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**LongSAL: A Longitudinal Search as Learning Study
With University Students [Draft]**

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**LongSAL: A Longitudinal Search as Learning Study
With University Students [Draft]**

by

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Abstract

LongSAL: A Longitudinal Search as Learning Study With University Students [Draft]

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Learning today is about navigation, discernment, induction, and synthesis of the wide body of information on the Internet present ubiquitously at every student's fingertips. Learning, or addressing a gap in one's knowledge, has been well established as an important motivator behind information-seeking activities. The Search as Learning research community advocates that online information search systems should be reconfigured to become educational platforms to foster learning and *sensemaking*. Modern search systems have yet to adapt to support this function. An important step to foster learning during online search is to identify behavioural patterns that distinguish searchers gaining more vs. less knowledge during search. Previous efforts have primarily studied searchers in the short term, typically during a single lab session. Researchers have expressed concerns over this ephemeral approach, as learning takes place over time, and is not fleeting. In this dissertation, an exploratory longitudinal study was conducted to analyse the long-term searching behaviour of students enrolled in a university course, over the span of a semester. Our research aims are to identify if and how students' searching behaviour changes over time, as they gain new knowledge on a subject; and how do processes like motivation, metacognition, self-regulation, and other individual differences moderate their 'searching as learning' behaviour. Findings from this exploratory longitudinal study will help to build improved search systems that foster human learning and sensemaking, and are more equitable in the face of learner diversity.

সারসংক্ষেপ (Abstract in Bengali)

লংস্যাল: ইন্টারনেটে তথ্য অনুসন্ধানের মাধ্যমে শিক্ষার্থীদের জ্ঞানলাভ বোঝার জন্য
একটি অনুদৈর্ঘ্য গবেষণা [খসড়া]

নীলাম্ব ভট্টাচার্য, PhD TBD

টেক্সাস বিশ্ববিদ্যালয়, অস্টিন, মার্কিন যুক্তরাষ্ট্র, বৈশাখ ১৪৩০ (মে ২০২৩)

সুপারভাইজার: ইয়াৎসেক গুইজদকা

আমার পিএইচডি এডভাইসর পরামর্শ দিয়েছেন যে এই থিসিস এর একটি বাংলা ভাসায় সারসংক্ষেপ ও লিখতে।
উনি ওনার থিসিস এর সারসংক্ষেপ ইংরেজি এবং পোলিশ দুই ভাষায় লিখেছিলেন। থিসিসের প্রথম খসড়া জমা দেওয়ার
পরে বাংলা সারসংক্ষেপ টি আরও বিস্তারিতভাবে লেখা হবে। বাংলা সংক্রান্ত এর উৎসর্গ: দিদার জন্য (tie back
to PhD Statement of Purpose)

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Introduction

1.1 Searching as Learning: Overview

Searching for information is a fundamental human activity. In the modern world, it is frequently conducted by users interacting with online search systems (e.g., web search engines), or more formally, **Information Retrieval** (IR) systems. As early as in 1980, Bertam Brookes, in his ‘fundamental equation’ of information and knowledge, had stated that an information searcher’s current state of knowledge is changed to a new knowledge structure by exposure to information (Brookes, 1980, p. 131). This indicates that searchers acquire new knowledge in the search process, and the same information will have different effects on different searchers’ knowledge states. Fifteen years later, Marchionini (1995) described information seeking as “a process, in which humans purposefully engage in order to change their state of knowledge”. Thus, we have known for quite a while that search is driven by higher-level human needs, and IR systems are a means to an end, and not the end in itself. **Interactive information retrieval** (IIR), a.k.a. human-computer information retrieval (HCIR) (Marchionini, 2006) refers to the study and evaluation of users’ interaction with IR systems and users’ satisfaction with the retrieved information (Borlund, 2013).

Despite their technological marvels, modern IR systems falls short in several aspects of fully satisfying the higher level human need for information. In essence, IR systems are software that take, as input, some query, and return as output some ranked list of resources.

*Within the context of information seeking, (search engines and IR systems) **feel like** they play a prominent role in our lives, when in actuality, they only play a small role: the **retrieval** part of information ...*

- *Search engines **don't help us identify what we need** – that's up to us; search engines don't question what we ask for, though they do recommend queries that use similar words.*
- *Search engines **don't help us choose a source** – though they are themselves a source, and a heavily marketed one, so we are certainly compelled to choose search engines over other sources, even when other sources might have better information.*
- *Search engines **don't help us express our query** accurately or precisely – though they will help with minor spelling corrections.*
- *Search engines **do help retrieve information**—this is the primary part that they automate.*
- *Search engines **don't help us evaluate the answers we retrieve** – it's up to us to decide whether the results are relevant, credible, true; Google doesn't view those as their responsibility.*
- *Search engines **don't help us sensemake** – we have to use our minds to integrate what we've found into our knowledge.*

— Ko (2021)

In recent years, the IIR research community has been actively promoting the **Search as Learning** (SAL) research direction. This fast-growing community of researchers propose that search environments should be augmented and reconfigured to foster learning, sensemaking, and long-term knowledge-gain. Various workshops and seminars have been organized to develop research agendas at the interaction of IIR and the Learning Sciences (Agosti et al., 2014; Allan et al., 2012; Collins-Thompson et al., 2017; Freund et al., 2013, 2014; Gwizdka et al., 2016). Additionally, special issues on Search as Learning have also been published in the *Journal of Information Science* (Hansen & Rieh, 2016) and in the *Information Retrieval Journal* (Eickhoff et al., 2017). Articles in these special issued presented landmark literature reviews (Rieh et

al., 2016; Vakkari, 2016), research agendas, and ideas in this direction. Overall, these works generally advocate that future research in this domain should aim to:

- understand the contexts in which people search to learn
- understand factors that can influence learning outcomes
- understand how search behaviours can predict learning outcomes
- develop search systems to better support learning and sensemaking
- help researchers be more critical consumers of information
- understand the cognitive biases fostered by existing search systems
- develop search engine ranking algorithms and interface tools that foster long term knowledge gain

Parallelly, the Educational Science and the Learning Science research communities have also been organizing workshops and formulating research agendas to conceptualize forms of ‘new learning’ (Cope & Kalantzis, 2013; Kalantzis & Cope, 2012; New London Group, 1996) that are afforded by innovations in digital technologies and e-learning ecologies (Cope & Kalantzis, 2017). Higher education researchers have been increasingly studying how students’ information search and information use behaviour affect and support their learning (Weber et al., 2018, 2019; Zlatkin-Troitschanskaia et al., 2021). Efforts are underway to conceptualize a theoretical framework around new forms of e-Learning that is aided and afforded by digital technologies (Amina, 2017; Cope & Kalantzis, 2017). In the community’s own words: “learning today is more about navigation, discernment, induction, and synthesis” of the wide body of information present ubiquitously at every student’s fingertips (Amina, 2017). Therefore, “knowing the source, finding the source, and using the information aptly is important to learn and know now more than ever before” (Cope & Kalantzis, 2013). All of these interests in the intersection of searching and learning goes to emphasize that understanding learning during search is critical to improve human-information interaction.

1.2 Problem Statement

A major limitation in the area of Search as Learning, Interactive IR (IIR), and more broadly, in Human-Computer Interaction (HCI) research is that, the user is examined in the short-term, typically over the course of a single experimental session in a lab (Karapanos et al., 2021; Kelly et al., 2009; Koeman, 2020; Zlatkin-Troitschanskaia et al., 2021). Very few studies exist in the search-as-learning domain that have observed *the same participant* over a longer period of time than a single search session (Kelly, 2006a, 2006b; Kuhlthau, 2004; Vakkari, 2001a; White et al., 2009; Wildemuth, 2004). This ephemeral approach has acute implications in any domain where learning is involved because “learning is a *process* that leads to *change* in knowledge . . . (which) unfolds over time” (Ambrose et al., 2010), and “. . . does not happen all at once” (White, 2016b).

To the best of the author’s knowledge, almost no new longitudinal studies were reported in major search-as-learning literature in the last five years, that systematically studied students’ information search behaviour and information-use over the long term, in their *in-situ* naturalistic environment and contexts, and linked those behaviours quantitatively to the students’ learning outcomes and individual differences.

Higher education students are increasingly using the Internet as their main learning environment and source of information when studying. Yet, the short term nature of research in this domain creates significant gaps in our knowledge regarding how students’ information search behaviour and information use develop over time, and how it affects their learning (Zlatkin-Troitschanskaia et al., 2021).

When research in this area relies so heavily on (short-term) lab studies, can we realistically say we are comprehensively studying human-tech interactions – when many of those interactions take place over long periods of time in real-world contexts? . . . An over-reliance on short studies risks inaccurate findings, potentially resulting in prematurely embracing or disregarding new concepts.

— Koeman (2020)

Current search engines and information retrieval systems “do not help us know what we want to know, …do not help us know if what we’ve found is relevant or true; and they do not help us make sense of the retrieved information. All they do is quickly retrieve what other people on the internet have shared” (Ko, 2021). Unless we have more long-term understanding of the nature of knowledge gain during search, the limitations of current search systems will continue to persist. Increased knowledge and understanding of students’, and more broadly researchers’, information searching and learning behaviour over time will help us to overcome the limitations of current IR systems, and transform them into rich learning spaces where “search experiences and learning experiences are intertwined and even synergized” (Rieh, 2020). The internet and digital educational technologies offer great opportunities to transform learning and the education experience. Enabled by our increased comprehension of the longitudinal searching-as-learning process, improved and validated by empirical data, we can create a new wave of fundamentally transformative educational technologies and “e-learning ecologies, that will be more engaging for learners, more effective (than traditional classroom practices), more resource efficient, and more equitable in the face of learner diversity” (Cope & Kalantzis, 2017).

1.3 Purpose of this Dissertation

To address the gaps in our knowledge of how information searching influences students’ learning process over time, this dissertation conducted a semester-long longitudinal study (approx. 16 weeks) with university student participants. The overarching research aim is to identify how students’ online searching behaviour correlate with their learning outcomes for a particular university course. Building upon principles from the Learning Sciences (Ambrose et al., 2010; National Research Council, 2000; Novak, 2010; Sawyer, 2005), and empirical evidences from the Information Sciences (Rieh et al., 2016; Vakkari, 2016; White, 2016a), this dissertation aimed at:

- situating students as learners in their naturalistic contexts, and characterized by their individual differences
- measuring students’ information search and information use behaviour over time

- correlating the information search behaviour with the learning outcomes for the university course

Learning, or addressing a gap in one's knowledge, has been well established as an important motivator behind information-seeking activities Section 1.1. Therefore, search systems that support rapid learning across a number of searchers, and a range of tasks, can be considered as more effective search systems (White, 2016a, p. 310). This dissertation takes a step in this direction. "It opens great expectations for many-sided, great contribution to our knowledge on the relations between search process and learning outcomes" (anonymous reviewer for Bhattacharya, 2021).

1.4 Outline

This dissertation document is structured as follows. First, principles of learning and relevant background from the domain of Educational Sciences are presented in Chapter 2. Next, relevant empirical evidences from the Information Searching Literature are discussed in Chapter 3. Chapter 4 presents the research questions, the overarching hypotheses, and discusses their rationale in the context of the existing research gaps. Chapter 5 describes the research methods, including the longitudinal study design, experimental procedures, data collection and analyses plans, anticipated limitations, and expected schedule to complete the dissertation.

2

Background: Knowledge and Learning

This first chapter on background literature discusses relevant concepts from the disciplines of Education and Learning Sciences. First, we introduce some relevant terminology, and the concepts of deep or meaningful learning. Then we discuss several research backed principles that have been shown to lead to meaningful learning. Next, we discuss how learning, sensemaking, and searching for information are related, and how modern technologies provide affordances for new forms of learning and knowledge work in the 21st century. We also discuss some concepts about individual differences of learners as well as techniques that can promote better learning. In the last section, we state what implications these findings have for shaping the longitudinal study in this dissertation.

2.1 Terminology

The Webster dictionary¹ defines **knowledge** in two ways. The first definition is “the range of one’s information or understanding”. Vakkari (2016) says it is “the totality what a person knows, that is, a **personal knowledge** or **belief system**. It may include both justified, true beliefs and less justified, not so true beliefs, which the person more or less thinks hold true.” Webster’s

¹<https://www.merriam-webster.com/dictionary/knowledge>

second definition of knowledge is “the sum of what is known: the body of truth, information, and principles acquired by humankind”. We can regard this as **universal knowledge**.

Learning is a *process*, that leads to a *change* in (personal) knowledge, beliefs, behaviours, and attitudes (Ambrose et al., 2010). Thus, learning always aims to increase one’s personal knowledge, and can often draw from the body of universal knowledge. In some cases, the change in personal knowledge can also lead to change in universal knowledge, such as when new discoveries are made, or new philosophies are proposed. Human learning is an innate capacity. It is longitudinal and unfolds over time. Learning is lifelong and life-wide, and has a lasting impact on how humans think and act (Ambrose et al., 2010; Kalantzis & Cope, 2012). Learning can be informal or formal. **Informal learning** is the casual learning taking place in everyday life, and is incidental to the everyday life experience. **Formal learning** is the deliberate, conscious, systematic, and explicit acquiring of knowledge (Kalantzis & Cope, 2012).

Education is a form of formal learning. It is the systematic acquiring of knowledge. In today’s world, the institutions of education are formally constructed places (classrooms), times (of the day and of life) and social relations (teachers and students); for instance, schools, colleges, and universities. The scientific discipline of Education concerns itself with the systematic investigation of the ways in which humans know and learn. It is the science of “coming to know” (Kalantzis & Cope, 2012).

Pedagogy describes small sequences of learner activities that promote learning in educational settings (Kalantzis & Cope, 2012). Traditional approaches to (classroom) pedagogy, especially the *didactic pedagogy*, primarily involves a teacher telling, and a learner listening. The teacher is in command of the knowledge, and their mission is to transmit this knowledge to the learners, in a one-way flow. It is hoped that the learners will dutifully absorb the knowledge laid before them by the teacher. The balance of agency weighs heavily towards the teacher. “There is a special focus on long-term memory, or retention, measurable by the ritual of closed-book, summative examination” (Cope & Kalantzis, 2017).

Cognitive scientists had discovered that learners retain material better, and are able to generalize and apply it to a broader range of contexts, when they learn **deep knowledge** rather

Learning Knowledge Deeply <i>Findings from Cognitive Science => Reflexive Pedagogy</i>	Traditional Classroom Practices <i>Didactic Pedagogy => Instructionism / Surface Learning</i>
Knowledge Integration and Sensemaking:	
<ul style="list-style-type: none"> • Learners relate new ideas and concepts to previous knowledge and experience • Learners integrate their knowledge into interrelated conceptual systems • Learners look for patterns and underlying principles 	<ul style="list-style-type: none"> • Learners treat course material as unrelated to what they already know • Learners treat course material as disconnected bits of knowledge • Learners memorize facts and carry out procedures without understanding how or why
Active Knowledge Making and Multiliteracy	
<ul style="list-style-type: none"> • Learners understand the process of dialogue through which knowledge is created, and they examine the logic of an argument critically • Learners are also knowledge producers, and discerning knowledge discoverers / navigators • Multiliteracies: learners interact with new forms of media; they consume and produce multimodal knowledge artefacts (images, videos, presentations, software, etc.) 	<ul style="list-style-type: none"> • Learners treat facts and procedures as static knowledge, handed down from an all-knowing authority • Learner is the knowledge consumer, with passive knowledge acquisition and memorization • Academic literacies: learners interact with traditional textbooks, assignments, and tests
Metacognition and Self-regulation:	
<ul style="list-style-type: none"> • Learners reflect on their own understanding, and their own process of learning • Thinking about thinking, critical self-reflection on knowledge processes and disciplinary practices 	<ul style="list-style-type: none"> • Learners memorize without reflecting on the purpose, or on their own learning strategies. • Focus on facts to be remembered, theories to be correctly applied.

Figure 2.1: Deep learning (of the human kind) versus traditional (also often online) classroom practices. Compiled from Cope & Kalantzis (2017) and Sawyer (2005).

than **surface knowledge**, and when they learn how to use that knowledge in real-world social and practical settings (Sawyer, 2005). Deep learning ² takes place when “the learner chooses conscientiously to integrate new knowledge to knowledge that the learner already possesses” and involves “substantive, non-arbitrary incorporations of concepts into cognitive structure” (Novak, 2002, p. 549) and may eventually lead to the development of transferable knowledge and skills. A parallel terminology for deep learning (Marton & Säljö, 1976; Marton & Säljö, 1976) is **meaningful learning** (Ausubel et al., 1968; Novak, 2002), and they are often contrasted with *surface learning* or *rote learning*. Figure 2.1 discusses some more details on deep or meaningful learning, and the limitations of traditional classroom practices to promote deep learning. Figure 2.2 describes (using a concept map) how meaningful learning can be achieved and sustained,

²of the human kind

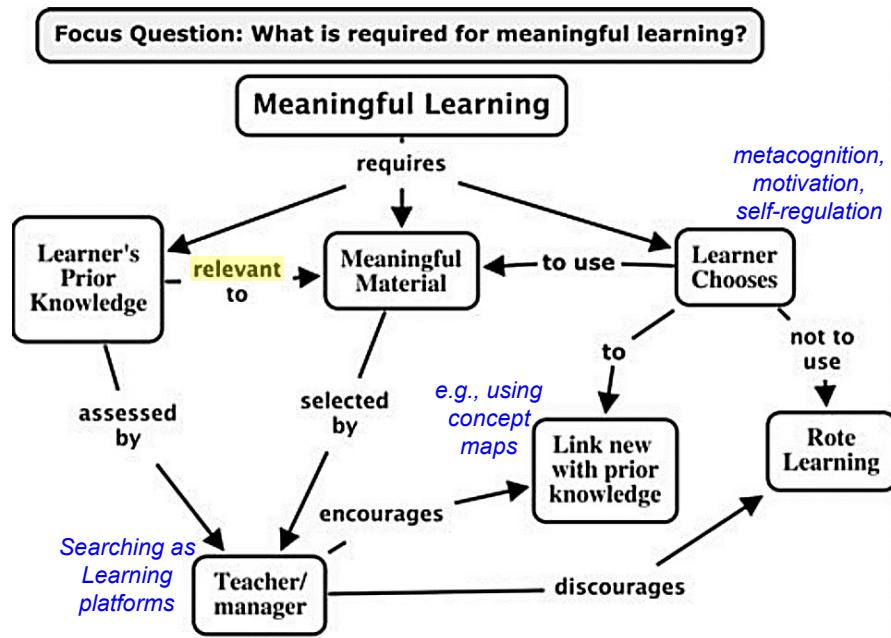


Figure 2.2: Meaningful learning (aka deep learning) as explained by Novak (2010, fig. 5.3) (annotations our own).

and our annotations highlight how Search-as-learning systems can foster the same.

2.2 Principles of Meaningful Learning

Ambrose et al. (2010) have proposed several principles of (student) learning that lead to creation of deeper knowledge in learners, and help educators understand why certain teaching approaches may help or hinder learning. These principles are based on research and literature from a range of disciplines in psychology, education, and anthropology, and the authors claim they are domain independent, experience independent, and cross-culturally relevant.

1. Students' **prior knowledge** can help or hinder learning.
2. How students **organize knowledge** influences how they learn and apply what they know.
3. Students' **motivation** determines, directs, and sustains what they do to learn.
4. Goal-directed practice coupled with **targeted feedback** enhances the quality of students' learning.

5. Students' current level of development interacts with the social, emotional, and intellectual **context** around the student to impact learning.
6. To become **self-directed** learners, students must learn to **monitor and adjust** their approaches to learning.

In line with the above, the US National Research Council identified several key principles about **experts' knowledge** (National Research Council, 2000), that illustrate the outcome of successful learning:

1. Experts notice features and **meaningful patterns** of information that are not noticed by novices.
2. Experts have acquired a great deal of content knowledge that is **organized** in ways that reflect a deep understanding of their subject matter.
3. Experts' knowledge cannot be reduced to sets of isolated facts or propositions but, instead, reflects contexts of **applicability**: that is, the knowledge is 'conditionalized' on a set of circumstances.
4. Experts are able to **flexibly retrieve** important aspects of their knowledge with little attentional effort.
5. Though experts know their disciplines thoroughly, this does not guarantee that they are able to teach others.
6. Experts have varying levels of flexibility in their approach to new situations.

The principles of learning illustrate that both the *context* of learning, and the *individual differences* of learners moderate the learning process. The findings about expert knowledge suggests that *incorporating new information into existing knowledge structures* in a meaningful manner is a key aspect of learning. We discuss these concepts in more detail in the following sections.

2.3 Meaningful Learning as Sensemaking

In this section, we discuss how meaningful learning can be further qualified using the concepts of sensemaking. **Sensemaking**³ is a process that occurs when learners *connect* their *previously developed* knowledge, ideas, abilities, and experiences together to address the uncertainty presented by a newly introduced phenomenon, problem, or piece of information (Next Generation Science Standards, 2021). A significant portion of learning is sensemaking, especially those which use recorded information or systematic discovery to learn concepts, ideas, theories, and facts in a domain (such as science or history) (P. Zhang & Soergel, 2014). The phrase “figure something out” is often synonymous with sensemaking. Sensemaking is generally about actively trying to figure out the way the world works, and/or exploring how to create or alter things to achieve desired goals (Next Generation Science Standards, 2021). (Dervin & Naumer, 2010) distinguish work on sensemaking in four fields: “Human Computer Interaction (HCI) (Russell’s sensemaking); Cognitive Systems Engineering (Klein’s sensemaking); Organizational Communication (Weick’s sensemaking; Kurtz and Snowden’s sense-making); and Library and Information Science (Dervin’s sense-making)”.

Many theories of learning and sensemaking revolve around the concept of fitting new information into an existing or adapted knowledge structure (P. Zhang & Soergel, 2014). The central idea is that knowledge is stored in human memory as *structures* or *schemas*, which comprise interconnected concepts and relationships. When new information is encountered or acquired, the learner or sensemaker needs to actively construct a revised or entirely new knowledge structure. Examples of some such theories include: the *assimilation theory (theory of meaningful learning)* (Ausubel et al., 1968; Ausubel, 2012; Novak, 2002; Novak, 2010); the *schema theory* (Rumelhart & Norman, 1981; Rumelhart & Ortony, 1977); and the *generative learning theory* (Grabowski, 1996; Wittrock, 1989); all of which have their foundations in the Piagetian concepts of *assimilation* and *accommodation* (Piaget, 1936).

³“Brenda Dervin, one of the originators of the sense-making methodology, prefers the spelling with a hyphen, while the community in computer science and more technical people in information science (e.g., SIGCHI) use sensemaking without a hyphen” (P. Zhang & Soergel, 2014).

Assimilation means addition of new information into an existing knowledge structure. A “synonym” (Vakkari, 2016) for assimilation is **accretion**, which is the gradual addition of factual information to an existing knowledge structure, without structural changes. Accretion does not change concepts and their relations in the structure, but may populate a concept with new instances or facts. **Accommodation** means modifying or changing existing knowledge structures, by adding or removing concepts and their connections in the knowledge structure. Accommodation is subdivided into *tuning / weak-revision*, and *restructuring*, based on the degree of structural changes (P. Zhang & Soergel, 2014). **Tuning** or **weak revision** does not include replacing concepts or connections between concepts in the structure, but tuning of the scope and meaning of concepts and their connections. This may include, for example, generalizing or specifying a concept. **Restructuring** means radically changing and replacing concepts and their connections in the existing knowledge structure, or creating of new structures. Such radical changes often take place when prior knowledge conflicts with new information. New structures are constructed either to reinterpret old information or to account for new information (Vakkari, 2016; P. Zhang & Soergel, 2014). A comparison of these types of conceptual changes can be found in (P. Zhang & Soergel, 2014 Table 3).

2.3.1 Concept Maps to enhance Sensemaking

As we saw in the previous section, deep learning / meaningful learning / sensemaking is a process in which new information is connected to a relevant area of a learner’s existing knowledge structure. However, the *learner must choose* to do this, and must actively seek a way to integrate the new information with existing relevant information in their cognitive structure (Ausubel et al., 1968; Novak, 2010). Learning facilitators (e.g., teachers) can encourage this choice by using the concept mapping technique.

A **concept-map** is a two-dimensional, hierarchical node-link diagram (a *graph* in Computer Science parlance) that depicts the structure of knowledge within a discipline, as viewed by a student, an instructor, or an expert in a field or sub-field. The map is composed of concept labels, each enclosed in a box (*graph nodes*); a series of labelled linking lines (*labelled edges*);

and an inclusive, general-to-specific organization (Halittunen & Jarvelin, 2005). Concept-maps assess how well students see the “big picture”, and where there are knowledge-gaps and misconceptions. A *mind map* is a diagram similar to a concept map, comprising nodes and links between nodes. However, mind maps emerge from a single centre, and have a more hierarchical, tree like structure. Concept maps are more free-form, allowing multiple hubs and clusters. Also, mind-maps have unlabelled links, and are subjective to the creator. There are no “correct” relationships between nodes in a mind map. Figure shows the key features of a concept map, with the help of a concept map.

Concept maps are therefore, arguably the most suited mechanism to represent the cognitive knowledge structures, connections, and patterns in a learner’s mind. Conventional tests, such as multiple choice questions, are best at assessing students’ recall of facts and guessing skills. Their format treats information as distinct and separate items, rather than interconnected pieces of a bigger picture. Concept maps on the other hand, encourage learners to identify and make connections between concepts that they know, and concepts that are new to them. Concept maps have been used for over 50 years to provide a useful and visually appealing way of illustrating and assessing learners’ conceptual knowledge (Egusa et al., 2010, 2014a, 2014b, 2017; Halittunen & Jarvelin, 2005; Novak, 2010; Novak & Gowin, 1984).

Analysis of concept maps can reveal interesting patterns of learning and thinking. Some of these measures that have been used by (Halittunen & Jarvelin, 2005) are: addition, deletion, and differences in top-level concept-nodes; depths of hierarchy; and number of concepts that were ignored or changed fundamentally. In this regard, (Novak & Gowin, 1984) have presented well-established scoring schemes to evaluate concept-maps: 1 point is awarded for each correct relationship (i.e. concept–concept linkage); 5 points for each valid level of hierarchy; 10 points for each valid and significant cross-link; and 1 point for each example.

Having discussed how deep learning / meaningful learning / sensemaking involves creation of knowledge structures in the learner’s mind, and suitably adding new pieces of information in the knowledge structure, we now discuss how these processes are influenced in the 21st century with the presence of new media, digital technologies, and information retrieval systems.

2.4 ‘New’ Learning as Online Information Searching

Digital media technologies and e-learning ‘ecologies’ can enable new forms and models of learning, that are fundamentally different from the traditional classroom practices of didactic pedagogy (Cope & Kalantzis, 2017). Some key concepts associated with these forms of ‘new learning’ are described below. These concepts from the Educational Sciences domain tie back strongly to the issues, challenges, and research agenda being investigated by researchers in the Search as Learning and Information Retrieval domain (Section 1.1).

2.4.1 Active Knowledge Making

The Internet and new forms of media provide us the opportunity to create learning environments where learners are no longer mainly *consumers* of knowledge, but also *modifiers*, *producers*, and *exchangers* of knowledge. In **active knowledge making**, learners can, and often need to, find information on their own using online resources. They are not restricted to the textbook alone. The Internet is often a definitive resource for information on any given topic. A learner can search the web (to learn) at any time, from anywhere, on any web-enabled device.

As knowledge producers, learners search and analyze multiple sources with differing and contradictory perspectives, and develop their own observations and conclusions. In this process, they become researchers themselves and learn to collaborate with peers in knowledge production. Collaboration gives learners the opportunity to work with others as coauthors of knowledge, peer reviewers, and discussants to completed works. Because learners bring their own views, outlooks, and experiences, the knowledge artefact they create is often uniquely voiced instead of a templated “correct” response (Amina, 2017).

*Learners become **active knowledge producers** (for instance, project-based learning, using multiple knowledge sources, and research based knowledge making), and not merely knowledge consumers (as exemplified in the ‘transmission’ pedagogies of traditional textbook learning or e-learning focused on video or e-textbook delivery). Active knowledge making practices underpin contemporary emphases on innovation, creativity and problem solving, which are quintessential ‘knowledge economy’ and ‘knowledge society’ attributes.*

— Cope & Kalantzis (2017)

2.4.2 Artefacts for Learning Assessment

Traditionally, the focus of learning outcomes has been long term memory. Students and learners were expected to remember a collection of facts, definitions, proofs, equations, and other associated details. For a significant amount of modern knowledge-work today, **memory is actually less important**. Information is so readily accessible now that it is no longer necessary to remember the information. Because of the technological phenomenon, the mass of information is available ubiquitously ⁴ to a learner (or a knowledge worker), in every moment of learning. Empirical details such as facts, definitions, proofs, or equations do not need to be remembered today, because they can always be looked up again (Amina, 2017; Cope & Kalantzis, 2017).

This creates an interesting shift in the focus of learning and knowledge work today: “*if we are not going to measure and value long-term memory in education, what are we going to assess?*” Cope & Kalantzis (2017) suggest that **we assess the knowledge artefacts** that learners produce. In active knowledge making, the final work ⁵ can be proof of the learning outcome and represent a learner’s ability to use the resources that are available (Amina, 2017). **Measure of learning can be measure of information quality and information use in artefacts.** This shows a shift in pedagogy and assessment and an increase in personalization and individualization of learning (Pea & Jacks, 2014). Memorizing the information on a topic is less important, compared to the writing, synthesizing, analyzing, and **sensemaking** of the available information that has been referenced in the work. This shifts the focus of assessment to the quality of the artefacts and the processes of their construction. Moreover, as technology increases the ability to capture detailed data from formal and informal learning activities, it can give us a new view of how learners progress in acquiring knowledge, skills, and attributes (DiCerbo & Behrens, 2014). Because learning is a continuous, longitudinal process, these advanced, technologically enhanced assessments are more useful in understanding the learning process and knowledge development (Amina, 2017).

⁴as long as there is internet connection

⁵be it a project report, poster, presentation, video, software, research paper, website, etc.

