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Archive users, their characteristics and motivations

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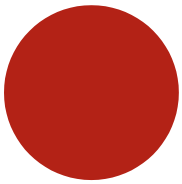

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Dissertation carried out in the context of the Master's Degree in Information Science, supervised by Professor Carla Teixeira Lopes and co-supervised by Dr. Inês Koch

Faculty of Engineering and Faculty of Arts and Humanities
University of Porto

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Resumo

De modo a oferecer um serviço com qualidade, é fulcral os arquivos conhecerem os seus utilizadores. Ao longo dos anos, a tecnologia tem evoluído e tem sido cada vez mais adotada em bibliotecas, arquivos e até museus. Porém, a par desta evolução, também os utilizadores mudaram e tiveram de se adaptar a todas as mudanças que as instituições sofreram ao longo dos anos, seja pela adoção de meios digitais ou outras transformações.

No contexto do projeto EPISA (Entity and Property Inference for Semantic Archives) surge a necessidade de conhecer os diferentes perfis dos utilizadores que visitam os arquivos, como se caracterizam demograficamente e como é que interagem com o arquivo. Desta forma, o projeto EPISA pode adequar a interface do seu protótipo de arquivo web tendo em conta os perfis dos utilizadores que o vão utilizar.

Esta dissertação teve como objetivo definir e caracterizar os perfis dos utilizadores de arquivo através da identificação das suas características demográficas, as motivações que os levam a visitar o arquivo e que dúvidas têm ao interagir com o mesmo. Para alcançar este objetivo, foram analisados os inquéritos de satisfação da DGLAB, que se encontram disponíveis durante todo o ano, e foram realizadas entrevistas aos profissionais destes arquivos que observam e interagem diretamente com os utilizadores. Ao todo foram analisados 4661 respostas do inquérito, compreendidas entre 2015 e 2022, e foram obtidas respostas de doze arquivistas. Desta forma, é obtida informação de duas fontes diferentes que se irão cruzar e originar os perfis finais. Estes perfis darão origem a *personas* de forma a representá-los de uma forma mais visual e realista. *Personas* são representações de padrões de características, comportamentos e objectivos de utilizadores, através de uma descrição fictícia de um individuo, juntamente com outros detalhes pessoais inventados que as tornam mais verídicas, como nome e fotografia.

Para este trabalho foram realizadas duas fases de criação de perfis – os perfis iniciais e os perfis finais. Na fase dos perfis iniciais foi estipulado o número de perfis a criar e a sua base de criação, ou seja, por motivo de visita ao arquivo. Nesta fase foram criadas personas apenas com os dados demográficos cruzados com os motivos de visita ao arquivo, presentes no inquérito. A segunda fase de criação, teve o contributo das respostas das entrevistas com os arquivistas, e permitiu completar a informação das personas iniciais.

Com a análise das respostas dos inquéritos e das entrevistas, resultaram um total de seis perfis: investigação genealógica, investigação histórica, fins legais, trabalho académico, fins institucionais e fins de publicação. Cada persona resultante de cada perfil foi caracterizada com base no género, idade, habilitação literária, frequência de visita, motivações, frequência e tipo de pedidos de ajuda, fatores que influenciam o seu comportamento de pesquisa e características únicas associadas aos utilizadores de cada perfil.

Palavras-chave: *Estudos de utilizadores; Utilizadores de arquivo; Perfis de utilizador; Personas; Arquivo*

Abstract

To provide quality services, archives must know their users. Over the years, technology has evolved and been increasingly adopted in libraries, archives and museums. However, alongside this evolution, users have also changed and had to adapt to all the changes institutions have undergone over the years, either by adopting digital media or other transformations.

Within the context of the EPISA project (Entity and Property Inference for Semantic Archives) arises the need to know the different user profiles that visit the archives, how they are characterised demographically and how they interact with the archive. In this way, the EPISA project can adapt the interface of its web archive prototype considering the users' profiles that will use it.

This dissertation aimed to define and characterise archive users' profiles by identifying their demographic features, the motivations that lead them to visit the archive and what doubts they have when interacting with it. To achieve this goal, the DGLAB satisfaction surveys, which are available throughout the year, were analysed and interviews were conducted with archive professionals who observe and interact directly with users. A total of 4661 survey responses were analysed, ranging from 2015 to 2022, and responses were obtained from twelve archivists. In this way, information was obtained from two different sources which gave rise to the final profiles. These profiles originated /textit[personas] to represent them in a more visual and realistic way. *Personas* are representations of patterns of user characteristics, behaviours and goals, through a fictional description of an individual, along with other invented personal details that make them more truthful, such as name and photograph.

Personas are representations of patterns of user characteristics, behaviours and goals, through a fictional description of an individual, along with other invented personal details that make them more believable, such as name and photograph.

For this study, two phases of profiling were performed: the initial profiles and the final profiles. In the initial profiles phase the number of profiles to be created and their creation basis was stipulated, i.e. by reason for visiting the archive. In this phase, personas were created only with demographic data crossed with the reasons for visiting the archive, present in the survey. During the second phase of creation, archivists were interviewed and their answers were used to complete the initial persona information.

With the analysis of the survey responses and interviews, six profiles emerged: genealogical research, historical research, legal purposes, academic work, institutional purposes and publication purposes. Each persona derived from each profile was characterised based on gender, age, educational background, frequency of visit, motivations, frequency and type of help requests, factors influencing their search behaviour and unique characteristics associated with the users of each profile.

Keywords: *User studies; Archive users; User profiles; Personas; Archive*

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Abbreviations and Acronyms

ANTT Torre do Tombo National Archive

CPF Portguese Center of Photography

CRAV Real Consultation in Virtual Environment

DGLAB General Directorate of Books, Archives and Libraries

EPISA Entity and Property Inference for Semantic Archives

INESC-TEC Institute for Systems and Computer Engineering, Technology and Science

ISB Information-seeking behaviour

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1 Introduction

Archives are institutions which aim to store and preserve the historical materials of a country, a city or even of a specific subject. Over the years archival institutions have evolved through the adoption of new tools and methods to improve their services and facilitate the work of archivists. These tools and methods have changed the way users search for and consult archival documentation.

The digitisation method allows the content of archival documents to be preserved and made accessible digitally, so that materials are less exposed to environmental and handling threats. In parallel with digitisation, digital archives have emerged and provide easy online access to archival materials. Any user can access and view the archival information of any archive from home. However, these developments require users to have technological skills that allow them to access these digital archives.

Access to information has to be adapted to the needs and skills of archive users. It is essential to know them to adapt the services so that all users can obtain information in an easy and intuitive way. By knowing the characteristics of the users, archives become more prepared to meet their needs and assist them in any difficulties or needs that may arise. It is necessary to consider that users are not all the same, they have distinct skills that make them more capable in certain tasks.

This dissertation aims to identify and characterise the different profiles of users of the archives of the General Directorate of Archives, Libraries and Books (DGLAB) by providing information on their characteristics, motivations and difficulties during the process of searching for archival information.

1.1 Context

The dissertation is done in the context of the EPISA project (Entity and Property Inference for Semantic Archives).

EPISA project aims to create a new description model for archives and promote semi-automatic metadata creation (EPISA, 2022). The project was developed by INESC-TEC (Institute for Systems and Computer Engineering, Technology and Science) in collaboration with the University of Évora and DGLAB (EPISA, 2022). Although the EPISA project already ended in December 2022, this dissertation will study the users of archives in Portugal, as well as their information needs and their information-seeking behaviour regarding the search and access to archival information, not only for the Torre do Tombo National Archive (ANTT) but also the other DGLAB archives.

DGLAB ensures the coordination of the National Archive system and the implementation of an integrated policy for non-school books, libraries and reading (DGLAB, 2013a). This institution preserves and promotes the Portuguese heritage through information systems that allow search, consultation, and other services to be requested. The information in these archives can be accessed in person (when not available online) or remotely through the DigitArq platform, which gathers archival documentation digitised and made available online. Because even in a physical environment, the documentation must be requested online through

the CRAV platform (Real Consultation in a Virtual Environment), access to information may be difficult to certain users who need the necessary technological skills to carry out the different procedures. Since the difficulty in accessing technological means is a known problem in the info-excluded population, it is also necessary to find out if there are any other factors that block access to information.

1.2 Motivation and Goals

Currently, studies have yet to be conducted on archival user-profiles and their information-seeking behaviour and information needs in Portugal. This situation means that archivists may need to gain sufficiently in-depth knowledge of the users who access archives, how they access them, and why. These institutions need to meet the vantages of knowing their users, their needs and how they behave searching for information in the archives.

There are user profiling studies conducted in institutions, companies and organisations. However, it is rare to find literature on these studies conducted in the archival context. This study allows expanding the literature on the topic of user profiles in an archival context, both in Portugal and internationally.

The creation of user profiles allows the evaluation and validation of prototypes that are being developed, as is the case of the EPISA project. Since this project aims to represent archival information in a prototype open-source knowledge platform (Koch et al., 2021), this study can serve as a means of validating this new system.

DGLAB's Archives Area has the mission to structure, promote and monitor dynamically and systematically the State's intervention in the field of archival policy. It also has the duty to administer the appropriate measures for the implementation of the policy and the regime of protection and enhancement of cultural heritage, promote the safeguard, enhancement, dissemination, access and enjoyment of archival heritage (DGLAB, 2013b). With such an important mission, archives must know well those who visit them.

Profiling users is considered a means of improving the usability of some systems or services. The method enables personalisation, facilitates adaptability and other functions centred around the user. Users vary in their interaction preferences, interests, backgrounds and skills, goals, behaviours, personal characteristics and context (Schiaffino and Amandi, 2009).

This study aims to identify and characterise archive users in Portugal. Any institution must know its users in order to be able to adapt its services according to their needs.

Figure 1 represents the goals for this project. The main goal is to define archive users based on their characteristics and motivations. To achieve this goal, it is necessary to fulfil other objectives first. By analysing the users' perspective it is possible to identify their demographic data and define initial profiles based on that information. After this, it is necessary to analyse the archivists' perspective on the users, identifying the motivations of the users of the different profiles. In this way, it becomes possible to define the final profiles and achieve the main goal.

Through the completion of these objectives, it is possible to answer the following research questions:

- **RQ1** - How can the identified profiles be characterised regarding age, gender, and education?
- **RQ2** - How can the identified profiles be characterised regarding their motivations?

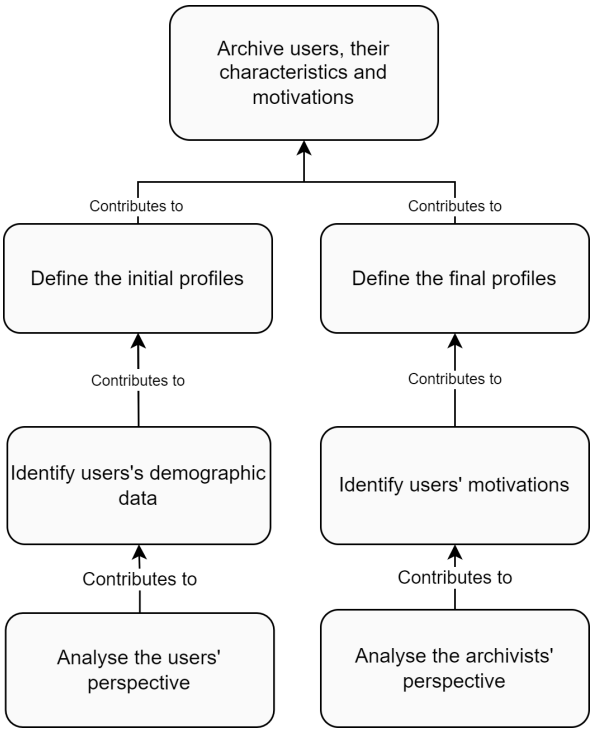


Figure 1: Goals Tree

1.3 Contributions

One goal of the dissertation project was the writing of a scientific paper to be published in a conference.

Thus, an article, "Unveiling Archive Users: Understanding their Characteristics and Motivations", was written for the International Conference on Theory and Practice of Digital Libraries which covers the information present in this dissertation, namely methodology and results obtained. It was written in collaboration with the supervisor and co-supervisor of this dissertation and it covers the results of this study. With the article it was also made available the data-sets with the questions of the satisfaction survey that were analysed and the script used to interview the archivists.

1.4 Dissertation structure

This dissertation is organised into five sections.

First, in Section 1, the Introduction aims to introduce and contextualise the topic to be addressed in this study. Next, the framework provides the context in which this dissertation is inserted, that is, why it emerged. This is followed by the presentation and description of

the problem that led to this dissertation, the benefits of the solution, and the objectives to be achieved during this study.

Next, it is presented the literature review in Section 2. This section aims to cover the different topics, definitions, methodologies addressed, and studies carried out in the user studies field, namely in an archival context. The literature review has three subsections. The first subsection addresses the archival context, that is, archive definition and evolution. The second subsection addresses the context of archival users, from their definition to the methods created to study them. Finally, the third subsection addresses information-seeking behaviour, starting with the definition of information, information needs and information-seeking behaviour. Following this presents models that aim to study this user behaviour.

Section 3 is the methodology that presents the different phases conducted to carry out this study.

Section 4 presents the survey results, from general analysis to a yearly overview and cross-referencing demographic data with profiles that give rise to the next section, Initial profiling.

Section 5 gathers the information obtained from the archivists' interviews through tables with the information for each question in the script.

Finally, Section 6 presents the initial personas and the final personas as well as the decisions made to attribute the characteristics to each. Here it is also presented how they were portrayed.

In the end, Section 7 presents the conclusions of this project, as well as the challenges faced and future work to be done. Following this section are the appendices.

2 Background literature review

This next section aims to introduce archives through their definition, historical contextualisation and evolution. Finally, the next section will present the context of archives in Portugal and the context of the EPISA project.

2.1 Archives

Usually, people have two common ideas when talking about archives (Ribeiro, 1994). For some, archives are meant only for researchers who aim to study the historical past through ancient documentary sources present in material supports that are no longer in use. For others, archives are associated with places that house old papers that have lost value to the institutions that produced them (Ribeiro, 1994). Although Ribeiro (1994)'s paper contains information over twenty years old, there are still many people who have this perception of archives today.

This section will explore the topic of Archives, such as their definition, what are its objectives, their evolution towards the digital world and how they are organised in Portugal. It will also address the EPISA as an evolving project for the organisation of archive systems.

2.1.1 Archive context and definition

Moss (2005) and Ribeiro (1994) explain that the idea of a public archive has been ingrained in Western culture since classical times and gained new legitimacy during the 18th-century French Revolution. It was during the 1950s with the "document explosion" that the concept of archive gained the meaning it has today, including documents originating from institutions or people, from the moment they are produced (Ribeiro, 1994).

Blais and Enns (1990) define public archives as repositories of national history that house materials from both the public and private sectors. Archives aim to gather, organise, and make available to society records of national historical interest. According to Ceeney (2008), the combination of record keeping and access is the most common use of archives worldwide. Because they serve as records of the past or as evidence of history, archives are an essential part of our society (Saurombe and Ngulube, 2018).

However, people frequently do not view archives as promising sources of information since they are unaware of these resources and how they can meet their information needs (Avery and Holmlund, 2010). People who could benefit from using archival holdings must be made aware that these repositories contain the type of information they are looking for (Ngulube et al., 2017). Archives need to adopt marketing strategies to make them known and boost their usage by all types of people. Individuals often do not consider archives as promising sources of information because they are unaware of these resources and how they can address their information needs (Avery and Holmlund, 2010). Archival marketing strategies have the potential to make archives known and increase their use by people at all levels of society (Ngulube et al., 2017).

Over the years, archives, libraries and museums have been forced to restructure their

services to suit the information needs of their users (Duff et al. (2013); Huvila (2014)). Museums are becoming more commercial, public libraries are attempting to remain relevant by being present in every community, and archives appear to be focused on issues regarding their collection rather than the users of their resources (Duff et al., 2013).

2.1.2 Archives in the Digital Era

Technology is very present these days. Because of that, institutions have to keep up with modern times and adapt to this new digital world.

The new digital technologies have challenged heritage institutions worldwide over the past decade (Bolton and Olsson, 2010). Since "*the digital*" has become the default value of culture, many heritage institutions are still hesitant to follow up (Snickars, 2011). Web archiving organisations have been capturing and preserving the countries' web heritage for years. They have saved billions of web documents, many containing unique and valuable historical information (Costa and Silva, 2011). Since 1996, the Internet Archive has accumulated 150 billion documents. On the other hand, web archive retrieval technology is still in its early phases (Costa and Silva, 2011).

Digital archives are different from museums and digital libraries (Cunningham, 2008). The digital archive is, by nature, a database, that is, a structured collection of data stored in a computer system (Bolick, 2006). Most digital archives are developed and maintained by museums and libraries (Bolick, 2006). The goal of a digital archive is to keep the data in digital form, regardless of the medium on which it is stored (Yadav, 2016).

In digital archives, the user can choose what to read, when, and how (Bolick, 2006). They include collections of different sources, such as letters, diaries, journals, maps, photographs, and interviews, that have been digitized and placed online. They also include numerical data, texts, videos, and audio files (Bolick, 2006). Every digital object is documented and organised in a vast online catalogue system. The objects can be located by browsing or searching. Individuals with access to a computer connected to the Internet have free and ready access to millions of digitized primary sources (Bolick, 2006).

2.1.3 Portuguese Archives

ANTT (Torre do Tombo National Archive) is a central State archive managed by the General Directorate of Books, Archives and Libraries (DGLAB). It holds original documents from the 9th century to the present day, as well as new electronic archives within the scope of the State's activities, both regarding archival and photographic heritage. The ANTT is one of the two National Archives that are members of the Portuguese Archive Network (RPA), together with the Portuguese Centre of Photography (CPF), along with 16 district archives, the Overseas Historical Archive, and includes entities such as city councils, colleges, foundations, professional associations, general secretariats and universities.

DGLAB was created in 2012 by the Presidency of the Council of Ministers/ Secretary of State for Culture. It is a central service of the direct administration of the State, with administrative autonomy. Its objective is to ensure the coordination of the National Archive

System and the implementation of an integrated policy for non-school books, libraries and reading (DGLAB, 2013a). As public institutions, the Archives of the DGLAB are responsible for protecting, conserving and accessing to significant documentary heritage, guaranteeing the essential means at the citizen's disposal (DGLAB, 2022b). These services consist of assisting readers and others in accessing archives. Such assistance means the provision of generic research guidance or information on the available and/or most appropriate collections for research on each subject, legal rules and other conditions of access to those collections. DGLAB also provides information on collections' State of organisation and preservation as well as available documentary description tools and how to use them.

