24]. Learning and investigation can be performed over multiple iterations, and can involve learning though various media, "social searching", and serendipitous browsing performed with the goals of knowledge acquisition, socialization, forecasting, and planning.

Categorizing Web usage into information seeking, digital curation, and other Web tasks does not necessarily give full insight into how information-related tasks are performed. Lindley et al. [22] conducted a qualitative study involving 24 participants, tracking their daily Web usage in the form of a diary. As a result of this study, the researchers identified five distinct modes of Web use: respite, orienting, opportunistic, purposeful, and lean-back. According to the authors, people browse the Web opportunistically when they look for information related to some personal interest, long-term goal, or future ambition. Purposeful use occurs when the users know what information they need to acquire or what online action they need to perform in order to continue or finish some other activity. Respite mode usually occurs when users are in the process of waiting for something or taking a break, and it serves as a means for people to temporarily occupy themselves when high engagement with the content is not a requirement. Orienting mode usually occurs when people want to be updated on what has been happening in their environment. Examples of this mode are checking email at work or looking at the news and updates on a social networking site. Finally, lean-back mode of Web use can be thought of as listening to the radio or watching television, and usually involves watching videos online or browsing through other types of entertainment content.

Lindley et al.'s primary motivations behind looking at use modes that occur when people browse the Internet were because that traditional Web use studies and Web tasks discovered by other researchers do not reflect the depth of user's intentions online. Understanding the characteristics of different modes guides the design of Web interaction. For example, opportunistic use can have unarticulated or continuously changing information needs. People often cannot indicate the completion of Web tasks, and they finish whenever they have been browsing the Internet for too long, or whenever they need to complete some other task of higher priority. Then, they will often resume their opportunistic information seeking. Finally, opportunistic use is 'grasshopper-like', which means that users jump from one resource to another [22]. From these factors, we can assume that to support such Web usage, we would need to consider mechanisms for supporting users' information needs, revisitation, and arbitrary navigation.

Different taxonomies of information seeking and curation tasks reflect on the actual Web usage rather than theoretical modeling of human behavior. However, these taxonomies still focus on human activities when they interact with technology. A better understanding of how the system can support these activities is needed in order to effectively support human information-related interactions.

### **Collaborative Information Discovery and Curation**

By surveying 204 Web users, Morris found that people often desire to or do collaborate on information seeking tasks [25]. To collaborate on information seeking, people often use instant messaging, email, create documents and Webpages to share information. Occasionally, collaborative information seeking occurs when collaborators work side by side and share search results in person.

Collaborative information-related activities on the Web are not limited to information seeking. Collaborative information tagging is a way of organizing content for future search and navigation. Although it is usually performed for personal reasons, tagging greatly enhances information retrieval [14].

# Summary

Today, there are a multitude of tools that support different aspects of information discovery and curation, but understanding how these tools are similar (or differ) is difficult. Moreover, the existing research is not useful for identifying gaps in current tools or ways that current tools may be improved to support information discovery and curation. We address these problems by presenting a conceptual framework for information discovery and curation (see Section ??).

#### **METHODOLOGY**

The methodology used for the study presented in this paper consisted of five major steps. To gain a deeper understanding of the problem of information discovery and curation, (1) we conducted a extensive literature review. Based on the literature review, (2) we derived a preliminary set of information discovery and curation design factors and related them within a framework. (3) The framework was then applied for the evaluation of 20 different information discovery applications and iteratively refined after every evaluation. (4) The resulting framework was used to develop a novel place photo discovery application,revealing unforeseen gaps that were consequently addressed. Lastly, (5) the framework was applied to a reevaluation of some of the previously evaluated tools with the purpose of validating its effectiveness. A summary of the methodology is presented in Figure 1.

# RESEARCH QUESTIONS AND OBJECTIVE

This study was designed to address the problem of designing Web applications for information discovery and was motivated by the following research questions and a research objective:

RQ1: How do existing Web applications support information discovery?

RQ2: How do existing information discovery applications support information curation?

To address RQ1 and RQ2, we conducted an extensive literature review (see Section ) and a case study of 20 information discovery tools (see Section ). Using insights from RQ1 and

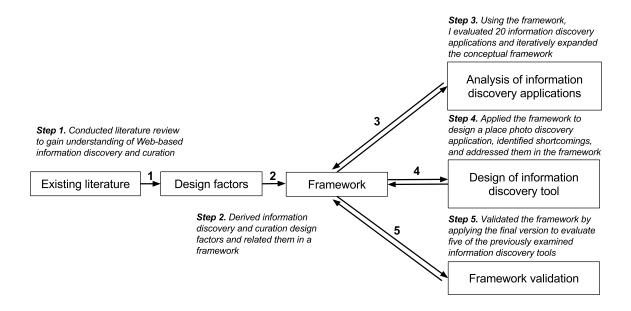


Figure 1. Methodology Overview

RQ2, we established our main research objective, which is to develop a framework for performing summative and formative evaluation of Web-based information discovery and curation tools. We further address our methodology for building the conceptual framework in Sections , , and .