Assessing open-ended artefacts does come with its challenges and limitations. First, assessing and grading artefacts requires the development of detailed qualitative coding guides (M. J. Wilson & Wilson, 2013). This process involves defining grading criteria and measuring inter-coder agreement to ensure that the coding guide is reliable. Prior studies have scored summaries along dimensions such as the inclusion of facts, relationships between facts, and evaluative statements (Lei et al., 2015; Roy et al., 2021; M. J. Wilson & Wilson, 2013). Second, the quality of responses may be difficult to compare across learners. Since this type of assessment imposes very few constraints on the learners' responses, it may cause some learners to *satisfice*, and not convey everything that was learned. Additionally, writing skills are likely to vary across learners, and some may not be able to effectively articulate everything that was learnt.

2.4.3 ‘Information Search and Evaluation’ as and for Learning

Learning today is more about **navigation, discernment, induction, and synthesis**, and less about memory and deduction (Cope & Kalantzis, 2013). However, knowing the source, finding the source, and using the information critically is important to learn and know now more than ever before (Amina, 2017). Learners must know the social sources of knowledge and understand and correctly use quotations, paraphrases, remixes, links, citations, and the like in the works that they develop. Searching and sourcing from the web entails a process of developing and completing a work that inevitably makes learners **knowledge producers**, as long as they can navigate and critically discern the value of multiple sources. This is a skill that must be learned, as many sources of information are not valid, reliable, or authentic (McGrew et al., 2018; Wineburg & McGrew, 2016). Understanding the different sources and identifying the more reliable ones are essential for effective teaching and learning (McGrew et al., 2017; McGrew, 2021). This is a critical aspect because the inability to cite properly or to use reliable resources provides learners with misconstrued information and ideas (Amina, 2017; Breakstone et al., 2021; McGrew et al., 2017).

The Stanford History Education Group (SHEG) conceptualised the **Civic Online Reasoning** (COR) curriculum⁶ to enable students to effectively search for and evaluate online information (Breakstone et al., 2018; Breakstone et al., 2021; McGrew, 2020). The curriculum centres on asking three questions of any digital content: (i) who is behind a piece of information? (ii) what is the evidence for a claim? (iii) what do other sources say? The curriculum has lessons and assessments for information evaluation skills such as lateral reading (Wineburg & McGrew, 2017), identifying news versus opinions, checking domain names, identifying sponsored content, evaluating evidence, and practising click restraint (McGrew & Glass, 2021). The lessons were developed and piloted by the Stanford History Education Group (McGrew et al., 2018; McGrew, 2020; McGrew & Glass, 2021). Taken together, these strategies will allow academics and students to better evaluate digital content, from the perspectives of professional fact checkers.

The purview of the *Civic Online Reasoning* curriculum is more targeted than the expansive fields of media and digital literacy⁷, (which can embrace topics ranging from cyberbullying to identity theft). Civic Online Reasoning focuses squarely on how to sort fact from fiction online, a prerequisite for responsible civic engagement in the twenty-first century (Breakstone et al., 2021; Kahne et al., 2012; Mihailidis & Thevenin, 2013).

2.5 Promoting Better Learning

It is not the technology that makes a difference; it is the pedagogy.

— Cope & Kalantzis (2017)

Having discussed how meaningful learning takes place, and how it is influenced by the presence of digital media and the mass of information on the Internet, let us now look deeper into the learners as persons themselves. In this section, we discuss how different cognitive and

⁶<https://cor.stanford.edu>

⁷“Digital literacy describes a holistic approach to cultivating skills that allow people to participate meaningfully in online communities, interpret the changing digital landscape, understand the relationships between systemic -isms and information, and unlock the power of digital tools for good. This includes media literacy. Terms like critical media literacy, media literacy, news literacy, and more are not necessarily interchangeable.” – Collins (2021)

metacognitive practices and aspects of learners can promote better learning. These phenomena have important implications for any digital systems that aim to foster learning.

2.5.1 Externalization and Articulation

The learning sciences have discovered that when learners externalize and articulate their developing knowledge, they learn more effectively (National Research Council, 2000). Best learning takes place when learners articulate their unformed and still developing understanding, and continue to articulate it throughout the process of learning. This phenomenon was first studied in the 1920s by Russian psychologist Lev Vygotsky. Articulating and learning go hand in hand, in a mutually reinforcing feedback loop. Often learners do not actually learn something until they start to articulate it. While thinking out loud, they learn more rapidly and deeply than while studying quietly (Sawyer, 2005). The learning sciences community is actively researching how to support students in their ongoing process of articulation, and which forms of articulation are the most beneficial to learning. Articulation is more effective if it is scaffolded – channelled so that certain kinds of knowledge are articulated, and in a certain form that is most likely to result in useful reflection (Sawyer, 2005). Students need help in articulating their developing understandings, as they do not yet know how to think about thinking, or talk about thinking; their knowledge state is *anomalous* (Belkin et al., 1982).

2.5.2 Metacognition and Reflection

One of the reasons that articulation is so helpful to learning is that it promotes *reflection* or *metacognition*. **Metacognition**, commonly referred to as thinking about thinking, involves thinking at a higher level of abstraction, which in turn improves thinking and learning (Blanken-Webb, 2017). It is “the process of reflecting on and directing one’s own thinking” (National Research Council, 2000, p. 78), and involves thinking about the process of learning, and thinking about knowledge. This ties forward to the self-regulation that effective learners exhibit (Section 2.5.4). Effective learners are aware of their learning process, and can measure how efficiently they are learning as they study.

Components of Metacognition	
Knowledge about Cognition	Regulation of Cognition
<p>Declarative Knowledge:</p> <ul style="list-style-type: none"> knowledge about one's skills, intellectual resources, and abilities as a learner the factual knowledge the learner needs before being able to process or use critical thinking related to the topic students can obtain declarative knowledge through presentations, demonstrations, discussions <p>Procedural Knowledge:</p> <ul style="list-style-type: none"> knowledge about <i>how</i> to implement learning procedures (e.g., strategies) requires students know the process as well as when to apply process in various situations students can obtain procedural knowledge through discovery, cooperative learning, and problem solving <p>Conditional Knowledge:</p> <ul style="list-style-type: none"> knowledge about <i>when</i> and <i>why</i> to use learning procedures the determination under what circumstances specific processes or skills should <i>transfer</i> students can obtain conditional knowledge through simulation 	<p>Planning:</p> <ul style="list-style-type: none"> planning, goal-setting, and allocating resources <i>prior</i> to learning <p>Information Management:</p> <ul style="list-style-type: none"> skills and strategy sequences used to process information more efficiently (e.g., organizing, elaborating, summarizing, selective focusing) <p>Monitoring:</p> <ul style="list-style-type: none"> assessment of one's learning or strategy use <p>Debugging:</p> <ul style="list-style-type: none"> strategies to correct comprehension and performance errors <p>Evaluation:</p> <ul style="list-style-type: none"> analysis of performance and strategy effectiveness after a learning episode

Figure 2.3: Operational definitions and features of the metacognition components, adapted from Schraw & Dennison (1994) and Vancouver Island University (2021).

The literature on metacognition broadly identifies two fundamental components of metacognition: knowledge about cognition, and regulation of cognition. **Knowledge about cognition** includes three subprocesses that facilitate the *reflective* aspect of metacognition: declarative knowledge (knowledge about self and about strategies), procedural knowledge (knowledge about how to use strategies), and conditional knowledge (knowledge about when and why to use strategies). **Regulation of cognition** include a number of subprocesses that facilitate the *control* aspect of learning. Five component skills of regulation have been discussed extensively in the literature, including planning, information management strategies, comprehension monitoring, debugging strategies, and evaluation. The operational definitions of these components are described in Figure 2.3

Schraw & Dennison (1994) developed the **Metacognitive Awareness Inventory** (MAI) survey and a scoring guide to measure these self-reported components and subprocesses of

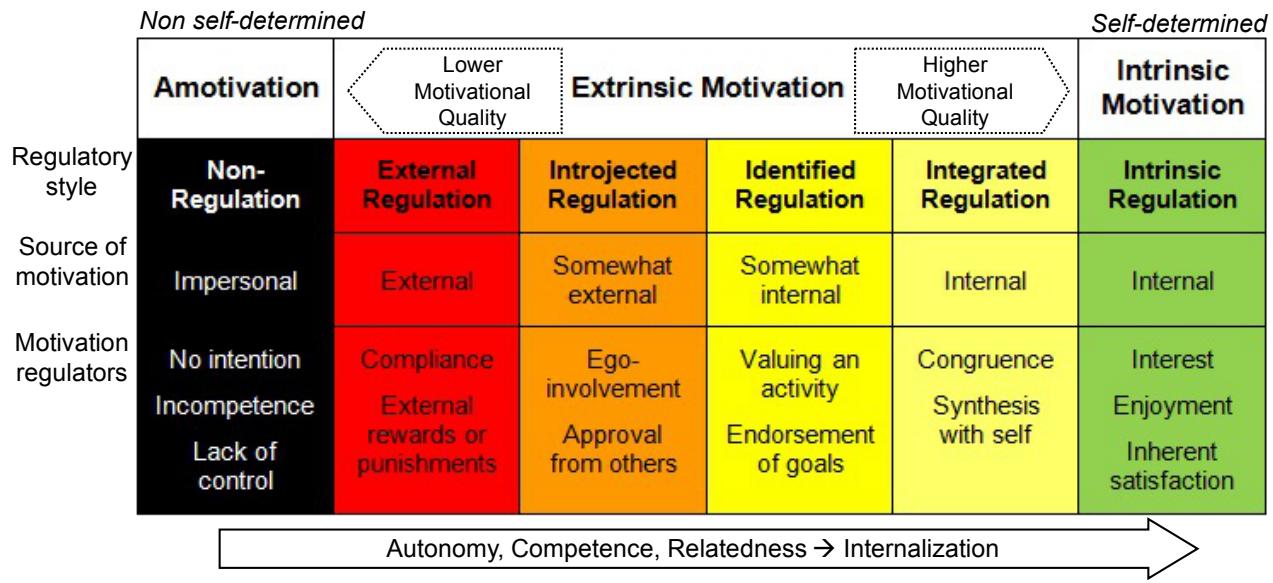


Figure 2.4: The motivation and self-determination continuum, as proposed by the Self-Determination Theory (SDT). Figure adapted from Ryan & Deci (2000a), Ryan & Deci (2000b), and Guyan (2013).

metacognition. The original survey consists of 52 true/false questions (Appendix B.5), such as “*I consider several alternatives to a problem before I answer*”, “*I understand my intellectual strengths and weaknesses*”, “*I have control over how well I learn*”, and “*I change strategies when I fail to understand*”. The instrument has been widely used in research, and has its reliability and validity measures available. Later, Terlecki & McMahon (2018) proposed a revised version of the MAI, using five-point Likert-scales, ranging from “*I never do this*” to “*I do this always*”. They argue that when measuring change in metacognition over time, the Likert-scale based ‘how often’ questions are more effective than dichotomous ‘Yes/No’ questions (Terlecki, 2020; Terlecki & McMahon, 2018).

2.5.3 Motivation

Motivation is the process that initiates, guides, and maintains goal-oriented behaviours (Cherry, 2020). The **Self-Determination Theory** (SDT) represents a broad framework for the study of human motivation and personality (Ryan & Deci, 2017). SDT differentiates the types of motivation based on the reasons that give rise to behaviour: intrinsic motivation and extrinsic motivation. **Intrinsic motivation** is engaging in a task or behaviour for the rewards

inside the task or behaviour, such as the pleasure, enjoyment and satisfaction that the behaviour provides. It is a stable form of motivation. **Extrinsic motivation** is engaging in a task or behaviour for the rewards *outside* the task or behaviour, such as receiving rewards, avoidance of punishment, gaining social approval, or achievement of a valued result. Extrinsic motivation is on a continuum from less stable to more stable, as illustrated in Figure 2.4. Extrinsic motivation does not last unless the rewards and punishments are explicitly visible (Deci & Ryan, 2013; Ryan & Deci, 2000b; Tahamtan, 2019).

Ryan (1982) proposed the **Intrinsic Motivation Inventory** (IMI) (Appendix B.3), a multidimensional questionnaire intended to assess participants' subjective experience related to a target activity in laboratory experiments. The instrument assesses participants' interest/enjoyment, perceived competence, effort, value/usefulness, felt pressure and tension, and perceived choice while performing a given activity, yielding six subscale scores. The *interest/enjoyment* subscale is considered the most indicative self-report measure of intrinsic motivation. The *perceived choice* and *perceived competence* concepts are theorized to be positive predictors of both self-report and behavioral measures of intrinsic motivation. The *pressure/tension* is theorized to be a negative predictor of intrinsic motivation. *Effort* is a separate variable that is relevant to some motivation questions, so it is used if its relevant. The *value/usefulness* subscale is used to measure internalization, with the idea being that people internalize and become self-regulating with respect to activities that they experience as useful or valuable for themselves.

2.5.4 Self-regulation

Self-regulation is the ability to develop, implement, and flexibly maintain planned behaviour in order to achieve one's goals. Self-regulation, and more broadly, self-direction, are critical to being an effective “lifelong” learner. Self-regulation becomes increasingly important at higher levels of education and in professional life, as people take on more complex tasks and greater responsibilities for their own learning. However, these metacognitive skills tend to fall outside the content area of most courses, and therefore, often neglected in instruction (Ambrose et al., 2010, p. 191). Building on the foundational work of Kanfer (1970b); Kanfer (1970a), Miller and

Brown formulated a seven-step model of self-regulation (J. Brown, 1998; W. R. Miller & Brown, 1991). In this model, behavioural self-regulation may falter because of failure or deficits at any of these seven steps: (*i*) receiving relevant information, (*ii*) evaluating the information and comparing it to norms, (*iii*) triggering change, (*iv*) searching for options, (*v*) formulating a plan, (*vi*) implementing the plan, and (*vii*) assessing the plan's effectiveness (which recycles to steps (*i*) and (*ii*)). Although this model was developed specifically to study addictive behaviours, the self-regulatory processes it describes are meant to be general principles of behavioural self-control. J. M. Brown et al. (1999) developed the **Self-Regulation Questionnaire** (SRQ) (Appendix B.4) to assess these self-regulatory processes through self-report. The items were developed to mark each of the seven sub-processes of the W. R. Miller & Brown (1991) model, forming seven subscales of the SRQ. The 63-item scale elicits responses in the form of 5-point Likert scale, ranging from strongly disagree to strongly agree. Based on clinical and college samples, the authors tentatively recommend a score of 239 and above as high (intact) self-regulation capacity (top quartile), 214-238 as intermediate (moderate) self-regulation capacity (middle quartiles), and 213 and below as low (impaired) self-regulation capacity (bottom quartile).

2.5.4.1 Self-directed and Self-regulated Learning

As we saw in the previous sections, self-regulation, motivation, and metacognition are key concepts that moderate the learning process. These terms are couched in the concepts of self-regulated learning and self-directed learning.

Self-directed learning (SDL) is a “process in which individuals take the initiative, with or without the help from others, in diagnosing their learning needs, formulating goals, identifying human and material resources, choosing and implementing appropriate learning strategies, and evaluating learning outcomes”(Knowles, 1975, p. 18). **Self-regulated learning** (SRL) can be described as the degree to which students are “metacognitively, motivationally, and behaviourally active participants in their own learning process” (Zimmerman, 1989, p. 329).

Often used interchangeably, self-directed learning (SDL) and self-regulated learning (SRL) have some important similarities and differences (Figure 2.5) (Saks & Leijen, 2014). SDL,

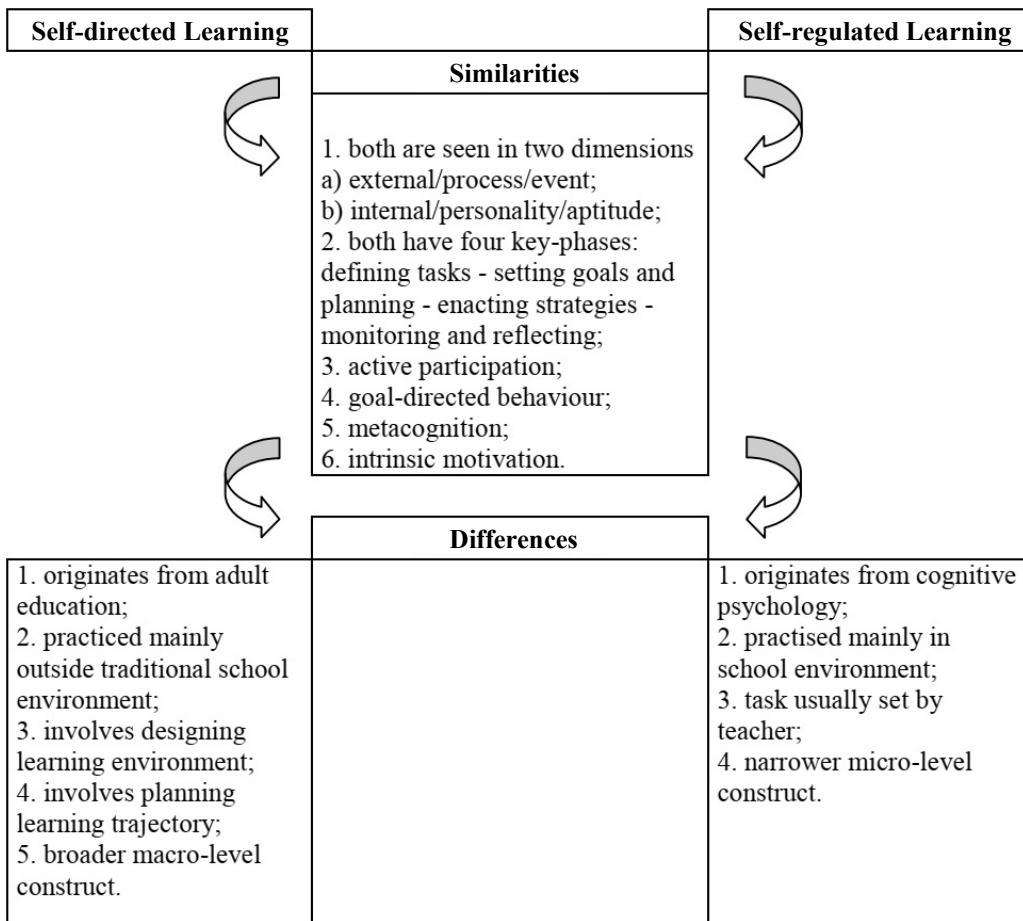


Figure 2.5: Self-directed learning vs. self-regulated learning, as illustrated by Saks & Leijen (2014).

originating from adult education, is a broader, macro-level construct, and is usually practised outside the traditional school environment. The self-directed learner is free to design their own learning environment, and free to plan and set their own learning goals. SRL, on the other hand, is a narrower, micro-level construct, originating from educational and cognitive psychology, and is mostly utilized in the school environment. Learners do not have as much freedom as in SDL. The instructor or facilitator often defines the learning task and the learning goals. Self-directed learning may include self-regulated learning, but the converse is not true (Jossberger et al., 2010; Loyens et al., 2008). In other words, “*a self-directed learner is supposed to self-regulate, but a self-regulated learner may not self-direct*” (Saks & Leijen, 2014). Despite their differences, SDL and SRL share key similarities (Saks & Leijen, 2014). First, both can be seen in two dimensions: (i) *external* to the learner, as a process or series of events, and (ii) *internal* to the

learner, arising from the learner's personality, aptitude, and individual differences. Second, both the learning processes have four key phases: *(i)* defining tasks, *(ii)* setting goals and planning, *(iii)* enacting strategies, and *(iv)* monitoring and reflecting. Third, both SDL and SRL require active participation, goal-directed behaviour, metacognition, and intrinsic motivation.

In summary, metacognition is monitoring and controlling what is in the learner's head; self-regulation is monitoring and controlling how the learner interacts with their environment; self-regulated learning is the application of metacognition and self-regulation to learning (Mannion, 2020); and the whole learning process is sustained by motivation, which is desirable to be intrinsic.

2.6 Summary and Implications for this Dissertation

In this first chapter of the background literature review, we discussed *(i)* what is meaningful learning, a.k.a. deep learning, or sensemaking; *(ii)* how meaningful learning updates the learner's cognitive knowledge structure; *(iii)* how the learning process is influenced by digital technologies, mass of information on the Internet, and IR systems; and *(iv)* what principles and practices learners and educators must realize and follow to promote meaningful learning. These findings are from the domains of Educational Sciences, Learning Sciences and Cognitive Sciences. We argue that these are important aspects to be considered when designing future IR or educational information systems that aim to combine and improve the searching and learning experience.

Guided by these findings, we made some important decision choices for the longitudinal study conducted in this dissertation. We aimed to situate learners in their context, and incorporate their individual differences using metacognition, motivation, and self-regulation characteristics. Additionally, we aimed to assess learning using artefacts and concept maps. We chose not use traditional tests like question-answers, and multiple choice assignments, since they are often not the preferred choice of knowledge-work output in real world scenarios.

In the next chapter, we look at relevant literature from the Information Sciences and Interactive Information Retrieval disciplines.

3

Background: Information Searching

This second chapter on background literature discusses relevant concepts from the disciplines of Information Sciences, and more specifically Interaction Information Retrieval. First, we introduce some terminology around information behaviour, information need, and information relevance. Then we discuss relevant findings various empirical studies, from the lens of three-stage interactions in the information search process. Then we discuss some overall generic characteristics of information search behaviour, and how they are linked to expertise and working memory. Next we discuss how learning has been assessed in recent search-as-learning studies. We also discuss some limitations of current search systems to foster learning, including the lack of sufficient number of longitudinal studies. In the last section, we state what implications these findings had for shaping the longitudinal study conducted for this dissertation.

3.1 Terminology

Information retrieval (IR) is the process of obtaining *information objects*, that are *relevant* to an *information need*, from a collection of those objects (Wikipedia). **Information objects** are entities that can potentially convey information. They can take many forms, such as documents, webpages, facts, music, spoken words, images, videos, artefacts, and other forms of

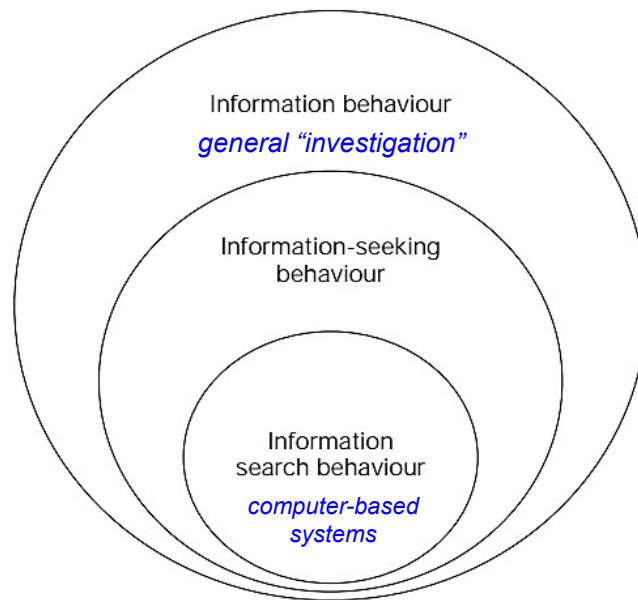


Figure 3.1: Nested model of information behaviour by T. D. Wilson (1999).

human expression. Areas where information retrieval techniques are employed include search engines, such as web search, social search, and desktop search; media search, as in image, music, video; digital libraries and recommender systems, as well as domain specific applications like geographical information systems, e-Commerce websites, legal information search, and others.

Multiple perspectives exist around how users interact with information, and IR systems. In the **Search Engine application view**, the interactions are restricted to the search engine interface. In the **Human-computer interaction (HCI)** view, interactions are between a person and a system; but the system can go *beyond* supporting only retrieval, to supporting more complex tasks. In the **cognitive view of IR**, which is the broadest, the interactions for obtaining information can be between a person and a system, as well as between people, for retrieval of information.

People's behaviour around information can be modelled as a nested Venn diagram as proposed by T. D. Wilson (1999) (Figure 3.1). **Information behaviour** is the more general field of investigation. **Information-seeking behaviour** can be seen as a sub-set of the field, particularly concerned with the variety of methods people employ to discover, and gain access to information objects. **Information search behaviour** is yet a sub-set of information-seeking,

concerned with the interactions between the user and computer-based information systems. In this dissertation, we focus on information search rather than the other two higher hierarchical concepts. This is because online IR systems, such as search engines or digital libraries, have become the primary source for people to obtain information in modern times, and web search is becoming ever more pervasive and ubiquitous in our day-to-day lives.

The field of **interactive information retrieval** (IIR) posits that IR systems should operate in the way that good libraries do. Good libraries provide both the information a visitor needs, as well as a *partner* in the learning process — the information professional — to navigate that information, make sense of it, preserve it, and turn it into knowledge. As early as in 1980, Bertram Brookes stated that searchers acquire new knowledge in the information seeking process (Brookes, 1980). Fifteen years later, Gary Marchionini described information seeking, as “*a process, in which humans purposefully engage in order to change their state of knowledge*” (Marchionini, 1995). So we have known for quite a while that search is driven by the higher-level human need to gain knowledge. Information Retrieval is thus a means to an end, and not the end in itself. Thus, the ideal IR system should not only help users to locate information, but also help them to **bridge the gap between information and knowledge**.

This brings us to the concept of information need. **Information Need** is the desire to locate and obtain information to satisfy a conscious or unconscious human need. Most search systems of today assume that the search query is an accurate representation of a user’s information need. However, Belkin et al. (1982) observed that in many cases, users of search systems are unable to precisely formulate what they need. They miss some vital knowledge to formulate their queries. As humans, we have difficulty in asking questions about what we do not know. Belkin called this phenomenon as **Anomalous State of Knowledge**, or ASK. Later, Huang & Soergel (2013) identified an exhaustive set of criteria that should be considered in order to ideally represent a user’s information need. These criteria for information need are highly dependent on the user context: user attributes, tasks or goals, as well as the situation the user is embedded in. This brings us to another closely related concept: information relevance.

Relevance is a fundamental concept of Information Science and Information Retrieval, and perhaps the most celebrated work in this area has been done by Tefko Saracevic ([Saracevic, 1975, 2007a, 2007b, 2016](#)). Webster dictionary define relevance as “a relation to the matter at hand”. In most circumstances, relevance is a “y’know” notion. People apply it effortlessly, without anybody having to define for them what “relevance” is. This creates one of the most fascinating challenges in the information field: humans understand relevance intuitively, while it is an open research problem to represent relevance effectively for use by algorithmic systems. The situation becomes more interesting because relevance always depends on context, and the context is ever dynamic, as the matter at hand changes.

3.2 Three-stage Interactions with Online Search Systems

As we saw in the previous section, information search behaviour is the (study of) interactions between a user, and digital Information Retrieval (IR) systems. The field of Information Science/Studies has developed multiple models explaining how information search works ([T. D. Wilson, 1999](#)). A few of them are presented in Figure 3.2. Across many of these models, we observe that most major Information Retrieval (IR) systems have three fundamental ways of letting users interact with the system, and the underlying information: (1) an interface for entering search **queries**; (2) an interface for viewing and evaluating a **list** of retrieved information-objects, or search results; (3) an interface for viewing and evaluating **individual information-objects**. For instance, Marchionini ([1995](#))’s ISP model hints at these three interfaces in the fourth, sixth and seventh stages, namely “formulate query”, “examine results”, and “extract info”. Spink ([1997](#))’s model of the IR interaction process consists of sequential steps or cycles, and each cycle comprises one or more interactive feedback occurrences of user input (query), IR system output (list), and user interpretation and judgement (of individual information-objects). Consequently, findings from the large body of empirical research in interactive IR (especially those with web based search systems) can be grouped around these three stages of interactions with search systems:

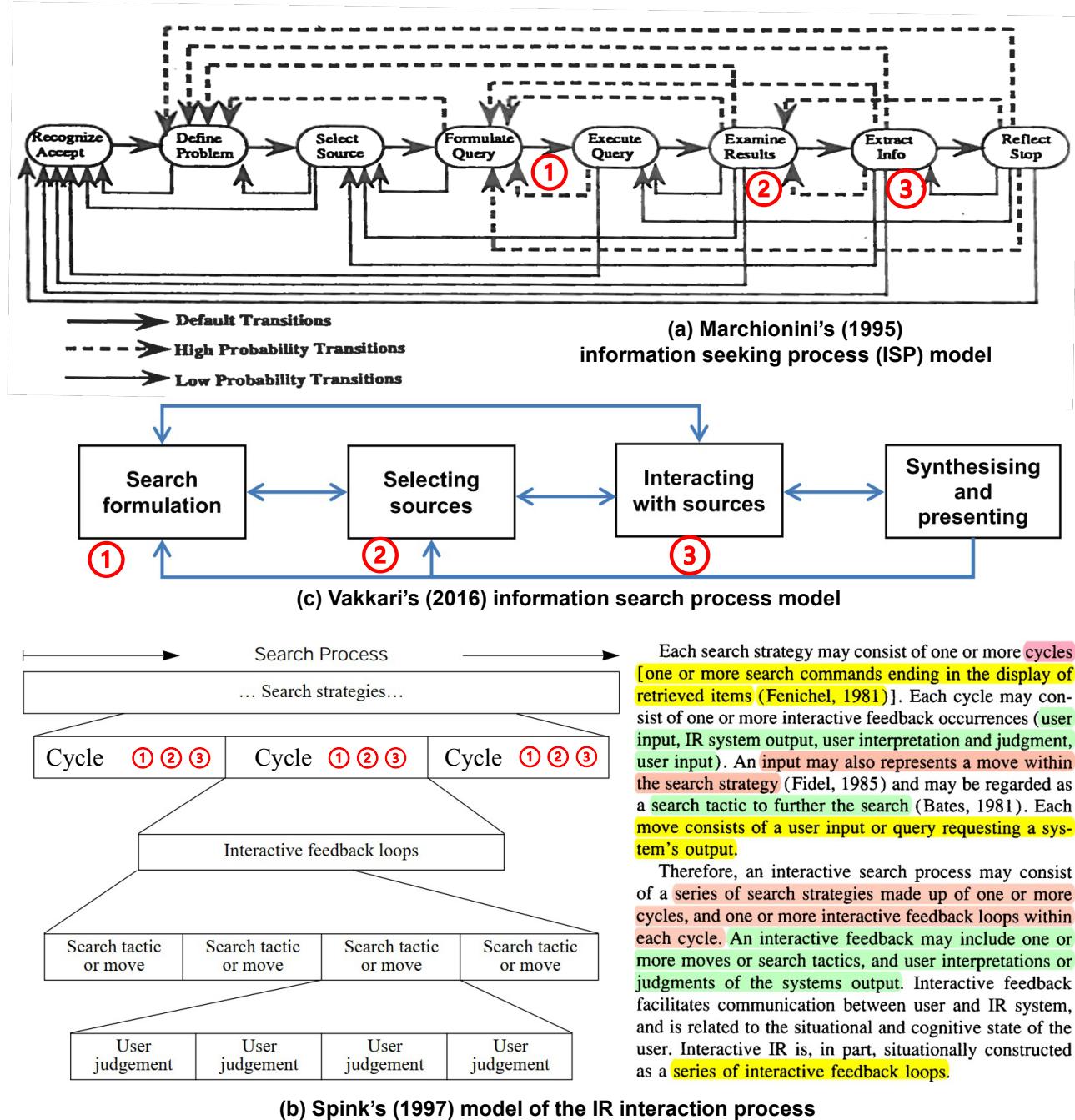


Figure 3.2: Models of information search process, with our coloured annotations identifying the three stages: (1) query formulation, (2) list-item selection, and (3) item examination.