DGLAB archives provide the following services: information request, search, consultation in person, reproduction, certification and registration. These services are available online via the electronic counter, through the CRAV portal (Real Consultation in a Virtual Environment) and in person at any DGLAB archive (DGLAB, 2022b). The Archives provide a reference service with specialised guidance in the consultation of research instruments. Through virtual research, users can identify the documents that have been digitised. The available description instruments are varied and provided by the different archives, namely: DigitArq, fonds guide, inventories, catalogues, printed matter or manuscripts (DGLAB, 2022b). DigitArq is a system that allows users to enjoy remotely, through the Internet, a set of services only available in person at the Archives. It is possible to consult the institution's catalogue, view scanned documents, request digital reproductions, reserve documents for on-site reading, request certificates or obtain information (DGLAB, 2022a).

Regarding digital National Archives, RODA (Repository of Authentic Digital Objects) was created. This complex system allows DGLAB to incorporate electronic documents in a controlled manner, ensuring their management over time and their accessibility to users (RODA, 2022). RODA's mission is to ensure the implementation and development of the national archival policy and the fulfilment of the State's obligations in archival heritage and records management, in any form or support throughout the national territory (RODA, 2022).

2.1.4 EPISA project

EPISA - Entity and Property Inference for Semantic Archives - represents a major step towards increasing the accessibility of Portuguese cultural heritage and information. This project aims to create a new description model for archives based on models already proposed for museums and archives and promote semi-automatic metadata creation (EPISA, 2022). Its primary purpose is integrating National Archives into the global semantic-linked data network.

By rethinking the existing archive system, the EPISA project contributes to the transition from an ISAD(G) multilevel description model to a linked data model representing archival data on an open-source knowledge platform prototype (Koch et al., 2021). Artificial Intelligence algorithms will use the current descriptions to identify entities and infer relationships between them. The prototype knowledge graph and its corresponding user interface

will support applications for specialists as well as the general public (Koch et al., 2021).

EPISA aims to: migrate existing ISAD-standard archival descriptions to standards compliant with the CIDOC-CRM (museums) and RiC (ICA) model; support archival description in the semi-automatic creation of metadata; present interfaces that allow more efficient interaction, for experts, for general users and machines; create a link between archival data and other sources of information and facilitate access to archives, cultural heritage and information (EPISA, 2022).

Under the direction of Professors Carla Teixeira Lopes and Cristina Ribeiro, the project was developed by INESC-TEC (Institute for Systems and Computer Engineering, Technology and Science) in collaboration with the University of Évora and DGLAB (EPISA, 2022). This project started in January 2019 and ended in December 2022.

2.2 Archive users

This section aims to define and understand archive users as well as present methods used to gather information from them.

Archive users cover a wide range of profiles, from general users, teachers, students (from university or not), genealogists (or just curious people in the area) or historians (Saurombe and Ngulube, 2016).

In this case, users are the people who seek information from archival materials (Conway, 1986). These users may be researchers visiting the repositories or seeking and using items they find in the archives. However, users do not just interact directly with the archives. They can also interact indirectly, as with students in a classroom (Conway, 1986). These students receive information that a professor has searched in an archive and taught to his or her students. Archivists can also be users when they extract information from archives and organise and structure it into a finding aid, reference letter, or exhibition (Conway, 1986). Broadly, archival users are all people who benefit from historical information. Conway (1986) believes that, given this definition, it is doubtful that many non-users of archives exist.

2.2.1 Understanding the users

To know the users better, archivists should regularly question researchers who visit the archives (Conway, 1986). The aim is to identify direct groups of beneficiaries of archival information and to understand the process of information transfer within and outside the archives. Critics of library user studies believe that researchers rarely act isolated but rather as members of information-sharing networks, both formal and informal (Conway, 1986).

It has been assumed for a long time in archival science that people who visit archives know what they want and are knowledgeable enough to express their needs in archival terms. They can assist themselves as much as possible in practical matters and in analysing and interpreting their information needs (Huvila, 2008). It is traditionally expected that users possess some experience in the subject matter to utilise the records (Huvila, 2008).

In the 1990s, more was done to help archives understand their users (Huvila, 2008). Academics and archival organisations have shown an increasing empirical interest in users of

archival documents during the late 1990s and the 2000s (Gilliland-Swetland (1998); Gilliland-Swetland et al. (1999); Duff and Johnson (2002); Sundqvist (2007)). In practice, most studies have focused on historians and their use of archives (Vilar et al. (2016); Huvila (2008)). Studies usually seek to learn about historians' information practices, material choices and formats, attitudes toward archivists and archives, and the varied goals and implications of archival research (Vilar et al., 2016). The hobbyist genre of information behaviour studies has featured genealogy as its most popular topic (Hartel, 2014), perhaps because amateur genealogists are frequent users of libraries, archives, and the internet (Molto, 2009).

Gilliland (1998; 1999) studied archival records in elementary school contexts. Other authors, such as Yakel and Bost (1994) and Kostiainen et al. (2003), have looked to work with administrators. Even in these cases, the notion of use tends to be rather record-centric. Researchers have examined records as they exist and observed how they are found, by whom, and whether they are retrieved for use. Even descriptive user studies have undoubtedly served to solve practical problems in archival institution (Huvila, 2008).

2.2.2 The importance of expertise in understanding users ISB

For public institutions, user skills is a crucial element to consider. User expertise works as a measuring mechanism of end-user interaction with a service and a library product (Lizazi-Mbanga and Mapulanga, 2021). When interacting with an archive, some aspects associated with users' expertise may dictate their behaviour and success in satisfying the information needed.

Studies of search behaviour frequently focus on the distinction between novices' and experts' search strategies (Aula et al., 2010). In studying experts, researchers can gain insight into successful strategies for searching for information and, conversely, observe novice searchers' methods that could be more successful (Aula et al., 2010).

Vilar and Šauperl (2017) concluded that expert users adopt different search strategies than novice users. The expert ones do not need as much time as the novices. According to Johnson (2008), archive users rule themselves by three simple questions: "Where shall I look?", "What shall I say?" and "What is that?". Attending to the first question, although young people are more familiar with computers and technology (Vilar and Šauperl, 2017), novice users tend to start their searches with Google, which means that they need to be aware that most of the archival content is not on this search engine. Users with more archival experience tend to choose their sources and archives (Vilar and Šauperl, 2017) based on their needs and what they are looking for. Considering the other two questions, sometimes, for novice users, such as scholars, the searching process can be quite complicated (Kamposiori et al., 2018). However, because they may be shy or believe they know what they are doing, they do not seek help when needed.

On the other hand, even highly skilful searchers sometimes struggle to find the information they are looking for (Aula et al., 2010). When this situation happens, first, they try different queries. Then, if they get frustrated, they seek the help of the archivist when they need to be guided in the right direction (Vilar and Šauperl, 2017), or even ask a friend for help (Aula

et al., 2010). Occasionally, even the language of a particular document can lead to confusion, and the meaning of its content may only sometimes be perceptible and easy to interpret (Vilar and Šauperl, 2017).

Archivists sometimes presume that users understand how to search for and obtain information from archival collections (Saurombe and Ngulube, 2016). As a result, some users might need clarification and support when searching for information in archives because, according to Saurombe and Ngulube (2016), libraries are more transparent than archives. Unfortunately, this can be a factor that can drive users away from the archives. Users do not have all the same traits and attributes, and archivists must be aware of that. They also need to adapt their strategies to assist skilled and novice users regarding their information needs and other aspects (Saurombe and Ngulube, 2016). To ease the work of archivists, strategies can be adopted to offer literacy to users, mainly for those with less experience. Yakel (2004) argues that information literacy programs offered by the library and information science field are essential for archival users. In other words, archival user education may be needed. For example, these programs can be achieved through sessions or workshops (Yakel, 2004).

2.2.3 Gathering information on users

There are instruments that allow researchers to collect information about users, such as through questionnaires, interviews or other interactive methods.

Questionnaires can be administered in a variety of ways, through electronic, paper or through interviews, and are widely used by researchers to collect information about users (Kelly, 2007). These questionnaires can feature different types of questions, such as closed questions where there are pre-defined possibilities for the user to select one of them, or open questions so that the participant can answer whatever they would like to (Adhabi and Anozie, 2017). Closed questions are more objective and are useful for providing numerical representations of subjects' attitudes and feelings and allow researchers to make statistical comparisons. Open questions allow the researcher to obtain more unique responses that vary according to the subjects' experiences and to understand in greater detail their attitudes and behaviours (Adhabi and Anozie, 2017).

Interviews are a way of presenting open questions that could be applied in a questionnaire, obtaining more individualized responses. Interviews can be structured, semi-structured or unstructured. The difference between the different types is the degree of control that the interviewer has over the purpose of the interview (Kelly, 2007).

The questions asked during a structured interview are less flexible and casual as the researcher follows a set of questions in each order and with a limited number of response categories (Denzin, 2008) and is suitable when the interviewer expects shorter answers (Stuckey, 2013).

A semi-structured interview is more flexible and outlines the topics to be covered, and the interviewees' responses define how the interview is conducted (Adhabi and Anozie, 2017). Stuckey (2013) states that it is advisable to record the interviews and transcribe them, even if notes are taken during the session. Being a less rigorous type of interview, it can be done

individually or in groups. (Adhabi and Anozie, 2017) considers semi-structured interviews as an ideal data collection tool for qualitative studies.

Unstructured interviews are conceptualized as narrative interviews (Stuckey, 2013). These types of interviews are controlled conversations that follow the interests of the researcher. The interview can be non-directive, where the researcher may not have pre-planned questions or focused, where the researcher manipulates the interview topic according to his or her interest (Adhabi and Anozie, 2017).

The *Think Aloud* method is another mechanism for gathering information from users. The goal is to ask participants to express aloud what they are thinking while they are solving problems (Charters, 2003) or interacting with a system (Kelly, 2007), for example.

2.2.4 User profiling

Schiaffino and Amandi (2009) considers user profiling crucial when gathering knowledge about users. Nowadays, profiling users is considered a means of improving the usability of some systems or services, allowing customisation, facilitating adaptability, and other functions centred around the user (Golemati et al., 2007). The interest generated around user profiling focuses on the fact that users differ in their interaction preferences, interests, background and skills, goals, behaviours, personal characteristics and context (Schiaffino and Amandi, 2009). In some situations, a user's personal information may be relevant to a study. This data is often demographical and mainly covers gender, age, city, and country, among others (Schiaffino and Amandi, 2009). Furthermore, user profiles, besides being individual, can also be grouped. In other words, group user profiles combine individual profiles, creating a generic profile for a specific group of users with the same or similar characteristics (Schiaffino and Amandi, 2009).

Two main methods can be used to obtain information about user profiling. Creating a user profile requires either explicit information provided directly by the user or implicit information obtained by watching the user's actions (Schiaffino and Amandi, 2009). However, sometimes the explicit user information method can lead to some issues. When using quantitative research methods like questionnaires, users may only be willing or able to complete them if they are short. The data users provide only sometimes correspond to reality, i.e. they may lie in what they are saying or struggle to express their interests and what they want to communicate. Therefore, observing user actions is the most used method for gathering user information (Schiaffino and Amandi, 2009). This type of profiling can be dynamic, consisting of performing activities or actions to determine the user's interest (Poo et al., 2003).

In the early 2000s, Furtado (2001) conducted a study based on the characterisation of ANTT user profiles. To obtain information regarding the archive users, the author analysed the data from the registration forms of both permanent and temporary readers, the complaints book and the activities report, and conducted interviews with temporary users. Through the results, the author obtained information about the demographic aspects of the users, as well as their information needs (Furtado, 2001). The needs were ascertained through information related mainly to the reasons for researching each user and which are the most requested collections and fonds.

2.2.5 Personas

A persona is a model that represents the characteristics of users (Tu et al., 2010) and has similarities with user profiles. A persona represents behavioural patterns, goals and motivations of users through the fictional representation of a person (Blokmvist, 2002). Personas have invented details that aim to make their characterisation more real, engaging and tangible (Blokmvist, 2002; Grudin and Pruitt, 2002). They are a means of communication and information about users and work environments created to improve attention, memory and organisation of detailed data about users (Grudin and Pruitt, 2002).

Personas are fictional people with names, goals (Tu et al., 2010), age, education, ethnicity, economic status, gender, friends, among other aspects. The scenarios around the personas can be constructed based on these factors. Personas are assigned photographs of themselves or their workplaces in order to give even more realism to their representation. They serve as a means of expressing assumptions about the target audience (Grudin and Pruitt, 2002).

Personas are created from the analysis of the goals, behaviours and motivations of real users. The process of creating personas is seen as a qualitative method of collecting data from users through various methods such as interviews, questionnaires or other means (Tu et al., 2010).

2.3 Information-Seeking Behaviour

This section addresses the issues of users and their search behaviour in archives. Firstly, it will discuss user profiling and why this method is used to improve processes, followed by the definition of information needs and what information-seeking behaviour means. Models describing users' Information-Seeking Behaviour (ISB) will also be presented.

Since their introduction, the concepts describing information, information needs, information seeking, and information use have experienced significant change. Considerable research on information seeking and retrieval centres on these themes, even in diverse ways (Ikoja-Odongo and Mostert, 2006). According to Shenton and Johnson (2007), it is essential to understand the information needs and information-seeking behaviour of different professional groups because it is helpful in the planning, implementation and operation of the information system and services in the given work environment. As a result, people's information needs and how they acquire, select, and use this information are influenced by their workplace and the kind of work they do (Shenton and Johnson, 2007).

2.3.1 Information definition

Information is defined, perceived and interpreted differently depending on the discipline (Case and Given, 2016). Some authors have tried to create an Information definition with a more general concept that would suit some research areas (Case and Given, 2016). In a more modern context, the term is defined more generally and means to instruct or provide knowledge (Ikoja-Odongo and Mostert, 2006). Other authors define information as a message, a document or a resource (Ikoja-Odongo and Mostert, 2006). Also, data, ideas, facts, works,

imaginative works of the mind, and data of value are potentially useful for decision-making and answering questions, among others (Stilwell et al., 2001).

2.3.2 Information need definition

Information need is one of the most fundamental concepts in Library and Information Science (LIS). A user's decision to seek information is frequently attributed to an explicit information need (Naumer and Fisher, 2017).

Every day, it is normal for people to face situations where they need to satisfy different types of needs, whether physical, psychological or cognitive (Hassan, 2013). These situations can be a barrier when they are trying to solve a problem and need more information to solve it (Hassan, 2013). As a consequence, people begin a process of searching for information to help them. Information needs are essential to work, satisfy interests or curiosities and solve problems (Nicholas, 2003). Information need is also described as circular, being the constant cause of information-seeking behaviour (Case and Given, 2016). Wilson (1997) states that although researchers are concerned with the definition of information need, they study information-seeking behaviour.

2.3.3 Information seeking behaviour definition

Information seeking is closely tied to the concept of "*need*" (Case and Given, 2016) and is often motivated by an explicit information need (Naumer and Fisher, 2017). "Information-seeking behaviour" is when an individual articulates, seeks, evaluates, selects, and uses the desired information to satisfy their needs (Stephen and Murugan, 2015). An individual seeks information when he or she recognises a gap in knowledge and feels motivated to acquire new information (Zerbinos, 1990). Marchionini (1997) defines information seeking as the process by which humans learn and problem-solve to change their knowledge base.

However, some factors can determine this process individually and in groups (Stephen and Murugan, 2015). Therefore, it is essential to understand the purpose for which information is needed, the user's environment, users' ability to select relevant information, preferred channels and sources, and barriers to information acquisition. Libraries must adapt to the knowledge of the information needs of their users to reorient their collections, services, and activities to meet their customers' information-seeking needs. In other words, user habits should be considered (Stephen and Murugan, 2015).

According to Stephen and Murugan (2015), professionals seek information from a large number of resources, including their knowledge and experience, coworkers, librarians, handbooks, journal articles, and many more. These sources of information can be broadly categorised by types of media or formats, such as formal (like a conference or a journal) or informal (such as conversation); internal or external (source within an organisation or outside); oral or written (that is, written including paper copy and electronic text); and personal (own knowledge and experience) and professional practices.

Most studies focused on users have progressed to examine ISB using more comprehensive methods (Meho and Tibbo, 2003). There was a shift in how data was collected from studying

large groups via questionnaires or structured interviews to studying small groups through observation or unstructured interviews (Meho and Tibbo, 2003). According to Meho and Tibbo (2003), a change in the analysis approach was also observed, especially in the explicit attempt to generate models of the individuals or groups studied regarding their approaches to information-seeking patterns.

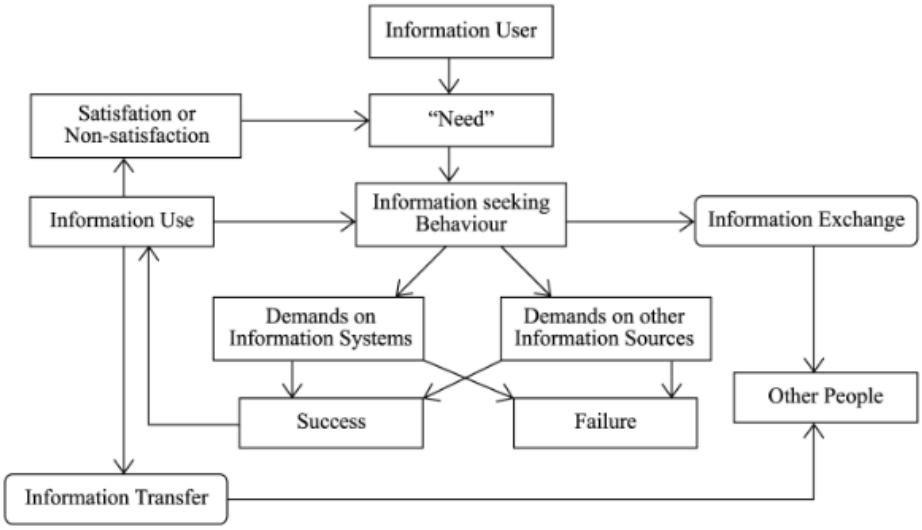


Figure 2: A model of information behaviour

Source: Wilson (2006)

Figure 2 represents the process of information behaviour. The aim is not to model information-seeking behaviour but to represent the relationships between the different concepts used in user studies Wilson (2006). From Figure 2, it is possible to conclude that ISB results from a need from the user. The user makes demands on information systems (such as libraries and online services) or other information sources. The user is also able to seek information from other people Wilson (2006). This "Information exchange" refers to reciprocity, seen as a fundamental element of human interaction. All these interactions with the various sources can lead to success or failure. The use of information from sources may or may not satisfy a need. However, meeting someone else's need may be potentially relevant, and this is called "Information Transfer" Wilson (2006).