# LITERATURE REVIEW

The development of the framework began with an extensive literature review. A diverse set of topics contributed to forming an understanding of information discovery and curation, including information behaviour and information seeking models, high-level Web tasks and modes of Web use, exploration-based models of discovery, and methods of personal and social curation. From this review, the preliminary design factors for the framework were derived. Key findings in the current literature are presented in Section ??.

# BUILDING AND REFINING THE CONCEPTUAL FRAME-WORK

Through a careful analysis of 20 information discovery applications (see Table ), the framework was iteratively expanded by adding new concepts and establishing relations between those concepts. The framework was refined as we explored the literature and available tools, and for presentation purposes in this paper, we present only two versions of the framework. The preliminary framework was a result of this tool analysis and depicted in Section ??. The final version of the framework (see Section ??) was a result of developing an information discovery application based on the preliminary work.

For our case study, we selected some of the most used information discovery applications today and considered the full

range of features in those tools (both by referring to the literature and documentation on those tools, as well as exploring the features). The popularity of information discovery applications was determined using Website popularity ranks provided by Alexa<sup>1</sup>, a commercial Web traffic data provider. The focus was on applications that had strong information discovery components and lesser priority was given to applications whose purpose revolved only around curation.

I used Yin's strategies for designing a case study [38] for guidance. The motivation behind choosing a case study over other methods of qualitative research was based on our choice of research questions, the lack of control over existing applications and their development, and having to focus on contemporary use of real-life Web applications. According to Yin [38], a case study would be an optimal research strategy given the above characteristics.

My study consisted of 20 cases, whereby each case is a Web application that focuses on the support of information discovery. we examined the overall purpose of each application, its description as defined within the application, as well as literature and documentation related to the application (if they were available) against the features that the application provided. For example, if an application provided bookmarking features, we checked if it was indeed intended to be used for information preservation.

Consequently, the methodology was an iterative process of selecting cases, analyzing them, and determining whether they could be described and evaluated using the framework. If we found a key feature that could not be described, we

<sup>&</sup>lt;sup>1</sup>Alexa is available at www.alexa.com

adapted the framework according to the findings. We repeated the process of case selection and evaluation until the framework was usable for all cases. We then grouped the elements of the framework into categories, recording corresponding questions to ask in order to evaluate applications.

A list of the tools that were used in this study are presented in Table . Summaries of their evaluations using the preliminary framework can be found in Appendix ??. Other tools were considered throughout the study, however, only the 20 applications presented underwent systematic examination.

Application	Address	Description	
Pinterest	www.pinterest.com	Visual discovery tool	
Delicious	delicious.com	Social bookmarking service	
Tumblr	www.tumblr.com	Microblogging plat- form	
StumbleUpon	www.stumbleupon.com	Web page discovery tool	
Wikipedia	en.wikipedia.org	Free content Internet encyclopedia	
Google Maps	www.google.ca/maps	Web mapping service	
Rotten Tomatoes	www.rottentomatoes.com		
500px	500px.com	Photography site	
BucketList	bucketlist.org	Goal tracking and dis- covery service	
We Heart It	weheartit.com	Visual discovery tool	
Scoop.it!	www.scoop.it	Online publishing platform	
Google Images	images.google.com	Image discovery ser- vice	
Vimeo	vimeo.com	Video sharing Website	
LifeHacker	lifehacker.com	Daily blog	
YouTube	www.youtube.com	Video hosting plat- form	
Yelp	www.yelp.ca	Business review site	
IMDb	www.imdb.com	Movie database	
Trip Adviser	www.tripadvisor.ca	Travel site	
Urban Spoon	www.urbanspoon.com	Online bar and restaurant guide	
Thesaurus	thesaurus.com	Online thesaurus	

Table 1. Web-based Information Discovery and Curation Tools as of May 15, 2014

# APPLYING THE FRAMEWORK TO THE DESIGN OF AN INFORMATION DISCOVERY AND CURATION APPLICATION

In order to analyze the framework's capabilities when designing for information discovery and curation, we used the framework as a guide for developing a place photo discovery application. The motivation for choosing a place photo discovery application was based on the gaps that were exposed during analysis of some of the applications, such as Google Maps and Pinterest. Applying the framework to designing an application has triggered more changes within the framework, its further extension and refinement. The resulting application is discussed in Section ??.

# FRAMEWORK VALIDATION

In order to further validate the framework, it was applied to the reevaluation of five of the previously examined tools for comparison purposes (see Section ??). For each tool, we identified gaps and proposed directions for future development.

#### **LIMITATIONS**

The case study we conducted has a number of limitations. A lack of documentation, research literature, and formal descriptions of available features for some applications introduces a threat to the construct validity of the study. In addition, information discovery tools and features can be used in unintended or unforeseen ways by designers and developers. Therefore, the recorded use of some features within information discovery applications was recorded on our interpretations. To compensate for such limitations, the researchers personally employed the tools over an extended period of time to gain a deeper understanding of their use. In addition, we considered some cases with similar functionality and design to be able to validate or clarify prior findings.