1. *Stage 1:* search query (re)formulation
2. *Stage 2:* list-item selection: search results evaluation (aka source selection)
3. *Stage 3:* item examination: content page evaluation (aka interacting with sources)

The discussions in the following subsections are based around these three stages of interactions. The empirical studies discussed below generally follow some common principles of user studies in Interactive IR (IIR) (Borlund, 2013; Kelly, 2009): participants are presented with a search task or search topic, and then they are asked to search the internet (or a simulation of the open web) for information. During the search, the various interactions (queries, clicks, webpages opened etc.) are recorded, and these are analysed and correlated with other sources of data to answer research questions.

3.2.1 Stage 1: Query (Re)formulation

How do users behave when submitting search queries (to an IR system)?

Query formulation is the process of composing a search query that describes the information need of a searcher. **Query reformulation** refers to the act of either modifying a previous query, or creating a new query. Query reformulation typically occurs due to a searcher's improved understanding of how to better translate their information need into a search query. The relationship between two successively issued queries have been classified in a number of ways. These classifications are called *Query Reformulation Types*, or QRTs. Amongst many others, Boldi et al. (2009) used cognitive aspects of the searchers issuing the query to propose a taxonomy of QRTs, while C. Liu et al. (2010) proposed a similar taxonomy focusing more on the linguistic properties of the two successive queries. These are compared and contrasted in Figure 3.3.

Task-type, task-topic, task-goal, and domain-expertise were found to influence query reformulation patterns of searchers (Eickhoff et al., 2015; Jiang et al., 2014; Mao et al., 2018). At first glance, a significant portion of the query reformulation terms ($\sim 86\%$) seemed to be coming from the task-description itself (Jiang et al., 2014; Mao et al., 2018). This was characterized by

Boldi et al. (2009)	Liu et al. (2010)
Used cognitive aspects of searchers issuing the query:	Used linguistic properties of two successive queries:
Generalization: user wants broader information than was obtained from the current search	Generalization: successive queries contain at least one term in common; second query contains fewer terms than first query
Specialization: user narrows down the current search	Specialization: successive queries contain at least one term in common; second query contains more terms than first query
Mission Change: user changes the search topic to an entirely different one	Word Substitution: successive queries contain at least one term in common; second query has same length as first query, but contains some terms that are not in first query
Parallel Move: user modifies the current query to change the search aspect with the same context Learners are the also knowledge producers, and discerning knowledge discoverers / navigators	Repeat: successive queries contain exactly the same terms, but the format or ordering of these terms may be different
Error Correction: user's search intent does not change in the period before and after reformulation; examples are correcting a misspelled term and/or performing a query paraphrase	New: successive queries do not contain any common terms

Generalization and *Specialization* are identical in both taxonomies. *Parallel Move* can contain *Word Substitution*, *Repeat*, or *New* QRTs. *Mission Change* will generally have *New* QRTs. *Error Correction* will possibly have *Repeat* or *Word Substitution*.

Figure 3.3: Comparison of Query Reformulation Types (QRTs) proposed by Boldi et al. (2009) and C. Liu et al. (2010).

significantly more fixations on the task-description, rather than other SERP elements. Jiang et al. (2014) and Mao et al. (2018) investigated this phenomenon further. Jiang et al. (2014) controlled for the task-type and task-goal, using the faceted-framework by Li & Belkin (2008). Mao et al. (2018) controlled for the task-topic and the domain-expertise of the searchers.

If search tasks had *factual* goals, searchers relied heavily on the task-description for reformulating their queries (Jiang et al., 2014). For *interpretive* tasks (intellectual tasks with specific goals), users spent more time reading search result surrogates, before reformulating their queries. This was observed by increased eye-fixations (indicative of visual attention) and dwell time on search result snippets (surrogates). For exploratory tasks, searchers fixated the longest on query-autocompletion (QAC) suggestions, indicating that they were possibly looking for help and suggestion based on their specific query, as the search-task had non-specific (amorphous) goals.

Searchers also relied on the task-description for reformulating queries, when the search-task was outside their domain of expertise (Mao et al., 2018). For in-domain tasks, they

used query terms from their own knowledge, that were not fixated on in visited SERPs and content pages. Eickhoff et al. (2015) reported that a significant share of new query terms came from visited SERPs and content pages, and query reformulation (specialization) often did not literally re-use previously encountered terms, but highly related ones ¹ instead. These observations can possibly be explained by Mao et al. (2018)'s findings: when exploring a new domain, the searcher may accumulate vocabulary and learn how to query during the search; when performing in-domain search-tasks, the searcher may have enough prior knowledge to come up with effective query terms. It was also seen that searchers from medicine domain used more unread query terms for their in-domain search-tasks, compared to politics and environment domains (Mao et al., 2018). This suggested that domain knowledge and expertise is more important for formulating good search queries in highly technical disciplines (e.g., medicine), compared to less technical domains (e.g., politics).

Query Auto Completion (QAC) is a technological feature that suggests possible queries to web search users from the moment they start typing a query. It is nearly ubiquitous in modern search systems, and is thought to reduce physical and cognitive effort when formulating a query. QAC suggestions are usually displayed as a list (Figure 3.4(b) and (c)), and users interact in a variety of ways with the list. Hofmann et al. (2014) observed a strong position bias among searchers who examined the QAC list: the top suggestions received the highest visual attention, even when the ordering of the suggestions were randomized. Average fixation time decreased consistently on suggested items from top to bottom. Even when the ranking of suggestions were randomized, time taken to formulate queries did not significantly differ.

Search topics were found to have a large effect on QAC usage (Jiang et al., 2014; Smith et al., 2016). Search was easiest for the topics with the highest QAC usage. Total eye-gaze duration was longest when visual attention was shared between the QAC suggestions and the actual search query input box. Some additional time was probably due to decision making on whether to use a QAC suggestion. Typing was faster when a QAC was not used. However, the IR system's retrieval performance (measured using NDCG@3), was greater when QAC was

¹measured using Leacock-Chodorow semantic similarity metric (Leacock & Chodorow, 1998)

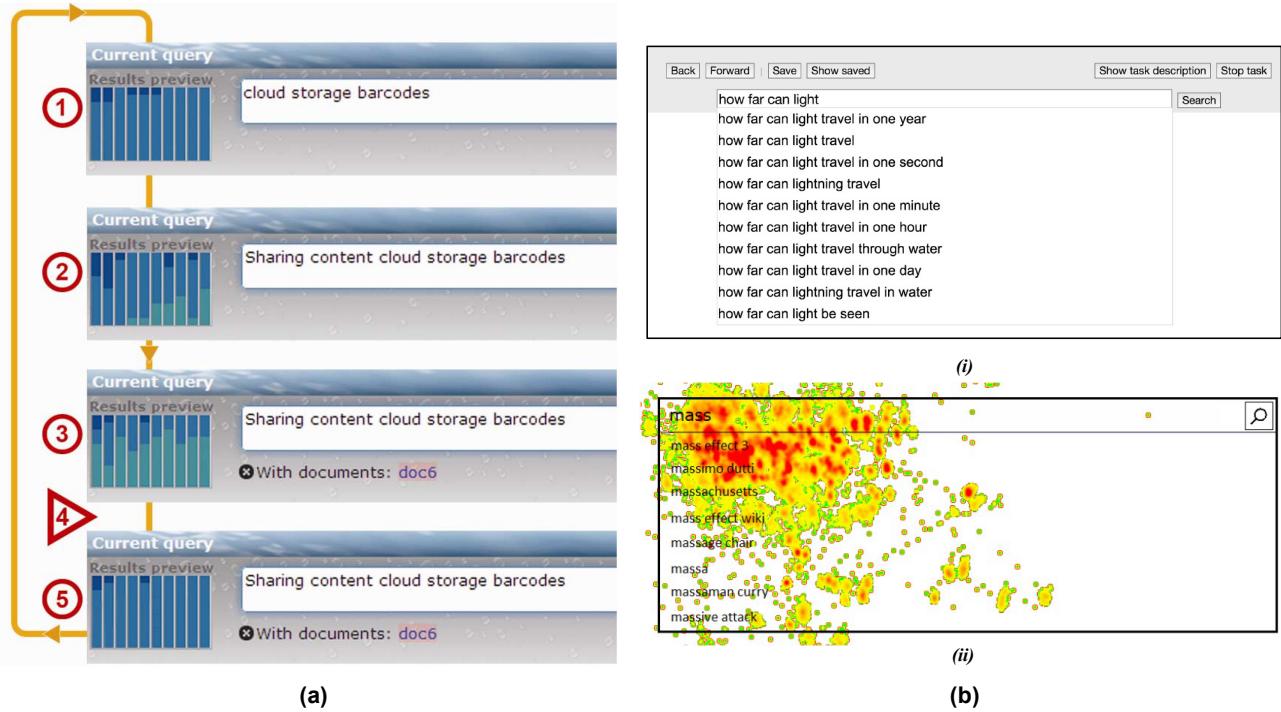


Figure 3.4: Investigating user-interactions with queries: (a) Visualizing the distribution of retrieved search results prior to running a query, for helping searchers understand their queries' effectiveness (Qvarfordt et al., 2013). The visualization is a stacked column chart with ten columns. Each column represents ten search results: first column represents results ranked 1-10, second column represents results 11-20, etc. Individual columns have three divisions, indicating the counts of results that: are already seen by the searcher (dark blue, top), will be re-retrieved, but have not been seen by the searcher (medium blue, middle), and will be newly-retrieved (bright teal blue, bottom). The system evaluates the searcher's query continuously as it is being typed, and updates the visualization in real-time. (b) Interfaces for examining interactions with query auto-completion (QAC), by (i) Smith et al. (2016), and (ii) Hofmann et al. (2014) (overlaid with heatmaps of eye fixations for all participants). This figure is best viewed in colour.

used. So Smith et al. (2016) speculated that the value of using QAC suggestions was realized later in the search session by users, when they saw a reduction in the number of additional queries needed, or an increase in the value of the information found.

Several user behavioural profiles were identified by exploring associations between visual attention from eye-tracking, search interactions from mouse and keyboard activity, and the use of QAC suggestions (Hofmann et al., 2014; Smith et al., 2016). These profiles are described in Figure 3.5. An interesting, yet common-sense observation was that participants' touch-typing ability greatly influenced their interactions with QAC suggestions.

Hofmann et al. (2014)	Smith et al. (2016)
From 331 search 'episodes' ($N = \text{unmentioned}$)	From 707 queries submitted in 232 topic sessions ($N = 29$)
A: monitoring: frequent fixations on QAC, and on the top-ranked suggestions in particular (hypothesized that QAC played a role in confirming to the user that they were typing the query correctly)	A: Fast Boxers: worked quickly, submitted queries in the query input box, using the enter key almost exclusively, with very little attention to the screen other than to the query input box
B: searching: user actively scanned and engaged with the QAC list from top to bottom; two distinct types of searching were identified:	B: Touch Typists: similar to A, worked quickly and mostly using the query input box and the enter key, but not to the exclusion of queries from the QAC suggestions and clicking on them. They looked at the QAC suggestions very rarely, but they did focus on the query input box, as they rarely have a missing fixation.
1) <i>seeking spelling support</i> for difficult words (e.g. 'schwarzenegger') while entering a query they have in mind;	C: Slow and Methodical Typists: worked slowly to create many long queries in the query input box. Although they tended to focus a great deal of attention to all parts of the screen, they were likely to focus on the query input box alone for many queries, and rarely focused only on the QAC suggestions list.
2) not seeking spelling support, but rather <i>looking for a complete query</i> that appropriately expressed their information need;	D: Agnostic Mousers: used both the query input box and the QAC suggestions list, but put more time focus on QAC list than the query box. Queries were submitted by clicking the mouse, to the near exclusion of the enter key. A high visual attention to the screen could be explained by the reliance on the mouse and the need to track the mouse cursor visually.
C: ignoring: non-touch-typists largely ignored the QAC suggestions because they primarily looked at the keyboard while typing, and typically only looked up from the keyboard when they had finished typing.	E: Fast and Unfocused Agnostics: worked quickly to submit a lot of queries using QAC suggestions, but they also typed some queries fully in the query input box. Although a lot of their visual attention was on QAC suggestions list and very little elsewhere, they had a lot of missed fixations, and may have focused on the keyboard.
	F: Fast QACers: also worked quickly, but created very short queries that were likely to be queries from the QAC suggestions. Their attention often focused on the QAC suggestions list only, and rarely on the query input box.

Figure 3.5: Comparison of User behaviour profiles identified around Query Auto-Completion (QAC), from eye-tracking data, by Hofmann et al. (2014) and Smith et al. (2016).

The native language of searchers was found to influence their overall querying and searching behaviour. Ling et al. (2018) explored this space using four variations of a multi-lingual search interface. They observed that participants strongly preferred to issue queries in their first or native language. A second or non-native language was the next preferred choice. Mixing of first and second-languages occurred very rarely. In 80% of the total 300 tasks (25 users \times 4 interfaces \times 3 task-types), participants used a single language for querying. In the rest 20% of the tasks, participants switched languages for querying, with a transition from first language to second language being the most common.

3.2.2 Stage 2: Search Results Evaluation / List-Item Selection

How do users behave when examining a list of information-objects (returned by an IR system)?

After a user submits a query to an IR system, the next action they generally perform is examining and evaluating the list of search results returned by the IR system. In this section, we discuss empirical studies which investigated information-searching behaviour around a list of information-objects, or a representation of information-objects (also called *surrogates*). We identified some common themes in the research questions investigated. The discussion below is grouped along these themes, as relationships between search behaviour and: (i) ranking of search results; (ii) information shown in search results; (iii) individual user characteristics; and (iv) relevance judgement and feedback.

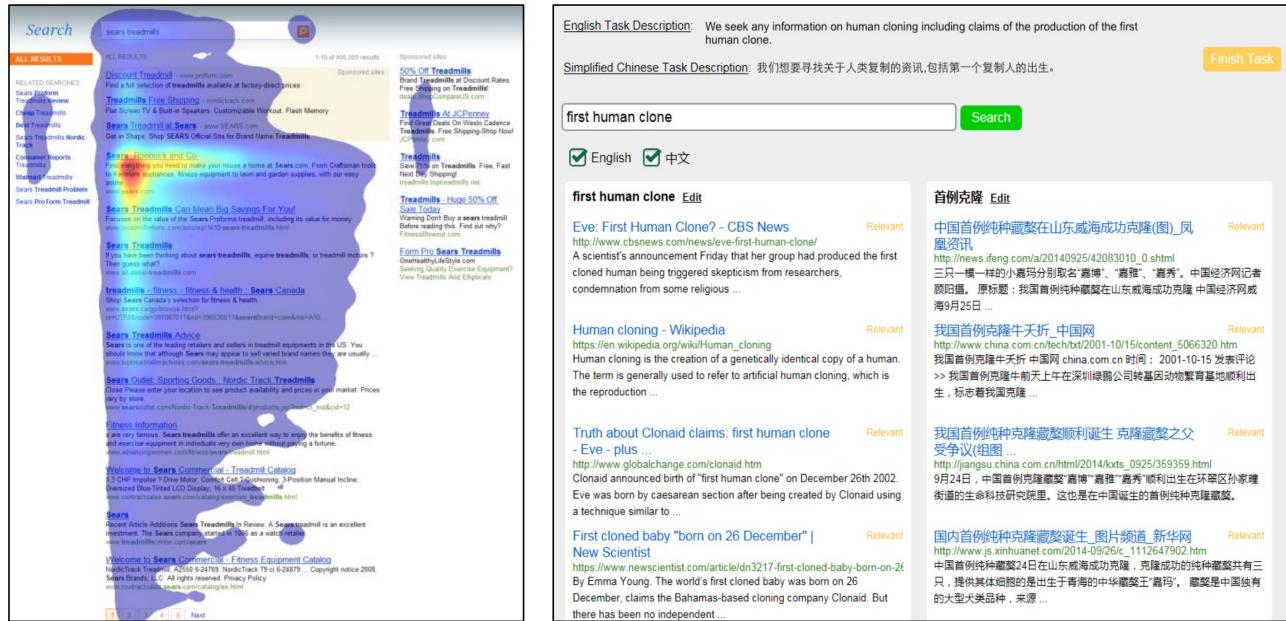
3.2.2.1 Ranking of search results

Most search engines display results in a rank ordered list, with the highest *algorithmically* relevant results placed at the top, and others results ordered below. Granka et al. (2004; Lorigo et al., 2008) studied eye-movement behaviour of searchers examining SERPs, and reported observations from three user studies. They saw that in 96% of the queries, participants looked at only the first result page, containing the top 10 results. No participant looked beyond the third result page for a given query. Participants looked primarily at the first few results, with nearly equal attention (dwell time) given to the first and the second results. However, despite equal attention, the first result was clicked 42% of the time, while the second was clicked only 8% of the time. If none of the top three results appeared to be relevant, then users chose not to explore further results, but issued a reformulated query instead. When the ranking of the search results were reversed (i.e. placing less relevant results in the higher ranked positions), participants spent considerably more time scrutinizing and comparing results (more fixations and regressions) before making a decision to click or reformulate.

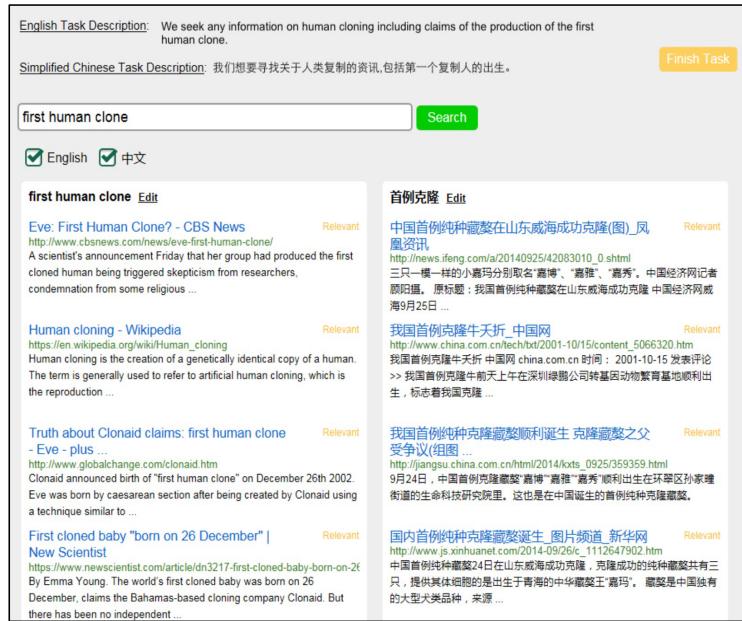
Some effects of gender were found to influence SERP examination (Lorigo et al., 2008). Females clicked on the second result twice as often, and made more regressions or repeat viewings of already visited abstracts, compared to males. Males were more likely to click



(a)



(b)



(c)

Figure 3.6: Example interfaces for studying user-interactions with a search-engine results page (SERP): (a) a simplified SERP without query input facility, to judge relevance of search results (on a 4-level scale) for pre-determined search queries (in this case ‘why do airplanes have differently shaped wings?’), from Schäringer et al. (2016); (b) eye-tracking heatmap on an organic SERP from Buscher et al. (2010; Dumais et al., 2010), showing the F-shaped pattern of visual attention; (c) a multilingual SERP from Ling et al. (2018). This figure is best viewed in colour.

on lower ranked results, from entries 7 through 10, and also look beyond the first 10 results significantly more often than women. Males were also more linear in their scanning patterns, with less regressions. Pupil dilation did not differ significantly between gender groups.

Effects of task-type and task-goals also influenced SERP examination behaviour. Guan & Cutrell (2007) used Broder (2002)'s taxonomy of navigational vs. informational searches. The authors reported that when users could not find the target results for navigational searches, they either selected the first result, or switched to a new query. However, for informational searches, users rarely issued a new query and were more likely to try out the top-ranked results, even when those results had lower relevance to the task. This illustrated possible strong confidence of searchers in the search engine's relevance ranking, even though searchers clearly saw target results at lower positions. Thus, people were more likely to deprecate their own sense of objective relevance and obeyed the ranking determined by the search engine. Jiang et al. (2014) used Li & Belkin (2008)'s framework of search-tasks, and saw that in tasks having specific goals, searchers fixated more on lower ranked results after some time. On the other hand, for tasks having amorphous goals, there was a wider breadth in viewing the SERP, and less effort spent in viewing the content pages. Fixations tended to decrease as search session progressed, indicating decreased interest and increasing mental effort, which could demonstrate *satisficing* behaviour (Simon, 1956). A comprehensive overview of various behavioural traits associated with task-types and task-goals can be found in (Jiang et al., 2014 Table 8).

3.2.2.2 Information Shown in Search Results (Surrogates)

The amount and quality of different kinds of information shown on SERPs also affected user's information searching behaviour. Cutrell & Guan (2007) saw that as the length of the surrogate information (result snippets) was increased, user's search performance improved for informational tasks, but degraded for navigational tasks (Broder, 2002). Analyzing eye-tracking data, they posited that the difference in performance was due to users paying more attention to the snippet, and less attention to the URL located at the bottom of the search result. This led to performance deterioration in navigational searches. Buscher et al. (2010) studied

the effects of the quality of advertisements placed in the SERPs (Figure 3.6(b)). Similar to findings discussed above, a strong position bias of visual attention was found towards the top few organic result entries — the well known F-shaped pattern of visual attention — which was stronger for informational than for navigational tasks. However, a strong bias *against* sponsored links was observed in general. Even for informational tasks, where participants generally had a harder time finding a solution, the ads did not receive any additional attention from the participants. Lorigo et al. (2008) compared the visual attention patterns of searchers using two different search engines: Google, and Yahoo!. Behavioural trends followed similar patterns for both search engines, even though Google was rated as the primary search engine of all but one of the participants. They found slight variations in some eye-tracking measures (reading time of surrogates, time to click results, and query reformulation time), and some self-reported measures (perceived ease of use, perceived satisfaction, and success rate). However, none of these differences were statistically significant.

The novel query-preview interface by Qvarfordt et al. (2013) was discussed in Section 3.2.1 and in Figure 3.4(a). The authors also reported several observations about user behaviour on SERPs. They saw that the presence of the preview visualization enabled participants to look deeper into the results lists. Participants tried to use the preview as a navigation tool, although it was not designed as such. The tool increased the rates at which participants examined documents at middle ranks in query results, and thus helped discover more useful documents in those middle ranks than without the preview widget. The preview tool also helped to increase the diversity of documents found in a search session, which could in turn lead to better performance in terms of recall and precision. Thus, the tool helped searchers overcome the strong position bias towards top-ranked results, as observed by other studies discussed previously.

3.2.2.3 Individual User Characteristics

Individual traits of searchers also influence their pattern of interactions with a SERP, and these patterns can be revealed by analyzing eye-tracking data. For instance, searchers have been classified as *economic* vs. *exhaustive*, based on their style of evaluating SERPs (Aula

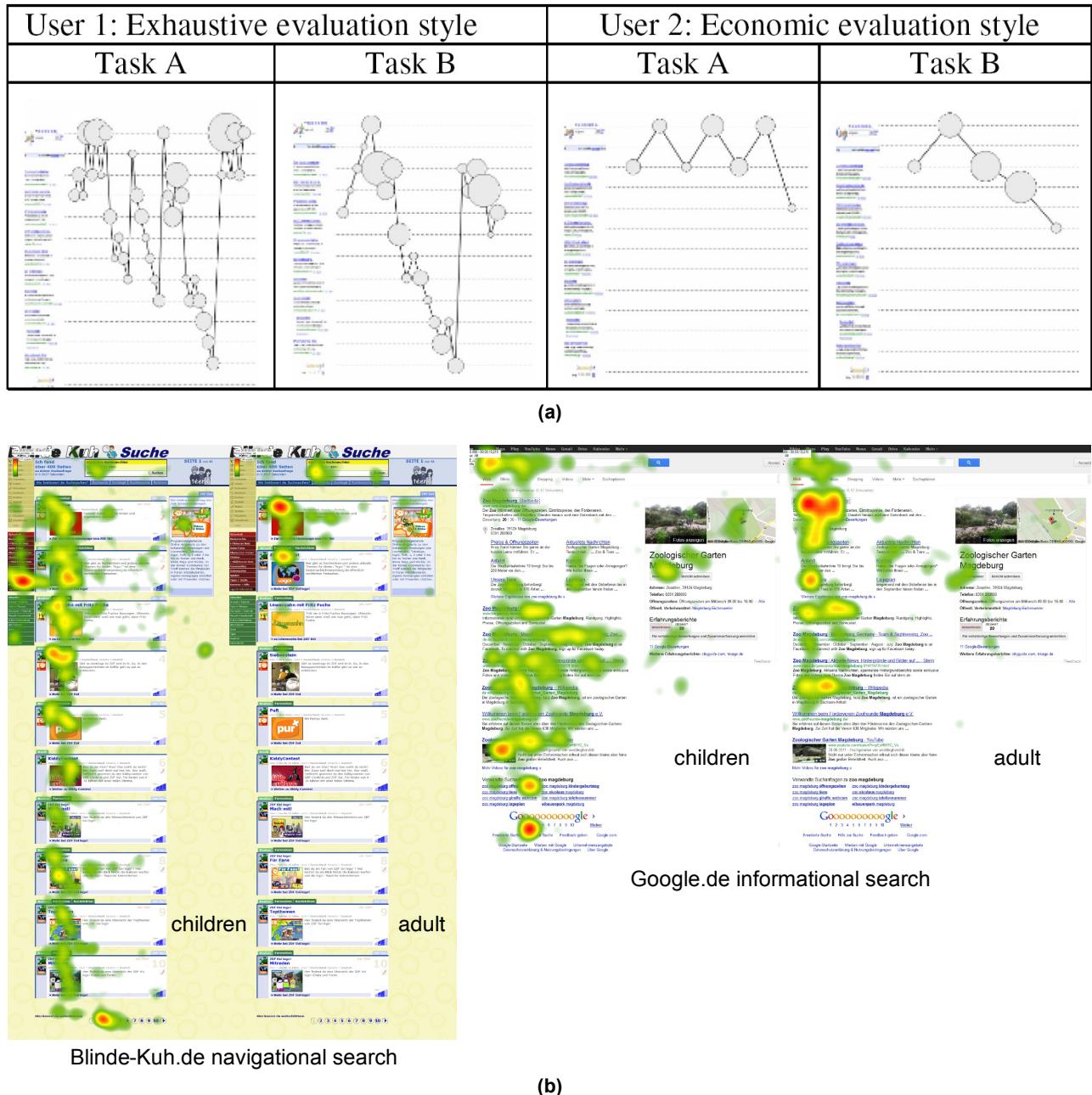


Figure 3.7: Effects of differences in user characteristics on interactions with SERPs: (a) exhaustive or *depth-first* user (User 1), vs. economic or *breadth-first* user (User 2), examining mostly irrelevant results in Task A, and mostly relevant results in Task B (both users followed the second link in Task B); vertical axis denotes vertical location on SERP, and horizontal axis denotes temporal ordering of result examination; from Aula et al. (2005); (similar patterns were identified by Bilal & Gwizdka (2016), in the SERP examination behaviour of children) (b) children vs. adults examining SERPs from a German search engine for children (left), and Google (right); differently from adults, children exhaustively explored all search results, paid more attention to thumbnails and embedded media, and read less text-only snippets; from Gossen et al. (2014). Similar observations as with children were reported for searchers with dyslexia (Palani et al., 2020). This figure is best viewed in colour.

et al., 2005). *Economic* searchers were found to scan less than half (three) of the displayed results above the fold, before making their first action (query re-formulation, or following a link). *Exhaustive* searchers evaluated more than half of the visible results above the fold, or even scrolled the results page to view all of the results, before performing the first action. Thus, economic searchers demonstrated depth-first search strategy, while exhaustive users favoured the breadth-first approach (Figure 3.7(a)). Dumais et al. (2010) demonstrated the use of unsupervised clustering to re-identify the *economic-exhaustive* user groups, based on differences in total fixation impact ², scanpaths, task outcomes, and questionnaire data. The *economic* cluster was further broken down by users who looked primarily at results (*economic-results* cluster), and users who viewed both results and ads (*economic-ads* cluster). All three groups spent the highest amount of time on the first three results, with the *exhaustive* group being substantially slower than the other two groups. The *exhaustive* and *economic-results* groups spent the second-highest amount of time on results four through six, while the *economic-eds* group spent this time on the main advertisements. This group spent more than twice as much time on the main ads as the *economic-results* group, and even more time on main ads than the *exhaustive group*. This observation is incongruent to Buscher et al. (2010)'s findings, as they observed a generally strong bias *against* viewing sponsored links. Abualsaad & Smucker (2019) conducted further analysis using these user types, and, in general, reconfirmed the previous findings. They found that the results above the fold, especially, ***the first three search results are special***, more so for economic users. On submitting a 'weak' query, if economic users did not find a correct result within the first three results, they abandoned examination, and reformulated their query.