2.3.4 Constraints regarding the study of ISB

Since information needs are a relative concept and vary by person, situation and time (Chowdhury, 2010), studying information needs is a complicated issue (Chowdhury (2010); Case and Given (2016)). This is because it involves cognitive processes that are difficult to observe or define, especially when they are performed beyond the consciousness of individuals (Case and Given, 2016).

Users may need help defining or articulating his or her information needs, making assessment difficult (Case and Given, 2016). This situation can impact the work of information

professionals when designing an information system able to meet users' needs (Case and Given, 2016).

2.4 ISB models

This section aims to present models defined by several authors with the purpose of representing information-seeking behaviour.

2.4.1 Ellis's ISB model

To represent the information-seeking behaviour, Ellis (1987) identifies six stages as part of this process: Starting, chaining, browsing, distinguishing, monitoring, and extracting.

The first stage, Starting, is the act of incorporating activities characteristic of the initial search (Ellis, 1987), such as locating references that could serve as the research cycle's starting points. Both sources that are expected to provide pertinent information and those that have already been cited are frequently included in these references. The act of asking colleagues or reviewing the literature, online catalogues, and indexes or abstracts are often characterised as starting activities (Meho and Tibbo, 2003).

Chaining is following up references (Ellis, 1987), citations or other referential information between materials, such as articles or books, or sources identified during "starting" activities. Backwards or forward chaining can be used. Backward chaining occurs when references from an initial source are followed. In contrast, the forward chaining identifies and follows up on other sources that refer to a source (Meho and Tibbo, 2003).

Browsing is looking for information in areas of potential interest on a casual basis. Not only does it include scanning of tables of contents and published relevant journals sources (Ellis, 1987), but it also includes printing references and abstracts from retrospective literature searches (Meho and Tibbo, 2003).

Differentiating is filtering material by utilising different source materials (Ellis, 1987). Employing known differences between sources to filter the amount of information obtained, such as author and journal hierarchies or the nature and quality of information (Meho and Tibbo, 2003).

Monitoring keeps up with developments in a particular area by regularly reading specific sources (Ellis, 1987) following specific sources regularly to stay up to date on developments in a particular area (for example, relevant journals, newspapers, conferences, journals, books, and catalogues) (Meho and Tibbo, 2003).

Extracting means analysing information from relevant sources (Ellis, 1987). Activities involve going through a particular source or sources and selecting relevant material from them (such as collections of indexes, abstracts, bibliographies, computer databases, sets of journals, or monographs) (Meho and Tibbo, 2003).

Meho and Tibbo (2003) believe that in addition to Ellis (1987) stages, it should include the following four additional stages: managing information, accessing, networking, and confirming.

Managing information is added as a new stage since knowledge is only immediately obtained or applied in some cases. It should be gathered, digested, organised, and stored for future use (Meho and Tibbo, 2003).

The "accessing" refers to the importance of information-seeking activities like starting, chaining, browsing, monitoring, extracting, and networking. Researchers must, however, obtain the materials or sources of information they identified and located to continue their information-seeking process. This is especially true because not all activities like starting, chaining, and browsing use direct sources of information. Bibliographic databases, personal contacts, colleague recommendations, interviews, publishers' catalogues, and backwards and forward chaining provide a great deal of information (Meho and Tibbo, 2003).

The activity of Networking is characterised by the activities involved in communicating, as well as maintaining close relationships with a wide range of people, including friends, colleagues, intellectuals working on similar topics, members of ethnic organisations, government officials, and booksellers, among many others (Meho and Tibbo, 2003).

Finally, the activities that check the accuracy of the information found are characteristic of verifying (Meho and Tibbo, 2003).

2.4.2 Krikelas' ISB model

This model is linear and simple compared to other authors and can even be applied to everyday situations.

Krikelas (1983) indicates that not all needs have to proceed to information seeking, but those of higher priority. The response posed as a priority or urgent needs to be executed immediately by selecting sources that satisfy the information need. In contrast, the non-urgent need is deferred (Krikelas, 1983). As seen in Figure 3, sources of information can be internal or external. Internal information exists in the memory of the person requiring the information and can be obtained through observation. External sources involve other sources such as literature or other individuals transferring information (Krikelas, 1983).

2.4.3 Marchionini's ISB model

Marchionini (1997) has structured the ISB into eight processes. These processes involve identifying a problem and the various steps until the problem is resolved or the process is dropped. According to the author, information searching is both systematic and opportunistic at the same time. Consequently, it is directly influenced by who seeks information and how different factors influence the search. This comprehensive model refers to information seeking in the electronic environment (Marchionini, 1997).

These eight processes are: Recognise and accept an information problem; define and understand the problem; choose a search system; formulate a query; execute research; analyse the results; extract information, and reflect/repeat/stop (Marchionini, 1997).

Marchionini (1997) also defined three sub-processes. The first one resides strictly in the user's mind and is mental. The aim is to understand, recognise, accept, and finally define the information problem. The second sub-process refers to planning and executing the

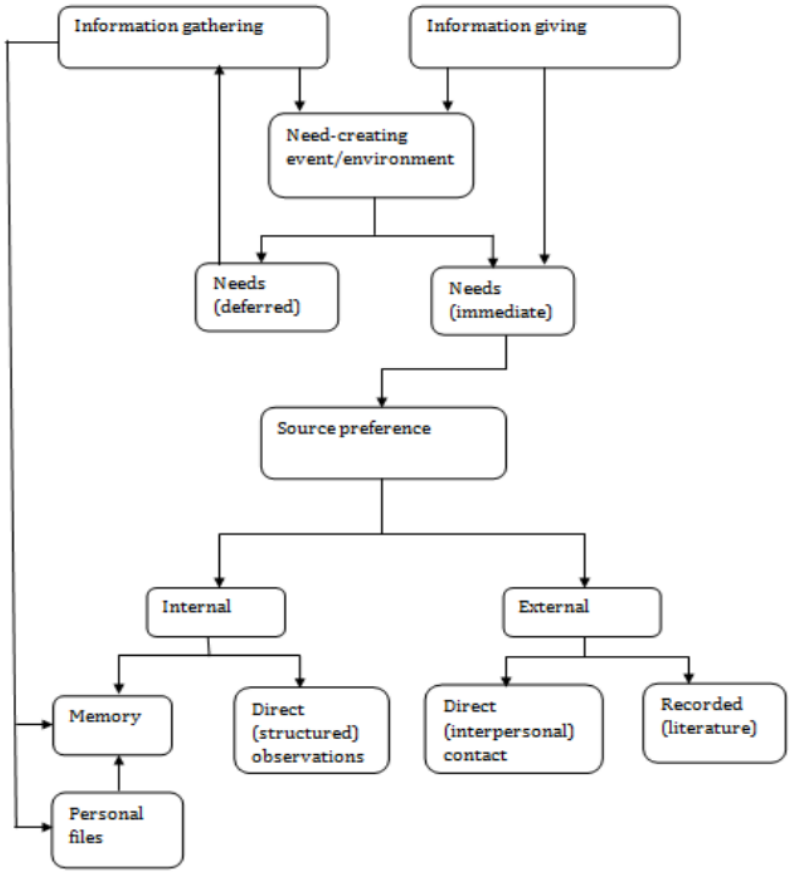


Figure 3: Krikelas' model of ISB

Source: Krikelas (1983)

information search activities, resulting from the problem definition (Marchionini, 1997). This sub-process is both mental and behavioural. It involves choosing the system for the search, formulating it, and evaluating the results. Finally, the third sub-process is also mental and refers to evaluating the information extracted and used to solve the problem. However, the problem may only sometimes lead to success, so the information seeker will need to repeat the processes or stop their search (Marchionini, 1997).

2.4.4 Duff and Johnson's ISB model

A study conducted by Duff and Johnson (2002) allowed an understanding of the ISB of historians when searching archival materials. Thus, they propose four types of activities approached by historians: Orientation, seeking known material, building contextual knowledge and identification of relevant material.

Orientation refers to the initial actions in which historians familiarise themselves with the study topic, relevant sources, finding aids, and archives. Orientation is achieved through visits to archives, searching finding aids, and speaking with archivists (Duff and Johnson, 2002). To contextualise, finding aids help users find information in a specific record group, collection, or series of archival materials. Examples of finding aids include published and unpublished

inventories, container and folder lists, card catalogues, calendars, indexes, registers, and institutional guides. Formal publications that help users find information in a record group, collection, or series of archival materials are also finding aids (The U.S. National Archives and Records Administration, 2016). In this study, users affirm that searching finding aids is the key to reducing uncertainty when visiting a new archive or accessing a new collection. It also allows obtaining a global and geographical notion of the collection (Duff and Johnson, 2002). The role of archivists is also something to consider when guiding archive visitors. Talking to archivists may be easier to guide the research process, as finding aids can sometimes be too complex for novice users (Duff and Johnson, 2002).

The first stage of an investigation, Seeking known material, culminates in identifying a list of potential sources or helpful information, such as names or citations. The goal is to identify and access these items (Duff and Johnson, 2002). Historians also gain knowledge about known materials from secondary sources, as is the case through interaction with archivists or colleagues or by gaining research experience (Duff and Johnson, 2002). It is, therefore, common for historians to seem vague about their information needs when they begin their research. The study by Duff and Johnson (2002) concluded that researchers with more experience are more likely to collect names to identify collections. When there is little access to a subject, they collect names and consult the archivist for advice about the most valuable sources for their research (Duff and Johnson, 2002).

Building contextual knowledge is required to comprehend not just the contents of a record but also the links between this record and others. Accessing a source can lead historians to identify names or organisations that can provide key hints and lead to additional material that can help interpret events in light of linkages with other records (Duff and Johnson, 2002).

Identifying relevant material occurs through exploring the context of sources to identify more relevant materials through searching subject indexes, performing a word search, or asking archivists (Duff and Johnson, 2002).

3 Methodology

This dissertation applied the qualitative research method through exploratory research, survey and interview.

The exploratory research aimed to elucidate and familiarise the reader of the topic of this research as well as to help how to answer the research questions. The studies of archival user profiles are not common subjects of publication, so this exploratory research focused on finding definitions, studies in archives and libraries and methods of user studies that allowed the developed of this dissertation work. The result of this exploratory research is mainly described in the literature review of this document.

The data collection methods used in this dissertation, survey and interview, aimed to collect information about the users of DGLAB archives to gather useful information for their characterisation and profiling. The final goal of gathering this information was to define the different user profiles by characterising them based on demographic data and their information-seeking behaviour in the archive. Personas with fictitious names and pictures were created to make these profiles more appealing and understandable. Four different phases were established for this methodological phase, that is, the analysis of the questionnaire and the interviews, as shown in Figure 4. The following subsections present the methodological analysis carried out in each stage.

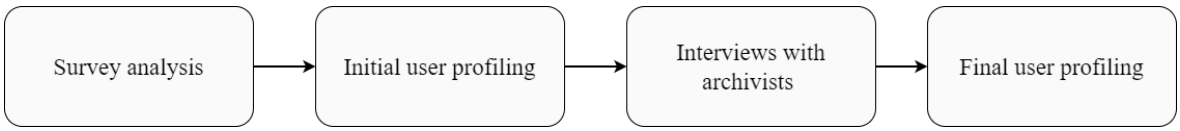


Figure 4: Stages to define DGLAB's User Profiles

Source: Own

3.1 Survey analysis

This section presents the DGLAB satisfaction survey and how the data provided was processed and analysed. This section presents the challenges that arose in the analysis, namely anomalies observed in the data.

3.1.1 Collect data from archive users

When discussing the selection of data to be analysed to define the profiles, new alternatives emerged for collecting and analysing information.

The possibility of creating a survey to demographically identify users and ask them about their specific archival research behaviour was considered. However, since the timeframe for this dissertation was only six months, there could not be enough time to obtain a sufficient number of responses, and therefore this idea was discarded.

The other possibility was analysing the CRAV registration data (the data provided contained only demographic data) and the definition of the profiles considering the nine most

frequently visiting job occupations. However, this idea was discarded as it was concluded that later on, for the interviews, it would be more challenging to interrogate the archivists by such a specific aspect as the profession.

Therefore, it was decided to analyse only the DGLAB survey since grouping the profiles by the reasons for visiting would be a better option as the data to be crossed were all of the same survey and would be a more feasible option to present and question the archivists.

3.1.2 DGLAB survey

The survey used and analysed for this work was the satisfaction survey created by DGLAB (Appendix A). The survey is available throughout the year and aims to assess the performance of DGLAB services and define which interventions in the archives should be prioritised and improved. The survey analysis conducted during this dissertation aims to collect information about DGLAB archive users in order to characterise and group them into profiles.

The DGLAB survey[1] was filled (without submitting the answers at the end) with several answer choices, including for both access groups, to understand the sequence of the questions. Thus, it was concluded that if a user selected the in-person access group, they could not select questions from the online or remote group and vice versa.

The survey is anonymous and divided into six sections, of which the first aims to identify the archive that the users last accessed and how they accessed it, i.e. online or in person.

The second and third sections comprise questions adapted to the type of access the user has chosen, meaning that the same questions are asked for the in-person group and the online group, with the exception that the questions change slightly (e.g. for the in-person group, the question "*Is this the first time you are using the Archive's services?*" refers to in-person services, whereas the question for the online group mentions "*online services of the Archive*"). The second section aims to understand how often the user visits the archive and why they visit. The third section asks the user about the use of documentary research tools, i.e. whether they have used them and which ones they have used. Here the user is also asked about its usefulness to know the user's satisfaction with these instruments.

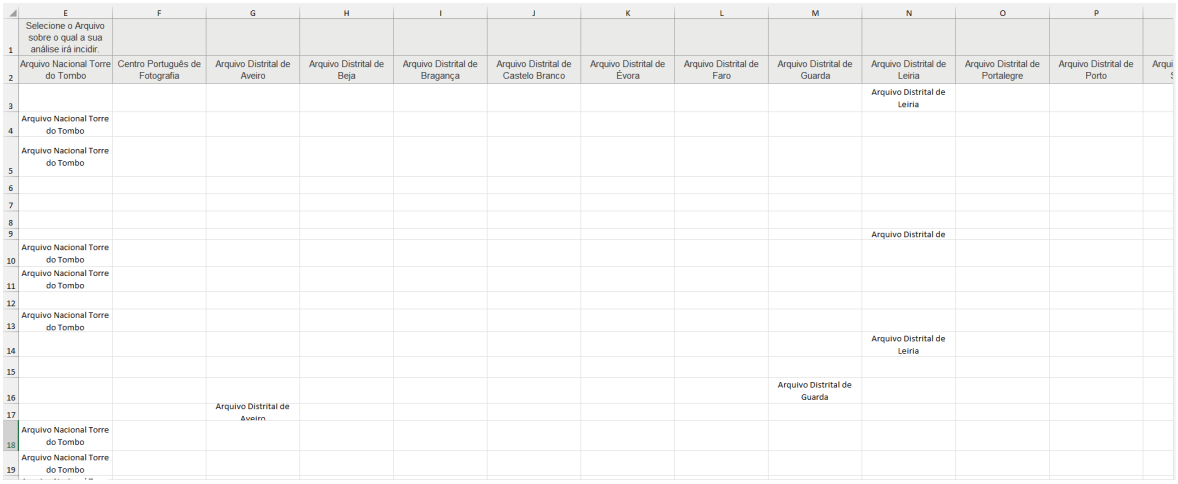
From the fourth section onwards, the survey is common to both types of access, and there is no longer any distinction. This section refers to the request, performance and satisfaction of the services provided by the archive. The fifth section provides information on the overall satisfaction of the archive and its performance concerning services, staff and others. The sixth and final section aims to identify the user demographically, asking about gender, age and academic qualifications. In this last section, there is also a space for the user to make any comment he/she considers pertinent to the quality of the services. For this dissertation and its final result, only the answers from Sections 1, 2 and 6 were analysed.

3.1.3 Data processing

DGLAB provided the raw data, in .xlsx (*Excel*) format, of all survey answers covering 2015 through 2022. The analysis for this study focuses on all users who voluntarily responded

[1] Available at: `https://www.surveymonkey.com/r/X8MMNBJ`

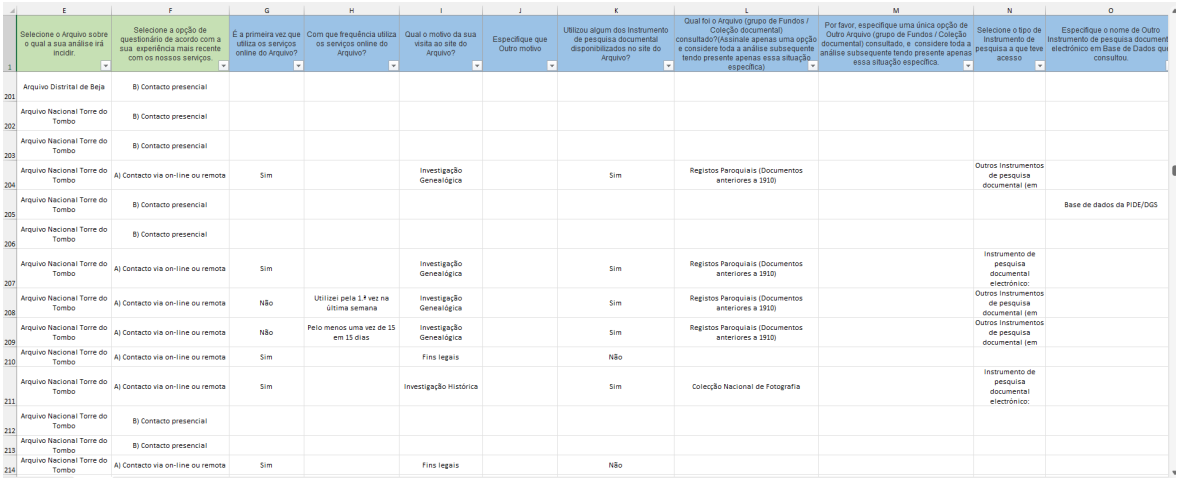
to the DGLAB satisfaction survey between the years mentioned above. Figure 5 exemplifies the organisation of the raw data provided. As can be seen in the Figure, the question is in one column, and the answers are spread across the following columns (each answer corresponds to a new column). Thus, it is necessary that the answers are all aligned with the question in order to become more perceptible and to be able to apply filters.