Many Web applications evolve rapidly. Therefore, our tool analysis only applies to tools at the moment of the study. Additionally, framework validation was performed on five of the previously examined tools, introducing another limitation to the study.

Only Web applications running in browsers on a desktop computer were considered in this study. The study can be extended with use of various devices, such as smartphones and tablets, as information discovery patterns and mechanisms may vary for different platforms.

Another limitation was the lack of prior research on the subject matter. Some researchers have studied information seeking models and high-level Web tasks, but there is a lack of literature on how to enable and support different Web tasks. This opens up opportunities for future research to analyze methods of developing and building frameworks for facilitating and evaluating tools that support other Web tasks, such as communication, transactions, and goal realization.

# A CONCEPTUAL FRAMEWORK FOR INFORMATION DIS-COVERY AND CURATION ON THE WEB

Although Web-based information discovery and curation tasks are commonly performed, there is a lack of literature on how to enable and support them when building Web applications. I reduce this gap by presenting a framework of design factors to facilitate digital information discovery and curation. In my framework, I build on existing models and frameworks of information discovery and curation and my analysis of existing Web tools to derive corresponding design factors for Web design. The first part of the framework deals with the *motives* behind information discovery and curation (see Section). These motives often define use cases for Web application design and help set initial assumptions about required functionality.

The second part of the framework defines the *actions* that comprise discovery and curation activities, and the design factors that enable those actions (see Section ). Some examples of actions include managing and preserving information. In order to enable these actions, a Web-based application must provide corresponding mechanisms, such as bookmarking and tagging capabilities.

Actions can be further decomposed into *operations* performed using mechanisms that enable the actions. For example, information preservation (action) can be enabled using a bookmaking feature (enabling mechanism) so that users can bookmark information using the feature (operation). Therefore, the remaining part of the framework deals with improving operations that are involved in information discovery and curation (see Section ).

On the whole, in my framework I consider human motives and relate information discovery and curation actions with corresponding enabling mechanisms. Similarly, I relate operations, that arise from actions, with corresponding cognitive support, personalization, and automation. Similar terminology is used in Activity Theory [?] to describe human practices.

Figure 2 gives a high-level overview of the framework and illustrates how the different components of the framework are connected.

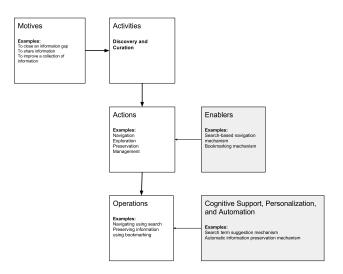


Figure 2. Framework Composition

# MOTIVES BEHIND INFORMATION DISCOVERY AND CURATION

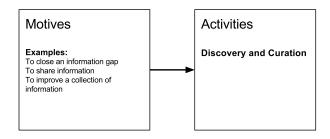


Figure 3. Section Overview: Motives Behind Information Discovery and Curation

There are a wide variety of user motives behind information discovery and curation, and certain aspects of these motives can significantly impact the design of an application. Understanding a user's motives can help form a conceptual model of a needed Web application and its features. The following generalizations of motives and their properties can help define conceptual models and identify primary information discovery and curation use cases. Figure 3 illustrates the part of the framework discussed in this section.

### Closing a Knowledge Gap

The primary motive for information discovery is usually to close a knowledge gap that occurs when the user tries to accomplish a task and lacks information to do so. This motive can take up various forms, which often depends on the nature of the information need and other conditions surrounding the given motive.

Depending on the context in which it arose, an information need can have various degrees of specificity. For example, if the motive is to find inspiration for a project, the information need is vaguely defined. However, if the motive is to find a phone number of a specific business, an information need is well-defined. In some cases, the information need may be hidden and the user might not be aware of the existing knowledge gap. The specificity of an information need determines important properties of information discovery mechanisms, such as whether users can benefit more from mechanisms that allow them to specify an information need, help form an information need, or allow them to randomly retrieve information. This property has to be taken into consideration when evaluating or designing a Web application.

The nature of an information need predetermines whether discovery is respectively serendipitous or oriented towards fact finding. Therefore, depending on the user needs, an application can be designed to increase serendipity and opportunistic discovery or to improve purposeful fact finding. On the one hand, displaying featured content can improve serendipitous discovery because of its unexpected nature and novelty. On the other hand, using context (e.g., location and date) to tailor search results to the user can improve fact finding.

Another type of motive for information discovery relates to the two qualities of the Web defined by Lindley et al. – temporality and persistence [22]. *Persistence* refers to the quality of the Web that allows people to habitually revisit Web pages and continue on-going Web projects. *Temporality* refers to the quality of the Web that allows the content of Websites to be continuously updated to provide users with new information. Persistence alone usually facilitates information *rediscovery*, which is an act of refinding previously found information. However, if persisitence is combined with temporality, they can facilitate discovery of new information within the same application or channel. I refer to this type of discovery as *channel-based discovery*. Some of the common motives for channel-based discovery include orienting (or monitoring for updates) and opportunistic information discovery [22].