Age of searchers also influence SERP evaluation behaviour. Gossen et al. (2014) demonstrated differences in SERP evaluation for children and adults (Figure 3.7(b)). When answers were not found within the top search results, the adults reformulated the query starting a new search, while young users exhaustively explored all the ten results, and used the navigation buttons between results pages to continue further examination. Children also paid more

²a measure derived from eye fixation durations, proposed by Buscher et al. (2009)

attention to thumbnails and embedded media, and focused less on textual snippets. Children saw the query suggestions at the bottom of the Google SERP (because they navigated to the bottom), while the adults did not. Bilal & Gwizdka (2016; Gwizdka & Bilal, 2017) investigated this phenomenon further, and observed that even within children, age plays a role in SERP evaluation behaviour. Younger children (grade six, age 11) clicked more often on results in lower-ranked positions than older children (grade eight, age 13). Older children's clicking behaviour was based more often on reading result snippets, and not just on the ranked position of a result in a SERP. Whereas, younger children made less deliberate choices in choosing which result to click, and were more exhaustive in the exploration of results. Thus, using Aula et al. (2005)'s classification and Dumais et al. (2010)'s observations, it can be posited that (younger) children start out as *exhaustive* searchers. With increase in age and maturity, older children and adults evolve into *economic* searchers. Interestingly, very similar behaviour patterns as with children (scrolling further down on SERPs, exhaustive exploration, etc.) were also observed recently for searchers with dyslexia (Palani et al., 2020).

Searcher's native language also influenced SERP interaction behaviour (Ling et al., 2018) (Figure 3.6(c)). We discussed in Section 3.2.1 that users strongly preferred issuing queries in a single language, especially their native language. However, while examining SERPs, they marked search results in both their first language and second language to be relevant, to an equal degree. This confirms the usefulness of search result pages that integrate results from multiple languages. However, a clear separation in the language of the search results was strongly preferred, and an 'interleaved' presentation (e.g. odd numbered results in one language and even numbered results in another language) was least preferred.

3.2.2.4 Relevance Judgement

Balatsoukas & Ruthven (2010, 2012) proposed a list of relevance criteria for understanding how searchers evaluate search results, or perform *relevance judgement*. These criteria were developed based on literature reviews and their empirical findings from eye-tracking studies.

3. Background: Information Searching

Draft February 23, 2023

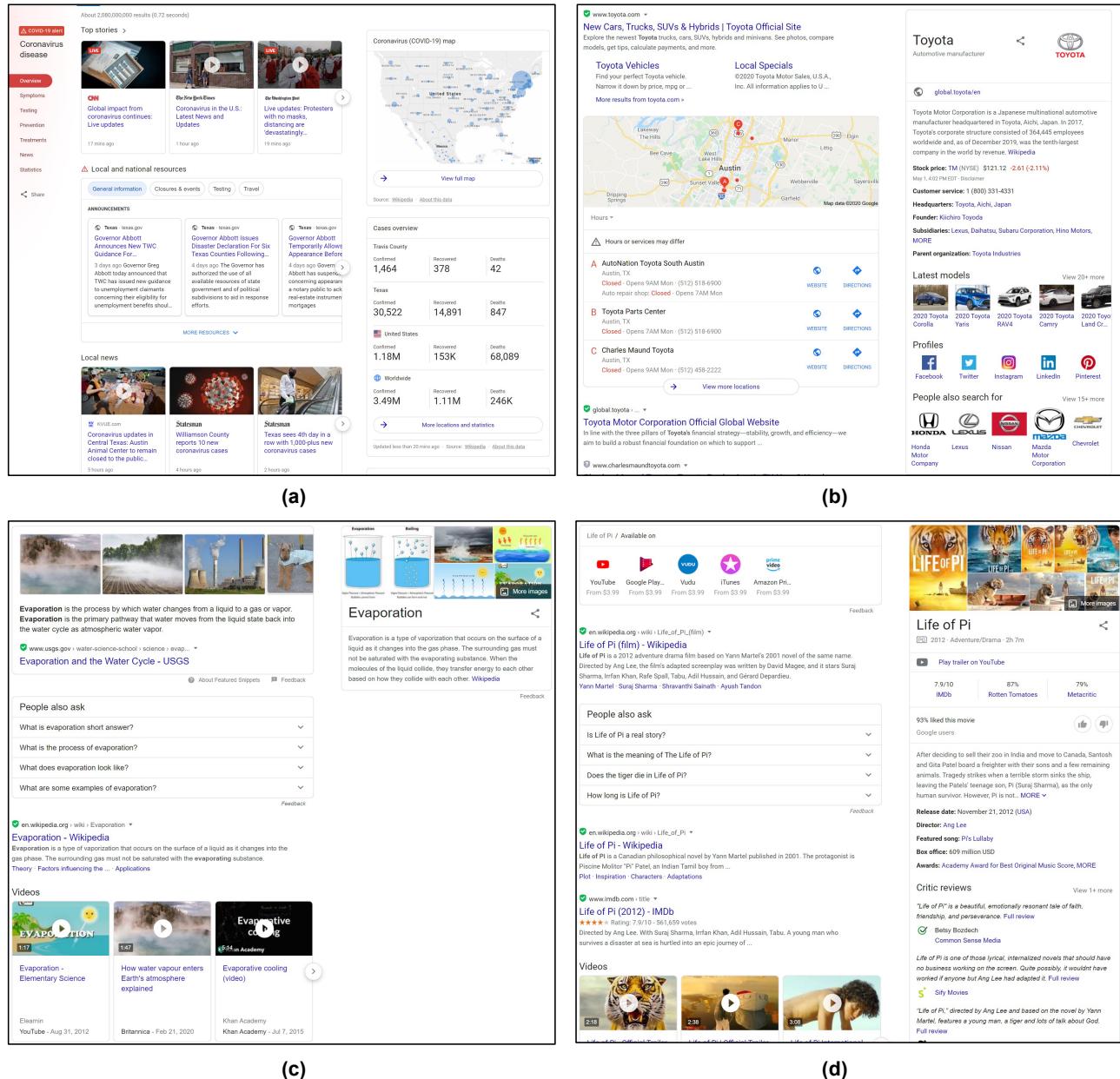


Figure 3.8: Google search engine result page (SERP) for the queries: (a) “coronavirus” (b) “toyota” (c) “evaporation”, and (d) “life of pie”. All screenshots are from ‘above-the-fold’, viewed on a 2560 × 1440 monitor. These examples highlight that modern SERPs have come a long way from a list of “ten blue links”. SERPs are becoming consumable information-objects in their own right, and thus require different kinds of cognitive processing and interactions, than from the early days of the internet. Inspired and adapted from Wang et al. (2018). Accessed on May 5, 2020. This figure is best viewed in colour.

The final list contains 15 relevance criteria (e.g., *topicality, quality, recency, scope, availability*, etc.) and can be found in (Balatsoukas & Ruthven, 2012 Appendix B).

Search engines are increasingly adding different modalities of information on the SERP, besides the “ten blue links”. These include images, videos, encyclopaedic information, and maps (Figure 3.8). Z. Liu et al. (2015) studied the influence of these different forms of SERP information – called ‘verticals’ – on searcher’s relevance judgements. A general observation was that if verticals were present in a SERP, they created strong attraction biases. The attraction effect was influenced by the type of verticals, while the vertical quality (relevant or not) did not have a major impact. For instance, ‘images’ and ‘software download’ verticals had higher visual attention, while news verticals had equal attention as the “ten blue links” search results.

3.2.3 Stage 3: Content Page Evaluation / Item Examination

How do users behave when examining a single information-object (e.g., a non-search-engine webpage, aka content page) obtained from an IR system?

In online information searching, searchers repeatedly interact with individual webpages, a.k.a. ‘content pages’ in IR terminology. These webpages can be visited by following links from a search engine, following links between different webpages, or directly typing the URL in the browser.

The first group of papers we discuss investigated users’ **visual attention** and **reading behaviour** on webpages. Pan et al. (2004) studied whether eye-tracking scanpaths on webpages varied based on task-type, webpage type (business, news, search, or shopping), viewing order of webpages, and gender of users. They found significant differences for all factors, except for task-type, which seemed to have no effect on scanpaths. They used weak task-types: remembering what was on a webpage vs. no specific task. In a later work on using informational vs. navigational search-tasks, they again saw limited effect of task-type on visual attention (Lorigo et al., 2006). Findings from Josephson & Holmes (2002)’s study suggested that users possibly follow habitually preferred scanpaths on a webpage, which can be influenced by factors like webpage characteristics and memory. However, they used only three webpages, making the

findings difficult to generalize. Goldberg et al. (2002) studied eye movements on Web portals during search-tasks, and saw that header bars were typically not viewed before focusing the main part of the page. So they suggested placing navigation bars on the left side of a page. Beymer et al. (2007) focused on a very specific feature on webpages: images that are placed next to text content and how they influence eye movements during a reading task. They found significant influence on fixation location and duration. Those influences were dependent on how the image contents related to the text contents (i.e., whether they showed ads or text-related images). Buscher et al. (2009) presented findings from a large scale study where users performed information-foraging and page-recognition tasks. They observed that in the first few moments, users quickly scanned the top left of the page, presumably looking for clues about the content, provenance, type of information, etc. for that page. The elements that were normally displayed in the upper left third of webpages (e.g., logos, headlines, titles or perhaps an important picture related to the content) seemed to be important for recognizing and categorizing a page. After these initial moments, influence of task-type set in. For page-recognition tasks, the attention remained in the top-left corner of the webpage. However, for information-foraging tasks, fixations moved to the center-left region of the webpage, where the user was possibly trying to find task-specific information. The right third of webpages attracted almost no visual attention during the first one-second of each page view. Afterwards as well, most users seemed to entirely ignore this region, or only occasionally look at it. This suggested that users had low expectations of information-content or general relevance on the right side of most webpages. As many webpages display advertisements on the right side, this was a plausible observation, and are in line with the observed “F-shaped-patterns”³ on webpages.

Buscher et al. (2009) also proposed an eye-tracking measure called *fixation impact*. This measure first appends a circular Gaussian distribution around each fixation on a webpage element, to create a fuzzy area of interest. This is called the *distance impact* value. If a webpage element completely covers the fixation circle (Gaussian distribution), it gets a *distance impact* value of 1. If the element partially covers the fixation circle, its *distance impact* value is smaller.

³<https://www.nngroup.com/articles/f-shaped-pattern-reading-web-content>

Multiplying the *distance impact* value with the fixation duration gives the fixation impact for the given webpage element. Thus, an element that completely covers the fixation circle gets the full fixation duration as *fixation impact* value. Elements which are partially inside the circle get a value proportional to the Gaussian distribution. The authors posited that the rationale behind creating the fixation impact measure was motivated by observations from human vision research, which indicates that fixation duration correlates with the amount of visual information processed; the longer a fixation, the more information is processed around the fixation centre. Using the fixation impact measure, Buscher et al. (2009) proposed a model for predicting the amount visual attention that individual webpage elements may receive (i.e. visual salience).

Another group of studies investigated how users judged **relevance of webpages** w.r.t. an assigned search-task or information need. (Gwizdka, 2018; Gwizdka & Zhang, 2015a, 2015b) observed that when relevant pages were revisited, the webpages were read more carefully. Pupil dilations were significantly larger on visits and revisits to relevant pages, and just before relevance judgements were made. Certain conditions of visits and revisits also showed significant differences in EEG alpha frequency band power, and EEG-derived attention levels. Relevance of individual webpage elements were also assessed as *click-intention*: whether users would click on an element they were looking at. Slanzi et al. (2017) used pupillometry and EEG signals to predict whether a mouse click was present for each eye fixation. EEG features included simple statistical features of signals (mean, SD, power, etc.), as well as sophisticated mathematical features (Hjorth features, Fractal Dimensions, Entropy, etc.). A battery of classifier models were tested. However, the results were not promising. Logistic Regression had the highest accuracy (71%), but very low F1 score (0.33), while neural network based classifiers the had highest F1 score (0.4). The authors suspected that the low sampling rate of their instruments (30 Hz eye-tracker and 128 Hz 14-channel EEG) impacted their classifier performances. González-Ibáñez et al. (2019) compared relevance prediction performances in the presence and absence of eye-tracking data, and argued that when eye-tracking data collection is not feasible, mouse left-clicks can be used a good alternative indicator of relevance.

The ‘*Competition for Attention*’ theory states that items in our visual field compete for our attention (Desimone & Duncan, 1995). Djamasbi et al. (2013) studied web search and browsing from the perspective of this theory. Theoretical models suggest that in goal-directed searches, information-salience and/or information-relevance drives search behaviour (i.e. competition for attention does not hold true), whereas exploratory search behaviour is influenced by competition among stimuli that attracts a user’s attention (i.e. competition for attention holds true). However, in practice, information search behaviour often becomes a combination of both types of visual search activities (Groner et al., 1984). Djamasbi et al. (2013) found that, despite the goal directed nature of their search-task (finding the best snack place in Boston to take their friends) *competition for attention* had some effect at the content page level. Some of the users’ attention was diverted to non-focal areas on content pages. However, there was little effect of *competition for attention* on how the results were viewed on SERPs. Users exhibited the familiar top-to-bottom pattern of viewing (Section 3.2.2), paying the most attention to the top two entries.

3.3 Effects of Expertise and Working Memory on Search Behaviour

Our focus of discussion in this dissertation is information searching and learning. As we saw in Chapter 2, learning and expertise are closely connected: expertise is an evolving characteristic of users that reflects learning over time, rather than being a static property (Rieh et al., 2016; Sawyer, 2005). (White, 2016a, Chapter 7) considers three types of expertise, that are relevant in information seeking settings: (i) domain or subject-matter expertise; (ii) search expertise; and (iii) task expertise. **Domain or subject-matter expertise** describes people’s knowledge in a specialised subject area such as a domain of interest. **Search expertise** refers to people’s skill level at performing information-seeking activities, both in a Web search setting and in other settings such as specialised domains. **Task expertise** describes people’s expertise in performing particular search tasks, potentially independent of domain. Although considered distinctly, the boundaries between these expertise types are quite blurred, and therefore difficult to estimate at the time of search, and model it in a way that can be consumed by search systems.

Search Stage	Search behaviours indicative of learning, or increasing domain expertise
Query (re)formulation	<ul style="list-style-type: none"> - Increase in the <i>number</i> and <i>specificity</i> of query terms - Increase in number of synonyms - Decrease in number of reformulated queries
Search Engine Results Page (SERP) examination (Source Selection)	<ul style="list-style-type: none"> - Increased clarity in relevance criteria = increased ability to distinguish between relevant and non-relevant results - Decrease in the number of search results viewed (supported by Mao et al. (2018), contrasted by White et al. (2009)) - Decrease in the proportion of partially relevant results viewed, and increase in the number of relevant results viewed - Average time for assessing a search result decreases
Content Page examination (Interaction with sources)	<ul style="list-style-type: none"> - Increase in the amount of information-use from viewed content pages in the learning outcome artefact (summary, project report, exam answers, etc.) <p><u>Knowledge Assimilation</u>: addition of new information to existing knowledge structure</p> <ul style="list-style-type: none"> - Focus on factual and specific information - Refining output with factual information - Revisiting content pages for information initially overlooked <p><u>Knowledge Restructuring</u>: large changes or replacement of concepts and their relations in knowledge structure</p> <ul style="list-style-type: none"> - Focus on background and conceptual information; notes taken on themes and ideas - Ideas are related and combined for a focus, in the outcome <p><u>Knowledge Tuning</u>: small changes in scope and meaning of concepts and their relations in knowledge structure; no replacements</p> <ul style="list-style-type: none"> - Focus on procedural and specific information - Identification of information to support and refine focus
Overall search session	<ul style="list-style-type: none"> - Decreased time per search session - Decrease in variability of search tactics - Increase in the diversity of websites visited within a subject area (increase in the average number of unique top-level websites on a SERP or across clicked documents) - Increase in focus of exploration (e.g., the degree to which a SERP is covered by a single topic) - Search path is more 'branchy' – returning to a previously visited point and then following a new unexplored direction) (White et al., 2009)

Figure 3.9: Literature reviews by Rieh et al. (2016) and Vakkari (2016) identified the following search behavioural traits as indicative of domain experts, or novices undergoing learning to become experts.

Previous work on domain knowledge and expertise have linked ⁴ domain expertise and search behaviour in terms of metrics, behavioural patterns, and criteria (M. J. Cole et al., 2013; Mao et al., 2018; O'Brien et al., 2020; White et al., 2009). A representative summary is presented in Figure 3.9, and is adapted from literature reviews by (Rieh et al., 2016) and (Vakkari, 2016). Briefly, (Wildemuth, 2004) showed that novices converge toward the same search patterns as experts, as they are exposed to a topic and learn more about it. (X. Zhang et al., 2011) found that features such as document retention, query length, and the average rank of results selected could be predictive of domain expertise. (M. J. Cole et al., 2013) showed that eye-gaze patterns could be used to predict an individual's level of domain expertise using estimates of cognitive effort associated with reading. (White et al., 2009) showed that measures such as diverse website visitation, more narrow topical focus, less diversity (or entropy), more 'branchiness' of search sessions, less dwell time, and higher query and session complexity are indicative of expert knowledge and/or search behaviour.

As a stark contrast, (Zlatkin-Troitschanskaia et al., 2021) reviewed literature on higher education **students' information search behaviour**. Students can be considered as novices in all three respects: domain/subject-matter, search skills, and task. The authors report that across literature, higher education students' information search behaviour tends to follow some general general patterns: *(i) foraging*: no explicit (task-specific) research plan and little understanding of the differences (pros/cons) between various IR systems; *(ii) Google dependence*: no intention to use any search tool other than Google, causing students to struggle to understand library information structures and engage with scholarly literature effectively; *(iii) rudimentary search heuristic*: reliance on one and the same simple search strategy, regardless of search context; *(iv) habitual topic changing*: students change the search topic after rather superficial skimming, and before evaluating all search results; and *(v) overuse of natural language*: students type questions into the search box that are phrased as if posing them to a person. Highly ranked online sources accessed via a well-known search engine were perceived as trustworthy.

⁴and continue to link

Effects of memory span and working memory capacity have also been found to influence search effort and search behaviour (Arguello & Choi, 2019; Bhattacharya & Gwizdka, 2019a; L. Cole et al., 2020; Gwizdka, 2013, 2017). **Working memory** (WM) is considered a core executive function defined as someone's ability to hold information in short-term memory when it is no longer perceptually present (Diamond, 2013; G. A. Miller, 1956). (Bailey & Kelly, 2011) showed that the amount of effort was a good indicator of user success on search tasks. (Smith & Kantor, 2008) studied searcher adaptation to poorly performing systems and found that searchers changed their search behaviors between difficult and easy topics in a way that could indicate that users are satisficing. Differences in search effort between different types of systems (higher effort invested in searching library database vs. web) were found by (Rieh et al., 2012). A couple of studies showed that mental effort involved in judging document relevance is lower for irrelevant and higher for relevant documents (Gwizdka, 2014; Villa & Halvey, 2013). (Gwizdka, 2017) found that higher WM searchers perform more actions and that most significant differences are in time spent on reading results pages. Behaviour of high and low WM searchers were also found to change differently in the course of a search task performance.

3.4 Assessing Learning during Search

In order for IR systems to foster user-learning at scale, while respecting individual differences of searchers, there is a need for measures to represent, assess, and evaluate the learning process, possibly in an automated fashion. Consequently, a variety of assessment tools have been used in prior studies. These include self reports, close ended factual questions (multiple choice), open ended questions (short answers, summaries, essays, free recall, sentence generation), and visual mapping techniques using concept maps or mind maps. Each approach has its own associated advantages and limitations. **Self-report** asks searchers to rate their self-perceived pre-search and post-search knowledge levels (Ghosh et al., 2018; O'Brien et al., 2020). This approach is the easiest to construct, and can be generalised over any search topic. However, self-perceptions may not objectively represent true learning. **Closed ended questions** test searchers' knowledge using factual multiple choice questions (MCQs). The answer options

can be a mixture of fact-based responses (*TRUE*, *FALSE*, or *I DON'T KNOW*), (Gadiraju et al., 2018; Xu et al., 2020; Yu et al., 2018) or recall-based responses (*I remember / don't remember seeing this information*) (Kruikemeier et al., 2018; Roy et al., 2020). Constructing topic-dependant MCQs may take time and effort, since they are topic dependant. Recent work on automatic question generation may be leveraged to overcome this limitation (Syed et al., 2020). Evaluating close ended questions is the easiest, and generally automated in various online learning platforms. Multiple choice questions, however, suffer from a limitation: they allow respondents to answer correctly by guesswork. **Open ended questions** assess learning by letting searchers write natural language summaries or short answers (Bhattacharya & Gwizdka, 2018; O'Brien et al., 2020; Roy et al., 2021). Depending on experimental design, prompts for writing such responses can be generic (least effort) (Bhattacharya & Gwizdka, 2018, 2019b), or topic-specific (some effort) (Syed et al., 2020). While this approach can provide the richest information about the searcher's knowledge state, evaluating such responses is the most challenging, and requires extensive human intervention (Kannainen et al., 2021; Leu et al., 2015; M. J. Wilson & Wilson, 2013) (as discussed in Section 2.4.2). **Visual mapping** techniques such as mind maps and concept maps have also been used to assess learning during search (Egusa et al., 2010, 2014a, 2014b, 2017; Halttunen & Jarvelin, 2005). Concept maps have been discussed at length in Section 2.3.1. Learning has also been measured in **other ways**, such as user's familiarity with concepts and relationships between concepts (Pirolli et al., 1996), gains in user's understanding of the topic structure, e.g., via conceptual changes described in pre-defined taxonomies (P. Zhang & Soergel, 2016), and user's ability to formulate more effective queries (Chen et al., 2020; Pirolli et al., 1996).

3.5 Limitations of Current Search Systems in Foster-ing Learning

3.5.1 Longitudinal studies

Learning is a longitudinal process, occurring gradually over time (Sections 2.3 and 2.2). Therefore, information researchers have studied participant's search behaviour in prior, **albeit few**, longitudinal studies. Examples include studies by (Kelly, 2006a, 2006b; Kuhlthau, 2004; Vakkari, 2001a; White et al., 2009; Wildemuth, 2004).

(Wildemuth, 2004) examined the search behaviour of medical students in microbiology. In this experiment, students were observed at three points of time (at the beginning of the course, at the end of the course, and six months after the course), under the assumption that domain expertise changes during a semester. Some search strategies, most notably the gradual narrowing of the results through iterative query modification, were the same throughout the observation period. Other strategies varied over time as individuals gained domains knowledge. Novices were less efficient in selecting concepts to include in search and less accurate in their tactics for modifying searches. (Pennanen & Vakkari, 2003; Vakkari, 2000, 2001a, 2001b) also examined students at multiple points in time, as they were developing their thesis proposal. One important change in behaviour was the use of a more varied and more specific vocabulary as students learned more about their research topic. (Weber et al., 2019) examined a large sample of German students from all academic fields in a two wave study and found that the more advanced they are in their studies, the more students show a more advanced search behaviour (e.g., using more English queries and accessing academic databases more frequently). **Advanced search behaviour predicted better university grades.** (Weber et al., 2018) also provide mixed evidence on the potential long-term effects of such interventions, as some of their participants reverted to their previous habits two weeks after the study and therefore exhibited only short-term changes in their information-seeking behaviour.

Overall, results regarding the promotion of user' search and evaluation skills are encouraging. But there is a clear need for more longitudinal studies. The general body of search-as-learning

literature examines the learner in the short-term, typically over the course of a single lab session (Kelly et al., 2009; Zlatkin-Troitschanskaia et al., 2021). The trend is similar in other Human-Computer Interaction (HCI) research venues. A meta-analysis of 1014 user studies reported in the ACM CHI 2020 conference revealed that more than 85% of the studies observed participants for a day or less. To this day, “longitudinal studies are the exception rather than the norm” (Koeman, 2020). “An over-reliance on short studies risks inaccurate findings, potentially resulting in prematurely embracing or disregarding new concepts” (Koeman, 2020).

3.5.2 Supporting sensemaking and reflection

As we saw in Section 2.3, learning *is* sensemaking. Yet, modern search systems are still quite far from supporting sensemaking and learning, and rather, at best are good *locators* of information. (Rieh et al., 2016) says that modern search systems should support sensemaking by offering more interactive functions, such as tagging for annotation, or tracking individuals’ search history, so that a learner could return to a particular learning point. In addition, a system could provide new features that allow learners to reflect upon their own learning process and search outcomes, thus facilitating the development of critical thinking skills.

*It's easy to be impressed by the scientific and engineering feats that have produced web search engines. They are, unquestionably, one of the most impactful and disruptive information technologies of our time. However, it's critical to remember their many limitations: they do not help us **know what we want to know**; they do not help us **choose the right words** to find it; they do not help us know if what we've found is **relevant or true**; and they do not help us **make sense of it**. All they do is quickly retrieve what other people on the internet have shared. While this is a great feat, all of the content on the internet is far from everything we know, and quite often a poor substitute for expertise.*

— Ko (2021) (emphasis our own)

3.6 Summary

In this second chapter of the background literature review, we discussed (*i*) how searchers interact with three stages / interfaces of modern information retrieval system: query formulation,

search results evaluation, and content page evaluation; (*ii*) how expertise and working memory influence overall search behaviour; (*iii*) how learning or knowledge gain during search has been assessed in recent search as learning literature; and (*iv*) what are the limitations of current search systems to foster learning, including gaps in literature about long term search behaviour and learning outcomes, as well as lack of support for sensemaking.

We saw that while we have a plethora of studies investigating search behaviour searchers in the short term, we have merely a handful of studies observing the same participant for more than a day. To the best of the author's knowledge, most of these studies were conducted over a decade ago. Thus, while we have excellent knowledge of short term nature of influence of searching on learning, we do not know what are the longer term effects. Furthermore, we have gaps in our knowledge of (*i*) how practices like articulation and externalization, and user attributes like metacognition, motivation, and self regulation moderate the searching as learning process; (*ii*) how these moderator variables change over time; and (*iii*) what these phenomena collectively entail for the design of future learning-centric IR systems. In the next chapter, we take these gaps in knowledge and use them to inform our research questions and hypotheses.

4

Research Questions and Hypotheses

4.1 Research Questions

Combining empirical findings and gaps in the literature from the disciplines of Education (Chapter 2) and Information (Chapter 3), we saw that:

- searching for information online is an integral part of new learning (Section 2.4.3)
- learning happens when students connect new pieces of information to their existing knowledge structures via assimilation, restructuring, or tuning (Section 2.3), and this process is influenced by the learner's individual traits (Section 2.5)
- modern knowledge-work requires less of long term memory, and more of creation of knowledge-artefacts, which should be treated as better assessors and outcomes of learning (Section 2.4.2)
- domain expertise and search behaviour are strongly linked (Section 3.3)
- learning is a process that takes place longitudinally over time (Sections 2.3 and 2.2), yet only a handful of studies (mostly over a decade ago) have investigated the intertwined process of researchers' learning and their information searching behaviour over time (Section 3.5.1)

- this creates acute gaps in our knowledge about long term information searching and learning behaviour, which is crucial for building learning-centric search systems of the future, which can support sensemaking and knowledge-gain

Guided by the above insights, we asked the following research questions in this dissertation, and aimed to answer them via a longitudinal study of students' information search behaviour and learning outcomes over the course of a university semester (Section 5.1). For the purposes of this dissertation, we considered learning as change in a student's knowledge about certain topics over the duration of a university semester.

The research questions are first stated in this section, to put them all together in one place for easy reference. Then the overarching hypotheses are discussed in Section 4.2.

RQ1: *What kind of longitudinal information search behaviours are correlated to the degree of change in students' knowledge levels and learning outcomes?*

RQ2: *What are the similarities and differences in information search behaviours for tasks where the learning goals are new (new search tasks), versus those where the learning goals are repeated (repeated search tasks)?*

RQ3: *How does externalisation and articulation affect students' learning outcomes and experiences during search?*

RQ4: *How do (changing) individual differences of students moderate their information search behaviours and learning outcomes?*

4.2 Overarching Hypotheses

In this Section, we discuss the research framework and hypotheses behind the research questions. The study is primarily planned to be exploratory, therefore the hypotheses are exploratory in nature as well.

4.2.1 Learning as Students' Transition from Novice to Expert (RQ1, RQ2)

Learning and expertise are closely connected: expertise is an evolving characteristic of learners that reflects learning over time, rather than being a static property (Rieh et al., 2016). Domain expertise and search behaviour has been studied, albeit mostly during single lab sessions, and sometimes longitudinally (Section 3.3). There is a clear gap in understanding how higher education students search for information in the long term, how their information use behaviour develops over time, and how it affects their learning (Zlatkin-Troitschanskaia et al., 2021). RQ1 and RQ2 aims to address some of these gaps.

Hypothesis for RQ1: Search behaviours described in Table 3.9 will occur both within individual search sessions, and across progressive search sessions recorded over a semester, as domain expertise of students increases (Eickhoff et al., 2014).

Hypotheses for RQ2: This research question stems from the idea of lifelong or continuous learning: how do search behaviours evolve over time when gaining knowledge about perpetual life skills (e.g., financial literacy). We hypothesize that

- relevance judgement of previously viewed information on this topic will change over time, as searcher gains more knowledge and expertise
- the decision or choice to put effort into searching again, or suffice with previously found information, will have links to motivation and self-regulation

4.2.2 Promoting Better Learning (RQ3, RQ4)

Better learning takes place when students articulate and refine their unformed and still developing understanding, and continue to articulate it throughout the learning process (Section 2.5.1). Also, students' motivation, self-regulation and metacognition capabilities determine, direct, and sustain the approaches they take to learn (Section 2.5). Effective searching for learning is affected by students' search tactics and information evaluation capabilities (Section 2.4.3) as well as cognitive capabilities such as memory span (Section 3.3).

Hypothesis for RQ3: articulation during the search as learning process (via concurrent think aloud) will lead to better learning (and possibly better searching) outcomes, than working silently.

Hypotheses for RQ4: with respect to the individual differences and contexts in which students search to learn, we speculate the following hypotheses:

- students showing sustained or increasing metacognition, self-regulation, and motivation over the duration of the semester will put more “effort” into their searches, and demonstrate better learning and search outcomes
- students with higher memory span will demonstrate more ‘branchiness’ and parallel browsing in their search behaviour
- students with better information evaluation capabilities will demonstrate better learning and search outcomes

4.3 Anticipated Contributions

We anticipate by answering the proposed research hypotheses and question, the results can greatly contribute to the existing knowledge of Interactive Information Retrieval and Educational Sciences in general, and Search as Learning in particular. Referring back to some of the research agenda advocated by the multiple workshops and journal special issues on Search as Learning (Section 1.4), our research questions aim to investigate (*i*) the contexts in which students search to learn; (*ii*) the factors that influence their learning outcomes; and (*iii*) whether students are more critical consumers of information.