	E	F	G	H	I	J	K	L	M	N	O	P
1	Selecione o Arquivo sobre o qual a sua análise irá incidir.											
2	Arquivo Nacional Torre do Tombo	Centro Português de Fotografia	Arquivo Distrital de Aveiro	Arquivo Distrital de Beja	Arquivo Distrital de Bragança	Arquivo Distrital de Castelo Branco	Arquivo Distrital de Évora	Arquivo Distrital de Faro	Arquivo Distrital de Guarda	Arquivo Distrital de Leiria	Arquivo Distrital de Portalegre	Arquivo Distrital de Porto
3										Arquivo Distrital de Leiria		
4	Arquivo Nacional Torre do Tombo											
5	Arquivo Nacional Torre do Tombo											
6												
7												
8												
9										Arquivo Distrital de		
10	Arquivo Nacional Torre do Tombo											
11	Arquivo Nacional Torre do Tombo											
12												
13	Arquivo Nacional Torre do Tombo											
14										Arquivo Distrital de Leiria		
15												
16									Arquivo Distrital de Guarda			
17			Arquivo Distrital de Aveiro									
18	Arquivo Nacional Torre do Tombo											
19	Arquivo Nacional Torre do Tombo											

Figure 5: Example of raw data sent by DGLAB

Source: DGLAB



	E	F	G	H	I	J	K	L	M	N	O
1	Selecione o Arquivo sobre o qual a sua análise irá incidir.	Selecione a opção de questionário de acordo com a sua experiência mais recente com os nossos serviços.	É a primeira vez que utiliza os serviços online do Arquivo?	Com que frequência utiliza os serviços online do Arquivo?	Qual o motivo da sua visita ao site do Arquivo?	Especifique que Outro motivo	Utilizou algum dos instrumento de pesquisa documental disponibilizados no site do Arquivo?	Qual foi o Arquivo (grupo de Fundos / Coleção documental) consultado?(Assinale apenas uma opção e considere toda a análise subsequente tendo presente apenas essa situação específica)	Por favor, especifique uma única opção de Outro Arquivo (grupo de Fundos / Coleção documental) consultado, e considere toda a análise subsequente tendo presente apenas essa situação específica.	Selecione o tipo de Instrumento de pesquisa a que teve acesso	Especifique o nome de Outro Instrumento de pesquisa document electrónico em Base de Dados qu consultou.
201	Arquivo Distrital de Beja	B) Contacto presencial									
202	Arquivo Nacional Torre do Tombo	B) Contacto presencial									
203	Arquivo Nacional Torre do Tombo	B) Contacto presencial									
204	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Sim		Investigação Genealógica		Sim	Registos Paroquiais (Documentos anteriores a 1910)		Outros Instrumentos de pesquisa documental (em	
205	Arquivo Nacional Torre do Tombo	B) Contacto presencial									Base de dados da PIDE/DGS
206	Arquivo Nacional Torre do Tombo	B) Contacto presencial									
207	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Sim		Investigação Genealógica		Sim	Registos Paroquiais (Documentos anteriores a 1910)		Instrumento de pesquisa documental electrónico:	
208	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Não	Utilizei pela 1.ª vez na última semana	Investigação Genealógica		Sim	Registos Paroquiais (Documentos anteriores a 1910)		Outros Instrumentos de pesquisa documental (em	
209	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Não	Pelo menos uma vez de 15 em 15 dias	Investigação Genealógica		Sim	Registos Paroquiais (Documentos anteriores a 1910)		Outros Instrumentos de pesquisa documental (em	
210	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Sim		Fins legais		Não				
211	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Sim		Investigação Histórica		Sim	Colecção Nacional de Fotografia		Instrumento de pesquisa documental electrónico:	
212	Arquivo Nacional Torre do Tombo	B) Contacto presencial									
213	Arquivo Nacional Torre do Tombo	B) Contacto presencial									
214	Arquivo Nacional Torre do Tombo	A) Contacto via on-line ou remota	Sim		Fins legais		Não				

Figure 6: Example of the reorganisation of the raw data

Source: Own

As the organisation of the data made the analysis more complex, the data was reorganised in order to make it easier to view and filter. Figure 6 shows the result of the reorganisation, and it can be seen that the answers and the different options for each question are grouped only in the column of the corresponding question. The main change made to the data can be seen in Figure 6. The answers are now aligned in the same column as the questions, making it easier to visualise the information. The colour scheme in the tables is to differentiate between questions that are answered by all users (green), by users in the online group (blue) and by

users in the in-person group (orange). In the image, it is only possible to observe the general and the online group represented. After this reorganisation, the years' data were transferred to a single *Excel* table by creating a new column called "*Year*". In a single table, filtering the data by year became possible instead of searching all the tables individually.

3.1.4 Anomalies detected during data processing

During the data processing, some inconsistencies were observed. The initial number of answers provided by DGLAB was 4740, with the elimination of 79 anomalies reducing the data to 4661 results.

The inconsistencies identified were grouped into 4 categories.

First, errors in which there is information, e.g. from in-person users, as well as information in the online/remote cells, and vice-versa.

Second, two IDs refer to the same person in the same year, and the answers are inconsistent.

Third, it is about inconsistencies not occurring in the real questionnaire when placing the same answers as the user did. These refer to situations when someone mentioned they did not use a documentary research tool. However, it appears the collection that was consulted and/or the type of tool used. The same happens when a service provided by the archive is requested - the service was not requested, but the cells related to the type of service provided are filled in.

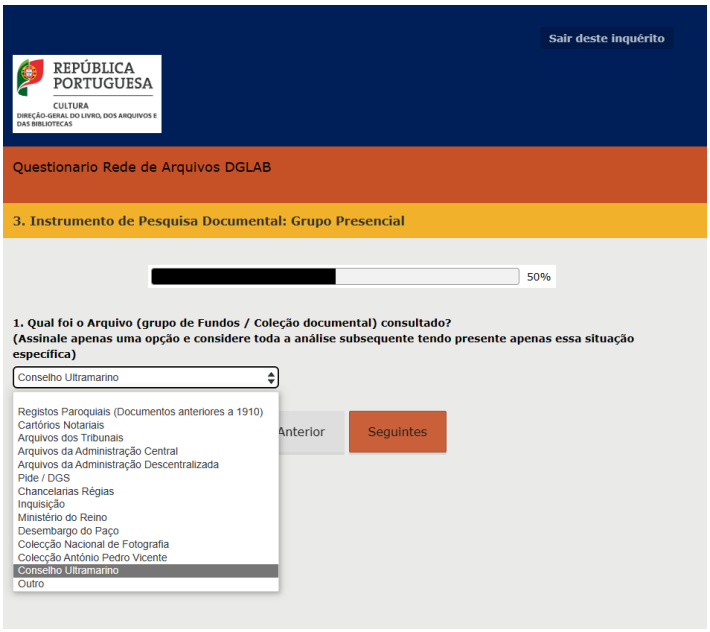


Figure 7: Fond/ Document collection used - DGLAB survey question

Source: DGLAB survey

The last inconsistency concerns the fond/collection of "Conselho Ultramarino" (Overseas Council). This is the only case in which cells in *Excel* are filled in in-person and online, but it is possible to fill in the survey made available by DGLAB. Additionally, when the user selects

in-person at the beginning, the order of questions and the ones that appear differs from when the user selects online/remote. For example, it was tested if a person selected in-person group at the beginning of the survey and selected that they used a document search instrument. Figure 7 shows the question that appears when a user selects that he used document search instruments and the options to select the group of fonds/ document collection accessed. As seen in the header, it appears "*Grupo presencial*" (in-person group), since it was the option chosen at the beginning of the survey.

If the user selects "*Conselho Ultramarino*" (Overseas Council) they are redirected to the question in Figure 8. Note that, unlike what appeared in the previous question header, in Figure 8it appears "*Grupo online*" (online group).

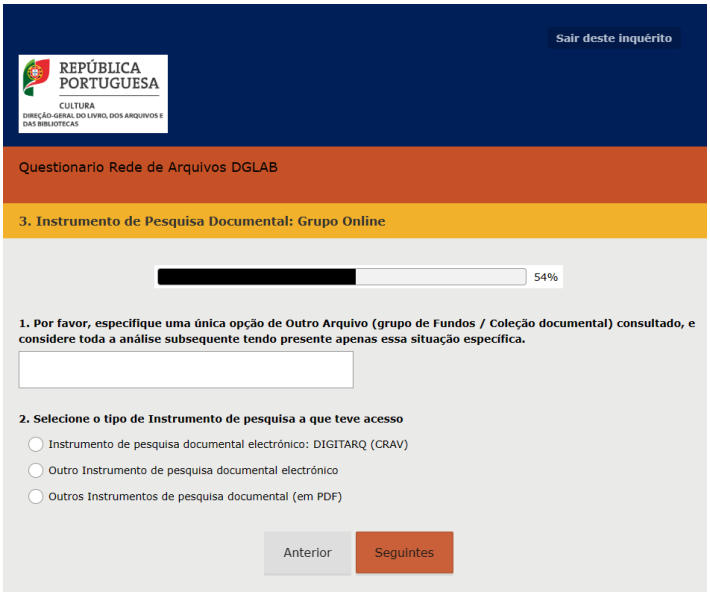


Figure 8: Question that appears in the survey when selecting "*Conselho Ultramarino*"

Source: DGLAB survey

Figure 9 shows an example if the user selects any instrument other than "*Conselho Ultramarino*" (Overseas Council). As seen, the question is still part of the "*Grupo prencial*" (in-person group).

In this way, it is possible to conclude that this inconsistency is feasible in the survey, that is, it is an answer that differs from the standard of the remaining ones.

After the data was organised in *Excel* and anomalies were eliminated, demographic data (gender, age and education), year of survey completion, frequency and reason for visit and type of access were imported into *SPSS* (Statistical Package for Social Science). This tool was used since it is more suitable and easier to combine data. While the remaining data allowed to make a general analysis of the users, the demographic data and the reason for visit were cross-checked to define the initial profiles.

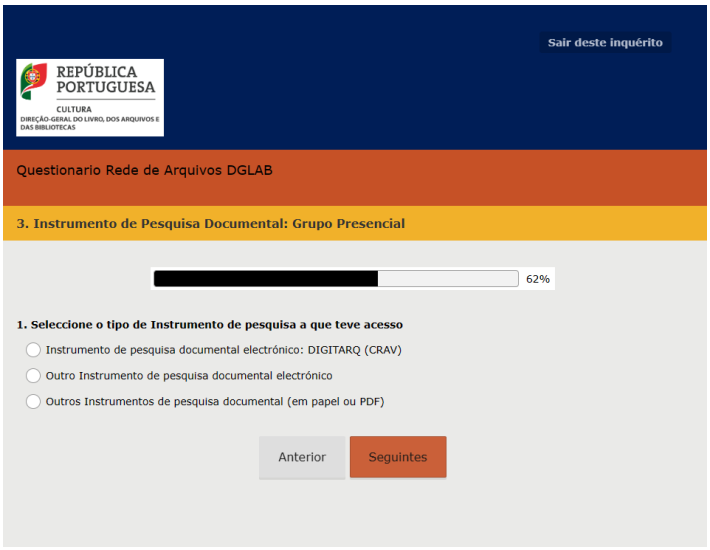


Figure 9: Fond/ Document collection used - DGLAB survey question

Source: DGLAB survey

3.2 Initial user profiling

The initial profiles were defined according to the most frequent reasons for visiting the archives, as defined by DGLAB in its satisfaction survey: genealogical research, historical research, legal purposes, academic work, institutional purposes and publication purposes. Using *SPSS*, gender, age and educational background were analysed for each reason to characterize each profiles. Thus, the most frequent answers of each were assigned to each persona, along with an illustrative photograph taken from stock image websites and a fictitious name. In the initial personas, no age was assigned but rather the most frequent age range for a reason. In Section 6.1, Figures 16 to Figure 21 present the results of the initial personas created with the crossed data from the surveys.

3.3 Interviews with the archivists

The purpose of the interviews was to verify whether the characterization of each profile was similar to the perception of DGLAB archivists. In addition, the interviews provided extra information about the users of each profile, such as their motivations and doubts regarding the archive.

Before interviewing archivists, it was necessary to determine which and how many would be interviewed. It was established to interview one archivist from each national and district archive, totaling eighteen archivists. The archives were contacted via email, and each archive would assign an archivist for the interview.

Given the unavailability of archivists in some archives to carry out the interviews, it was created a *Google Forms* form with the same structure and questions as the interview script (Appendix C). In the questionnaire, some questions are multiple choice, check boxes and open ended questions on questions that need to be more detailed e.g. user motivations.

However, given the unavailability of some archives to conduct the interviews or fill out

the questionnarire, the analysis focuses only on twelve — ten interviews: ANTT, CPF, and the District Archives of Beja, Bragança, Évora, Faro, Guarda, Porto, Viana do Castelo and Vila Real — and two answers to the form — Leiria and Santarém.

The archivists' answers were based on their perceptions through daily observation and interaction with users in the physical archive. While the surveys focus on both types of access, only in-person access is discussed in the interviews. As seen in the survey (Appendix A) DGLAB distinguishes the two types of access to the archive. Although in-person access implies that the user has to go to the physical archive to access information, both types of contact access the archival material in the same way. All searches or service requests must be carried through the information systems provided by DGLAB. DigitArq is used to search archival documents and CRAV allows requests regarding reproduction, consultation in person, among others. Since much information is digitised, physical visits to the archive must be performed only when the documentation users need is not available online and must be consulted in person. Even if this documentation is only available in the physical archive, it must be searched through the online system.

The interviews took place during April and June of 2023. The interviews were semi-structured and conducted online, through *Zoom*, to allow greater flexibility and greater reach of archives and lasted about 60 to 90 minutes. It was created a script to help structure the interviews (Appendix B). Before the interview, the archivist was asked if they consented to audio recording the interview to use the data in the context of the dissertation. These responses on consent were recorded as record evidence, and all archivists gave permission.

After the request for recording consent, the questions from the first part of the script are asked. Then the first persona is presented for the archivist to comment on their demographic data. Then the remaining questions are asked. This cycle is repeated until all the profiles have been asked and answered. Finally, the interview is concluded with an acknowledgement to the interviewee. Figure 10 represents how the interviews were conducted, i.e. the different phases.

The first part of the script asks the archivists about users demographic data for each profile. Next, the persona of the profile is presented to the archivist to observe and comment (if necessary) on differences in the persona's characteristics in the archive where they work, for example.

The second part covers a more significant number of questions aiming to ask archivists about the behaviour of each user profile in the archive, like their frequency of visit, motivations, how often they ask for help and what help they ask for, factors influencing behaviour and unique characteristics.

3.3.1 Interview analysis

After completing the interviews, it became necessary to organise the responses. The interviews were transcribed using the *Transcribe* tool in *Microsoft Word*. With the notes taken during the interviews, the transcription, and the audio recording, it was possible to extract and organise the data in *Excel*.

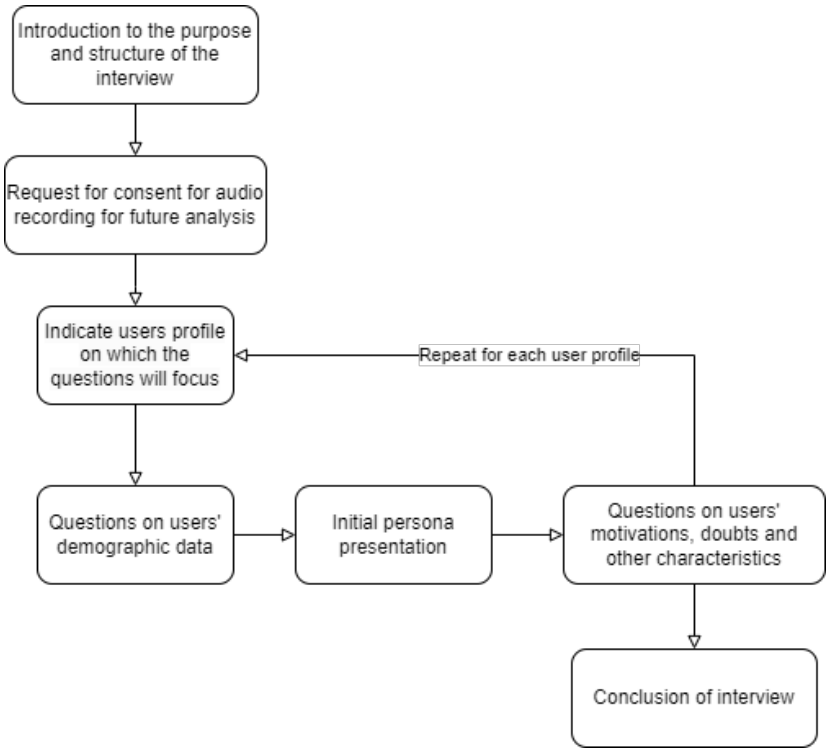


Figure 10: Interview structure representation

Source: Own

As the interviews involved significant information and the archivists expressed themselves differently, developing a method for normalising and summarising the responses became essential. Summarisation or standardisation was applied mainly to gender, frequency (visit or help), motivations or difficulties searching for information.

Regarding gender, users were assumed to be "*male*" or "*female*" based on expressions said by archivists, such as "*more men*" or "*more women*". In the absence of gender predominance, it would be considered "*no distinction*".

Concerning the frequency of visits and requests for help, a scale was established comprising the options "*Very infrequent*", "*Infrequent*", "*Frequent*" and "*Very frequent*". To normalise each response it was considered the synonyms of these expressions and the quantifiers added to the casual expressions mentioned by the archivists, such as "*very*" / "*a lot*", "*some*", "*rare*", among others.