The motive behind information rediscovery involves finding previously discovered information and reclosing the previously closed knowledge gap (e.g., in case the information was forgotten). It usually results in the user looking for previously found resources and Web pages. In fact, Web page revisitation is one of the most commonly performed Web browsing

activities [?, ?]. The percentage of revisited web pages involved in Web browsing can range from 58% [?] to 81% [?]. Some of the reasons for revisiting pages include shopping, communication, entertainment, education, activity planning, and hobby-related information retrieval [?] (e.g., travel, fitness, and cooking). Some Web pages and resources can be rediscovered using navigation while others need to be previously preserved (bookmarked) in order to allow rediscovery. Rediscovery is one of the many ways in which information discovery and curation interweave.

### **Supporting Future Use and Reaccess**

The main motive behind information curation is to make it possible to retrieve and use information. In order to facilitate easy information retrieval, many Web applications employ various forms of bookmarking systems. Traditionally, bookmarks must be manually organized into folders. However, this method of organization has been found inefficient because folders with bookmarks become easily cluttered [?]. Therefore, in order to efficiently support information rediscovery, Web tools need to provide mechanisms for information preservation along with information management.

### **Improving Collections**

Reportedly, people gather information to improve existing collections [22]. Although some deeper motives may include self reflection or the possibility of future use, collecting information is a motive in itself. In general, information gathering may be stretched over a period of time [17], resulting in repeated page visitation. Although information gathering comprises only 13.4% of Web usage, it highly contributes to various goal-supporting activities, such as decision making and planning [17].

# **Facilitating Communication**

As part of his information behavior model, Wilson identified communication of information as an outcome of information seeking. Communication can also be thought of as a motive for information discovery and curation. To support communication of information, Web tools have to provide mechanisms that allow various users to share information among themselves.

Social bookmarking is a way to preserve and share information within various communities. In recent years, it has gained popularity as an effective way of communicating with other users [?]. One of the first visions of social bookmarking was associated with Web blogging. Oravec [?] believes that web blogs help users annotate or bookmark important information and build a "map" of the Internet. The evolution of social bookmarking has led to advanced bookmarking technologies and provided a means for collaborative information discovery and curation.

### Summary

While it is not feasible to list all of the possible motives for information discovery and curation, in this section I outline some of the key motives that can aid in developing use cases and formalizing conceptual models for Web applications. These motives also make it easier to showcase how mechanisms for discovery and curation (presented in the next section) complement each other.

# DISCOVERY AND CURATION ACTIVITIES, ACTIONS, AND THEIR ENABLERS

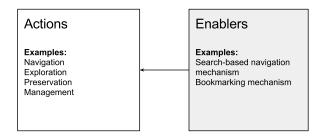


Figure 4. Section Overview: Discovery and Curation Activities, Actions, and Their Enablers

The next part of the framework (see Figure 4) deals with the actions associated with enablers of information discovery and curation. A more detailed overview is depicted in Figure 5; the two main activities (discovery and curation) are decomposed into actions, and each of the actions is supported by a group of features or mechanisms that enable a given aspect of discovery or curation in a Web application. Examples of these enabling mechanisms can be found in Appendix ??. The following subsections describe each of the feature groups and outline the corresponding questions a designer could ask to improve application design and evaluation.

#### **Navigation in Discovery: Following Information Scent**

In order to discover information, a user needs to have a way of navigating to it. Navigation in information discovery can be thought of as following an information scent. In general, information scent models deal with how users identify value, cost, or the access path of information sources based on proximal cues, such as links, icons, categories, etc. [28]. Common methods of navigation that facilitate information discovery include descriptional, referential, opportunistic, and system-regulated (see Table 2).

# Descriptional Navigation

A navigation is descriptional when the user has a means of describing their information need. It is often implemented as *search-based navigation* since it allows users to enter a search query and describe what they want to find. Some of the modern descriptional navigation systems are voice-activated.

Almost every present-day Web application has implemented a search feature, with rare exceptions of applications that utilize other methods of navigation, such as StumbleUpon and certain shopping websites. Some Web applications are *integrated* with others, enabling users to search multiple websites at once.

There are numerous ways in which descriptional navigation supports information discovery. Search-based navigation often serves as an entry point for information seeking [?]. When the motive behind information discovery has a well-articulated information need, then the user can express their information need by entering a search query.

Descriptional navigation can also help to rediscover information. However, it is not always a reliable way of refinding information [?]. In information portals that provide access to fairly ambiguous information and that have regularly updated information flow, the search feature is usually designed around retrieving information related to some general topic. In order to make search-based navigation a reliable way to rediscover information, it must return consistent results.