Many researchers have expressed their concern with the lack of longitudinal studies in IIR and related domains (Kelly et al., 2009; Koeman, 2020; Zlatkin-Troitschanskaia et al., 2021). If significant relationships were to be found between students’ information search behaviours and learning outcomes, the results of this dissertation can provide great insights and contributions towards (*i*) understanding how search behaviours can predict learning outcomes; (*ii*) creating

reliable measures, methods, and instruments for capturing changes in people's knowledge level, learning experiences, and learning outcomes (Rieh, 2020); and *(iii)* developing search systems that better support learning and sensemaking.

5

Methods: LongSAL - the Longitudinal Study

To investigate the research questions and hypotheses discussed in Section 4.1, we conducted the LongSAL study. The following sections discuss the study design, apparatus and procedure.

5.1 Study Design and Participants

LongSAL (Longitudinal Search as Learning study) is a remote, exploratory, longitudinal study that was conducted between January and June 2022 (Spring semester) at the School of Information, University of Texas at Austin (UT Austin). The study was approved by The University of Texas at Austin Institutional Review Board (Submission ID: STUDY00002136, Date Approved: December 8, 2021).

Participants were recruited from the student pool enrolled in the required undergraduate core-course: *Ethical Foundations for Informatics* (Fleischmann et al., 2022). 18 participants originally signed up for the study; 10 participants fully completed all the phases of the study, and the remaining 8 dropped off at different points during the semester. Students enrolled in the course had to submit a research paper of 2,000-2,500 words as the final project for the course. There were four checkpoints spread across the semester to submit the drafts in progress: (i) paper proposal, (ii) outline, (iii) rough draft, and (iv) final paper. Writing the research

paper required choosing an informatics ethical dilemma, and applying three ethical perspectives covered in the course to explore potential solutions to the selected dilemma. This involved searching and navigating information online, finding at least 20 relevant external sources, combining ideas, and weaving a narration around the information found in the selected sources.

The study design was informed by running a pilot study during Summer 2021 semester, in partnership with two courses at UT Austin School of Information: *Information in Cyberspace*, and *Academic Success in the Digital University*. More details of the pilot study are presented in Appendix ??.

5.2 Apparatus

5.2.1 YASBIL Browsing Logger

The YASBIL browsing logger (Bhattacharya & Gwizdka, 2021) was utilised for this study. YASBIL (Yet Another Search Behaviour and Interaction Logger)¹ is a two-component logging solution for ethically recording a user's browsing activity for Interactive IR user studies. It was developed by the author in early Spring 2021, and was employed in the pilot study for data collection and testing. YASBIL comprises a Firefox browser extension and a WordPress plugin. The browser extension logs browsing activity in the participants' machines. The WordPress plugin collects the logged data into the researcher's data server. YASBIL captures participant's behavioural data, such as webpage visits, time spent on pages, identification of popular search engines and their SERPs, tracking mouse clicks and scrolls, and the order and sequences of these events. The logging works on any webpage, without the need to own or have knowledge about the HTML structure of the webpage. To protect the privacy of participants, the logger software can be switched on or off by the participant. Participants received regular reminders to turn YASBIL on only when they were searching for information related to the course.

YASBIL offers ethical data transparency and security for participants, by enabling them to view and obtain copies of the logged data, as well as securely upload the data to the researcher's

¹<https://github.com/LongSAL/yasbil>

	ENTRY QSNAIRE [QSNR1]	INITIAL PHASE [PHASE1]	LONGITUDINAL TRACKING PHASE [PHASE2A, 2B, 2C, 2D]	MID-TERM QSNAIRE [QSNR2]	FINAL PHASE [PHASE3]	EXIT QSNAIRE [QSNR3]
Why	Record individual-differences	Establish baseline search behaviour and initial knowledge	Understand change in search behaviour and knowledge acquisition over time	Track changes in individual differences	Record “evolved” search behaviour, and “final” knowledge	Final state of individual differences
When	Week 1-2 of semester	Weeks 1-2 of semester; after QSNR1	Four different points over the semester	Semester mid-point	After last day of classes	After PHASE3
Where	Asynchronous	Synchronous: Remote	Async	Async	Sync: Remote	Async
What	<u>Only in QSNR1:</u> –Consent Form <u>Repeated in QSNR2 and QSNR3:</u> –Motivation –Self-regulation –Metacognition	Two search tasks: for each task, participants searched to find at least three unique, good quality online resources relevant to a given topic. • <u>Pre-search self reporting:</u> existing knowledge, interest, perceived difficulty • <u>Post-search self reporting:</u> perceived learning, perceived search success, interest and motivation, decision making Website reliability assessment from Stanford History Education Group (SHEG).	Participants <u>recorded browsing activity</u> when they worked on final project assignment: writing a research paper, at four different points in the semester (PHASE2). – 2A: Proposal – 2B: Paper Outline – 2C: Rough Draft – 2D: Final Paper Participants also shared (anonymized) assignment submission	Similar to QSNR1, with repeated components	Two search tasks: one task-topic repeated from PHASE1, one new; same format as PHASE1 Website comparison assessment from Stanford History Education Group (SHEG).	Similar to QSNR2 Participants self-reported scores and grades they received for different parts of the final project
Approx. Time Reqd.	10 - 15 mins	60 - 90 mins	No time limit for working on assignments. Sharing data with researchers took 1-5 minutes.	10 - 15 mins	60 - 90 mins	10 - 15 mins
Comp: (USD) \$150	\$5	\$25	\$5, \$5, \$10, \$15 (total \$35)	\$10	\$30	\$15
	Bonus \$30 paid in the end, if participant completed all parts of the study.					

Figure 5.1: Longitudinal study procedure.

server over an HTTPS connection. Although developed using the cross-browser WebExtension API ², YASBIL currently works in the Firefox Web Browser. So participants were instructed to install Firefox and YASBIL on their machines when they volunteered to participate in the study.

5.3 Procedure

The longitudinal study consisted of six data collection components, as illustrated in Figure 5.1. They comprise three asynchronous **questionnaires** (QSNR1, QSNR2, QSNR3), two **remote synchronous study phases** over Zoom video conferencing software (PHASE1, PHASE3), and a set of four asynchronous **longitudinal tracking phases** (PHASE2a, PHASE2b, PHASE2c, PHASE2d). These phases are discussed in detail in the following sections.

²<https://developer.mozilla.org/en-US/docs/Mozilla/Add-ons/WebExtensions/Build-a-cross-browser-extension>

5.3.1 QSNR0: Recruitment Questionnaire (Appendix B.1)

Participants were recruited for the study via the recruitment questionnaire (QSNR0). The questionnaire contained questions about demographic information of the participant pool. The description of the study and the link to the questionnaire was posted in the Canvas Learning Management System used for the I303 course.

5.3.2 QSNR1: Entry Questionnaire

After recruitment, participants completed the entry questionnaire (QSNR1). The purpose of QSNR1 was to capture their individual-differences, or moderating variables, at the beginning of the semester. Details of the data captured in SUR1 are described below, with references to sections in the Appendix, where the full-text of the questionnaire can be found.

5.3.2.1 Consent Form (Appendix B.2.1)

The first page of QSNR1 was online consent form for participating in the study. Participants were able to proceed with the study once they provided informed consent.

5.3.2.2 Motivation (Appendix B.3)

Adapted from the *Intrinsic Motivation Inventory (IMI)* by (Ryan, 1982), which is a multi-dimensional measurement device intended to assess participants' subjective experience related to a target activity (the assignments for the course they are taking). The instrument assesses participants' interest/enjoyment, perceived competence, effort/importance, pressure/tension, perceived choice, and value/usefulness, while performing a given activity, thus yielding six sub-scale scores. The pressure/tension and the perceived choice components were not included in the entry questionnaire QSNR1, and were present in the mid-term (QSNR2) and exit (QSNR3) questionnaires.

5.3.2.3 Self-regulation (Appendix B.4)

Adapted from the *Self-Regulation Questionnaire (SRQ)* by (J. M. Brown et al., 1999), which assess seven self-regulatory processes through self-report: receiving relevant information, evaluating the information and comparing it to norms, triggering change, searching for options, formulating a plan, implementing the plan, and assessing the plan's effectiveness (Section 2.5.4).

5.3.2.4 Metacognition (Appendix B.5)

Adapted from the *Metacognivite Awareness Inventory (MAI)*, originally proposed by (Schraw & Dennison, 1994) as a 52-item true / false questionnaire, and later revised by (Terlecki & McMahon, 2018) to use five-point Likert scales. The instrument measures two components of cognition through self-report: knowledge about cognition, and regulation of cognition (Section 2.5.2).

After completing QSNR1 offline, participants were instructed to prepare for the initial synchronous phase, PHASE1, by installing Firefox web browser and the YASBIL extension on their machines. This was a one-time step. If a participant could not find the time for this step, they were informed that an extra 5-10 minutes would be taken in the beginning of PHASE1 to complete this step.

The entry questionnaire and the software installation took about 10-15 minutes to complete. Participants were compensated with USD 5 for their time for completing this step. The questionnaire was published to the I-303 course students in the first week of the Spring 2022 semester.

5.3.3 PHASE1: Initial Phase

The PHASE1 of the data collection took place in the beginning of the semester. The data-collection took place over a Zoom video call combined with YASBIL browsing logger installed in the participants' machines. Participants were asked to share their screen for the whole duration of the phase. Their screens and audio were recorded for the entire duration. They had the freedom to turn off their video. The total time for PHASE1 was expected to not exceed

1.5 hours (90 minutes). Participants were compensated with USD 25 for this phase. The different components of PHASE1 are described below.

5.3.3.1 Training Search Task

Participants performed a training search task to familiarize themselves with how to operate the YASBIL browser extension to log their browsing activity. The training task took around 2-5 minutes.

5.3.3.2 PHASE1-FINANCE and PHASE1-UBUNTU: Two Actual Search Tasks

Participants performed two search tasks: PHASE1-FINANCE, and PHASE1-UBUNTU. The PHASE1-FINANCE task was repeated at the end of the semester as PHASE3-FINANCE task. The PHASE1-UBUNTU task was not repeated, and instead the PHASE3-BIAS task took its place. This helps to answer the research question RQ2 (Section 4.1). The order of the two search tasks were randomized.

The repeated search task FINANCE was on the topic of financial literacy, a topic that we posit can be considered as universally important to college students, and part of lifelong learning. The prompts for the PHASE1-FINANCE and PHASE3-FINANCE tasks are presented in Figure 5.2. The non-repeated search tasks were on topics that were taught in the I303 course: Ubuntu ethics (for PHASE1) and Algorithmic Bias (for PHASE3). The prompts for these tasks are present in Figure 5.3.

To answer RQ3 (effect of externalization and articulation in learning), each participant performed one of the search tasks while thinking aloud (Concurrent-Think Aloud or *CTA condition*), and performed the other search task in silence (*silent condition*). The choice of the search task for each of the conditions was randomized and balanced.

Each search task began with a pre-task questionnaire (Appendix C.1), which asked participants to self-rate their pre-search knowledge-level and interest on the topic. Then participants turned on the YASBIL browsing logger and started searching. The deliverable for each search task was a written summary (artefact). After participants are satisfied with

Repeated Search Task: Financial Literacy	
Prompt for Initial Phase [PHASE1-FINANCE]	Prompt for Final Phase [PHASE3-FINANCE]
<p>Money management and financial literacy are essential life skills, and what better time to learn about them than in college?</p> <p>Write a note to your future self, about essential money-related advice and skills that college students should know and practice.</p> <p>What to do:</p> <ul style="list-style-type: none"> • Find at least three (3) unique, good quality online resources that are relevant to this topic • Look for resources that help establish connections and develop a narrative <p>What to deliver:</p> <ul style="list-style-type: none"> • Write a summary of the lessons, advice, and/or tips you found across the different resources. This is a note to your future self, so the narrative can be in a format that is most useful and interesting to YOU :) • Paste the links of ALL the resources that you finally selected to develop your narrative, in the second text box, one link per line <p>Please turn YASBIL ON before starting to search.</p> <p>Write the summary (note to your future self) here: _____</p> <p>Paste the links of the resources that you finally selected (at least 3), one per line: _____</p>	<p>At the start of the semester, you wrote a note to your future self, about essential money-related advice and skills that college students should know and practice.</p> <p>Here is what you wrote: [... <i>dynamic content showing participant's PHASE1 response</i> ...]</p> <p>Here are the resources you took help from: [... <i>dynamic content</i> ...]</p> <p>Now you have a chance to update or revise the note with more information. You can either choose to write afresh, or copy-paste the note from above into the first textbox below and add to it /edit it.</p> <p>Feel free to search the web if you need to, <u>after turning YASBIL on</u>.</p> <p>You can choose NOT to search, as well.</p> <p>If you do choose to search, please paste the links of ALL the resources that you finally selected for updating your note, one link per line, in the second textbox. The links can be the same ones you visited earlier, or different.</p> <p>Please turn YASBIL ON before starting to search (if you choose to search).</p> <p>Write the updated summary (note to your future self) here: _____</p> <p>Paste the links of the resources that you used to update your note here, one per line. If you did not search this time, type "N/A": _____</p> <p>Did you need to search the web for updating the note? Why? Yes: _____ No: _____ Other: _____</p>

Figure 5.2: Prompts for the search task that was repeated in the final phase, on the topic of financial literacy.

the quality of the deliverable, they turned off YASBIL browsing logger, and proceeded to the post-task questionnaire.

The post-task questionnaire (Appendix C.2) asked participants to self-rate their post-search topic knowledge, search experience, interest and motivation, and overall perceptions. The pre-task and post-task questionnaires are adapted from (Collins-Thompson et al., 2016; Crescenzi, 2020).

After the two search tasks were completed, participants answered questions about whether

Non-Repeated Search Tasks	
Prompt for Initial Phase: Ubuntu Ethics [PHASE1-UBUNTU]	Prompt for Final Phase: Algorithmic Bias [PHASE3-BIAS]
<p>The term Ubuntu originates in Africa, and refers to the idea that our individual lives are intricately tied to the lives of others, and we all need to cherish these interconnections. Such interconnections should be guided by kindness, openness, accommodation, and willingness to work for others' interest.</p> <p>Do you think the Ubuntu philosophy can be used to mitigate the social, physical, and mental isolation that people may be facing during the COVID-19 pandemic?</p> <p>What to do:</p> <ul style="list-style-type: none"> Find at least three (3) unique, good quality online resources that are relevant to this topic Look for resources that help establish connections and develop a narrative <p>What to deliver:</p> <ul style="list-style-type: none"> Write a short summary of the content that you found across the different resources. In the summary, briefly mention your thoughts about each resource - do you agree or disagree with the content in the resource? Anything else? Paste the links of ALL the resources that you finally selected to develop your narrative, in the second text box, one link per line <p>Please turn YASBIL ON before starting to search.</p> <p>Write the summary here: _____</p> <p>Paste the links of the resources that you finally selected (at least 3), one per line: _____</p>	<p>In the I303 course, you studied about Algorithmic Bias and its implications. Therefore, for answering the questions below, you may choose NOT to search the web, if you feel you can answer the questions reasonably well.</p> <p>If you need to search the web, feel free to do so, after turning YASBIL ON. Paste the links of ALL the resources that you finally selected to develop your narrative, in the second text box, one link per line</p> <p>Please turn YASBIL ON before starting to search (if you choose to search).</p> <p>As you understand these concepts, briefly explain (with examples if necessary)</p> <ol style="list-style-type: none"> What is algorithmic bias? How does algorithmic bias originate? What are some implications of algorithmic bias? <p>Response: _____</p> <p>Paste the links of the resources that you used to write your answers, one per line. If you did not need to search, type "N/A": _____</p> <p>Did you need to search the web for this task? Why? Yes: _____ No: _____ Other: _____</p>

Figure 5.3: Prompts for the non-repeating search tasks. Topics were selected from the I-303 course content.

they preferred the think-aloud condition or the silent condition, and why (Appendix C.3).

5.3.3.3 PHASE1-SHEG: Website Reliability Assessment

To assess participants' (mis)information evaluation capabilities, participants performed a website reliability assessment created by the Stanford History Education Group (SHEG) (2021b).

This task presents students with the website of the American College of Pediatricians (ACPed.org) and asks them whether it is a trustworthy source to learn about children's health. Despite the site's professional title and appearance, the American

College of Pediatricians is not the nation's major professional organization of pediatricians. That designation belongs to the similarly named American Academy of Pediatrics.

This exercise is an open web search in which students are free to stay on the American College of Pediatricians site or leave it to search for information about the group. Successful students will look beyond the surface features of the site and detect its agenda from its new releases or other focus issues. A faster route, however, is to leave the site almost immediately to search for reliable information about the true agenda of this organization.

— Stanford History Education Group (SHEG) (2021b)

The prompt for the PHASE1-SHEG task is present in Appendix C.4).

5.3.3.4 Memory Span Test

PHASE1 concluded with the assessment of the participant's working memory capacity (WMC) using a memory span task (Francis et al., 2004). The task has 25 trials. On each trial participants saw a list of items presented one at a time in random order and were asked to recall the items in the same order in which they were presented. If they got a list correct, the list length increased by 1 for that type of material. If they got a list incorrect, the list length decreased by 1.

The type of material participants were asked to recall were: digits, letters that sound dissimilar, letters that sound similar, short words, and long words. The outcome score was the list length of the last list that participants could correctly recall.

5.3.4 PHASE2A - PHASE2D: Longitudinal Tracking Phase

The four-part longitudinal tracking phases PHASE2A - PHASE2D were conducted asynchronously over the duration of the semester, to understand the change (or lack thereof) of participants' search behaviour and knowledge gain over time. Whenever participants worked on different parts of their final project (Ethical dilemma research paper for the I-303 course), as described in Figure 5.4, they used Firefox web browser, and logged their browsing activity using YASBIL browsing logger. To protect their privacy, participants were regularly instructed to turn YASBIL on only when they were searching for information related to coursework. After each checkpoint

Final Project Description: Ethical Dilemma Research Paper	
<p>Throughout the semester, you will choose an informatics ethical dilemma and apply three ethical perspectives covered in the class to explore potential solutions to your selected dilemma. You are required to apply readings from the course as well as readings from outside of the course, including incorporating the three ethical theories as part of your analysis. This final project is broken down into several components that you will complete throughout the semester.</p>	
<p>Proposal (week 3): must include the proposed title of your research paper as well as a one-page description of the informatics ethical dilemma. At this stage, you are not required to have settled on your ethical theories yet. Please make sure to include your strategy for finding appropriate outside readings. [PHASE2A]</p> <p>Outline (week 6): will typically include bulleted lists, filling in as much detail as you have ready at this point; must include the three planned ethical theories; must list of at least 10 potentially relevant references / scholarly readings, with 5 of them coming from beyond the course syllabus (external sources). [PHASE2B]</p> <p>Rough Draft (week 10): must be at least a half-complete version of your final paper; should be 1,000-2,500 words; must cite at least 10 sources, including 5 from external sources. [PHASE2C]</p> <p>Final Paper (week 15): must be complete, coherent, and easy to read; must incorporate feedback from all previous stages; should be 2000-2500 words; must cite at least 20 sources, including 10 external sources. [PHASE2D]</p>	<p>Peer Reviews of Rough Draft (week 10-11): peer-review the rough draft of two of your peers; prepare a one page peer review for each of them; must include: a brief summary of the purpose and content of the paper as you understood it, the strengths of the paper, and constructive feedback on how to improve it</p> <p>Final Presentation (week 15): record a 5-min video presentation of your paper.</p>

Figure 5.4: Final project description, setting up the longitudinal tracking phase of the study throughout the duration of the Spring 2022 semester. Text taken from I-303 course syllabus (Fleischmann et al., 2022); emphasis and annotations our own.

assignment, participants self-uploaded an anonymized version of the working-draft of their research paper, and answered a post-task questionnaire. The post-task questionnaire were similar to those used in the PHASE1 and PHASE3 search tasks, where participants self-reported, among other things, their perceived learning outcome and perceived search outcome (Collins-Thompson et al., 2016). Participants received reminder emails before the deadline of each assignment, to remind them to use Firefox, turn YASBIL on, and upload the anonymized working-draft. To prevent participant drop-off, a staggered payment model was adopted during PHASE2. Participants received USD 5 each when they completed PHASE2A and PHASE2B, USD 10 for PHASE2C, and USD 15 for PHASE2D, for a total of USD 35 for entire PHASE2.

5.3.5 QSNR2: Mid-Term Questionnaire

The mid-term questionnaire QSNR2 took place around the mid-point of the semester (Week 8-9). The purpose was to track whether any of the participants' individual difference measures (motivation, metacognition, and self-regulation) changed during the first half of the semester. This questionnaire was essentially a replica of the Entry Questionnaire QSNR1, with two modifications. First, the consent form and the demographics sections were absent. Second, the Intrinsic Motivation Inventory (IMI) included the 'pressure/tension' and the 'perceived choice' subscales, as these scales are more meaningful after an activity has taken place (Ryan, 1982). The IMI was also be reworded to reflect the mid-point of the semester. Participants were compensated with USD 10 for completing this step.

5.3.6 PHASE3: Final Phase

The Final Phase PHASE3 was similar in structure to the Initial Phase (PHASE1), and took place at the end of the semester, after all the course related tasks were completed by the participant. The purpose of the session is to record the 'evolved' search behaviour, and final knowledge state. Participants performed two search tasks: PHASE3-FINANCE and PHASE3-BIAS, and one website comparison task: PHASE3-SHEG.

5.3.6.1 PHASE3-FINANCE and PHASE3-BIAS: Two Actual Search Tasks

Of the two search tasks, the topic of one was repeated from PHASE1 (financial literacy, Figure 5.2), while the topic of the other came from the course material: algorithmic bias (Figure 5.3). In both search tasks, participants were given the option of ***not searching*** if they felt confident enough to answer the search task questions from their prior knowledge (Crescenzi, 2020). The deliverables for each search-task, as before, was a written summary (artefact).

5.3.6.2 PHASE3-SHEG: Website Comparison Assessment

Following the two search tasks, participants performed another website comparison assessment from the Stanford History Education Group (SHEG) (2021a). This task assessed their

evolved information evaluation skills.

This task instructed participants to compare two websites and select the one that they would use to begin research on a topic. One of the pages is a Wikipedia article. The other has “.edu” in its URL, but the page reveals that the content is a student-written blog post created as part of a university course. Many students have been taught that Wikipedia pages are unreliable and should be avoided. Many have also been taught that sites with a .edu domain are trustworthy. This assessment gauges their ability to think in more nuanced ways about these kinds of websites.

— Stanford History Education Group (SHEG) (2021a)

The prompt for the PHASE3-SHEG task is present in Appendix C.5).

Similar to PHASE1, participants were asked to share their screen for the whole duration of the phase. Their screen and audio was recorded for the same. They had the freedom to turn off their video. The total time for PHASE3 was expected to not exceed 1.5 hours (90 minutes). Participants were compensated with USD 30 for PHASE3. At the end of PHASE3, participants were instructed to complete the Exit Questionnaire QSNR3 as soon as convenient.

5.3.7 QSNR3: Exit Questionnaire

The exit questionnaire QSNR3 took place after the Final Phase PHASE3. The purpose was to record the final state of the participants' individual difference measures (motivation, metacognition, self-regulation), and whether these characteristics changed during the second half of the semester. As before, QSNR3 questionnaire was essentially be a replica of QSNR2, with the Intrinsic Motivation Inventory (IMI) reworded to reflect the end-point of the semester. Participants were compensated with USD 15 for their time for completing this step.

After QSNR3 was complete, participants received a bonus compensation of USD 30, if they completed all the phases of the LongSAL study without missing anything.

5.4 Measures to Address Ethical Concerns

- Participation in the study (which was voluntary and compensated separately) and participation in the I303 course (which was required for graduation from the Informatics major)

were sufficiently disentangled. The course instructors were never aware of which students participate in the course, and did not share any student data with the researchers. This avoided any undue pressure or expectation on the students.

- Participants logged their browsing activity using a Firefox browser extension YASBIL, which was been developed by the authors. The extension has an ON-OFF button, which put the participants in full control of when they wished to start and stop the logging. Participants had been sufficiently trained to use the browser extension, and were repeatedly reminded to log data only when they were working on the research paper assignments for the course, and not at other times.
- This study has been approved by The University of Texas at Austin Institutional Review Board (Submission ID: STUDY00002136, Date Approved: December 8, 2021).

After data collection for all the phases was complete, data analysis was performed on the collected data, which is discussed in the next chapter.

6

Data Analysis

Note about pronouns: all participants are referred to using gender-neutral they/them pronouns.

Merge SES2a and SES2b into SES2ab

6.1 Data Cleaning and Processing

see crescenzi thesis

Session: `task_id`, 30 minutes of inactivity (Google Analytics: a session lasts until there's 30 minutes of inactivity)

Session duration is considered 30 minutes (!) (or maybe 1 hour?) as per Google Analytics¹ and (TODO: find reference)

Possibility to create a step by step diagram? (powerpoint)

6.2 Active Tab Identification for Log Parsing

6.3 URL Categorization

- peer-reviewed publications are PUBs

¹<https://www.hotjar.com/google-analytics/glossary/session-duration>

- others are ARTICLES (e.g. Wikipedia)
- if no other info, then WEB
- fuzzy between WEB and ARTICLE (when classified manually)
- ARTICLE if there is a clear author
 - except WIKIPEDIA, due to common parlance
 - encyclopedias
- journal homepages are WEB
- list of chapters in a book are L.PUB.
 - e.g. in detail view of
- book chapter is PUB

6.4 User characteristics: Latent Profiles

Finally using HI and LO groups.

- feature sets for profiling (toggle on and off)
 - IMI
 - MAI
 - SRQ
 - WMC / memory span:
 - * scaling by dividing by 10 (?) (that's the max Coglab would show)

What factors are specifically responsible for the transitions or the changes in the Latent profiles at different points in the semester?

Memory span values normalized by 10, because “*The maximum memory span measurable with this experiment is ten*” as per CogLab output

- stUse LIME / SHAP and counterfactual explanations to understand which components contribute to change in Profile Membership
- no no; a simple examination of what feature values changed between timepoints will be enough
- use 2 groups! 2 groups is always better. easier to explain; easier to write.

6.5 Search Behaviour Data Analysis Framework

From White (2016a), Table 2.1 (adapted from Bates, 1989):

- **Level 1: Move**
 - Atomic search event – for example, a query or click (*An identifiable thought or action that is part of information searching.*)
- **Level 2: Tactic**
 - Goal or task, including query or click chain (*One or several moves made to further a search*)
- **Level 3: Statagem**
 - Mission or session (*A larger, more complex set of thoughts and/or actions than the tactic; a stratagem consists of multiple tactics and/or moves, all of which are designed to exploit a particular search domain that is thought to contain the desired information*)
- **Level 4: Strategy**
 - Session or cross-session search task (*A plan, which may contain moves, tactics, and/or stratagems, for an entire information search.*)

6.6 Level 1: Moves - Query Reformulation

- Yung Sheng's Dissertation
- (Hassan et al., 2014) Table 1

Measures:

- Number of terms per Query
- Query length (characters?)
- Number of (unique) queries per search
- Number of reformulated query types
- Abandoned Queries (Percentage of queries with no clicks)
- query similarity (Hassan et al., 2014)
 - average similarity between all queries to the first query in every session
 - exact match, approx match, lemma match, semantic match

6.7 Level 1: Moves - Dwell Time (DT) - combined with URL types

URL type categories

(Q is a web-page type; QUERY is a move)

- Q
 - BOOK / PUB / WEB / WORD streform type
- L
 - WEB%
 - PUB%
 - ARTICLE%
 - BOOK%

- VIDEO%
- COURSE%
- I
 - all subcategories in L
 - CITATION%
 - FILE%
- NOTETAKING
- LONGSAL
- ? (UNCLASSIFIED)

Separately (as in (Lam et al., 2007)) - SEARCH - LIB - OTHER

Dwell Time categories:

- SHORT: 1 - 5 seconds
 - “A time span of less than 5 seconds is a too short period for being able to read a summary and extract information” (He et al., 2016).
- MEDIUM: 5 - 30 seconds
- LONG: > 30 seconds
 - from Handehawa’s thesis, and related Shah references

Other Ideas

- do analysis of LIB and LIBGUIDE type URLs - library websites
- Dwell Time:
 - overall
 - per-task
 - per timepoint?

- sig diff in DT between
 - SES1 and SES3
 - SES2a and SES2d?
- checkout: `sns.pairplot()` – pairwise relationships in a dataset
 - <https://seaborn.pydata.org/generated/seaborn.pairplot.html>
- checkout seaborn's plotting capabilites!

6.8 Level 1: Moves - Interactions

Events

- QUERY
 - reformulation types
- TAB: Parallel Browsing Events
 - OPEN
 - SWITCH
 - CLOSE
- TASK: from YASBIL events and `task_id`
 - START
 - END
- IDLE: user stays idle for ≥ 1 minute (Taramigkou et al., 2018)
 - SHORT: 1 - 5mins
 - MEDIUM: 5 - 30 mins
 - LONG: ≥ 30 mins – treat as new session

IDLE could be PDF reading, or hand note-taking, or truly idle.

6.9 Level 2: Implicit Features for Exploratory Search Process

From Hendahewa (2016) and related papers.

- **Creativity** → Information Novelty
 - **Unique Coverage:** Unique web pages visited
 - **Likelihood of Discovery:** Measurement of difficulty to find certain information
- **Exploration**
 - **Total Coverage:** Total number of content pages visited
 - **Distinct Queries:** Total number of different queries issued
 - **Query diversity:** Measurement of similarity between queries issued
- **Knowledge Discovery** → Finding useful and relevant information
 - **Useful Coverage:** Number of pages where users spend a considerable amount of time
 - **Relevant Coverage:** Number of pages that users denote as relevant to the task

<https://rucore.libraries.rutgers.edu/rutgers-lib/49207/>

6.10 Level 2+: Search Tactics and Strategies

Pernilla Q et al's paper: Jiyin He, Pernilla Qvarfort, Martin Halvey, Gene Golovchinsky. Beyond actions: Exploring the discovery of tactics from user logs. In Information Processing & Management, vol. 52, issue 6, Nov. 2016, pp. 1200–1226.