For the search motivations, the answers for each profile were considered and were generally similar among all profiles. For example, "*college work*" was equivalent to "*academic work*" in answering these questions and could be transcribed into a single expression.

The type of help requested, and the difficulties faced were summarised in a single response. The standardisation process for these answers was widely used, as they are prevalent across archives and cover almost all profiles.

When the archivist mentioned offering help to the user on how, where, and what to search for, this was assumed as "*Guidance*", to represent the initial help that many users need. Responses that mentioned the difficulty of reading old documents were defined as

"*palaeography*", indicating users' lack of palaeographic knowledge. Difficulties using and accessing DigitArq and CRAV were transcribed as "*DigitArq*" and "*CRAV*". Answers that were not as common, such as "*form filling*", were kept and not normalised. No standardisations were made for the answers to the remaining questions as they were more distinct between archives. They have only been summarised to express briefly what the archivist stated.

3.4 Defining the final profiles

For the definition of the final profiles, it was necessary to carry out two major steps organise the answers from the interviews and assign the characteristics to the profiles/personas.

The definition of the final profiles is the validation of the data from the survey (which resulted in the initial profiles) and the additional information obtained from the interviews. These profiles' final personas are more detailed than the initial ones, as the interviews aimed to complete the missing information about each profile.

The demographic data from the survey are common to the demographic questions asked during the interviews — gender, age and educational background. Therefore these data cross over, and decisions must be made in case of ambiguity.

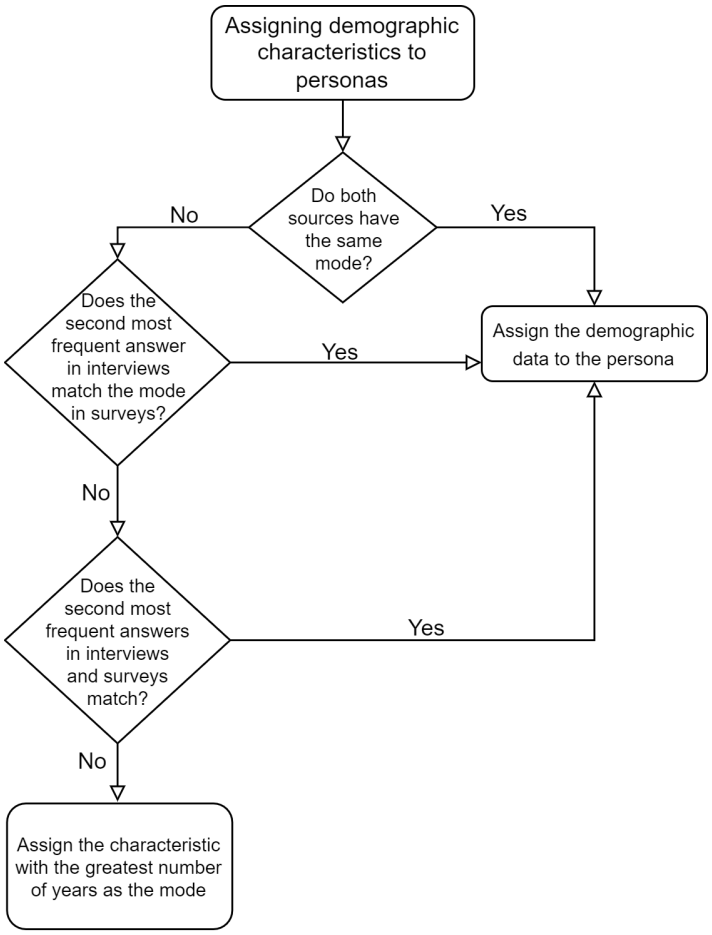


Figure 11: Flowchart to assign demographic data

Source: Own

Figure 11 presents the decisions to be made if ambiguity arises in the demographic data. If the mode of the answers is the same in both the surveys and the interview answers, this data is assigned. If the mode is different, then it is checked whether the second most frequent answer in the interviews is the same as the mode in the surveys. If not, it may be necessary to analyse the data annually, check which are the most frequent responses from year to year, and assign the most frequent value that appears more often (see the example of academic profile in Section 6.2).

4 Survey analysis

DGLAB provided the satisfaction survey results from 2015 to 2022, with 4661 valid responses. All survey answers refer to users' last interaction with the archive, online or in person. The data presented starts from a general observation to a particular observation. First general data will be presented which cover the data of all years, then data by year will be presented, and finally it will be presented the results of the crossing of data — between the motives and the demographic data.

4.1 General analysis

Among the survey respondents, 2692 (57.8%) are male and 1969 (42.2%) are female.

The frequency of user age ranges is shown in the `Total` column of Table 2. The age ranges shown in the table have been defined by the DGLAB. The age with the highest number of users is between 48 and 52.

Among the respondents, 1539 (33.6%) have a Bachelor's degree, followed by 855 (18.7%) with high school education, 828 (17.9%) with a postgraduate degree, 796 users with a Master's degree, 515 (11.2%) with a PhD and 53 (1.2%) with primary education.

The majority of respondents, 3324 (71.3%), visited the archive online, while only 1337 (28.7%) visited it in person.

Most of the users who responded to the survey (2668 users, 57.2%) were visiting the archive for the first time. The users' distribution by visit frequency is shown in Table 1. Among the users who did not visit the archive for the first time, 517 (11.1%) often visit the archive at least once every six months.

Table 1: Frequency of visits to the archive

Frequency of visits to the archive	**Frequency**
First time visiting the archive	**2668 (57.2%)**
At least once every 15 days	249 (5.3%)
At least once every 6 months	517 (11.1%)
At least once a year	409 (8.8%)
At least once a month	405 (8.7%)
Almost every day or at least once a week	413 (8.9%)

The survey includes six predefined options regarding users' motivations. Genealogical research is the most common reason to visit, with 2234 users (47.9%), followed by historical research with 914 users (19.6%), legal purposes with 845 users (18.1%), academic work with 242 users (5.21%), institutional purposes with 79 users (1.7%) and publication purposes with 62 users (1.3%). Users can also give "*other*" reasons. Only 285 users (6.1%) chose this option, mainly stating they wanted to obtain birth or baptismal certificates. This reason has been excluded from the following crossed-data tables because of its low expressiveness. However, it is counted and included in the totals and percentages. Figure 12 represents the reasons most frequently visited by users.

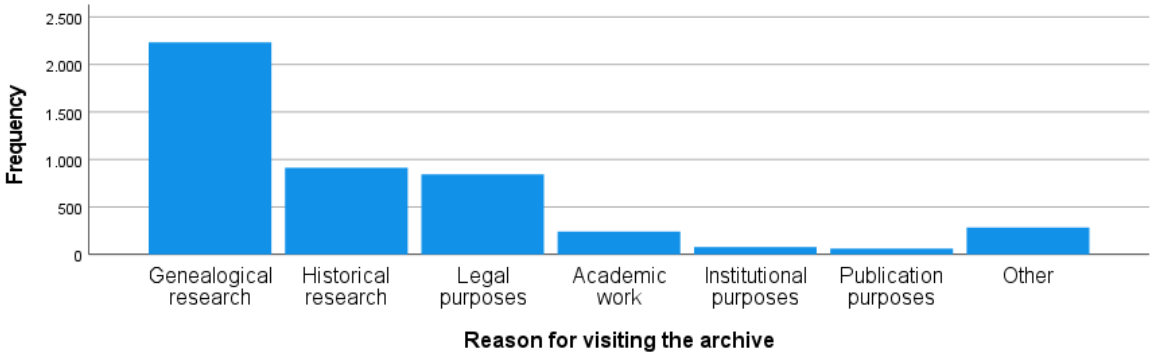


Figure 12: Frequency of reasons for visiting the archive

Source: Own

4.2 Analysis per year

To explore the data in more detail, it was verified whether these patterns are constant for all years, from 2015 to 2022, or if they differ.

As can be seen in Figure 13, genealogical research is the most frequent reason to visit the archive. The years 2015 and 2016 had historical research as the second most frequent reason, and after this year, legal purposes became the second most frequent reason for visiting the archive. Visits for institutional or publication reasons have always represented the smallest number of visits.

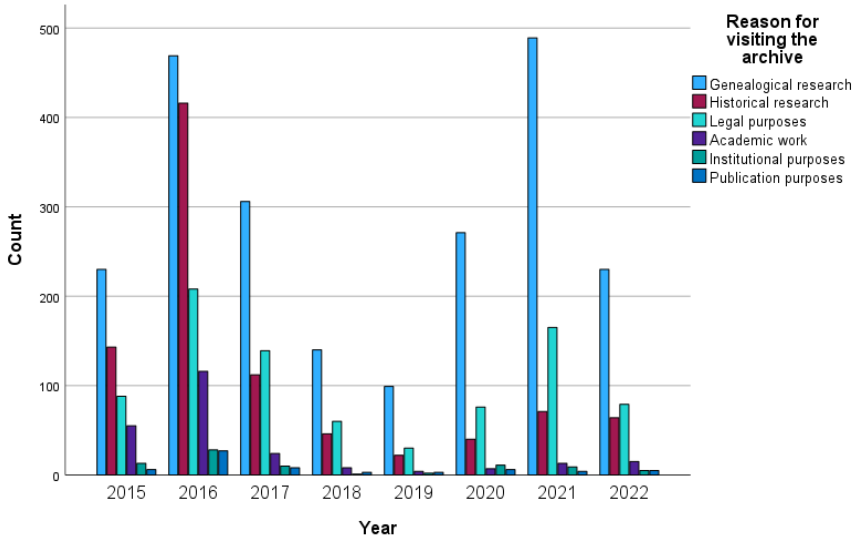


Figure 13: Reasons for visiting the archive per year

Source: Own

The most frequent type of access over the years is online access. However, in 2015 there were more users mentioning that their last access was online, namely 333 (59.1%) users out of 563. Visits to the physical archive have tended to decrease, with more drastic differences between the two types of access mainly from 2020, as seen in Figure 14.

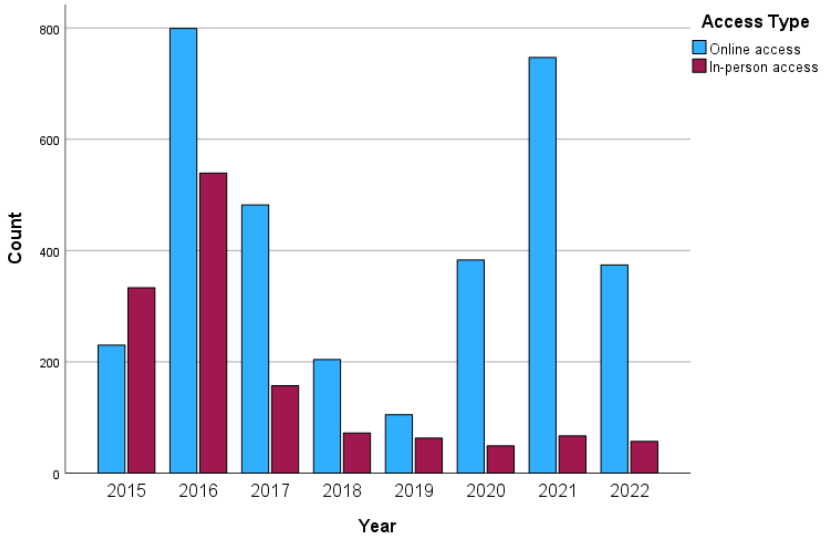


Figure 14: Most frequent type of access to the archive per year

Source: Own

The male gender is also the most frequent every year. The year 2018 showed a closer approximation of the amount of male and female users, 147 (53.3%) and 129 (46.7%), with a difference of only 18 (6.6%) respondents. Figure 15 presents the frequency of each gender by year.

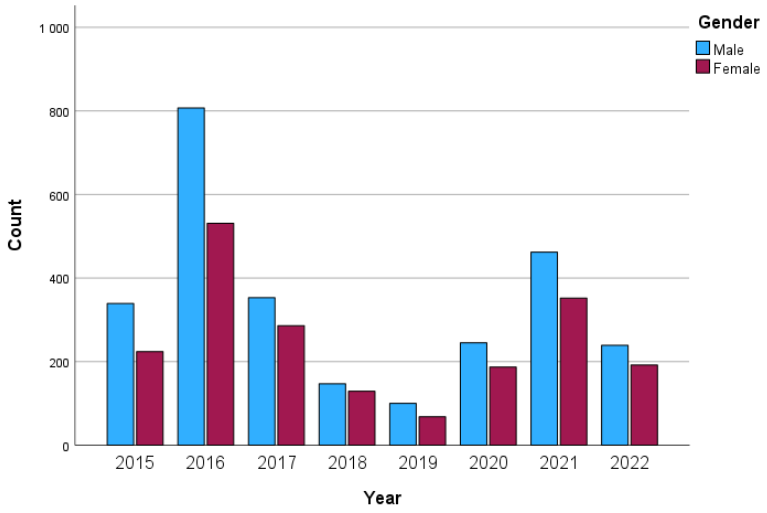


Figure 15: Gender frequency per year

Source: Own

In 2016, 2017, 2018 and 2021, the age mode was 48 and 52 years old and followed the general mode. 2015 is the year where the youngest age range is observed, 38-42, and 2019 and 2022 are the years where the mode of ages ranged between 58 and 62 years. Table 2 presents the results for all age ranges by the seven years.

Table 2: Age range frequency by year

	2015	2016	2017	2018	2019	2020	2021	2022	Total
18-22	21 (3.7%)	22 (1.6%)	14 (2.2%)	6 (2.2%)	4 (2.4%)	9 (2.1%)	16 (2.0%)	5 (1.2%)	97 (2.1%)
23-27	25 (4.4%)	66 (4.9%)	46 (7.2%)	11 (4.0%)	11 (6.5%)	17 (3.9%)	27 (3.3%)	12 (2.8%)	215 (4.6%)
28-32	41 (7.3%)	114 (8.5%)	45 (7.0%)	20 (7.2%)	11 (6.5%)	29 (6.7%)	62 (7.6%)	32 (7.4%)	354 (7.6%)
33-37	57 (10.1%)	134 (10.0%)	56 (8.8%)	26 (9.4%)	15 (8.9%)	37 (8.6%)	73 (9.0%)	34 (7.9%)	432 (9.3%)
38-42	**70 (12.4%)**	137 (10.2%)	61 (9.5%)	20 (7.2%)	12 (7.1%)	52 (12.0%)	107 (13.1%)	52 (12.1%)	511 (11.0%)
43-47	60 (10.7%)	123 (9.2%)	80 (12.5%)	38 (13.8%)	18 (10.7%)	51 (11.8%)	111 (13.6%)	56 (13.0%)	537 (11.5%)
48-52	60 (10.7%)	**178 (13.3%)**	**86 (13.5%)**	**41 (14.9%)**	14 (8.3%)	45 (10.4%)	**115 (14.1%)**	49 (11.4%)	**588 (12.6%)**
53-57	50 (8.9%)	162 (12.1%)	75 (11.7%)	34 (12.3%)	23 (13.7%)	**58 (13.4%)**	90 (11.1%)	49 (11.4%)	541 (11.6%)
58-62	65 (11.5%)	153 (11.4%)	61 (9.5%)	28 (10.1%)	**27 (16.1%)**	57 (13.2%)	86 (10.6%)	**62 (14.4%)**	539 (11.6%)
63-67	58 (10.3%)	104 (7.8%)	49 (7.7%)	22 (8.0%)	19 (11.3%)	37 (8.6%)	53 (6.5%)	32 (7.4%)	374 (8.0%)
68-72	35 (6.2%)	84 (6.3%)	40 (6.3%)	21 (7.6%)	12 (7.1%)	27 (6.3%)	40 (4.9%)	30 (7.0%)	289 (6.2%)
73-77	12 (2.1%)	35 (2.6%)	21 (3.3%)	7 (2.5%)	1 (0.6%)	11 (2.5%)	23 (2.8%)	16 (3.7%)	126 (2.7%)
78-82	7 (1.2%)	20 (1.5%)	5 (0.8%)	2 (0.7%)	0 (0.0%)	1 (0.2%)	3 (0.4%)	2 (0.5%)	40 (0.9%)
Over 83	2 (0.4%)	6 (0.4%)	0 (0.0%)	0 (0.0%)	1 (0.6%)	1 (0.2%)	8 (1.0%)	0 (0.0%)	18 (0.4%)
Total	563 (100%)	1338 (100%)	639 (100%)	276 (100%)	168 (100%)	432 (100%)	814 (100%)	431 (100%)	4661 (100%)

4.3 Analysis by motivation

After the general analysis, data was cross-referenced between the reasons for visiting and demographic data — gender, age and education.

Table 3 shows the frequency of gender by reason for visiting the archive. Excluding academic work, the remaining reasons are predominantly male users.

Table 3: Gender frequency by reason for visiting the archive

	Genealogical research	Historical research	Legal purposes	Academic work	Institutional purposes	Publication purposes	Total
Male	**1346 (60.3%)**	**583 (63.8%)**	**446 (52.8%)**	108 (44.6%)	**41 (51.9%)**	**33 (53.2%)**	2692 (57.8%)
Female	888 (39.7%)	331 (36.2%)	399 (47.2%)	**134 (55.4%)**	38 (48.1%)	29 (46.8%)	1969 (42.2%)
Total	2234 (100%)	914 (100%)	845 (100%)	242 (100%)	79 (100%)	62 (100%)	4661 (100%)

The most common age range across the six reasons is between 48 and 52 years, being the mode in genealogical research (287 (12.8%)), historical research (112 (12.3%)) and in legal purposes (131 (15.5%)). The youngest motive is academic work, with the most common age range being 28 to 32 years (37 (15.3%)).