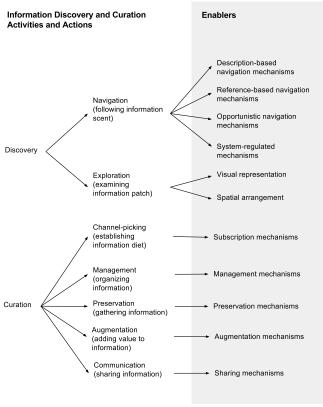


Figure 5. Information Discovery and Curation Activities, Actions, and Corresponding Enablers

#### Referential Navigation

A navigation is referential when the user finds a reference to the term that they are looking for, such as a link or icon. This reference represents an information scent. The underlying assumption of this method of navigation is that the user can recognize the needed information or a reference to it as they see it [32].

Referential navigation mechanisms can take many forms. Some common types are **categories**, **facets**, **filters** and **tags**. In some applications, users can search by a given **resource**. For example, YouTube provides a playlist with music related to the currently playing song. Information scent representatives may also reference sources outside of the given system. This enables another type of **integration** of Web applications.

Referential navigation can help the user identify their information needs by suggesting terms, topics or categories to use, and therefore, direct the user to relevant resources [?]. It can also help narrow the results to a specific type of resource so that further discovery is bounded by that type. For example,

TripAdvisor helps narrow search resilts by allowing users to choose among hotels, flights, vacation rentals, restaurants and destinations.

**Table 2. Navigation Mechanisms** 

Table 2. Navigation Mechanisms		
Navigation mech-	Questions to be posed during the de-	
anisms	sign or evaluation of discovery and	
	curation tools	
Descriptional		
Search-based nav-	Is it possible to navigate within the	
igation	application using a search mecha-	
<i>G</i>	nism?	
Integrated search	Is it possible to retrieve informa-	
8	tion from other applications using a	
	search mechanism?	
Referential	search mechanism.	
Categories	Is it possible to navigate using cate-	
Categories	gories?	
Facets	Is it possible to navigate using	
1 accis	facets?	
Filters	Is it possible to navigate using fil-	
Titters	ters?	
Tags	Is it possible to navigate using tags?	
Search by item or	Is it possible to havigate using tags:	
resource	source?	
Integrated refer-	Is it possible to retrieve information	
ence	from other applications using any of	
Clicc	the referential mechanisms?	
Opportunistic	the referential mechanisms:	
Opportunistic	Is it possible to opportunistically	
navigation	navigate through information within	
navigation	the application?	
Integrated oppor-	Is it possible to opportunistically re-	
tunistic naviga-	trieve information from other appli-	
tion	cations?	
tion	cations:	
System-		
regulated		
Static direct dis-	Is it possible to view static informa-	
play	tion directly without active search?	
Integrated static	Is it possible to view static informa-	
display	tion from other applications without	
anspiay	active search?	
Featured content	Is it possible to view featured con-	
1 catarea content	tent?	
Integrated fea-	Is it possible to view featured content	
tured content	from other applications?	
News feed	Is it possible to view news feeds?	
Integrated news	Is it possible to view news feeds	
feed	from other applications?	
1000	from oner applications:	

# Opportunistic Navigation

Opportunistic navigation is a method of navigating 'randomly' through resources and Web pages. I apply the term 'opportunistic' to describe this type of navigation because it is not truly random, however, its serendipitous nature often

makes users feel like it is. This navigation method is especially useful when the information need is fully undefined.

Many applications support **opportunistic navigation** to allow for opportunistic jumping from one resource to another. For example, StumbleUpon makes it possible to explore the Web in general — other websites and Web applications, allowing for **integrated** navigation — whereas Wikipedia provides opportunistic access to its own articles.

#### System-regulated Navigation

Web applications often display or update information without the user's active participation. This information can be a **news feed**, **featured** deals or articles, **static information**, or other types of content. In my thesis, I refer to this type of navigation as system-regulated because it occurs when the application brings the content to the user instead of the user applying any effort to find content. It differs from opportunistic navigation because the the user cannot choose when to observe new information; instead, all updates are regulated by the application.

One example of an application that utilizes system-regulated navigation is Yelp. As soon as the user enters the site, this tool displays featured restaurants as well as the user's recent activities. As with any other navigation method, system-regulated navigation can ensure cross-application **integration** by displaying content from other Web applications.

# **Exploration in Discovery: Examining Information Patches**

Exploration of resources is another action that facilitates information discovery. Visual and spatial cues, which help representing single or multiple resources, enable this action by allowing users to conveniently examine information patches (see Table 3).

Abrams et al. [?] identified link representation as one of the problems with traditional bookmarking. Analogous with browsing through a bookmark manager, identifying relevant information when browsing through links in a Web application can be a challenging task. **Visual** and **textual previews** make it easier to evaluate the relevance of resources by providing the user with more information scent. Many social bookmarking systems, such as Scoop.it! and Pinterest, support visual previews of bookmarked pages. Delicious is a social bookmarking application that lacks this type of link representation support, and therefore, it is harder to determine if a link will lead to a relevant resource.