- <http://dx.doi.org/10.1016/j.ipm.2016.05.007>
- <https://www.pernillaq.com/exploratory-search>
- checkout the forward citations of this paper on automated log analyses

- like process mining!
- “*Since modern search systems may allow user interactions beyond the tactics defined in the literature the tactics may need to be extended*”

Behaviours from *Search Patterns* book

- quit
- narrow
- expand
- pearl growing / citation mining / snowballing
- pogo sticking
- thrashing

6.10.1 Strategies from webpage L2 categories only

No sense of time. Only events query is a move, Q is a web-page type

Tactics (per task)

- TASK.{START / END}
- QUERY.{types of reformulations}
- Q.{BOOK / PUB / WEB / WORD}
- L.{PUB / WEB / X}
- L.click (only hyperlink clicks (?))
- I.{PUB / WEB / ARTICLE / X}
- I.click
- OTHER.{X}
- TAB.{tab events}
- IDLE.{DT categories}
 - IDLE.LONG = change of episode (or session)

6.10.2 Strategies from webpage L1 categories and Dwell Time (DT)

Tactics (per task)

- TASK.{START / END}
- Q.{types of reformulations}
- L.{DT categories}
- L.click (only hyperlink clicks (?))
- I.{DT categories}
- I.click
- OTHER.{DT categories}
- TAB.{tab events}
- IDLE.{DT categories}
 - IDLE.LONG = change of episode (or session)

6.10.3 Strategies from webpage L2 categories and Dwell Time (DT)

Tactics (per task)

- TASK.{START / END}
- Q.{types of reformulations}
- L.{PUB / WEB / X}.{DT categories}
- L.click (only hyperlink clicks (?))
- I.{PUB / WEB / ARTICLE / X}.{DT categories}
- I.click
- OTHER.{X}.{DT categories}
- TAB.{tab events}
- IDLE.{DT categories}
 - IDLE.LONG = change of episode (or session)

6.10.4 Strategies from Lam et al. (2007)

- As in (Lam et al., 2007) Sec 6 (S to denote a Search event and X to denote a non-search engine event):
 - Short Navigation: S(Start) \rightarrow X (End), with the S event limits to the first session events and the X event to the last events.
 - Topic Exploration: S \rightarrow X \rightarrow X \rightarrow X \rightarrow X \rightarrow ...
 - Methodical Results Exploration: S \rightarrow X \rightarrow S \rightarrow X \rightarrow S ...
 - Query Refinement: S \rightarrow S \rightarrow S \rightarrow S ...
- In our coding:
 - Short Navigation: QUERY \rightarrow non-Query (NQ: L / I / ?)
 - Topic Exploration: QUERY \rightarrow NQ \rightarrow NQ \rightarrow NQ \rightarrow NQ \rightarrow ...
 - etc.
- Using WebNavigation events and tab switches
- can do sequential pattern mining as in (Ibáñez & Simperl, 2022)
 - maximal sequential pattern
 - etc.
- Other search patterns:
 - SS: Search-engine Searches
 - TS: Third-party Searches using third-party online sites as search engines
 - TE: True Explorations of search results

6.10.5 Struggling vs. Exploring

Indicators predictive of struggling (Hassan et al., 2014):

- low amount of similarity between consecutive queries
- more clicks per query

- differences in the nature of the reformulation patterns: less query term substitution and more addition/removal with exploring

6.10.6 Navigators vs. Explorers

From IWSS book (later, low priority)

6.10.7 Transition analysis of Search Tactics / Strategies

Transition analysis can be applied to:

- search tactics
- tabs: parallel browsing behaviour (think hard... do we need a constant number of tabs for this to work?)
- combined (opening tab and closing tabs are tactics / events in Markov process)

Analyze / compare entropies and transition matrices across different tasks and sessions?

- e.g. SES1 tasks → SES2 → SES3

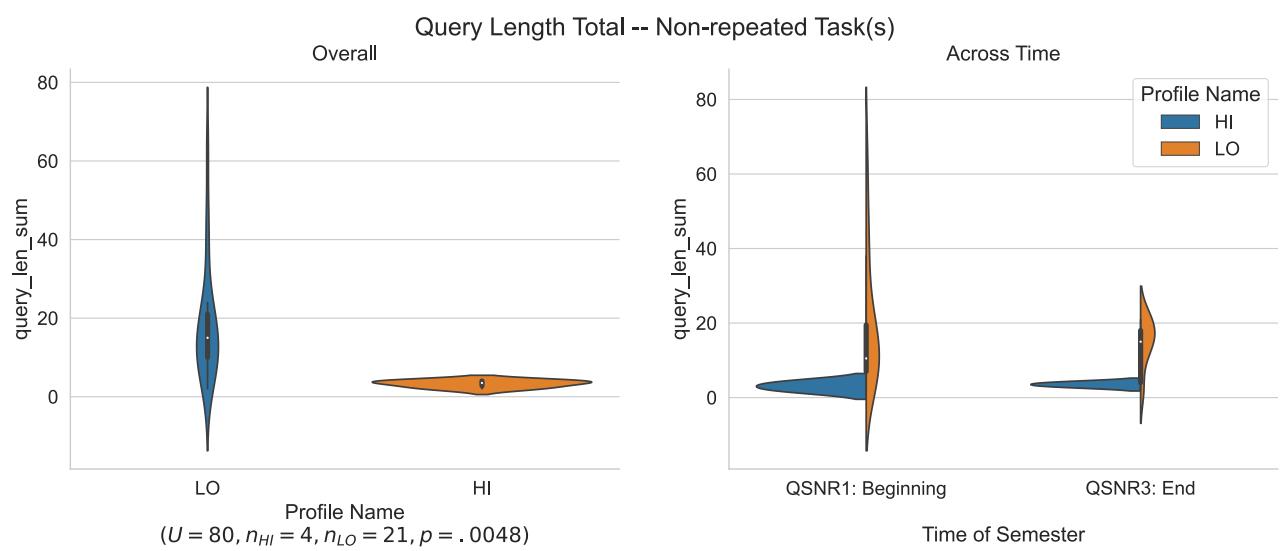
Help with analyses:

- Chen and Cooper (2002) used a Chi-square test to compare the distribution of transitions in search tactic transition matrices.
- (He et al., 2016, p. 1220 sec 6.1) for calculation formulas for entropy of transitions
- (Krejtz et al., 2014) sec 4 for calculation formulas
- (He et al., 2016, p. 1220 sec 6.2) for hypotheses

6.11 Correlation analysis

Correlation between user profiles and search tactics (Table 9 Taramigkou et al., 2018)

Refer to Test PnG in Figure 6.1.

**Figure 6.1:** Longcaption.

7

Results

As the sample sizes were often small, and / or did not match the normality assumptions of parametric tests, we have employed the non-parametric Mann-Whitney U test for all the null-hypothesis testing. This allows easy comparison between different categories of results.

Additionally we also report Common Language Effect Size (CLES) for each statistical test result. The common language effect size is the proportion of pairs where x is higher than y . In other words, it is the probability that a score sampled at random from one distribution will be greater than a score sampled from some other distribution. CLES was first introduced by McGraw and Wong (1992) [TODO]. The Python statistical library employed in data analysis – Pingouin ([Vallat, 2018](#)) – uses a brute-force version of the formula given by Vargha and Delaney 2000 [TODO]: The advantage is of this method are twofold. First, the brute-force approach pairs each observation of x to its y counterpart, and therefore does not require normally distributed data. Second, the formula takes ties into account and therefore works with ordinal data.

In the interest of better presentation and readability of this chapter, some of the ancillary plots are presented in Appendices [D](#) and [E](#).

7.1 Latent Profiles (and Transitions)

TODO: describe the high and low groups appropriately.

TODO: Describe stats from HI and LO profiles, as in YSC Sec 5.1.

- how the following changed over time
 - motivation, metacognition, self regulation
 - perceived learning, perceived search outcome

TODO:

- For each section below on measures
 - how the measure was operationalized
 - what is the value / trend
 - 1-2 lines
- For Discussion later
 - Pool together the 1-2 lines

Proposal (PHASE2A)

Outline (PHASE2B)

Rough Draft (PHASE2C)

Final Paper (PHASE2D)

7.2 Query Formulation

7.2.1 Length of Queries

Query length was operationalized as the number of terms (words separated by spaces) in the search query that participants submitted to the search engines or other information retrieval

sites. Query length can vary from a single word to several phrases or a full sentence. Longer search queries may indicate a more specific or complex information need, while shorter search queries may be more general or broad in scope.

For all tasks, on average, the high group issued longer queries than the low group (Figure ResP4090733126835336320), except before the Outline (PHASE2B), and the Final Paper submission (PHASE2D). The low group, with lower levels of motivation, metacognition, and self-regulation, were issuing queries which were often two terms (words) shorter on average, than the corresponding queries from the high group.

The total query length for the low group increased monotonically over the semester during PHASE2 (Figure ResP494716060171793945), with the longest queries being issued by this group before the Final Paper submission phase (PHASE2D). On the other hand, queries from the high group were the longest during the Outline phase (PHASE2B), and then it decreased in the subsequent phases. This indicates that the high group, with higher levels of motivation, metacognition, and self-regulation, were planning ahead in the early parts of the semester to find their references. On the other hand, the low group, with lower levels of those traits, demonstrated a tendency to procrastinate and delay their work until the final paper. A quote from participant P006_HANOI illustrates this phenomenon:

“so far for this rough draft I haven’t actually had to google anything since I downloaded everything into pdfs during the outline stage and haven’t needed any new material so far.”

— P006_HANOI

7.2.2 Count of queries per search task

Count of queries per search task refers to the number of separate queries or search attempts that a participant issued in order to complete a task. The count of queries per search task may vary depending on the complexity of the information need, the user’s level of expertise with the search system, and other factors.

The average number of queries issued by the high group increased from Proposal to Outline to Rough Draft, and then decreased before the Final Paper task (Figure ResP4526976288600811998).

In contrast, the low group issued higher number of queries during the early part of the semester – Proposal and Outline – but then they issued lower number of queries during the later parts of the semester, w.r.t. the high group. The difference in the total number of queries issued by the two groups approached statistical significance according to a two-tailed Mann-Whitney U test, but the effect size was very weak ($U = 14.0, n_{low} = 8, n_{high} = 8, p = .06, CLES = 0.22$).

7.2.3 Count of reformulated query types

Query reformulation refers to the process of modifying or refining a search query in order to improve the relevance of search results and better match the user’s information needs (Section 3.2.1). Query reformulation typically occurs due to a searcher’s improved understanding of how to better translate their information need into a search query. Using the taxonomy proposed by C. Liu et al. (2010) (Figure 3.3), we classified each previous-next query pair issued by participants into one of the five query reformulation types (QRTs): New, Generalization, Specialization, Word Substitution, and Repeat.

The low group issued more number of **New** queries in total (Figure ResN3873804091287075248) and on average (Figure ResP3026382842695489517), compared to the high group. During the Rough Draft and Final Paper phases, the low group exhibited heightened tendency to generate New search queries in their pursuit of novel information. On average, participants in the low group issued four more search queries than those in the HI group in these last two phases of the research project (Figure ResP3026382842695489517). This suggests that the LO group engaged in more active and extensive information-seeking behaviour, potentially reflecting a greater sense of urgency and pressure to complete their assignments. The difference in total number of New queries between the groups approached significance ($U = 50.0, n_{low} = 8, n_{high} = 8, p = .06, CLES = 0.78$), with a moderately strong effect size.

The low group demonstrated a significantly higher count of total **Query Generalizations** ($U = 44.5, n_{low} = 7, n_{high} = 7, p = .01, CLES = 0.91$). While the high group issued a total of 2.57 ± 2.1 query generalizations per task the low group were issuing 9.86 ± 6.7 generalized queries for the same, across the entire study (Figure ResN3302769723271690264).

Query generalization is an indicative of exploratory behaviour, and this increase by the low group indicates a lack of specificity in the participants' information needs, which may lead to lower precision in search results.

The high group issued an average at least one word substitution for each search task. The trend in the count of total **Query Specializations** was similar to that of Query Generalizations (Figure ResN6450294753032251158). The high group demonstrated the maximum number of query specialization before the Outline phase, whereas the low group did the same before the Final Paper phase. While the difference was not significant, the effect size was moderately high ($U = 42.5, n_{low} = 8, n_{high} = 7, p = .10, CLES = 0.76$).

Word Substitutions were performed in all the tasks by the high group, whereas the low group skipped it during Proposal, and the PHASE3-BIAS task (Figure ResN3108315939720148502).

We faced a challenge in disentangling **Repeat** queries from “hub-and-spoke” behaviour, where the user goes back and forth between the SERP and a content page by using the browser’s forward and back buttons ¹. Each back button press on the browser (to go back to the SERP from a content page) meant a fresh HTTP GET request was sent to the search engine. This resulted in YASBIL logging the move as a resubmission of the query. Keeping this in mind, we observed that the low group issued a significantly higher number of repeat queries (or hub-and-spoke moves), compared to the high group ($U = 51.5, n_{low} = 7, n_{high} = 8, p = .0077, CLES = 0.92$). The highest differences occurred in the Outline phase and the Final paper phase (Figure ResP7955607431899741484), with the low group issuing double the number of repeat queries (6.11 ± 3.7) on average, w.r.t. the high group (3.51 ± 2.8)

7.2.4 Number of clicks per query

ResP878771263343515297 HI group was more efficient. Average number of clicks per query was lowe (less than 4) as they moved forward in the semester, with highest in the Outline phase.

¹The SERP is the hub, which represents the initial point of inquiry, while the spokes represent the subsequent branches of exploration along different content pages. This search behaviour is often used when users have a general idea of the topic they are interested in, but need to explore different facets of the topic to narrow down their search and find relevant information.

ResN2805268620307804410

$(U = 1069.5, n_{HI} = 56, n_{LO} = 30, p = .03)$

ResN5118140679486679749 SD also says something

7.2.5 Entropy of Query Reformulation

Inspired by previous works in analysing eye-movement sequences Krejtz et al. (2015) and search tactics sequences (He et al., 2016), we employed a similar entropy analysis of query reformulation sequences issued by users.

Transition analysis and entropy helps to cover differences in disparate tasks and activities
(get text from Qvardford paper)

If we consider the sequence of query reformulations issued by a participant (e.g., *New -> New -> Specialization -> Specialization -> Word Substitution -> Generalization*) then this sequence can be considered as a first order Markov chain, wherein, the next step in the chain depends only on the current state. Entropy analysis on these Markov chains quantifies how predictable the states are, and yields two categories of uncertainty measures: transition entropy, H_t , and stationary entropy H_s .

In the context of query reformulations, the maximum **transition entropy** ($s \log s$) can be reached when there is an equal probability of switching between each of the $s = 5$ states, or QRTs (query reformulation types). The minimum transition entropy (0) is achieved in a fully deterministic Markov chain where all transition probabilities are either 1 or 0. This means that with a higher transition entropy there is more randomness in the participant's transitions between different QRTs. This randomness is an indication that the participants do not have a clear progression from one QRT to another. On the other hand, a lower transition entropy indicates that the participant's transition between QRTs are highly predictable. **Stationary entropy** is calculated from the distribution of QRTs. A higher stationary entropy value indicates that the QRTs were used uniformly, while a lower stationary entropy indicates that some QRTs are preferred over others. Values of stationary entropy vary between 0 and

$(\log s)$, where s is the number of possible states (QRTs)². The entropies discussed in the following sections were normalized by their theoretical maximums, for equivalent comparison across different conditions.

7.2.5.1 Transition Entropy of Query Reformulation

Transition entropy remained lower for HI group at beginning, middle and end

For repeated task (finance) HI group stopped querying from the middle of the task. Hi group felt more certain (TODO: get quote from response?) While LO group continued till the end to query - they were more uncertain.

TODO: add network figure?

7.2.5.2 Stationary Entropy of Query Qeformulation

ResN2968292861275564559 - whole stationary entropy

Stationary entropy: for HI goup high in the beginning of task then low at the end of task their chaosness decreased as they progressed through the tasks, while for the LO group, their uncertainty increased?

ResN634943316862196398 - beginning ResN6777243644016606483 - middle ResN6573661794052961083

- end

7.3 Webpages Visits

As the final project task involved searching for 20 references, we structure the discussion around visits to “normal” webpages, and visits to “academic” webpages containing publications.

7.3.1 All

HI group visited more number of pages in total and on average

Count

Dwell time

²The explanation is adapted from He et al. (2016)

7.3.2 L: Lists / Search Results

7.3.2.1 LWEB

Count

Dwell Time

Web Search Results

ResN7422811346952663922

7.3.2.2 LPUB

Count

Dwell Time

Publication / Academic search results

7.3.3 I: Information Objects / Content Pages

7.3.3.1 IWEB - Normal web pages

Count

Dwell Time

7.3.3.2 IPUB - Publications

Count

Dwell Time

7.4 Entropy of Search Tactics

Similar to entropy analysis of Query Reformulation types (Section 7.2.5), we perform entropy analysis of search tactic transitions. This analysis is directly inspired from He et al. (2016), who in turn were inspired from Krejtz et al. (2015).

In the context of search tactic transitions, a higher value of transition entropy (H_t) indicates more randomness and uncertainty in the participant's search behaviour (which is composed of

different search tactics, and transitioning or switching between those tactics). A lower value of transition entropy indicates that the search behaviour (i.e. tactic switching behaviour) is highly predictable. For stationary entropy of search tactics (H_s), a higher value indicates that participants utilize all the search tactics with equal probability, while a lower value suggests that certain search tactics are favoured over others. The entropies discussed in the following sections were normalized by their theoretical maximums, for equivalent comparison across different conditions.

7.4.1 Transition Entropy of Search Tactics

ResN7289045485214067875 Both groups had highest Ht during 2C (and also 3 Finance?)

ResP5638176378435107439 - beginning ResN3435548740759333098 - middle ResP6845508037293675246
- end

No sig diff for whole task, and at the beginning of task Sig diff appeared at the middle and increased at the end of task (similar to as observed by Gwizdka).

7.4.2 Stationary Entropy of Search Tactics

ResP8685879301269737254 LO group had hghest Hs in 2C No sig diff in overall task

No diff at beginning. Diff is most prominent at middle (ResN1140102300744288543) and also somewhat at end (ResN663758335140886910)

R!esN7928923989685423424 is a VERY good result! Model ID = 10

More plots are in Appendix ??, such as Figure E.1

7.5 Learning Outcomes

Correlation of SPL with Grades

- self-perceived learning (SPL)
- grades
- paired t-tests for SPL with obtained grade

- CONCL: obtained grades are not good indicators of learning

8

Discussion

Quick Check Results (Descriptive)

- which results have the strongest effect sizes and RBC scores?
- which users went beyond page 1 in a SERP?

Hypotheses from He et al. (2016):

The second set (H2) compares two different user groups, experts and novices, using one of the search systems in two different conditions. The H2 hypotheses illustrate how a focus on search tactics provides a different lens to view search logs.

- H2.1: Search experts are likely to be more predictable in their choice of search tactics compared to novices
- H2.2: Search experts have developed a set of search tactics they prefer over others, while novices use search tactics more uniformly.
- H2.3: While working with a search system novices will find a preferred method of transitioning from one search tactic to another. In other words, their search tactics transitions will become more predictable over time.

- H2.4: While working with a search systems novices will find preferred search tactics to use. In other words, their distribution of search tactics will become less uniform over time.

8.1 RQ1: how do search behaviours change over time?

- Phase 1
 - Query reform measures
 - search measures
 - learning outcomes
 - SHEG tasks
- Phase 2
- Phase 3
- Indicators predictive of struggling (Hassan et al., 2014):
 - low amount of similarity between consecutive queries
 - more clicks per query
 - differences in the nature of the reformulation patterns: less query term substitution and more addition/removal with exploring

8.2 RQ2: similarities and differences in repeated vs new tasks

Phase 1 and Phase 3 only

- search task
- SHEG tasks
- Similarities -> measures having no sig diff

- Overall task, Beginning, middle, end
- Differences -> measures having sig diff
 - Overall task, Beginning, middle, end

8.3 RQ3: correlation with learning?

9

Discussion and Conclusion

see Jacek's thesis

9.1 Research Summary

9.2 Summary of Results

which results have the strongest effect sizes and RBC scores?

9.3 Methodology

9.4 Contributions

Transition analysis and entropy are powerful tools in the field of information retrieval that can help to uncover patterns in user search behaviour across disparate tasks and activities. By analysing transitions between different states, such as between queries, documents, or web pages, transition analysis can reveal important insights into how users navigate information spaces and interact with search systems. For example, it can be used to identify common search patterns or to identify areas where users may be experiencing difficulty or confusion.

Entropy, on the other hand, provides a quantitative measure of the uncertainty or randomness in user search behaviour. By calculating entropy values for different aspects of search behaviour, such as query reformulation or click-through behaviour, researchers can gain a better understanding of the structure and characteristics of user search behaviour in different contexts. This can help to identify areas for improvement in search systems and to design more effective search algorithms and interfaces.

Together, transition analysis and entropy provide a powerful framework for understanding user search behaviour and improving the design and effectiveness of search systems. By analysing transitions and quantifying the level of uncertainty in user behaviour, researchers can uncover valuable insights that can inform the development of more effective search systems and improve the overall user experience.

From ASIST award session

FOLLOW UP WITH ...

- Change of the self, self-reflection
- Look at anthropology perspective

ROB:

- Look at qualitative data. More interesting

HEATHER:

- what can we share back to the teachers of the course, librarians and others

9.5 Limitations

9.5.1 Theoretical Limitations

Learning outcomes

9.5.2 Technical Limitation

- No PDF
- N=16 to N=10
- Also check anticipated limitations section from proposal
- Did not assess goodness of fit of whether first order Markov chain is the most appropriate for modelling search tactic transitions (Besag and Mondal's (2013) statistical test)
- did not track revisits across different tasks
- clicks may have been on popup ads, cookie consent forms, and others, instead of only links (difficult to guesstimate from HTML markup)

Some difficulties:

- opening same URL in 2 different tabs and switching between them for a while before realising one is different from the other
 - or maybe long webpage (e.g.) book - two tabs at two different locations in webpage

9.6 Future Work

- Bing + ChatGPT, from MSR blogpost:
 - <https://blogs.microsoft.com/blog/2023/02/07/reinventing-search-with-a-new-ai-powered-microsoft-bing-and-edge-your-copilot-for-the-web/>
- Google + ChatGPT, from Sundar Pichai
 - <https://blog.google/technology/ai/bard-google-ai-search-updates/>
 - “AI features in Search can distill information to help you see the big picture.”

Contrary opinions_ - <https://www.newyorker.com/tech/annals-of-technology/chatgpt-is-a-blurry-jpeg-of-the-web> - “When we’re dealing with sequences of words, lossy compression looks smarter than lossless compression.” - hallucinations - <https://abcnews4.c>

[om/news/nation-world/experts-warn-dangers-ai-google-microsoft-push-new-chatbots-chatgpt-bard-technology-big-tech-open-ended-questions-responses-alphabets-misinformation-disinformation-internet-new-developments-bing-search-engines](https://www.grid.news/story/misinformation-disinformation-internet-new-developments-bing-search-engines)

- Matt is here - potential to misinformation

We've confused young people's ability to operate digital devices with the sophistication they need to discern whether the information those devices yield is something that can be relied upon

<https://twitter.com/suzettelohmeyer/status/1617909351766757376> <https://www.grid.news/story/misinformation/2023/01/23/will-information-literacy-in-schools-fix-our-misinformation-problem/>

Final feedback: P022Pisa said > *It is great to be able to participate in the research this semester. Using the extension somehow brings me positive feedback and that helps me in study I303. So I wanna say thank you* > - P022Pisa

9.7 New references

Be sure to add new references

- <https://www.mdpi.com/2673-4001/4/1/8>
- <https://link.springer.com/article/10.1007/s10648-023-09730-8>
- Claudia Hauff's works from CHIIR2020 onwards
- SYR and other's works

Appendices

A

Prior Work: Pilot Study

A.1 SES1: Initial Session

B

QSNR: Questionnaires

B.1 QSNR0: Recruitment Questionnaire

Thank you SO much for your willingness to participate in the LongSAL research study. The aim of this study is to identify how search engines can better support the needs of university students' learning and education. To be eligible for this study, you must be enrolled in the I 303 Ethical Foundations for Informatics course for the Spring 2022 semester. Please fill out the information requested below. We will get back to you if you are selected to participate in the study. The principal investigator, Nilavra Bhattacharya, can be reached at <email-address> for any questions or concerns.

1. Please select which section of the I-303 Ethical Foundations for Informatics course you are enrolled in.

- TUE: FLEISCHMANN, VERMA
- WED: FLEISCHMANN, GURSOY
- THU: FLEISCHMANN, BAUTISTA
- FRI: FLEISCHMANN, DAY

2. Please select the degree level/name of the program you are in.

- Bachelor's
- Master's
- Integrated Bachelor's and Master's
- PhD
- Other

3. Please state which year of the program you are in.

- Freshman
- Sophomore
- Junior
- Senior
- Graduate Year 1
- Graduate Year 2
- Other

4. Please state your major(s)

5. Do you have native-level familiarity with English language?

- Yes
- No
- Other:

6. Please state your age (in years)

7. Please state your gender

8. With which ethnicities do you identify? Please select all that apply:

- African

- African American / Black
- Asian - East
- Asian - South East
- Asian - South
- Asian - Middle East
- Caucasian / White
- Hispanic / Latinx
- Native American
- Pacific Islander
- Mixed
- Other

9. Are you an international student? If “yes”, where are you originally from?

- Yes
- No

10. We need your contact information to communicate with you over the semester (if you are selected). Your contact information will not be used in any other way, and will be kept private. Please enter an email address that you check regularly. We will use this email address to send communications and Amazon Gift Cards as payment.

11. Your name as you would like us to address you (solely for communication).

B.2 QSNR1 - QSNR3: Entry, Mid-term and Exit Questionnaires

B.2.1 Consent Form

Consent to Participate in Research

Basic Study Information:

- UT Austin IRB Approved
- **Submission ID:** STUDY00002136
- **Date Approved:** December 8, 2021
- **Title:** LongSAL: A Longitudinal study on Searching as Learning
- **Principal Investigator:** Nilavra Bhattacharya, PhD Student, School of Information, UT Austin
- **Faculty Advisor:** Jacek Gwizdka, Associate Professor, School of Information, UT Austin

Invitation to be Part of a Research Study Things you should know:

- The purpose of the study is to identify how search engines can be improved to better support university students' learning and education.
- In order to participate, you must be enrolled in the I303 Ethical Foundations for Informatics course in the Spring 2022 semester.
- If you choose to participate, you will be asked, over the course of the semester, to take three surveys (10-15 mins each), attend two Zoom sessions (60-90 mins each), and record browsing activity while working on Final Project Paper. All parts of the study will be conducted online.
- Risks or discomforts involved in this research study are not greater than everyday life.
- There is no direct benefit for participating in this study.
- Taking part in this research study is voluntary. You do not have to participate, and you can stop at any time.

More detailed information may be described later in this form.

Please take time to read this entire form and ask questions before deciding whether to take part in this research study.

What is the study about, and why are we doing it? The aim of this longitudinal study is to identify how university students search the web for educational research activities.

Findings from this study will help to understand how search engines can be improved to better support university students' learning and education, and therefore help to build more human-centred and learning-centric search systems.

What will happen if you take part in this study? If you agree to take part in this study, you will be asked to perform the following activities over the duration of the Spring 2022 semester.

How long will this study take and how many people will be in the study?
Participation in this study will take approx. 10-15 minutes each for the three surveys, and 60-90 minutes each for the two synchronous Zoom sessions. There will be about 30-40 participants in total in this study.

What risks and discomforts might you experience from being in this study?
There are no major foreseeable risks to participating in this study. There may be a very minimal potential risk of confidentiality, or possibly frustrations with some tasks. To address the risk of confidentiality, once data collection is completed, all personally identifying data will be destroyed by erasing all digital files and shredding all the physical records. To address the risk of frustration, you can move at your own pace, or stop whenever you wish.

How could you benefit from this study? You will receive no direct benefit from participating in this study; however, this study will help to improve our current understanding of how students search the web for education and learning-related goals over time. This will inform the development of better learning-centric search systems.

What data will we collect from you? As part of this study, we will collect your:

- audio, screen recordings, and browsing logs when you are participating in the Zoom sessions. You can turn off your face video during these sessions.
- browsing log data, when you are performing research for the course final project. You can start and stop the logging when you choose.
- anonymized submissions for the final project at various points in the Semester
- self-reported grades for the final project assignments that you received

The holistic data about your research-assignment related internet search activity, the material that you produce for your assignments, and the scores you receive for those assignments, will help us understand where students perform well, where things can be improved, and how search engines can be improved to better support university students' learning and education.

How will we protect your information? We will protect the privacy and the confidentiality of your data by:

- Assigning you a coded username at the beginning of the study to protect confidentiality, and all your submitted data will be linked to this coded username.
- All digital data generated in the study will be stored via a university-approved secure cloud-based storage service and password-protected computers. All computers used in the project are password protected.
- Audio recordings will be listened to only for research purposes. Audio recordings will be transcribed and coded. No information that can be used to uniquely identify an individual will be present

We may share your data with other researchers for future research studies that may be similar to this study or maybe very different. In these cases, the data shared with other researchers will NOT include any information that can directly identify you.

We plan to publish the results of this study. To protect your privacy, we will NOT include any information that could directly identify you.

What will happen to the information we collect about you after the study is over?

We will keep your research data to use for future analyses and publications. Any information that can directly identify you will be deleted from the research data collected as part of the project.

How will we compensate you for being part of the study? You will receive up to USD 150 in Amazon Gift cards if you complete all the components of the study, as described above. If you choose to withdraw early from the study, you will receive compensation for the parts you have completed. You will be responsible for any taxes assessed on the compensation.

Your Participation in this Study is Voluntary It is totally up to you to decide to be in this research study. Participating in this study is voluntary. Your decision to participate will not affect your relationship with The University of Texas at Austin. You will not lose any benefits or rights you already had if you decide not to participate. Even if you decide to be part of the study now, you may change your mind and stop at any time. You do not have to answer any questions you do not want to answer.