The frequency of educational background by reason is represented in Table 5. Among the six reasons, the most frequent educational level is Bachelor's degree, fashioned in genealogical

Table 4: Age range frequency by reason for visiting the archive

	Genealogical research	Historical research	Legal purposes	Academic work	Institutional purposes	Publication purposes	Total
18-22	49 (2,2%)	17 (1.9%)	3 (0.4%)	24 (9.9%)	1 (1.3%)	1 (1.6%)	97 (2.1%)
23-27	94 (4.2%)	55 (6.0%)	28 (3.3%)	29 (12.0%)	1 (1.3%)	1 (1.6%)	215 (4.6%)
28-32	156 (7.0%)	80 (8.8%)	61 (7.2%)	**37 (15.3%)**	5 (6.3%)	2 (3.2%)	354 (7.6%)
33-37	208 (9.3%)	88 (9.6%)	70 (8.3%)	33 (13.6%)	6 (7.6%)	7 (11.3%)	432 (9.3%)
38-42	227 (10.2%)	110 (12.0%)	96 (11.4%)	33 (13.6%)	**14 (17.7%)**	7 (11.3%)	511 (11.0%)
43-47	251 (11.2%)	92 (10.1%)	118 (14.0%)	18 (7.4%)	10 (12.7%)	**13 (21.0%)**	537 (11.5%)
48-52	**287 (12.8%)**	**112 (12.3%)**	**131 (15.5%)**	23 (9.5%)	8 (10.1%)	4 (6.5%)	**588 (12.6%)**
53-57	270 (12.1%)	100 (10.9%)	88 (10.4%)	19 (7.9%)	12 (15.2%)	7 (11.3%)	541 (11.6%)
58-62	278 (12.4%)	93 (10.2%)	96 (11.4%)	12 (5.0%)	12 (15.2)	8 (12.9%)	539 (11.6%)
63-67	189 (8.5%)	67 (7.3%)	72 (8.5%)	9 (3.7%)	4 (5.1%)	8 (12.9%)	374 (8.0%)
68-72	138 (6,2%)	59 (6,5%)	55 (6,5%)	4 (1.7%)	2 (2.5%)	3 (4.8%)	289 (6.2%)
73-77	64 (2.9%)	28 (3.1%)	15 (1.8%)	0 (0.0%)	4 (5.1%)	1 (1.6%)	126 (2.7%)
78-82	18 (0.8%)	9 (1.0%)	7 (0.8%)	1 (0.4%)	0 (0.0%)	0 (0.0%)	40 (0.9%)
over 83	5 (0.2%)	4 (0.4%)	5 (0.6%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	18 (0.4%)
Total	2234 (100%)	914 (100%)	845 (100%)	242 (100%)	79 (100%)	62 (100%)	4661 (100%)

Table 5: Educational background frequency by reason for visiting the archive

	Genealogical research	Historical research	Legal purposes	Academic work	Institutional purposes	Publication purposes	Total
Primary	26 (1.2%)	6 (0.7%)	14 (1.7%)	1 (0.4%)	0 (0.0%)	0 (0.0%)	53 (1.2%)
High school	444 (20.2%)	103 (11.4%)	191 (23.2%)	12 (5.0%)	18 (23.4%)	5 (8.1%)	855 (18.7%)
Bachelor	**764 (34.7%)**	215 (23.8%)	**358 (43.6%)**	49 (20.5%)	**32 (41.6%)**	**17 (27.4%)**	**1539 (33.6%)**
Postgrad	502 (22.8%)	98 (10.8%)	131 (15.9%)	17 (7.1%)	12 (15.6%)	11 (17.7%)	820 (17.9%)
Master	329 (15.0%)	235 (26.0%)	99 (12.0%)	**84 (35.1%)**	13 (16.9%)	13 (21.0%)	796 (17.4%)
PhD	134 (6.1%)	**248 (27.4%)**	29 (3.5%)	76 (31.8%)	2 (2.6%)	16 (25.8%)	515 (11.2%)
Total	2199 (100%)	905 (100%)	822 (100%)	239 (100%)	77 (100%)	62 (100%)	4578 (100%)

research (764 (34.7%)), legal purposes (358 (43.6%)), institutional purposes (32 (41.6%)) and publication purposes (17 (27.4%)). Historical research holds the highest degree, i.e. PhD with 248 (27.4%) users, followed by academic work with a Master's degree with 84 (35.1%) users. It can be concluded that visitors to the DGLAB archives mostly hold higher education degrees.

5 Interviews with the archivists

The interviews were conducted with DGLAB archivists selected by the corresponding archive. A total of 12 answers out of 18 were obtained — ten interviews and two answers on the form. The interviews validate the information from the demographic data obtained in the surveys and provide extra information about their motivations and other characteristics. The interviews were semi-structured, and a script (Appendix B) was used as a guide to ask questions. During the interviews, some questions were not included as they became redundant or appeared challenging to interrogate the archivists.

The data analysis covers 12 archives. The archives analysed are: ANTT, CPF (Portuguese Center of Photography), and the District Archives of Beja, Bragança, Évora, Faro, Guarda, Leiria, Porto, Santarém, Viana do Castelo and Vila Real.

After interviewing the archivists, the interviews were transcribed to ease the analysis.

This section presents, through tables, the data obtained during the interviews already with the normalisation and summary method. Each table will have an explanation of the data presented in order to improve interpretation. The conclusions and attribution of characteristics to each profile will be presented in the 6.2 Final profiling Section. The empty cells in the tables symbolised when the archivist could not answer the question or because the answer is not applicable, as was the case with the CPF for some profiles.

5.1 The particular case of CPF

During the interviews, a particular situation arose about one of the archives, CPF. This situation happens because the CPF is an archive that holds mainly photographic documents, which differs from the other archives that comprise a wider variety of document typologies. According to the CPF archivist, there are only four main reasons for visiting, such as: Exhibition Purposes, Publication Purposes, Research (although it was not mentioned, it is implied that it is Historical Research) and Academic Work. Due to the nature of this archive, it was expected that the reasons for visiting would vary. In light of its specificity, only the first reason mentioned by the archivist will be excluded from the data analysis of this study.

> CPF: "*There are different purposes. In these last few years, what we have seen is that when users come here, they already have an idea of what they want. (...) photographic records for exhibitions and for publication. (...) These are the areas that most people ask for.*"
>
> (...)
>
> "*Then there is the part of research and academic purposes.*"

5.2 Gender

The responses from the interviews to the question regarding the most common gender by reason are presented in table 6. In the tables, there are different types of answers: "*Male*", "*Female*", "*No distinction*" and "*Entities*", which may or may not be followed by gender.

The "*Entities*" answer was placed in "*Gender*" since this was the first question and where the archivists showed the type of users for this profile.

Table 6: Interview answers regarding gender

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Male	No distinction	No distinction	No distinction	Entities	Entities
ANTT	No distinction	Male	No distinction	Male	Female	—
ADVianaCast.	Male	No distinction	No distinction	No distinction	Female/Entities	Male
ADGuarda	No distinction	No distinction	No distinction	No distinction	Female/ Entities	No distinction
ADVilaReal	Male	Male	Female	No distinction	Entities	Male
ADBeja	Male	Male	Female	No distinction	Female/ Entities	Female
ADÉvora	Male	No distinction	Male	Male	Entities	Male/ Entities
ADBragança	Male	Male	No distinction	Female	Entities	No distinction
ADFaro	Male	Female	Male	No distinction	Male	Male
ADLeiria	No distinction	No distinction	No distinction	No distinction	—	No distinction
ADSantarém	Male	No distinction	No distinction	No distinction	—	No distinction
CPF	—	Female	—	Male	—	Male

When the answer is one gender, it is because that is the most predominant among the profile users. When there is no distinction, it is because no gender predominance is observed, i.e. there are as many males as female users. The answer "*Entities*" was a way to aggregate the institutions, associations or other organisations presented by the archivists, such as courts, town halls, registry offices or consulates. The answer to this question is very common in the Institutional purposes profile and it may be followed by a gender, such as "*Female/Entities*" when the gender of the individuals visiting the profile for this purpose is identified, and they usually represent one of these entities. The ones mentioned by the archivists are not presented in the table for reasons of space occupation. For institutional purposes, the entities mentioned by ADPorto are registry offices, consulates, city halls, universities, associations (cultural and local) and funerary. In the same profile, ADVianaCast. mentioned: registry offices, consulates and courts. The ones mentioned by ADGuarda are courts, registry offices and law firms. The ADVilaReal mentioned courts and notarial offices. The ADBeja mentioned city councils (indicated as the most common), courts, and administrative and justice officials, the last two being professions. The ADBragança mentioned that the most frequent entities in this profile are institutions, newspapers, notarial offices, courts and civil registries. The ADPorto mentioned institutions, publishers and universities as entities for the publication purposes profile. Finally, ADÉvora mentioned institutions, journalists and academics, the last two being professions.

In an overall observation of the table, it is possible to conclude that male gender and no gender predominance are the most frequent answers in all profiles.

5.3 Age

For each profile, the table 7 shows the ages given by the archives for each profile. As can be seen, it is recurrent that they mention more than one age range and/or make comments such as "*very variable*" when the range of ages for a reason is very broad.

Since the ranges did not follow a rule and the archivist mentions the age range based on their perception, it may cover larger or smaller ranges. However, through general observation,

Table 7: Interview answers regarding age

	Genealogical research	Historical research	Legal purposes	Academic work	Institutional purposes	Publication purposes
ADPorto	40-50 or retirement	20-30	Very variable >18	20-30	—	—
ANTT	40-50	50's	Very variable	30's	>60	40-50
ADVianaCast.	20's; 48-52	30-40	40-50; >60	20-40	40-50	50's
ADGuarda	30-50; 60-70	<50	Very variable	22-25	30-40	Very variable - from young to old users
ADVilaReal	40-60	40-60	>30	18-28	—	40-60
ADBeja	50-60	55-75	40-50	25-35; 40-50	35-50	35-45
ADÉvora	40-60	30-40	40-50	20-30	—	40-50
ADBragança	>60	40-50	20-30; 50-60	20-30	—	40-50
ADFaro	55-60; >60	30-40	35-80	18-35	35-50	50-70
ADLeiria	20-30; 30-40; 40-50	50-60	40-50; 50-60; 60-70	20-30; 30-40	—	50-60
ADSantarém	30-40	20-30	30-40	20-30	30-40	—
CPF	—	35-50	—	17-19	—	40-65

it is possible to conclude that the most frequently mentioned ages are the 30s, 40s and 50s.

The institutional purpose reason is the one with the fewest responses, six out of twelve. As with gender, this is due to archivists mentioning that users of this profile are mainly entities and institutions. The demographic data refers to representatives of these institutions who visit and consult archive materials.

5.4 Educational background

The most common answers regarding academic qualifications by profile are presented in Table 8. Some answers include more than one qualification, such as "*Bachelor's and Master's*" and there is also the answer "*Very variable*" as the archivist considered that the profile includes users with very diverse qualifications, which makes it difficult to assign an academic qualification to the profile.

Table 8: Interview answers regarding educational background

	Genealogical research	Historical research	Legal purposes	Academic work	Institutional purposes	Publication purposes
ADPorto	Higher education	Bachelor's degree	Very variable	Bachelor's degree	—	Higher education
ANTT	Higher education	Bachelor's or other higher degree	Primary and high school education	Master's or post-doctorate degree	Bachelor's degree	Higher education
ADVianaCast.	Bachelor's degree	Bachelor's or other higher degree	High school or Bachelor's degree	Higher education	High school or Bachelor's degree	Bachelor's or Master's degree
ADGuarda	—	Bachelor's or other higher degree	Bachelor's or other higher degree	Bachelor's or Master's degree	High school or higher degree	Very variable
ADVilaReal	Bachelor's or other higher degree	Bachelor's degree	Very variable	High school or Bachelor's degree	—	Higher education
ADBeja	Bachelor's degree	Master's degree or PhD	High school or Bachelor's degree	Master's degree	High school education	Bachelor's degree
ADÉvora	High school education	Bachelor's or Master's degree	Bachelor's degree	Bachelor's or Master's degree	—	Master's degree or PhD
ADBragança	Higher education	PhD or post-doctorate	Primary or high school education	Bachelor's or Master's degree	—	High school education
ADFaro	High school education	Master's degree	Primary educ., high school or Bachelor's degree	Bachelor's degree	High school education	Master's degree or PhD
ADLeiria	High school or Bachelor's degree	Bachelor's or other higher degree	Very variable	Bachelor's or post-graduation	—	Bachelor's to PhD degree
ADSantarém	High school education	Master's degree	Bachelor's degree	Bachelor's degree	Bachelor's degree	Bachelor's degree
CPF	—	Master's degree or PhD	—	—	—	—

Some archivists mentioned "*Higher Education*" when uncertain about assigning a specific academic degree but knew it was common for users to be graduates. When only "*higher*

education" is mentioned, it is assumed to include Bachelor's, Master's, Postgraduate, Doctoral and Postdoctoral degrees, assuming the first two are the most common. When "*Bachelor's degree or other higher degree*" is mentioned, it is assumed that besides this degree, the others are included, the most common Master's, Post-graduation or PhD.

5.5 Frequency of visit

As previously stated in Section 4 of the methodology, the normalisation of the frequency of visits was done by creating a scale with the values "*very infrequent*", "*infrequent*", "*frequent*" and "*very frequent*". Table 9 shows the frequency of visits to the physical archive for each profile. Some answers have the comment "*during research*" as it was something relevant mentioned by the archivists. This means that these users are frequent during periods when they have to do research for their personal or academic purposes. Based on archivists' interpretation of this comment, this situation can be considered frequent (as is the case for ADVianaCast. in historical research) or infrequent (as is the case for ADBeja in academic work).

Observing Table 9, it is possible to conclude that the most frequent answers regarding the frequency of visits are "*infrequent*" and "*very infrequent*".

Table 9: Interview answers regarding frequency of visit

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Infrequent	Frequent	Infrequent	Frequent	Infrequent	Frequent - during investigation
ANTT	Frequent	Very frequent	Infrequent	Frequent	Infrequent	—
ADVianaCast.	Infrequent	Frequent - during investigation	Very frequent	Frequent	Frequent	Infrequent
ADGuarda	Infrequent	Very infrequent	—	Very infrequent	Very infrequent	Very infrequent
ADVilaReal	Infrequent	Very infrequent	Infrequent	Frequent	Very infrequent	Infrequent
ADBeja	Infrequent	Very infrequent	Very frequent	Infrequent - during investigation	—	Very infrequent
ADÉvora	Infrequent	Very frequent	Frequent	Frequent - during investigation	Infrequent	Very infrequent
ADBragança	Frequent	—	Frequent	—	Very infrequent	Infrequent
ADFaro	Infrequent	Frequent	Very frequent	Very infrequent	Very infrequent	Very infrequent
ADLeiria	Very infrequent	Very infrequent	—	—	—	—
ADSantarém	Very infrequent	Infrequent	Frequent	Very infrequent	Infrequent	Infrequent
CPF	—	Frequent	—	Very infrequent	—	—

5.6 Motivations

This section aims to present the motivations of the users of each profile, mentioned by the archivists during the interviews.

The motivations for visiting the archive vary from each profile, although sometimes they are common in some profiles (such as historical research and academic work).

Regarding Table 10, the genealogical research profile focuses on genealogy and creating a family tree for users to find out about their ancestors. This can be an activity done out of curiosity, or a paid service, meaning genealogy professionals doing genealogical research for other people. The family tree can be used to prove nationality or legal rights acquired. In addition, users who visit the archive for genealogy can make books such as monographs or

demographic studies. The answer "*start genealogy*" can cover other motivations such as own family tree or other purposes. However, as this more specific purpose was not specified, it was assigned a more general response, as stated by the archivist.

The historical research profile visits the archive for needs, mainly within the academic and research context. Users visit the archive because they need the information to prepare their theses or dissertations or to be able to do their academic work. Users' research may be in the work context (if they are researchers) or personal when they do research out of curiosity. Based on the answers given, users may also consult information from the archive for other studies to write articles and/or publish in journals. Their motivations are also based on writing other works such as local histories for demographic purposes, books and for creating personal archives.

Motivations for legal purposes are common among the various interview answers. They are mainly based on the acquisition of nationality by foreign citizens and on matters of habilitation of heirs and property. Users of this profile also request certificates or information needed for a notary or civil registry. According to archivists, obtaining nationality is a common motivation when foreign citizens have Portuguese relatives and, to reside in Portugal, they need to prove this family connection. Users seek birth, death or baptism certificates to prove the connection with that family member. Qualifications of heirs go through a similar process in which users seek proof that a given property belonged to a family member and that they are entitled to acquire it since they are descendants.

The motivations for academic work are close to historical research. Users of this profile visit the archive to gather information for their theses and dissertations, as well as for their academic work. The responses in this profile were very similar across all archives, as seen in Table 10.

The motivations for the profile of institutional purposes are based on legal needs. Users of this profile request statutes and certificates that need information for publications or exhibitions or to do local research. Some archivists have even mentioned that motivations may vary according to entity type. Courts need to consult the archive when court cases are reopened or request legal processes and records. Notary offices need the information to resolve matters of probate, information for deeds, and to authenticate documents. Some institutions need archival documents for entertainment and exhibition purposes.

Finally, the profile of publication purposes also has some close motivations of historical research and academic work. The motivations of users of this profile for visiting the archive are based on consulting archival information to prepare and publish their dissertations, theses, articles or academic papers. They also need information to prepare and publish other studies such as books, local histories or monographs. While the other two profiles mentioned above are more based on preparing these works, this profile focuses more on the publication phase.