**Visual** and **textual** information cues and representations are also important for a single resource exploration. Not only do they help navigating within the resource or Web page, but they can also contribute to the learning experience. For example, if the user would like to know what something looks like, they can learn it from the representation in question.

Similar to link representation, spatial visualization of numerous links is another problem that occurs when browsing through diverse content [?]. Therefore, a semantic to the **spatial arrangement** of information (single and multiple resources) is of major importance. Information discovery

applications often employ sophisticated ways of spatially arranging resources to make it easier to browse through large amounts of information. For example, many tools use a 'pinboard' layout of resources similar to Pinterest. Common ways of arranging multiple resources include list, grid, and gallery layouts. Additionally, **consistency** in the way multiple and single resources are represented helps form a conceptual model of how the application can be used and provides some degree of predictability [?].

**Table 3. Visual and Spatial Exploration Mechanisms** 

Table 3. Visual and Spatial Exploration Mechanisms		
Exploration	Questions to be posed during the de-	
mechanisms	sign or evaluation of discovery and	
	curation tools	
Visual and tex-		
tual cues of mul-		
tiple resources		
Visual preview	Are there visual previews of re-	
	sources to help identify resources of	
	value?	
Textual preview	Are there textual previews of re-	
	sources to help identify resources of	
	value?	
Visual and tex-		
tual cues of a sin-		
gle resource		
Visual cues	Are there visual cues to help identify	
	the value of information within a re-	
	source?	
Textual cues	Are there textual cues to help iden-	
	tify the value of information within a	
	resource?	
Spatial proximal		
cues of multiple		
resources		
List	Are resources presented in a list?	
Grid	Are resources presented in a grid?	
Gallery	Are resources presented in a gallery	
C	layout?	
Spatial semantic	Is there a semantic to the spatial ar-	
Compietan	rangement of multiple resources?	
Consistency	Are resources presented in a consis-	
	tent way?	
Cnatial massissed		
Spatial proximal cues of a single		
resource Spatial semantic	Is there a sementia to the special or	
Spatial semantic	Is there a semantic to the spatial arrangement of information within a	
	resource?	
Consistency		
Consistency	Are same types of resources presented in a consistent way?	
	senieu iii a consistent way:	

### Curation

Information curation is a common activity within many information discovery applications. By asking questions about application design with regards to information curation (see Table 4 of the conceptual framework) designers can find ways

to add value to information and enable information discovery over time.

Information discovery applications vary from being completely socially curated and populated by users, to those that lack any curation mechanisms. By definition, digital information curation is the notion of managing, preserving, and adding value to collections of information [3, 33]. Thus, the curation activity consists of actions such as information management, preservation, information augmentation, sharing, and channel-picking.

#### Management

Information management is one of the key elements of information curation [3, 33]. Information management mechanisms are prevalent in applications that have a lot of information that is hard to categorize automatically or can mean something different for each user. In the context of Web information management, **tagging** and **collection-based** information categorization play major roles.

Resource categorization helps establish relationships between various resources [3, 33]. Allowing people to tag can aid rediscovery and discovery in a socially curated space, as well as add more value to resources [?]. Sample applications that facilitate information management are Pinterest, a tool that supports tagging and collection-based categorization, and Tumblr, a tool that only supports tagging.

#### Preservation

Information preservation is a common Web task that is usually performed with the intent of revisiting information [?, 33]. However, information gathering is sometimes performed with just the goal of collecting information rather than revisiting it in the future [22].

Bookmarking is a traditional way of preserving information and many Web applications provide diverse bookmarking mechanisms. **Internal preservation of internal resources** means bookmarking resources to be reaccessed within the same application. Such bookmarking facilitates information curation within the system. **Internal preservation of external resources** signifies bookmarking other Web pages within an application. **External preservation** means bookmarking resources so that they become available through other bookmarking systems. An application must facilitate integration with other applications in order to enable external preservation [?].

For example, in the We Heart It image discovery application users can preserve *internal information* using *internal collections* and they can add information from *external* websites. However, there are no integrated means for bookmarking *internal content* using other bookmarking systems.

#### Augmentation

One of the most important elements of digital curation is augmentation: adding value to information [3, 33]. It is often performed within social bookmarking systems, and many Web applications allow users to add value to the resources they curate.

One way to augment information is by **annotating** it with comments and descriptions. Annotations are metadata attached to a resource that make it easier to search for and interpret information. For example, Yelp and TripAdvisor largely rely on reviews written by their users.

**Evaluation** methods can have various forms. They usually take place in socially curated information systems. However, evaluation can also contribute to personal reflection and information preservation. Many applications allow users to evaluate resources by rating them or recording other forms of approval or disapproval, such as "I like this" and "I dislike this" buttons on YouTube.

### Sharing

Sharing information is key to empowering social information curation [3]. Therefore, the main components that facilitate sharing are the adding of resources, and external and internal information sharing.