This Study is NOT a part of the I 303 Ethical Foundations of Informatics course:

- The study researchers intend to only recruit participants from the student pool enrolled in the course.
- The course instructors will not share any student data with the researchers.
- The course instructors will not be aware of which students did or did not participate in this study.
- Participation in this study is completely voluntary, and in no way affects the outcome of this course for you, or your academic relations with the course instructors.

Even after consenting to participate, you can choose to withdraw consent anytime during the semester. We will delete all the data collected from you up to that point. You will receive compensation for the parts you have completed, as outlined above.

Contact Information for the Study Team and Questions about the Research
Prior to, during, or after your participation, you may contact the researchers below if you have any questions about this research, or feel you may have been harmed due to participation:

Nilavra Bhattacharya
Phone: <phone-number>
Email: <email-address>
Or
Jacek Gwizdka
Email: <email-address>

Contact Information for Questions about Your Rights as a Research Participant

If you have questions about your rights as a research participant, or wish to obtain information, ask questions, or discuss any concerns about this study with someone other than the researcher(s), please contact the following:

The University of Texas at Austin
Institutional Review Board
Phone: <phone-number>
Email: <email-address>

Please reference the study protocol number (STUDY00002136) in your communications.

Your Consent By clicking the button below, you are agreeing to participate in this study. Make sure you understand what the study is about before you consent. If you have any questions about the study after you consent, you can contact the study team using the information provided above.

- By clicking this button I understand what the study is about and my questions so far have been answered. I agree to participate in this study.

Please enter the coded username assigned to you (shared via email)

B.3 Motivation

Adapted from Intrinsic Motivation Inventory (IMI) (Ryan, 1982). Items will be randomly ordered.

Scoring directions: Score each response from 1 (not at all true) to 5 (very true). Then reverse score the items marked with (R). To do that, subtract the item response from 6, and use the resulting number as the item score. Then, calculate subscale scores by averaging across all the items on that subscale. The subscale scores are then used in the analyses of relevant research questions.

For each of the following statements, please indicate how true it is for you, using the following scale:

(1) not at all true — somewhat true — very true (5)

B.3.1 Interest/Enjoyment

1. I will enjoy taking this course very much.
2. This course will be fun to do.
3. I think this will be a boring course. (R)
4. This course will not hold my attention at all. (R)
5. I would describe this course as very interesting.
6. I think this course will be quite enjoyable.

B.3.2 Perceived Competence

1. I think I will be pretty good at this course.
2. I think I will be doing pretty well at this course, compared to other students.
3. After working at this course for awhile, I will feel pretty competent.
4. I think I will be satisfied with my performance in this course.
5. I think I am pretty skilled at this course.
6. This is a course that I think would not be able to do very well. (R)

B.3.3 Effort/Importance

1. I plan to put a lot of effort into this course.
2. I don't think I will try very hard to do well at this course. (R)
3. I will try very hard on this course.
4. It is important to me to do well in this course.
5. I do not plan to put much energy into this course. (R)

B.3.4 Value/Usefulness

1. I believe the course and the final project activities could be of some value to me.
2. I think that doing the final project activities is useful for me.
3. I think the final project is important activity to do because it can equip me with skills that are necessary for making ethical decisions in my adult and professional life.
4. I would be willing to do research on the final project topic again because it has some value to me.
5. I think doing the final project activities will help me in my adult and professional life
6. I believe doing the final project activities will be beneficial to me.
7. I think this is an important course.

B.3.5 Pressure / Tension (not in QSNR1)

1. I do not feel nervous while doing the final project activities. (R)
2. I feel very tensed while doing the final project activities.
3. I am very relaxed while doing the final project activities. (R)
4. I feel anxious while working on the final project parts.
5. I feel pressured while doing the final project activities.

B.3.6 Perceived Choice (not in QSNR1)

1. I believe I have some choice about doing the final project activities.
2. I feel like it is not my own choice to do the final project parts. (R)
3. I don't really have a choice about doing the final project tasks. (R)
4. I feel like I have to do the final project tasks. (R)
5. I do the final project activities because I have no choice. (R)
6. I do the final project activities because I want to.
7. I do the final project activities because I have to. (R)

B.4 Self-regulation

Self-Regulation Questionnaire (SRQ) by J. M. Brown et al. (1999).

Please answer the following questions by selecting the option that best describes how you are. There are no right or wrong answers. Work quickly and don't think too long about your answers.

(1) Strongly Disagree – Disagree – Neutral – Agree – Strongly Agree (5)

1. I usually keep track of my progress toward my goals.
2. My behavior is not that different from other people's. (R)
3. Others tell me that I keep on with things too long. (R)
4. I doubt I could change even if I wanted to. (R)
5. I have trouble making up my mind about things. (R)
6. I get easily distracted from my plans. (R)
7. I reward myself for progress toward my goals.
8. I don't notice the effects of my actions until it's too late. (R)
9. My behavior is similar to that of my friends. Evaluating
10. It's hard for me to see anything helpful about changing my ways. (R)
11. I am able to accomplish goals I set for myself.
12. I put off making decisions. (R)
13. I have so many plans that it's hard for me to focus on any one of them. (R)
14. I change the way I do things when I see a problem with how things are going.
15. It's hard for me to notice when I've "had enough" (alcohol, food, sweets, internet, social media) (R)
16. I think a lot about what other people think of me.
17. I am willing to consider other ways of doing things.
18. If I wanted to change, I am confident that I could do it.
19. When it comes to deciding about a change, I feel overwhelmed by the choices. (R)

20. I have trouble following through with things once I've made up my mind to do something.
(R)
21. I don't seem to learn from my mistakes. **(R)**
22. I'm usually careful not to overdo it when working, eating, drinking, or being on social media.
23. I tend to compare myself with other people.
24. I enjoy a routine, and like things to stay the same. **(R)**
25. I have sought out advice or information about changing.
26. I can come up with lots of ways to change, but it's hard for me to decide which one to use. **(R)**
27. I can stick to a plan that's working well.
28. I usually only have to make a mistake one time in order to learn from it.
29. I don't learn well from punishment. **(R)**
30. I have personal standards, and try to live up to them.
31. I am set in my ways. **(R)**
32. As soon as I see a problem or challenge, I start looking for possible solutions.
33. I have a hard time setting goals for myself. **(R)**
34. I have a lot of willpower.
35. When I'm trying to change something, I pay a lot of attention to how I'm doing.
36. I usually judge what I'm doing by the consequences of my actions.
37. I don't care if I'm different from most people. **(R)**
38. As soon as I see things aren't going right I want to do something about it.
39. There is usually more than one way to accomplish something.
40. I have trouble making plans to help me reach my goals. **(R)**
41. I am able to resist temptation.
42. I set goals for myself and keep track of my progress.
43. Most of the time I don't pay attention to what I'm doing. **(R)**
44. I try to be like people around me.

45. I tend to keep doing the same thing, even when it doesn't work. (**R**)
46. I can usually find several different possibilities when I want to change something.
47. Once I have a goal, I can usually plan how to reach it.
48. I have rules that I stick by no matter what.
49. If I make a resolution to change something, I pay a lot of attention to how I'm doing.
50. Often I don't notice what I'm doing until someone calls it to my attention. (**R**)
51. I think a lot about how I'm doing.
52. Usually I see the need to change before others do.
53. I'm good at finding different ways to get what I want.
54. I usually think before I act.
55. Little problems or distractions throw me off course. (**R**)
56. I feel bad when I don't meet my goals.
57. I learn from my mistakes.
58. I know how I want to be.
59. It bothers me when things aren't the way I want them.
60. I call in others for help when I need it.
61. Before making a decision, I consider what is likely to happen if I do one thing or another.
62. I give up quickly. (**R**)
63. I usually decide to change and hope for the best. (**R**)

Scoring Directions: Score each response from 1 (strongly disagree) to 5 (strongly agree), and calculate the following seven subscale scores by summing the items on that subscale. Items marked (**R**) are reverse-coded (i.e. 1 = strongly agree and 5 = strongly disagree). To do that, subtract the item response from 6, and use the resulting number as the item score.

1. *Receiving relevant information:* 1, 8, 15, 22, 29, 36, 43, 50, 57
2. *Evaluating the information and comparing it to norms:* 2, 9, 16, 23, 30, 37, 44, 51, 58
3. *Triggering change:* 3, 10, 17, 24, 31, 38, 45, 52, 59
4. *Searching for options:* 4, 11, 18, 25, 32, 39, 46, 53, 60

5. *Formulating a plan:* 5, 12, 19, 26, 33, 40, 47, 54, 61
6. *Implementing the plan:* 6, 13, 20, 27, 34, 41, 48, 55, 62
7. *Assessing the plan's effectiveness:* 7, 14, 21, 28, 35, 42, 49, 56, 63

Based on our clinical and college samples, we tentatively recommend the following ranges for interpreting SRQ total scores with the 63-item scale:

- **>= 239:** High (intact) self-regulation capacity (top quartile)
- **214 - 238:** Intermediate (moderate) self-regulation capacity (middle quartiles)
- **<= 213:** Low (impaired) self-regulation capacity (bottom quartile)

B.5 Metacognition

Metacognitive Awareness Inventory (MAI) proposed by Schraw & Dennison (1994) and revised by Terlecki & McMahon (2018).

*Think of yourself as a **learner**. Read each statement carefully, and rate it as it generally applies to you when you are in the role of a learner (student, attending classes, university etc.) Please indicate how true each reason is for you using the following scale:*

Score	Response
1	I NEVER do this
2	I do this infrequently
3	I do this inconsistently
4	I do this frequently
5	I ALWAYS do this

1. I ask myself periodically if I am meeting my goals.
2. I consider several alternatives to a problem before I answer.
3. I try to use strategies that have worked in the past.
4. I pace myself while learning in order to have enough time.
5. I understand my intellectual strengths and weaknesses.
6. I think about what I really need to learn before I begin a task.

7. I know how well I did once I finish a test.
8. I set specific goals before I begin a task.
9. I slow down when I encounter important information.
10. I know what kind of information is most important to learn.
11. I ask myself if I have considered all options when solving a problem.
12. I am good at organizing information.
13. I consciously focus my attention on important information.
14. I have a specific purpose for each strategy I use.
15. I learn best when I know something about the topic.
16. I know what the teacher expects me to learn.
17. I am good at remembering information.
18. I use different learning strategies depending on the situation.
19. I ask myself if there was an easier way to do things after I finish a task.
20. I have control over how well I learn.
21. I periodically review to help me understand important relationships.
22. I ask myself questions about the material before I begin.
23. I think of several ways to solve a problem and choose the best one.
24. I summarize what I've learned after I finish.
25. I ask others for help when I don't understand something.
26. I can motivate myself to learn when I need to.
27. I am aware of what strategies I use when I study.
28. I find myself analyzing the usefulness of strategies while I study.
29. I use my intellectual strengths to compensate for my weaknesses.
30. I focus on the meaning and significance of new information.
31. I create my own examples to make information more meaningful.
32. I am a good judge of how well I understand something.
33. I find myself using helpful learning strategies automatically.
34. I find myself pausing regularly to check my comprehension.

35. I know when each strategy I use will be most effective.
36. I ask myself how well I accomplish my goals once I'm finished.
37. I draw pictures or diagrams to help me understand while learning.
38. I ask myself if I have considered all options after I solve a problem.
39. I try to translate new information into my own words.
40. I change strategies when I fail to understand.
41. I use the organizational structure of the text to help me learn.
42. I read instructions carefully before I begin a task.
43. I ask myself if what I'm reading is related to what I already know.
44. I reevaluate my assumptions when I get confused.
45. I organize my time to best accomplish my goals.
46. I learn more when I am interested in the topic.
47. I try to break studying down into smaller steps.
48. I focus on overall meaning rather than specifics.
49. I ask myself questions about how well I am doing while I am learning something new.
50. I ask myself if I learned as much as I could have once I finish a task.
51. I stop and go back over new information that is not clear.
52. I stop and reread when I get confused.

Scoring Directions: Score each response from 1 (never) to 5 (always), and calculate the following subscale scores by summing the items on that subscale.

Knowledge about Cognition:

1. *Declarative Knowledge:* 5, 10, 12, 16, 17, 20, 32, 46 (score out of $8 \times 5 = 40$)
2. *Procedural Knowledge:* 3, 14, 27, 33 (score out of $4 \times 5 = 20$)
3. *Conditional Knowledge:* 15, 18, 26, 29, 35 (score out of $5 \times 5 = 25$)

Regulation of Cognition:

1. *Planning:* 4, 6, 8, 22, 23, 42, 45 (score out of $7 \times 5 = 35$)

2. *Information Management Strategies:* 9, 13, 30, 31, 37, 39, 41, 43, 47, 48 (score out of $10 \times 5 = 50$)
3. *Comprehension Monitoring:* 1, 2, 11, 21, 28, 34, 49 (score out of $7 \times 5 = 35$)
4. *Debugging Strategies:* 25, 40, 44, 51, 52 (score out of $5 \times 5 = 25$)
5. *Evaluation:* 7, 19, 24, 36, 38, 50 (score out of $6 \times 5 = 30$)

C

Questionnaires for Initial PHASE1 and Final PHASE3 Phases

Pre-Test session (SES1) is conducted at the beginning of the semester, and the Post-Test session (SES3) is conducted at the end of the semester.

C.1 Pre-Task Questionnaire (for PHASE1 and PHASE3)

(The following items are adapted from Collins-Thompson et al. (2016).)

1. How much do you know about this topic?
(1) nothing / I know a lot (5)
2. How interested are you to learn more about this topic?
(1) not at all / very much (5)
3. How difficult do you think it will be to search for information about this topic?
(1) very easy / very difficult (5)

(The following items are adapted from Crescenzi (2020).)

Indicate your agreement with the following statements.

(1) Strongly Disagree / Neutral / Strongly Agree (5)

4. I am interested to learn more about the topic of this task.
5. I know a lot about this topic.
6. I can write a good summary now without needing to look for information.
7. It will be difficult to determine when I have enough information to write my summary.
8. I think this will be a difficult task.
9. I am confident I know (or can find) adequate information to write a good summary.

C.2 Post-Task Questionnaire (for SES1 and SES3)

(The following items are adapted from Collins-Thompson et al. (2016).)

Indicate your agreement with the following statements.

(1) Not at all / Unlikely / Somewhat / Likely / Very Likely (5)

Search for information exploration:

1. I was cognitively engaged in search task.
2. I made an effort at performing the search task.
3. The time for search was spent productively on meaningful tasks.
4. I was able to explore relationships among multiple concepts.
5. I was able to expand the scope of my knowledge about the topic.
6. I feel that I was able to put together pieces of information into one big concept.

Learner interest and motivation:

7. I feel that I have full understanding of the topic of this task

8. I became more interested in this topic.
9. I would like to find more information about this topic
10. I would like to share what I learned with my people I know.
11. I feel that I learned useful information as a result of this search.
12. I was able to develop new ideas or perspectives.

Perceived learning and search success:

On a scale of 0 - 100

13. How would you grade your learning outcome?

14. How would you grade your search outcome?

(The following items are adapted from Crescenzi (2020).)

Indicate your agreement with the following statements.

(1) Strongly Disagree / Neutral / Strongly Agree (5)

15. Overall, it was difficult to search for information to make the summary.

16. It was difficult to determine search terms to use to find relevant information.

17. It was difficult to decide whether to continue inspecting the search results or to search again.

18. It was difficult to choose which search results to view.

19. It was difficult to determine when to stop looking for information.

20. I would have preferred to think longer about my summary.

21. If I had more time, I would have considered more information.

22. I felt anxious while completing this task.
23. I did not have enough time.
24. It was difficult to decide which sources to select.
25. I felt hurried or rushed during this task.
26. I had adequate information to make a good summary.
27. I felt I had enough information.
28. My understanding of the topic was no longer changing.
29. I collected enough information to make a summary.
30. I was no longer learning about the topic.
31. I felt I had adequate information to make a summary.
32. I was focused on getting information about one thing.
33. I felt continuing the search was a waste of time, as the same information was showing up.
34. I had a list of certain things I was interested in.
35. I stopped searching because I was not finding new information.
36. I stopped searching when I had an option that satisfied the things that were important to me.
37. I only considered looking for the piece of information most important to me.
38. I kept finding the same information in every search.
39. My view of the topic was no longer changing.
40. I was most concerned about finding information on one specific aspect.

C.3 Preference for CTA vs Silent Condition

1. You were asked to talk-aloud for one task, and work in silence for the other. Which one was better?
 - Talk aloud much was a lot better
 - Talk aloud was slightly better
 - I did not feel any difference
 - Working in silence was slightly better
 - Working in silence was a lot better

2. Why?

C.4 PHASE1-SHEG: Website Reliability Assessment

You are researching children's health and come across this website: <https://acped.org>.

Please decide if this website is a trustworthy source of information on children's health.

You may use any information on this website, or you can open a new tab and do an Internet search if you want. You can consider checking out search engines other than Google, such as Bing, Yahoo, or Ecosia.

Take about 5 minutes to complete this task. Turn YASBIL on before proceeding.

1. Is this website a trustworthy source to learn about children's health? Explain your answer, citing evidence from the webpages you used. Be sure to provide the URLs to the webpages you cite in the next textbox.

2. Please paste the URLs to the webpages you used to explain your answer above, one per line.

C.5 PHASE3-SHEG: Website Comparison Assessment

Imagine you are doing research on criminal justice reform, and you find the following webpages.

- A. <https://sites.psu.edu/aspsy/2019/10/20/criminal-justice-reform>
- B. https://en.wikipedia.org/wiki/Criminal_justice_reform_in_the_United_States

Which of these two webpages do you think is a better place to start your research?

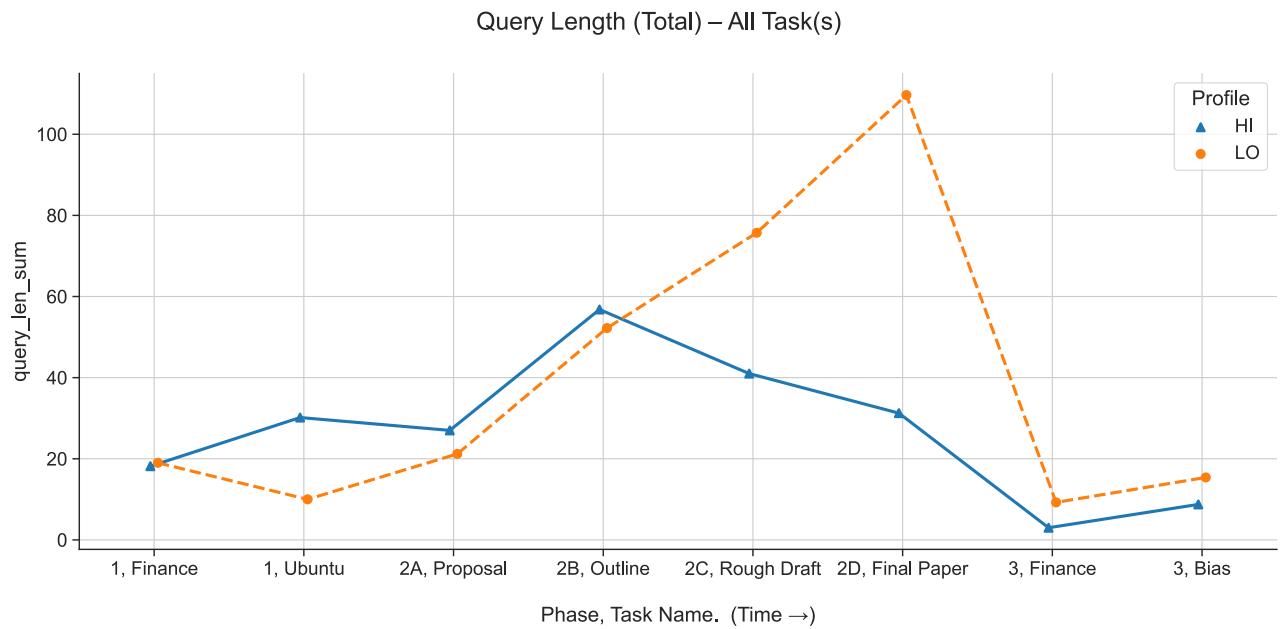
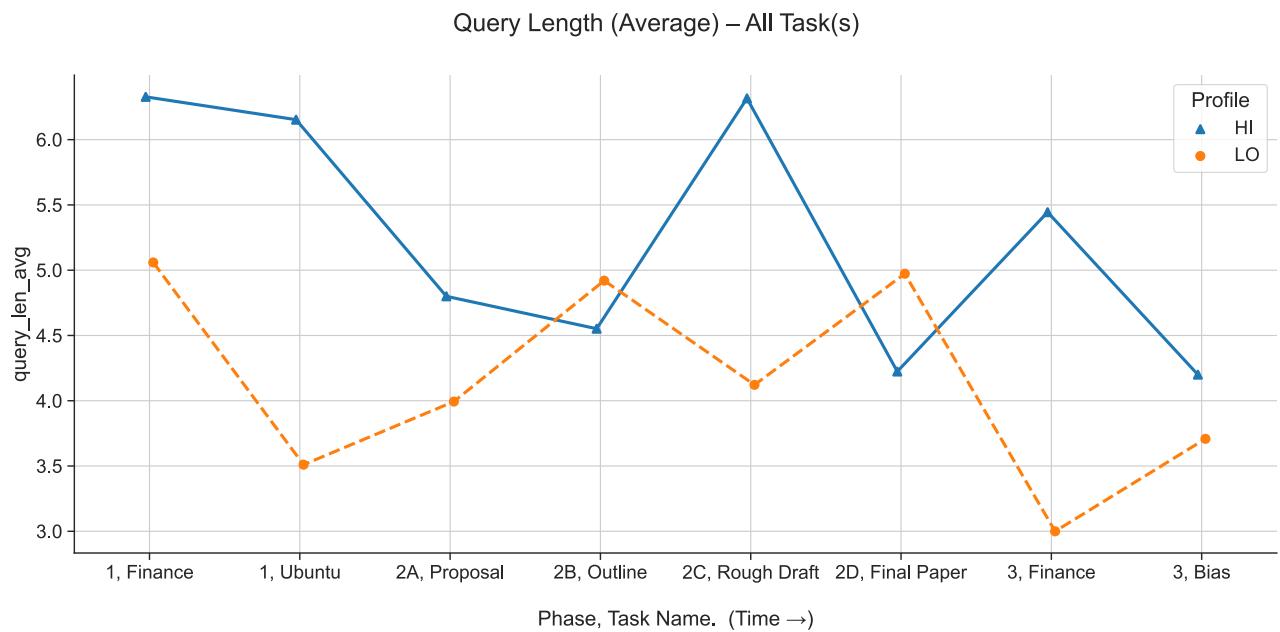
You may use any information on the two webpages, or you can open another tab and do an Internet search if you want. You can consider checking out search engines other than Google, such as Bing, Yahoo, or Ecosia.

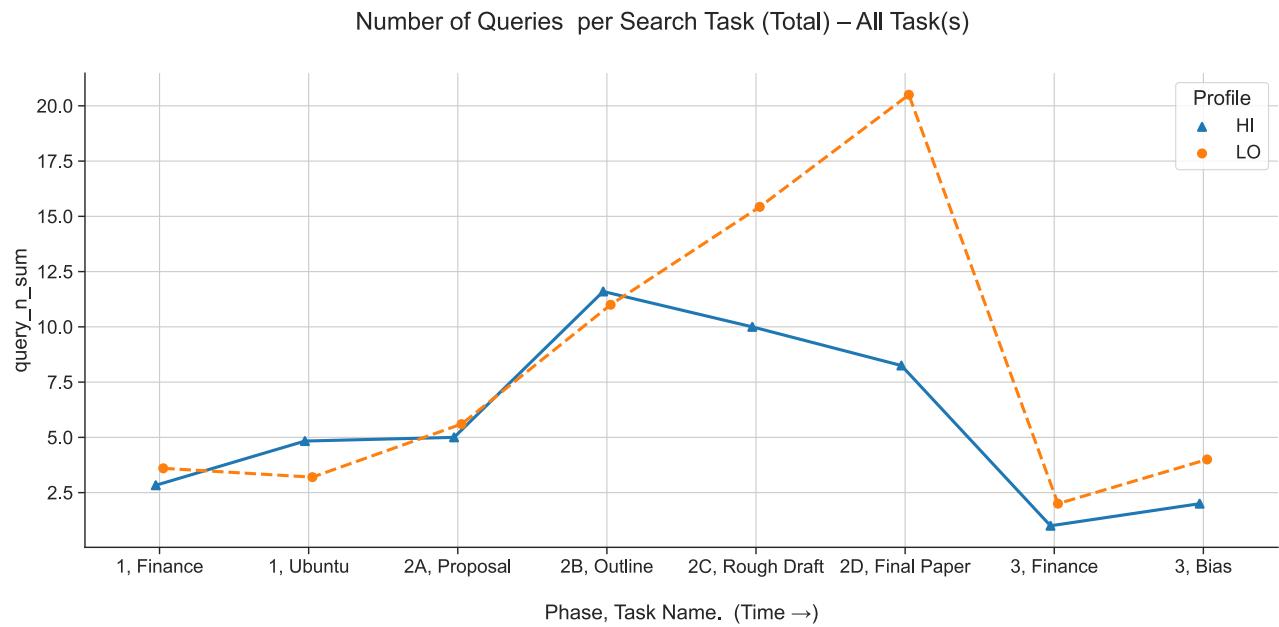
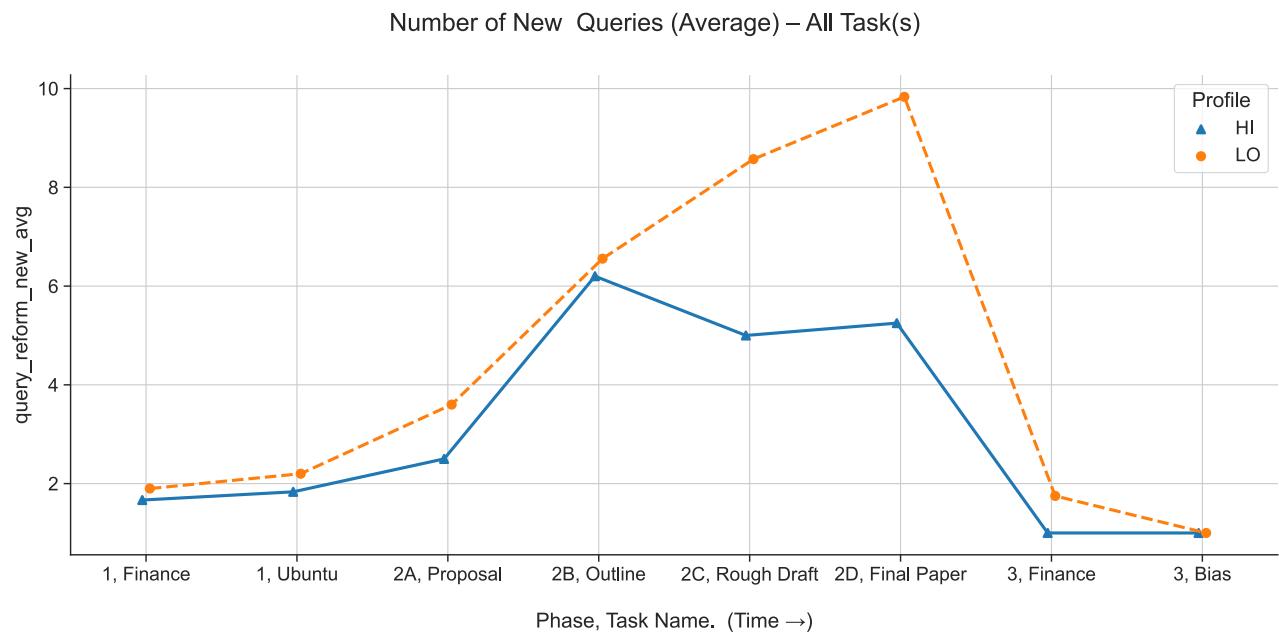
Take about 5 minutes to complete this task. Turn YASBIL on before proceeding.

1. Which of these two webpages do you think is a better place to start your research?
2. Explain your choice. Refer to both webpages in your answer.
3. Please paste the URLs to the webpages you used to explain your answer above, one per line.

D

Supplementary Plots - Query Reformulation

**Figure D.1:** Query Length (Total) – All Task(s).**Figure D.2:** Query Length (Average) – All Task(s).

**Figure D.3:** Number of Queries per Search Task (Total) – All Task(s).**Figure D.4:** Number of New Queries (Average) – All Task(s).

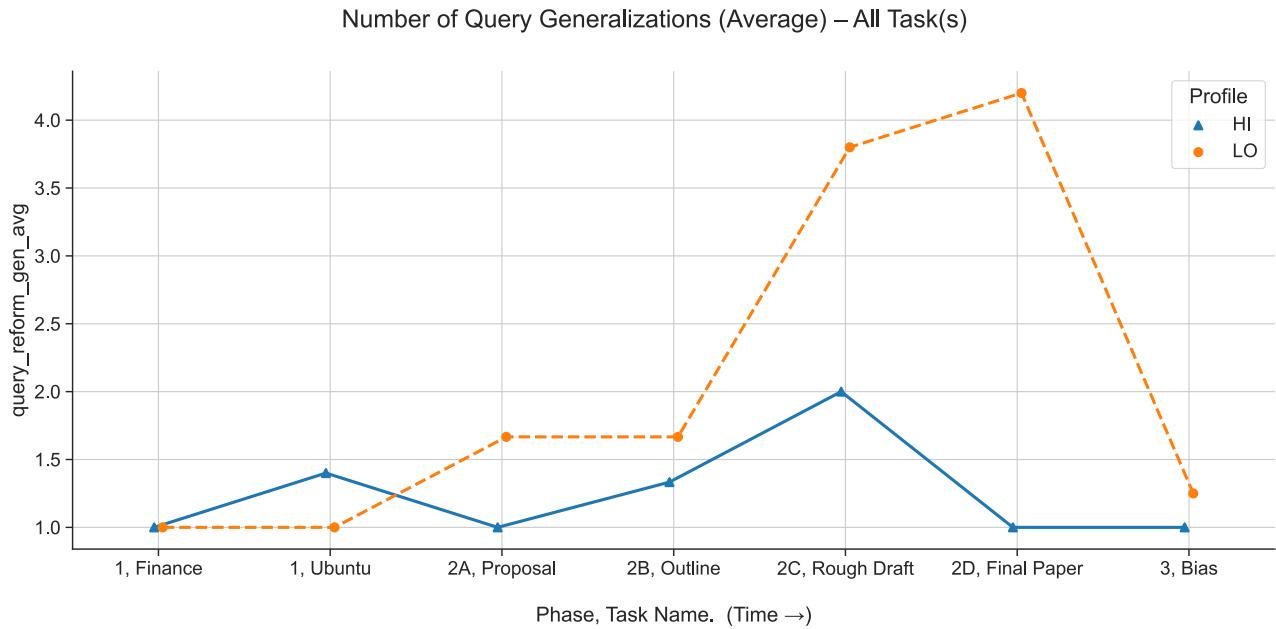


Figure D.5: Number of Query Generalizations (Average) – All Task(s).