Table 10: Interview answers regarding motivations of the profiles

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Family tree; family album	Dissertation elaboration; studies; scientific articles	Acquisition of nationality; certificates	Dissertation elaboration; studies; scientific articles	Requesting statutes; Certificates; local research; publication purposes	Genealogical monographs; publications; academic purposes; museums or local associations
ANTT	Family tree to obtain nationality or prove legal rights	Academic work; research work	Prove a right; notarial record; civil registration	Research work; studies	Quote; make available online; digitise; do not make personal use of the archive	Academic publishing; publish local histories; publish genealogical research; publish research
ADVianaCast.	Family tree; heritage issues	Thesis elaboration; subject study	Habilitation of heirs; acquisition of nationality; wills and testaments; orphan inventories	Thesis elaboration; academic work	Courts - requisition of processes; records/ Notary's offices - habilitation of heirs	Publication of thesis; works
ADGuarda	Family tree; paid genealogy services	Academic work; research work	Acquisition of nationality	Academic work	—	Academic work; research; personal research
ADVilaReal	Family tree	Academic work; colloquiums; journals; scientific articles; monographs	Acquisition of nationality; property registration	Academic work	Court - reopened cases/ Notary's offices - information for deeds	Publications of public interest; local affairs; demographic studies; publication in scientific journals or newspapers; monographies
ADBeja	Start genealogy	Academic work; personal research	Search for deeds; habilitation of heirs; legal processes	Academic work; Research work	Habilitation of heirs; certificates	Publication in journals; Scientific articles; yearbooks; academic purposes
ADÉvora	Family tree; research on other people (excludes family), e.g. for demographic studies	Research work; local history (demography); notarial register	Habilitation of heirs	Thesis elaboration; dissertation elaboration	Exhibitions/ Lawyers - Legal purposes/ Notary's offices - authentication of documents; Acquisition of nationality (request for individuals)	Publication in journals; Academic papers; Thesis elaboration; Scientific articles
ADBragança	Family tree; local monographies; family books; books about villages	Scientific articles; thesis elaboration; academic work	Habilitation of heirs; property registration; certificates; acquisition of nationality	Academic work	Certificates; legal purposes; activities of institutions (entertainment activities and exhibitions)	Publication in journals; writing and publication of books
ADFaro	Family tree	—	—	—	—	—
ADLeiria	—	—	—	—	—	—
ADSantarém	—	—	—	—	—	—
CPF	—	Thesis elaboration; personal archives; curiosity; personal research; books	—	Academic work	—	Publications; publication of thesis; publication of books;

5.7 Frequency of help needed

Table 11 presents the frequency with which users ask archivists for help in the reading room. As previously stated, to normalise this information, the same scale of frequency of visits to the archive was established.

Through a general observation of the table, there are some profiles that depend more on help than others. For example, historical research and publication purposes are the profiles with the highest number of answers as "*very infrequent*", and legal purposes is the profile with the most answers as "*very frequent*". The most frequent response in the table is "*infrequent*" with 24 responses, followed by "*frequent*" with 20 responses. There are more negative responses, — "*infrequent*" and "*very infrequent*" — with 41 results, than positive — "*frequent*" and "*very frequent*" — with 26 responses, which translates to the fact that it is more common for users not to need help from archivists.

Table 11: Answers regarding frequency of help requested from archivists

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Frequent	Infrequent	Frequent	Infrequent	Frequent	Infrequent
ANTT	Very frequent	Very infrequent	Very frequent	Very infrequent	Infrequent	Very infrequent
ADVianaCast.	Frequent	Infrequent	Frequent	Frequent	Infrequent	Very infrequent
ADGuarda	Frequent	Frequent	Very infrequent	Infrequent	Infrequent	Very infrequent
ADVilaReal	Frequent	Frequent	Infrequent	Frequent	Infrequent	Infrequent
ADBeja	Infrequent	Very infrequent	Frequent	Infrequent	Frequent	Very infrequent
ADÉvora	Frequent	Infrequent	Infrequent	Frequent	Infrequent	Very infrequent
ADBragança	Frequent	Very infrequent	Very frequent	Infrequent	Infrequent	Infrequent
ADFaro	Frequent	Frequent	Frequent	Frequent	Very infrequent	Very infrequent
ADLeiria	Very infrequent	Very infrequent	Very frequent	Very infrequent	---	Very infrequent
ADSantarém	Infrequent	Infrequent	Very frequent	Infrequent	Infrequent	Infrequent
CPF	—	Frequent	—	Very frequent		Infrequent

5.8 Type of help needed and users' difficulties

This section presents the answers provided regarding the help and difficulties users of each profile face when searching for and dealing with archival information.

From a general observation of Table 12, the most common help or difficulties among users of all profiles are the need for guidance and the difficulty reading older documents, as is required palaeographic knowledge. By "*Guidance*", it is implied that users need help starting their research, i.e. which documents to search for the information they need, where and how to look for that archival documentation. "*Palaeography*" gathers all the expressions said by users about the difficulty users have in reading old documents, as well as interpreting information and abbreviations.

The genealogical research profile is where this help and difficulty is most observed. In addition, it was also mentioned that these users need to learn how to organise the archive and need help using DigitArq and CRAV.

Historical research profile has three responses "*autonomous*" as it was mentioned by the archives as being users who do not need help, know how to research, have knowledge of the archival organisation and have their search well defined. It was mentioned that they are

critical of the information system and usually ask basic questions. Users of this profile also have difficulty searching in DigitArq, and CRAV was also mentioned. The need for guidance is also something requested by these users.

Legal purpose profile has more extensive and less standardised information as they are more specific needs and difficulties. In addition to the need for guidance, it was mentioned that these users have difficulty using the computer, interpreting sources and expressing what they want. Some archivists divided the difficulties between types of users within the same profile: lawyers or solicitors and common people, individuals. Lawyers or solicitors need help linking archival information with the information they hold. It was also mentioned that they need help identifying documents and filling in forms. However, ADÉvora mentioned that these users are more autonomous than the other individuals, needing more guidance and having more doubts. The archivists also mentioned that these users need help using DigitArq and CRAV.

Table 12: Answers regarding help requested from archivists

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Guidance; do not know the archival organisation	Autonomous - Critical about the information system	Guidance	Autonomous - Critical about the information system	Guidance	Autonomous - how to use archive documents in publications
ANTT	Guidance; palaeography	Basic questions - Ask the existence of indexes	Do not know how to use the computer; CRAV; interpret sources	Basic questions - Asking about the existence of indexes	CRAV	Autonomous
ADVianaCast.	Guidance; palaeography	Guidance; palaeography	Guidance; difficulty expressing what they want	Guidance	Requests for information on documents available in the archives	Autonomous; requests for research to be carried out by the archive
ADGuarda	Guidance; CRAV; how to search	Guidance; CRAV	Lawyers - difficulty in connecting the specific data they have with the archival documents where they access information	Guidance	Specific online help	Guidance
ADVilaReal	Guidance; palaeography	Guidance	Guidance	Guidance; palaeography	Autonomous	Guidance; palaeography
ADBeja	Guidance; palaeography	Autonomous	Individuals - guidance / Solicitors and lawyers - identifying documents; form filling	Guidance	Form filling; paleography	Autonomous
ADÉvora	Guidance; palaeography; DigitArq; CRAV	Guidance; palaeography	Solicitors and lawyers - more autonomous; research already defined/ Individuals- have more doubts	Guidance; palaeography	Requests for research to be carried out by the archive	Autonomous
ADBragança	Guidance; palaeography	Autonomous	Guidance; DigitArq	Few habit of frequenting archives; no research habits; guidance	Requests for research to be carried out by the archive	Guidance
ADFaro	Guidance; palaeography	Guidance: to understand the documents in the fonds that are not yet described	Guidance; palaeography	Guidance	Autonomous	Locate fonds
ADLeiria	—	—	DigitArq; CRAV	DigitArq; locate fonds	—	—
ADSantarém	Palaeography; how to overcome lack of parochial registers	DigitArq	DigitArq; CRAV; They often do not have enough data to conduct the research	CRAV	DigitArq; CRAV	DigitArq; It depends on the subject they deal with and the fonds they consult
CPF	—	Guidance; DigitArq	—	Guidance; DigitArq	—	Guidance; requests for research to be carried out by the archive

Based on Table 12, users of academic work most often need guidance. It was mentioned that are not frequent visitors of the archive and they have few research habits. The lack of paleographic studies was identified by only two archivists, as well as the difficulty in using DigitArq. However, two archivists, ADPorto and ANTT, mentioned that they are more autonomous profiles and are critical about the information system or ask only basic questions, such as about the existence of indexes. It can be assumed that these two archives are the most populated since they are in the most populated cities in Portugal, Porto and Lisbon, respectively. As they are also two of the cities with the most university students, they may be more familiar with the archives compared to the other district archives interviewed.

The last two profiles had the fewest responses. It was mentioned that users of the institutional purposes profile need guidance, help using DigitArq and CRAV, filling out forms, and help reading older documents. However, what stands out in these profiles is that three archives mentioned that it is common for these users to request to search for information through the archive. One of the services that DGLAB archives offer is the search for information requested by the user, i.e., the user asks the archive to look if a particular document is in the archive. This service can be free or paid according to the search time (if it takes more than 30 minutes, it becomes a paid service). In this way, it is common among the users of this profile not to perform the search themselves but ask the archive to do it.

Finally, the users of the publication purposes can be considered very autonomous, as it is something mentioned by five archives. It was mentioned that it is common for these users to request the information search service to be carried out by the archive. Four archives stated that it is common for them to need guidance, that they find it challenging to use DigitArq, lack palaeographic knowledge and that they need to know how to use information from the archive in their publications.

5.9 Factors influencing users ISB

This section presents the archivists' answers regarding the factors influencing users' ISB in each profile.

Table 13 present the factors mentioned by archivists that may influence the ISB of users who visit the archive. Since these were very specific answers, the standardisation process was hardly applied, and only the information summarisation process was applied.

Analysing the table, it can be concluded that the most common factor is age.

For the genealogical research profile, it was mentioned four times that age influences the search for information. It was mentioned that younger users find it more difficult to conduct research and need more practice with specific sources and documents. On the other hand, it was mentioned by another archive that younger users are more autonomous than older ones. The ADFaro mentioned that older users find reading older documents easier,compared to younger users. However, it was also mentioned that older users may need more help as they need to use digital means to search and consult documents (DigitArq and CRAV).

Table 13: Interview answers regarding the factors that may influence users' ISB

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	—	Age - younger people are more critical, demanding and autonomous	—	Age - younger people are more critical, demanding and autonomous	—	—
ANTT	Age - younger people find it more difficult to do research and lack practice in certain types of sources and documents; older people are more "relaxed"	—	Gender - women are more willing to collaborate; men have lower qualifications	—	—	—
ADVianaCast.	Gender - women search more for curiosity; men more for research or even paid services	—	Education - users with less qualification have more difficulty in expressing and finding what they want / Age - elderly people have more difficulties and are more stubborn / Job - lawyers and solicitors are more autonomous; the average citizen has more difficulties	—	—	—
ADGuarda	—	—	—	—	—	—
ADVilaReal	—	Education - having an university degree does not imply that people do not need help or can read documents	—	Purpose of work - may influence their search behaviour	—	—
ADBeja	Age - older people have more difficulty due to the need to access CRAV and DigitArq	—	—	—	—	—
ADÉvora	Age - older people ask for more help; younger people are more autonomous	Age - older people define their search better; younger people need more guidance	—	Gender - women have a more defined search, men need more guidance	—	—
ADBragança	Educational background - retired researchers and teachers have more research habits; the rest and the curious have no research skills	Education - users with more qualifications find it easier to search the archive	Educational background / Age - younger people find it easier to search	—	—	—
ADFaro	Age - older people find it easier to read archival documents	Educational background - users with more qualifications find it easier to search	Age - older people find it easier to read documents but more difficult to use the CRAV / Education - the higher the educational level, the easier it is for them to find the required information	—	—	—
ADLeiria	—	—	—	—	—	—
ADSantarém	Professional genealogists are usually very demanding	—	—	—	—	—
CPF	—	—	—	—	—	—

Regarding gender, it was mentioned that women do genealogical research out of curiosity to know their ancestors. At the same time, men consult the archive for more focused research or even for paid work (e.g. professional genealogists). Regarding education, researchers and retired teachers have more research habits than users who search out of curiosity.

In the historical research profile, age and education are the most common factors influencing the ISB. Younger people are more critical and autonomous. However, it was mentioned by another archive that this age group needs more help compared to older users. Two archives, ADBragança and ADFaro, mentioned that users with higher qualifications tend to have an easier time finding information in the archive. However, the ADVilaReal mentioned that having a university degree does not imply that users do not need help or lack palaeographic or research skills.

In the legal purposes profile, some archivists mentioned more than one factor influencing users' ISB. Regarding gender, it was noted that women are more willing to collaborate when help is offered, and it is more common for men to have lower educational qualifications than women. As for age, older people have more difficulties in the information search process and are more stubborn, making it more difficult to obtain the desired information, while younger people find it easier to search. It was mentioned that older users find it easier to read documents but more challenging to use the CRAV since they require technological skills. In addition to age and gender, it was mentioned that users with higher qualifications find it easier to find information compared to those with lower qualifications. It was also mentioned that the profession can influence information seeking, i.e. users such as lawyers or solicitors are more autonomous than the average citizen.

The academic work profile had only three responses. For this profile, it was mentioned that younger users are more critical, demanding and autonomous compared to older ones. Regarding gender, female users have more definite research and male users need more guidance and help. Finally, it was considered by the ADVilaReal that the purpose of the work could influence the success in searching for information, i.e., if the academic work that the user is doing is motivating for him, he will have more motivation to search for information and find what he needs.

In the profiles, for institutional purposes and publication purposes, it was not identified any factors influencing the information-seeking behaviour.

5.10 Unique characteristics

This section presents the results of the last question asked during the interviews, which is "*Any characteristic that distinguishes them from other users?*".

For this question, the answers are very different, even within each profile. For these results, also the normalisation process was not applied, only to synthesise the answers. It was also the question with the fewest answers.

Users of the genealogical research profile were considered curious and persistent. ADPorto mentioned that it is a profile interested in the archive and collaborating with it through volunteering actions, for example. Users usually have an affective connection with their

motivation as their goal is to search and discover who their relatives are through the creation of the family tree. It was also considered by ADFaro as the oldest profile composed of retired people.

The historical research profile was considered more critical, demanding and autonomous and usually had its research well defined. It is a profile considered to be specialised and knowledgeable about archival documentation, which may be a factor that facilitates research. ADÉvora considered that it is a profile that can often fit into the genealogical research profile.

The profile of legal purposes is variable and dependent. It is common for these users to visit the archive only once and not return. This is due to the nature of the legal motivations associated with this profile. These users are also very grateful for the information they find.

The unique characteristics of the academic work profile refer to the fact that it is also a profile with more critical, demanding and autonomous users (like the historical research profile). It was considered by the ANTT to be a profile with users who are more stressed, depressed and under pressure. This may be because they are university students and feel more anxious about their studies and academic work. It was mentioned that users of this profile easily find the description of the fonds in DigitArq and have ease in using the computer — which may be since it is considered a very young profile.

Institutional purpose users were considered as representing services and acting in an institutional environment, i.e. users visiting the archive represent an entity or institution. Usually, their needs are very close to legal purposes. Institutional purpose users were considered as representing services and acting in an institutional environment, i.e. users visiting the archive represent an entity or institution. Usually, their needs are very close to legal purposes. It was mentioned that it is a profile with difficulty understanding the need to access an online system to consult archive documents.

Finally, the publication purposes profile is considered to be a very autonomous profile with well-defined research. It is a rigorous profile with what they are looking for, as this information will be used in their publications that the public will see.

Table 14: Interview answers regarding users' unique characteristics

	Genealogical research	**Historical research**	**Legal purposes**	**Academic work**	**Institutional purposes**	**Publication purposes**
ADPorto	Curious; interest in the archive and in collaborating (volunteering)	More critical, demanding and autonomous	Very variable profile; grateful for the information they get.	More critical, demanding and autonomous	—	—
ANTT	Curious	—	Very dependent profile	More stressed, depressed and under pressure	—	—
ADVianaCast.	—	More autonomous when they know the sources	—	Very frequent profile in the archive	—	Very autonomous profile
ADGuarda	—	—	—	—	—	—
ADVilaReal	Affective connection with their motivation	—	—	Youngest profile	Acting in an institutional environment - representing a service	More rigorous with what they are looking for and what they want
ADBeja	Familiar with archival terminology and genealogy	Very specialized and knowledgeable about the documentation present in the archive	—	—	—	—
ADÉvora	—	This profile ends up being framed in the Genealogical Research profile	—	More secure in their searches	—	—
ADBragança	Very persistent	—	—	—	—	—
ADFaro	It is an older profile	Have their search well defined	Users often visit the archive once and never return	Easily look up the description of the fonds in Digitarq and are comfortable using the computer	Sometimes they do not understand why they need to make the requests at CRAV in order to consult the documents	Have their search well defined
ADLeiria	—	—	—	—	—	—
ADSantarém	—	—	—	Many are looking for documentation with a low level of archival treatment in this District Archive.	Usually they have a very specific need close to the Legal Purposes	—
CPF	—	—	—	—	—	—

6 Archive Users Profiling

This section presents the initial profiles created from the DGLAB survey and the final profiles created from this data and the interviews. Section 6.1 presents the initial personas and how their demographic characteristics were assigned, and Section 6.2 presents the final personas and the overall characteristics assigned.

6.1 Initial profiling

The profiles present from Figure 16 to Figure 21 were created by cross-referencing the demographic characteristics present in the DGLAB survey with the reasons for visiting the archive also established by the institution. Each profile has been assigned the most frequent characteristic per reason.

For example, the profile of genealogical research was assigned as male since it is the most frequent gender with 1346 (60.3%) users. The age assigned was the most frequent, i.e. 48-52, with 287 (12.8%) answers . Finally, the academic qualification assigned to this persona was Bachelor's Degree, as it was the most frequent for this profile, with 764 (34.7%) answers. The name and image were assigned considering the assigned gender and age. The persona is portrayed in Figure 16.

The most frequent results for each profile are in bold in the tables in section 4.3 (Crossed-data analysis) of this dissertation. The most frequent values for gender by reason are presented in Table 3, age in Table 4 and education in Table 5. It was imperative to have these profiles defined at this stage to present them to the archivists during the interviews.

Figure 16: Genealogical Research Initial Persona

Source: Own

Figure 17: Historical Research Initial Persona

Source: Own

Figure 18: Legal Purposes Initial Persona

Source: Own

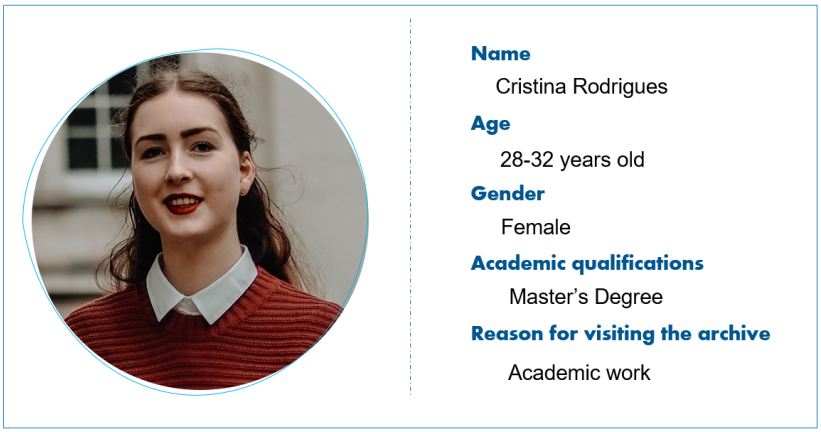


Figure 19: Academic Work Initial Persona

Source: Own

Figure 20: Institutional Purposes Initial Persona

Source: Own

Figure 21: Publication Purposes Initial Persona

Source: Own

6.2 Final profiling

This section aims to discuss the attribution of each characteristic to the final personas based on the flowchart and the explanation given in Section 3.4.