Adding resources not only facilitates global Web information curation, but it also scales the information available through the system, providing more opportunities for information discovery. Resources can be created by users themselves, taken from some other sources online, or both. For example, YouTube allows users to upload their own videos, whereas Pinterest permits adding images from other sites in addition to users' personal images.

Sharing resources through different media and resharing them within the Web application supports channel-based information discovery within the media channels. Information discovery applications commonly allow for sharing information on popular networking sites outside the application.

#### Channel-picking

Channel-picking is an action of selecting information sources. A common enabler for this action is subscriptions. Subscriptions to updates from a site help users follow the news [?]. In order to support channel-based discovery, an application must provide a subscription mechanism. For example, Rotten Tomatoes allows **subscriptions** to **newsletters**; however, it does not allow subscriptions to movie critics as is allowed with a user-based subscription mechanism, such as the one in Pinterest.

In some applications, the content is updated and curated by users, and users can **subscribe** to other **users** or **artifacts**. Similar to site subscriptions, user and artifact subscriptions are subscriptions to activity updates. These subscription mechanisms help with networking and provide awareness about other users' activities [?]. Such subscriptions also help filter new content delivered to the user.

#### Summary

Information discovery and curation tools can have different implementations depending on the motives behind the activities. The design factors presented in this chapter can help enable different actions associated with information discovery and curation. However, the activities can be significantly improved by additional support and automation, as described in the next section.

	e 4. Curation Mechanisms
Curation mecha-	Questions to be posed during the de-
nisms	sign or evaluation of discovery and
	curation tools
Management	
Collection-based	Is it possible to sort information into
categorization	collection-like structures, either privately or publicly?
Tag-based catego- rization	Is it possible to tag information, either privately or publicly?
Preservation	
Internal preserva- tion of internal re-	Is it possible to preserve internal information within the application?
sources Internal preserva-	Is it possible to preserve external in-
tion of external re-	formation within the application?
Sources External preserve	Is it possible to preserve internal in-
External preserva- tion of internal re-	formation outside of the application?
sources	Tormation outside of the application:
Augmentation	
Annotation	Is it possible to annotate resources,
1 IIIII Ottation	either privately or publicly?
Evaluation	Is it possible to evaluate resources,
	either privately or publicly?
Sharing	
Adding resources	Is it possible to add resources to the collection of information within the application from other websites?
Internal sharing	Is it possible to publicly reshare internal resources within the application?
External sharing	Is it possible to publicly reshare internal resources outside of the application?
Channel-picking	Cuttoff:
User subscription	Is it possible to subscribe to activities
	of other users?
Site subscription	Is it possible to subscribe to site updates?
Artifact subscrip-	Is it possible to subscribe to artifact
tion	updates?
	1

# ENHANCING THE INFORMATION DISCOVERY AND CURATION EXPERIENCE

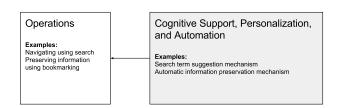


Figure 6. Section Overview: Enhancing Information Discovery and Curation Experience

The information discovery and curation enablers presented in the previous section are design elements that afford various operations. For example, the search feature enables typing in a query and searching for information. These operations can be further aided by another set of design elements that introduce cognitive support, personalization, and automation. A high-level overview of this part of the framework is illustrated in Figure 6. The primary goal of this part is to highlight opportunities for improvement over various information discovery and curation enabling mechanisms.

Strategies for improvement include providing additional cognitive support for a given operation, personalizing the user experience, and automating an operation. Not all of the strategies are feasible for every single operation, and some operations can be supported in multiple ways. The following sections outline some of the possibilities for advancing information discovery and curation features.

# **Enhancing Navigation**

There are two common methods of enhancing information discovery when search-based navigation is used (see Table 5). The first method entails returning personalized results when the user enters a search query. **Personalization** can be accomplished using a variety of techniques, including predefined user preferences, social interactions, context, browsing history, etc. The second method is to **suggest search terms** to make it easier for the user to formulate their information need. For example, Yelp suggests search terms as the user enters their query.

To further support referential navigation, applications can **personalize** reference suggestions, such as **categories**, **tags**, and **topics** of interest. They can also suggest relevant resources based on the one that the user already selected. As an example, after a user clicks a 'pin', Pinterest showcases other similar 'pins'.

For opportunistic navigation, Web tools sometimes allow users to **personalize** types or categories of information that they the users would like to discover. StumbleUpon allows users to not only choose topics of interests, but it can also help them discover new promising topics.

Featured content can also be **personalized** to improve information discovery with system-regulated navigation. For example, Yelp showcases restaurants from a predefined area, such as the city where the user is from.

Finally, to make better use of subscribed content and reduce human efforts when searching for information, an application can support various **notification mechanisms**. These mechanisms can advise the user about updates on the **Website content**, various **artifacts**, and activities of other **users**.