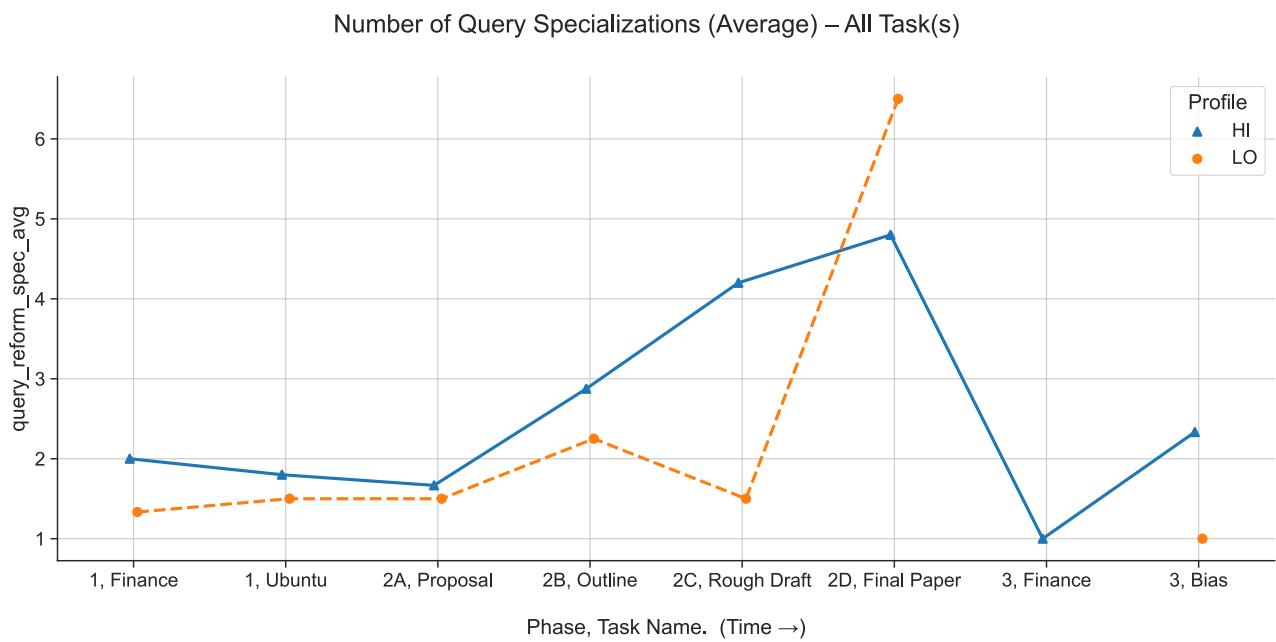


Figure D.6: Number of Query Specializations (Average) – All Task(s).

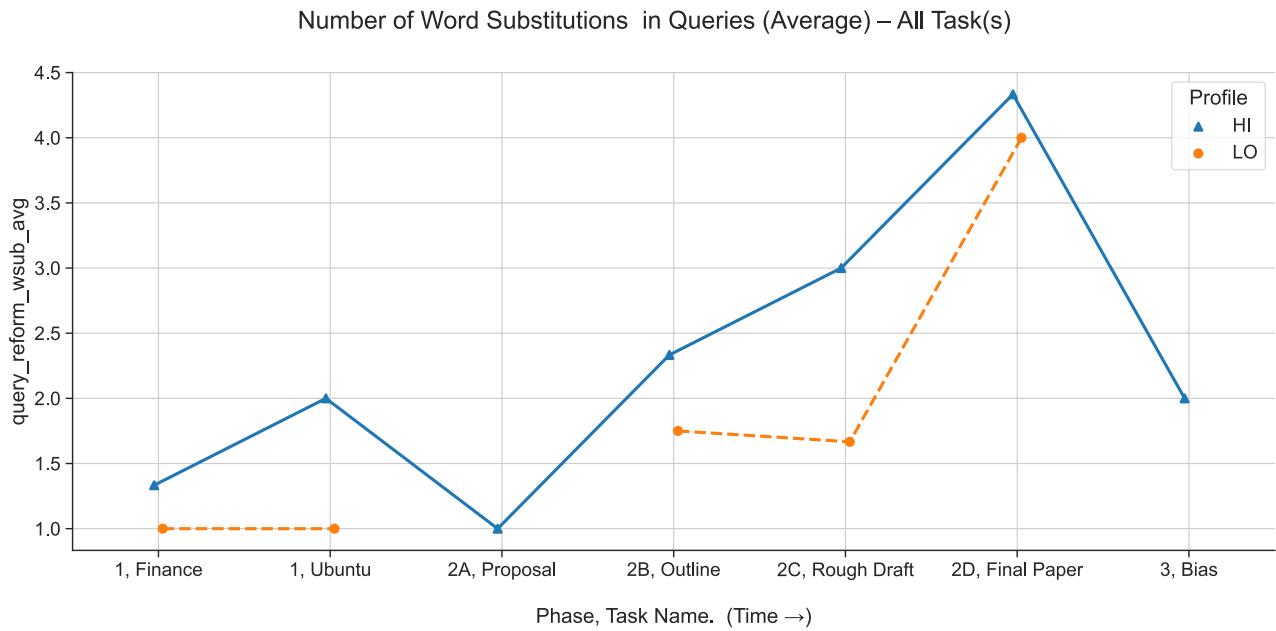


Figure D.7: Number of Word Substitutions in Queries (Average) – All Task(s).

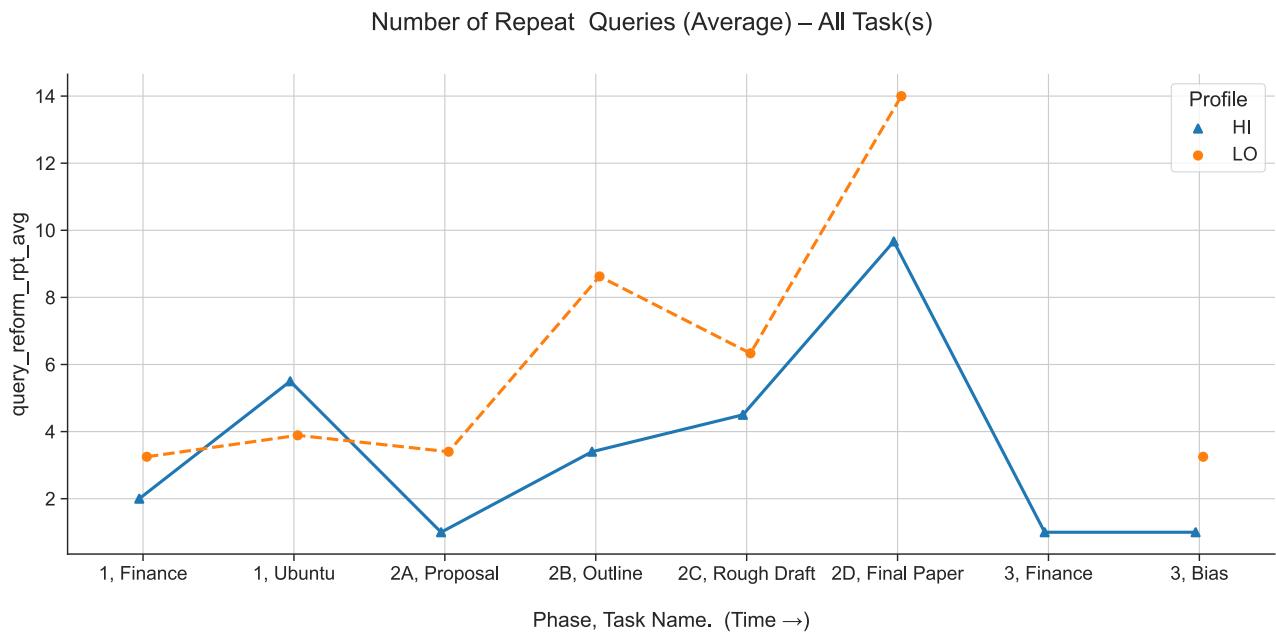


Figure D.8: Number of Repeat Queries (Average) – All Task(s).

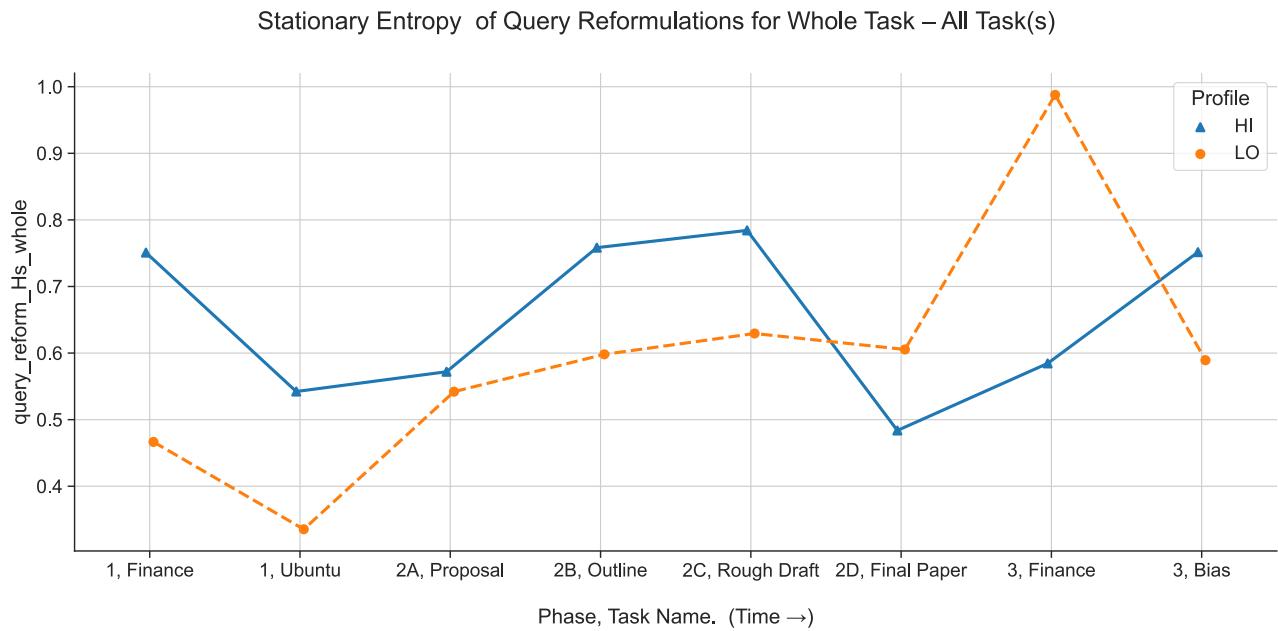


Figure D.9: Stationary Entropy of Query Reformulations for Whole Task – All Task(s).

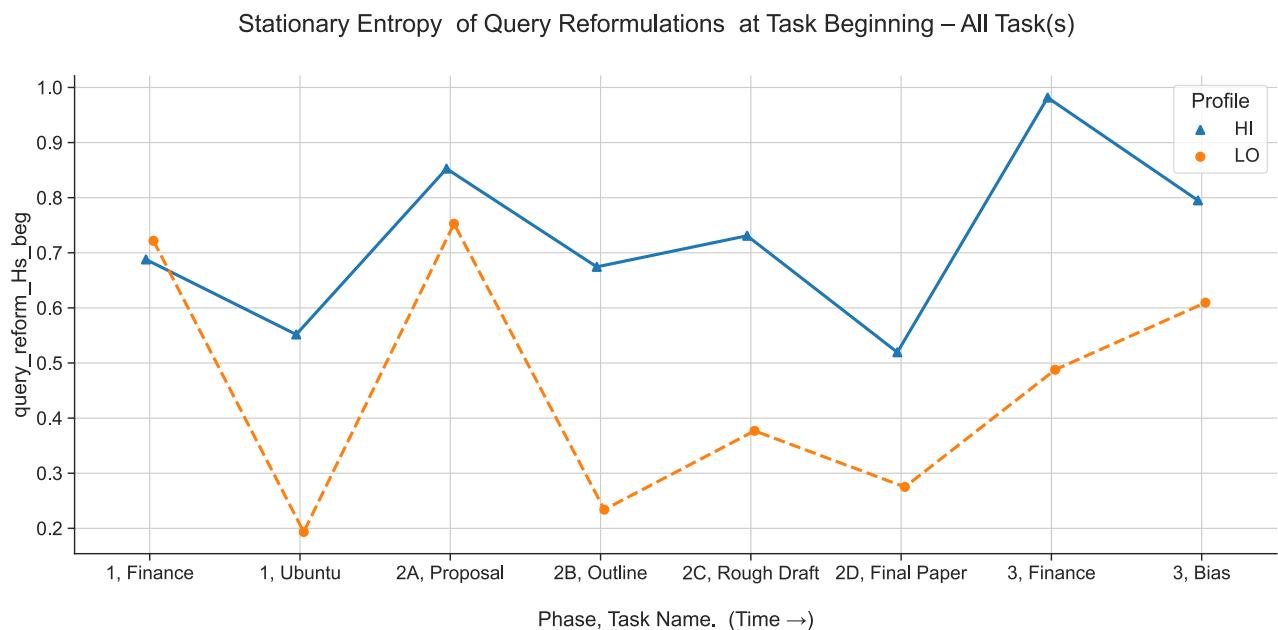


Figure D.10: Stationary Entropy of Query Reformulations at Task Beginning – All Task(s).

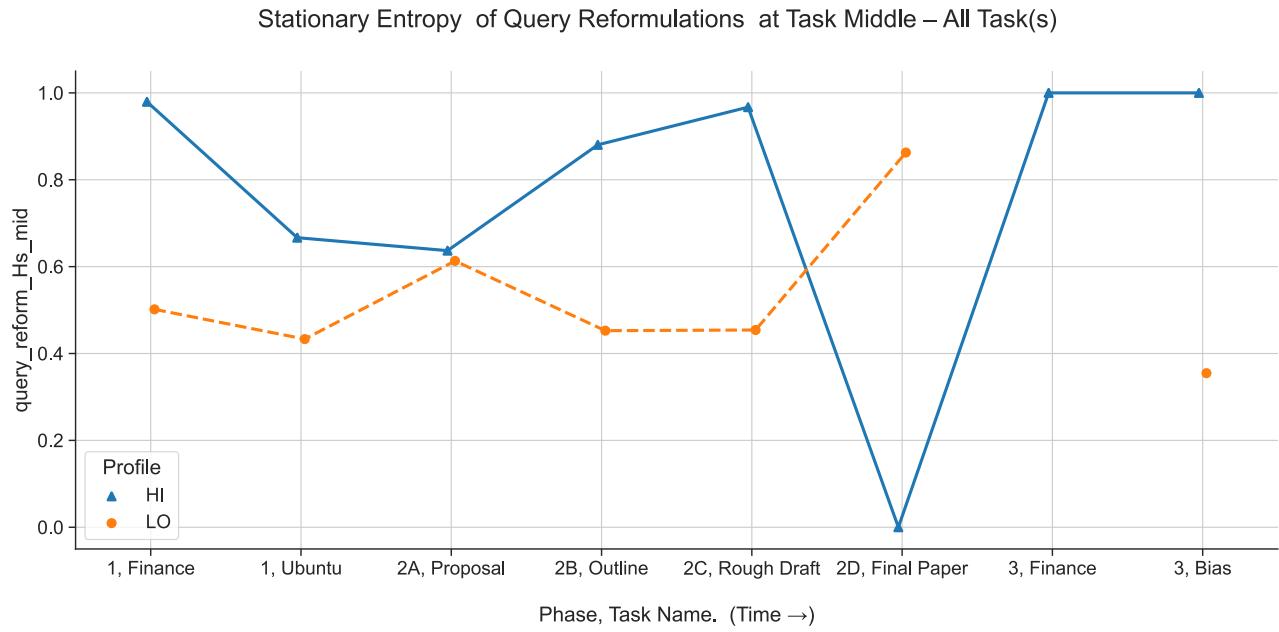


Figure D.11: Stationary Entropy of Query Reformulations at Task Middle – All Task(s).

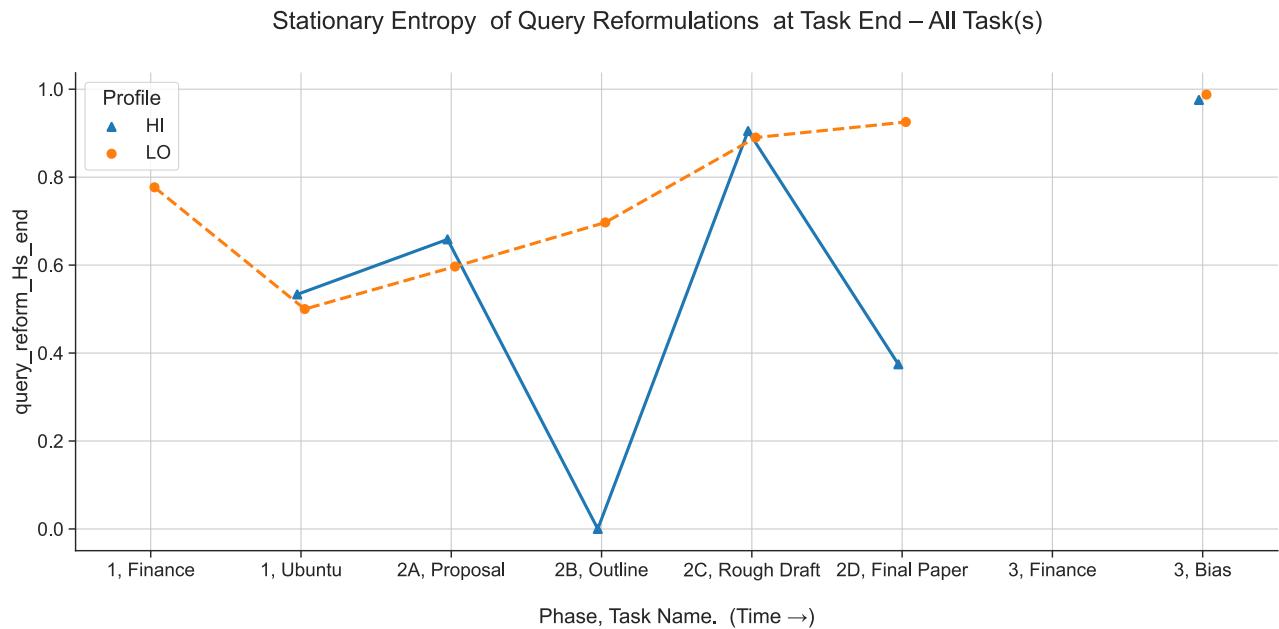


Figure D.12: Stationary Entropy of Query Reformulations at Task End – All Task(s).

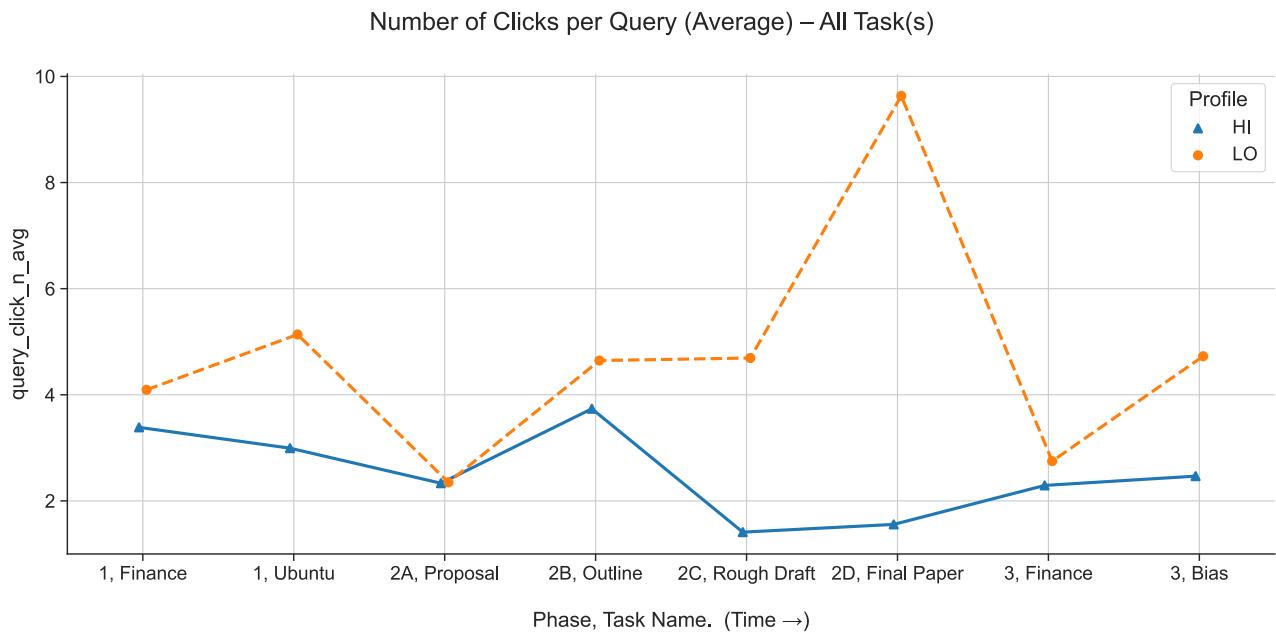


Figure D.13: Number of Clicks per Query (Average) – All Task(s).

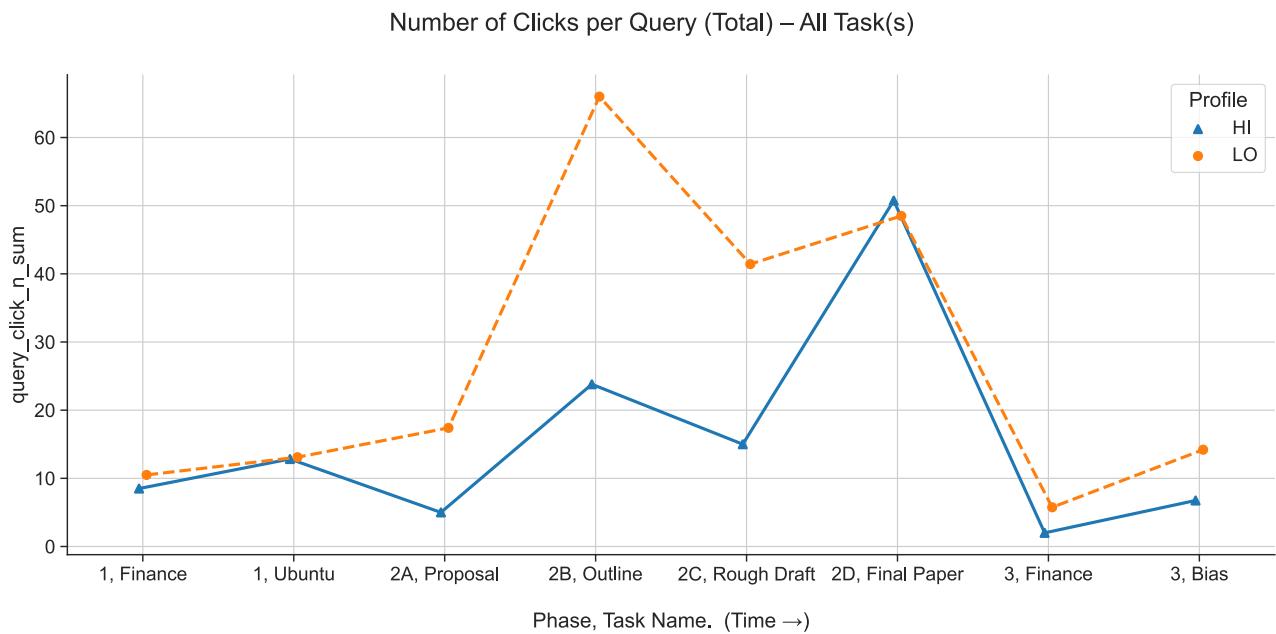


Figure D.14: Number of Clicks per Query (Total) – All Task(s).

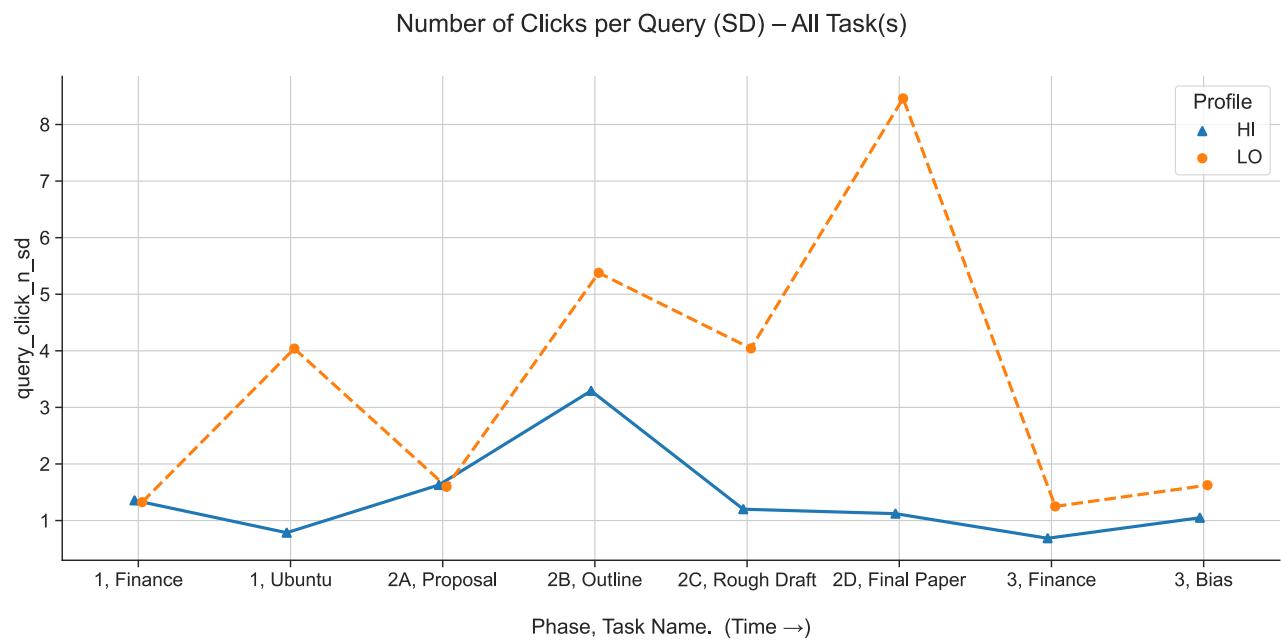


Figure D.15: Number of Clicks per Query (SD) – All Task(s).

E

Supplementary Plots - Search Behaviour

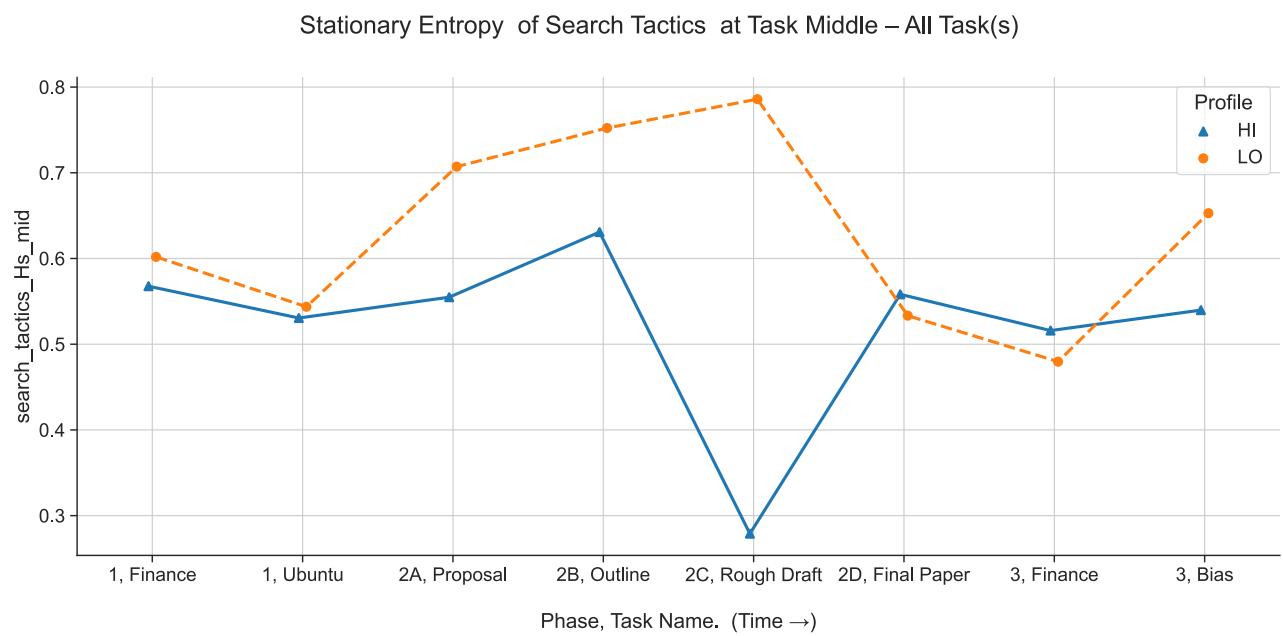


Figure E.1: Stationary Entropy of Search Tactics at Task Middle – All Task(s).

F

Acknowledgements - The PhD Journey

Similar to David Maxwell's thesis.

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