# **Enhancing Exploration**

**Personalization** of the **spatial** information representation usually has limited support in Web applications. Presumably, it is because consistency is more welcomed within information discovery applications than spatial personalization. However, it is still possible to personalize the arrangement

Table 5. Cognitive Support, Automation, and Personalization for Navigation

gation		
Support, automation,	Questions to be posed during the de-	
and personalization	sign or evaluation of discovery and	
elements	curation tools	
Descriptional		
Personalized results	Does the search mechanism return	
	personalized results?	
Guided search	Does the system suggest search	
	terms to the user?	
Referential		
Suggesting cate-	Does the system suggest categories	
gories	of interest?	
Suggesting topics of	Does the system suggest topics of in-	
interest	terest?	
Suggesting tags	Does the system suggest similar	
C	tags?	
Suggesting similar	Does the system suggest similar resources?	
resources	sources?	
Opportunistic		
Personalized oppor-	Is it possible to personalize oppor-	
tunistic navigation	tunistic navigation?	
tumstic navigation	tumstic navigation:	
System-regulated		
Personalized fea-	Is featured content personalized to	
tured content	the user?	
User activity update	Is it possible to receive notifications	
notification	about other users' activities?	
Application activity	Is it possible to receive notifications	
update notification	about website content updates?	
Artifact update noti-	Is it possible to receive notifications	
fication	about artifact-related updates?	

of multiple resources or information within a single resource (see Table 6).

Visual and textual personalizations are more common, especially when the content within the application is curated by its users. For example, Flickr Web application for managing and sharing photographs personalizes album covers so that they are easier to rediscover. Similarly, 'pinboards' on Pinterest have personalized cover images.

# **Enhancing Curation**

Information management can be improved if the system helps the user make decisions about information categorization or tagging (see Table 7). Alternatively, information can be **categorized** or **tagged automatically**. For example, when the user bookmarks a restaurant on Yelp, it is automatically categorized. The user can filter bookmarks by category whenever they go into the embedded bookmark manager.

Preservation operations can also be automated. An example of the most common automatic preservation mechanism is **history**. Applications such as YouTube and Google Maps preserve users' browsing history so that they can review it

Table 6. Visual and Spatial Exploration Cognitive Support and Person-

alization	ii Exploration Cognitive Support and Terson-
Cognitive support and personalization	Questions to be posed during the design or evaluation of discovery and
design elements	curation tools
Visual and textual cues of multiple resources	
Personalized visual preview	Does the system personalize visual previews of resources?
Personalized textual preview	Does the system personalize textual previews of resources?
Visual and textual cues of a single resource	
Personalized visual cues	Does the system personalize the visual cues within a resource?
Personalized textual cues  Spatial proximal	Does the system personalize the textual cues within a resource?
cues of multiple resources	
Personalized arrangement of multiple resources	Does the system personalize the arrangement of resources?
Spatial proximal cues of a single	
resource Personalized arrangement of information within a resource	Does the system personalize the arrangement of information within a resource?

later. Additionally, preservation mechanisms can be **suggested** to the user.

YouTube allows users to **automatically share** information about their activities, such as comments, added videos, liked or disliked videos, and created playlists. In general, socially curated spaces **offer sharing channels** to support convenient information communication.

Augmentation is another aspect of information curation that can be either **automated** for or **suggested** to the user. For example, Yelp asks users to rate the places which the application identifies as having been visited by the user.

Notification mechanisms enable user awareness about new content on the subscribed channel [?]. Web applications that facilitate rapidly updating content support various notification mechanisms, such as messages within the application, informative emails, and smartphone notifications. Many types of notifications include suggested users or artifacts to follow. Some Web tools automatically subscribe users to notifications, usually during the registration process.

Table 7.	Cognitive Support,	Personalization,	and Automation	for Cura-

tion	
Cognitive sup- port, person- alization, and automation ele- ments	Questions to be posed during the design or evaluation of information discovery and curation tools
Management Suggesting collections Suggesting tags Automated classification into collections Automated tagging	Does the system suggest relevant collections?  Does the system suggest relevant tags?  Does the system automatically sort resources into collections?  Does the system automatically tag resources?
Preservation History  Suggested preservation Augmentation Automated augmentation Suggested augmentation	Does the system automatically preserve information found by the user? Does the system suggest preservation channels to the user?  Does the system automatically annotate resources? Does the system suggest annotation options to the user?
Sharing Automated sharing Suggested sharing	Does the system support automatic sharing? Does the system suggest sharing channels to the user?
Subscription Suggesting users for subscription Suggesting artifacts for subscription Automated sub- scription	Does the system suggest which users to subscribe to? Does the system suggest which artifacts to subscribe to?  Can the system automatically subscribe the user to the website activity?
	ļ

#### Summary

Providing cognitive support, personalization, and automation dramatically improves the user experience when people interact with information discovery and curation systems. The framework can be used for identifying gaps in information discovery support and developing new technologies (see Chapters ?? and ??).

#### CONCLUSION

#### **ACKNOWLEDGMENTS**

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