Figures 22 to Figure 27 present the final result for each persona. The figures show their demographic information, such as gender, age, education, name and illustrative photograph. Moreover, it is also possible to see how often they visit the archive and ask the archivists on duty for help. Furthermore, their research motivations, difficulties, factors influencing their behaviour and unique characteristics are also presented.

6.2.1 Genealogical research

The genealogical research persona remained with the same gender as previously assigned to the initial persona, i.e. male, with eight answers (Table 6), as it was the most frequent response in both the DGLAB satisfaction surveys and the interview responses. This profile was the only one in which no profile noted a predominance of the female gender. Figure 22

shows how this profile is portrayed.

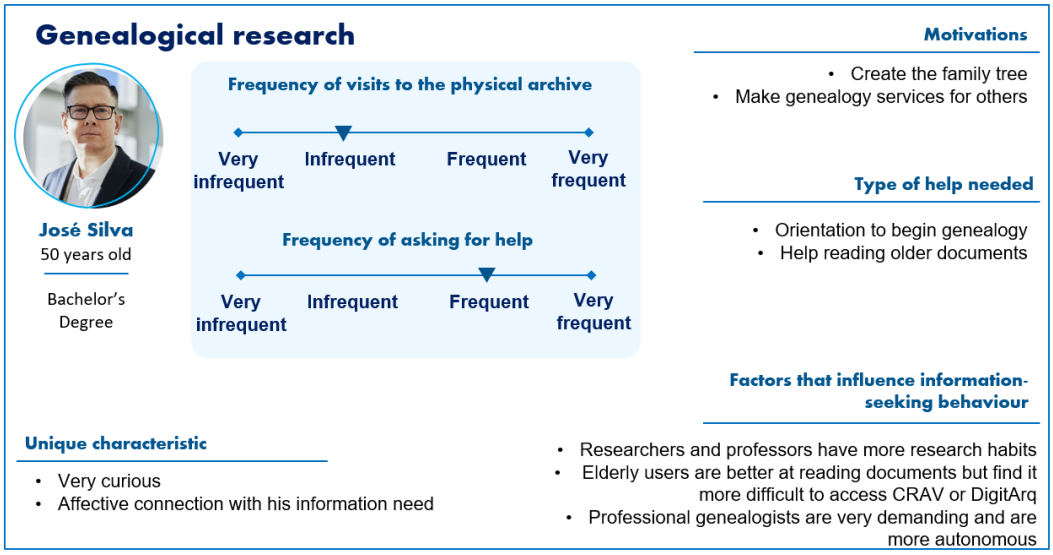


Figure 22: Genealogical Research Persona

Source: Own

For the final profiling, a single age was assigned instead of an age range to make the personas look more authentic. Thus, the age assigned to the persona in this profile was 50 years. This choice considers the most common age range answered by the archivists, 40-50 years, and the most common range in the surveys, 48-52. Although the remaining ages were also analysed for the age assignment, since the most common range in the interviews is very similar to the one initially analysed, it was concluded that the age to be assigned should be close to both ranges.

The educational qualification remains the same as the one assigned to the initial persona, meaning Bachelor's degree. Although the answers "*High school education*" and "*Bachelor's degree*" have four mentions each, there are two answers "*Higher education*" which means that users have an academic degree, but the archivist could not distinguish which degree. Therefore, it can be concluded that it is more common for users to have an academic degree.

This profile was considered as "*infrequent*" since there was a higher number of responses, i.e. seven responses, as seen in Table 9. During the interviews, it was mentioned by some archivists that a lot of information is digitised and available online, which makes visits to the physical archive less frequent.

> Porto District Archive: "*It seems that we even have a more considerable number of online researchers than in-person, but no possible comparison. It is a really huge ratio of online researchers compared to those who come in person.*"

> Viana do Castelo District Archive: "*(...) but now they do not visit much because it is almost all online.*"

The motivations (Table 10) that stood out most in this profile and were attributed to the

persona were creating the family tree and performing genealogy for others, i.e., professional genealogists.

> Guarda District Archive: "*(...) most of them come to research their own family's history. Although there are professional researchers (...) who do service that weavers pay for third parties.*"

This profile was found to be dependent on the help of the archivist on duty in the reading room, as there were seven responses as "*frequent*", as can be seen in Table 11.

The most common types of help (Table 12) that stood out for this profile was the need for guidance, i.e. where, how and what to search for in the archive, and the lack of paleographic knowledge, which makes it difficult to read older documents.

> Viana do Castelo District Archive: "*(...) above all, it is how to start, but also how to read. (...) Sometimes they have doubts about reading and they ask us. (...) Or for abbreviations, meanings of words.*"

Age and education were the factors influencing the ISB (Table 13) of this profile that stood out the most. The factors attributed to the persona were that older users are more skilled in reading older documents but find it more difficult to access CRAV and DigitArq; retired researchers and professors have more research habits compared to other users; and professional genealogists are more demanding.

> Faro District Archive: "*Maybe with their older age they will find it easier to read the documents*".

Finally, the unique characteristics (Table 14) that were particularly noteworthy were that the users are very curious and the fact that they have an affective connection with their motivation, as it is common for them to be researching for family members. Since it was a profile that was considered dependent on the help of archivists, one of the discarded characteristics was their familiarity with archival terminology and genealogy. This factor may apply to professional genealogists.

6.2.2 Historical research

The final historical research profile remained male. As seen in Table 6, in this profile, the most frequent answer was "*no distinction*" of gender, with six answers. As it was necessary to assign a gender to the persona, the most frequent gender in both the surveys and the interviews was assigned, i.e. male, with four answers. Figure 23 portrays the persona created for this profile.

The age assigned regards the most frequent range shown in Table 7, that is, 30-40, mentioned three times. This is a lower age range than the survey results (48-52). However, other ages mentioned were also considered, as is the case of ages 40 and 50, which were frequently

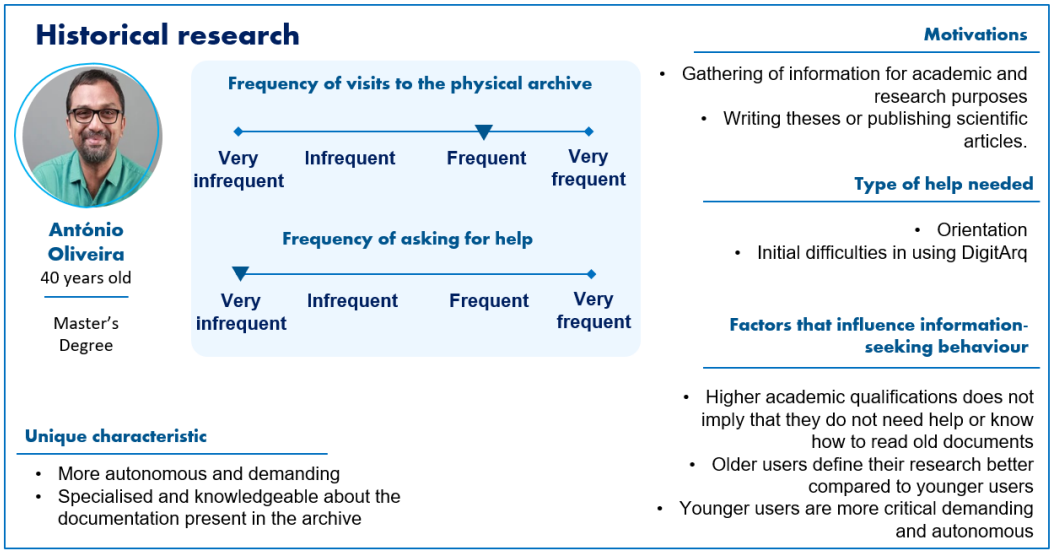


Figure 23: Historical Research Persona

Source: Own

covered. In this way, and to conclude, it was considered to attribute the age 40 to the persona since it is closer to the range from the surveys and close to the most frequent in the interviews.

The academic qualification raised some ambiguity as the survey's most frequent answers were incompatible with those in the interviews. In the surveys, the most frequent qualification for this profile is a PhD while in the interviews it is a Bachelor's degree, with seven answers. There are four answers with "*other higher degree*" five answers with "*Master's degree*" and three answers with "*PhD*". In this way, Table 5 was analysed again in order to see which is the second most common qualification for this profile — it is Master's degree with 235 answers. Since "*Master's degree*" is the second most frequent value in the survey and the interviews, this qualification was attributed to the persona.

Based on the data in Table 9, this persona was characterised as a "*frequent*" visitor to the physical archive. However, the frequency of visits was a characteristic that led to ambiguity since there was a tie between "*frequent*" and "*very infrequent*" with four answers each. The visit frequency can be subjective according to the archivist's interpretation. Being a profile considered seasonal, meaning it is frequent during specific periods, it can either be considered infrequent because it goes to the archive only while doing research for a particular project or frequent because, during that time, it spends much time in the archive. To characterise the persona, it was considered a frequent user in the archive since, according to the interviewees' responses, it is increasingly more common for users to access only online, the fact that there are currently users who spend months at a time in the physical archive looking for information, can be considered a frequent user.

Users' motivations (Table 10) for this profile were, in summary, the collection of archival information to prepare theses or dissertations or for academic or research work that may or may not lead to scientific articles.

Bragança District Archive: "*(...) most of it is for articles (...) for their theses, for college work (...)*"

This persona's frequency of help requests was assigned as "*Very infrequent*". Although there is a tie with four answers each between "*infrequent*" and "*very infrequent*" (Table 11), based on the answers gauged on the type of help and difficulties this profile was considered as being very autonomous, as three did not mention any help coming from this profile or only made a comment on their personality ("critical about the information system"). Based on Table 12, their doubts and difficulties are essentially based on the need for guidance and how to use and search DigitArq.

The factors influencing the behaviour of this profile (Table 13) that were considered most relevant were education and age. One answer that became quite interesting for this profile was that of the ADVilaReal, which explains that having an academic degree does not determine that users know how to search the archive or read old documents. It is necessary to take into consideration that archival description and organisation is a subject that is not known by the general public, and a first impression may raise doubts. If a user does not have an academic degree in the area, he or she may need guidance for research or even other help, such as learning how to search in DigitArq. The same happens with reading old documents, i.e. if a user has a high academic degree but no knowledge in palaeography, the academic degree does not automatically provide these skills.

Vila Real District Archive: "*(...) the biggest difficulty they often have is the fact that they have, for example, a degree or a doctorate (...) it may not be decisive, for example, for reading old documents.*"

Considering age, the factors that have become relevant are the fact that older users define their searches better than younger users. However, younger users can also be seen as more critical, demanding and autonomous.

The unique characteristics attributed to this profile were its autonomy and demand and its knowledge and experience on the documentation present in the archive. Users who visit the archive frequently for their research become more specialised in the documentation and structure of the archive.

Porto District Archive: "*As they deepen and specialise more in their area of knowledge, they end up going a bit beyond what our mission is, right? Our mission is to promote access to information, not to do research. So, here they are doing work that goes beyond access to information. They are interpreting, analysing, they are processing information. They end up having a more specialised, more in-depth posture than the others.*"

6.2.3 Legal Purposes

For legal purpose profile, it was assigned male gender (Table 6), as in the initial profile. Although the most frequent answer was "*No distinction*" with seven answers, it became

necessary to assign a gender to the persona. There was also a tie in the archivists who observed gender predominance, with two answers for each gender. Thus, it was considered the most frequent response in the surveys, in this case, the male gender. Figure 24 portrays the persona created for this profile.

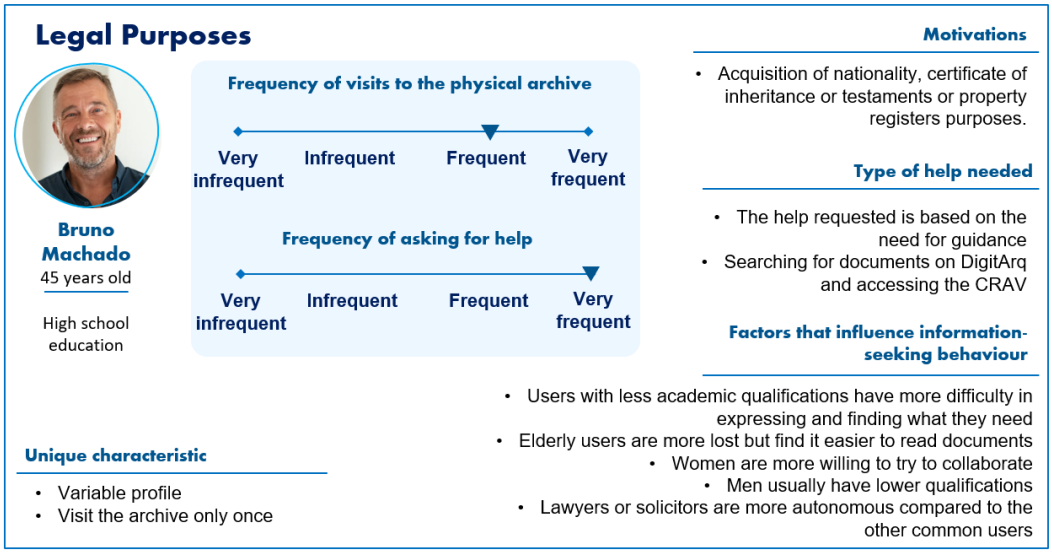


Figure 24: Legal Purposes Persona

Source: Own

The age assigned to the persona was based on the analysis of Table 4 and Table 7. The interviews' most frequently mentioned age range was 40-50, with four results. It was, however, a profile mentioned three times as being very variable. In addition to ages in the 40s, 50s or even older, younger ages, such as 20-30 and over 18, were also mentioned. Thus, the age assigned was 45, just a short distance from the range of the surveys or interviews.

The academic qualifications considered an aspect that does not regard the standard adopted for the attribution of the characteristic to the persona, as represented in the flowchart in Section 3.4 of the Methodology. Although the most frequent qualification in the interviews was a Bachelor's degree, as in the survey, the response of the ANTT archivist saying that men have lower educational qualifications than women was taken into account (see Table 13). Thus, as it is a male profile, and since "high school education", with five answers, was mentioned almost as often as a bachelor's degree, with six answers, it was assigned the characteristic based on the second most frequent answers of both survey and interview.

This persona was considered a "*frequent*" user of the archive. Regarding the frequency of visits, there was a tie in the answers being "*frequent*", "*infrequent*" and "*very infrequent*", with three answers each. As previously mentioned, archivists might consider users to be either frequent, in the sense that different people come regularly, or infrequent because users do not return. To eliminate ambiguity, this persona was characterised as a frequent visitor. Although users do not return, that is, they do not repeat their visits, they are considered frequent because there are many visits of these users, even if they are single visits.

Their motivations (Table 10) are essentially based on the request for documentation/ in-

formation to obtain Portuguese nationality and the need for documentation to resolve issues associated with inheritance and property registries.

> Beja District Archive: "*Most of the situations that (...) arise in this area are mainly issues that come to us in search of a deed to legalise or related to the purchase of a property or with the qualifications of heirs. It is mostly in that sense.*"

The frequency of help attributed to this persona was "*very frequent*", considered a highly dependent profile of help from the archivists. The most common help they need is "*guidance*", and they have difficulties in using DigitArq and CRAV. Having difficulty using the computer, interpreting sources and difficulty expressing what they want leads to an increased need for guidance. For this persona, only the typical user, excluding lawyers and solicitors (they will be mentioned in factors that influence users' behaviour), was considered as, during the interviews, it was assumed to be the most frequent in this profile.

The factors influencing the behaviour of these users are essentially related to education, gender, age and profession. Users with lower educational qualifications need help expressing themselves and finding what they want. Thus, users with higher education and from the legal area tend to have more ease and autonomy in finding information compared to other users. Women are more likely to collaborate when they need help, and that help is provided, and, as a rule, they have higher qualifications than men. Elderly users have more difficulties and are more stubborn.

> ANTT: "*Women are more eager, let us say. They are more willing to try (...). Women are usually more available, even if it is only to make their registration. Men are usually the ones (...) who have the lowest qualifications. It is more noticeable and men with the lowest qualifications*"

The unique feature that stands out in this profile is that it is considered variable and dependent. It is also considered a profile that visits the archive without returning.

6.2.4 Academic Work

The gender attribution of this profile gave rise to ambiguity, and further analysis was required for gender assignment. For this profile, eight out of twelve archivists mentioned no gender predominance, as it is possible to see in Table 6. However, when analysing the most frequent predominant gender, it was concluded that it is not the most common gender in the surveys. Thus, it was carried out the yearly analysis, from 2015 to 2022, to check the most frequent gender in more years. In this way, the most frequent gender would be the assigned gender.

Table 15 shows the gender frequency by year from 2015 to 2022 of the academic work profile. Female gender is the most frequent in five years, these being 2015, 2016, 2018, 2019 and 2022. Thus, the ambiguity was resolved being that it was found that it is more common for the female gender to be the most common in this profile over the years. The relative value

Table 15: Gender frequency by year in the reason for academic work - survey

Year	Gender	Academic work
2015	Male	26 (17.7%)
	Female	**29 (24.1%)**
2016	Male	48 (5.9%)
	Female	**68 (12.8%)**
2017	**Male**	**12 (3.2%)**
	Female	**12 (4.2%)**
2018	Male	2 (1.4%)
	Female	**6 (4.7%)**
2019	Male	1 (1.0%)
	Female	**3 (4.4%)**
2020	**Male**	**5 (2.0%)**
	Female	2 (1.1%)
2021	**Male**	**8 (1.7%)**
	Female	5 (1.4%)
2022	Male	6 (2.5%)
	Female	**9 (4.7%)**
Total	Male	108 (4.0%)
	Female	**134 (6.8%)**

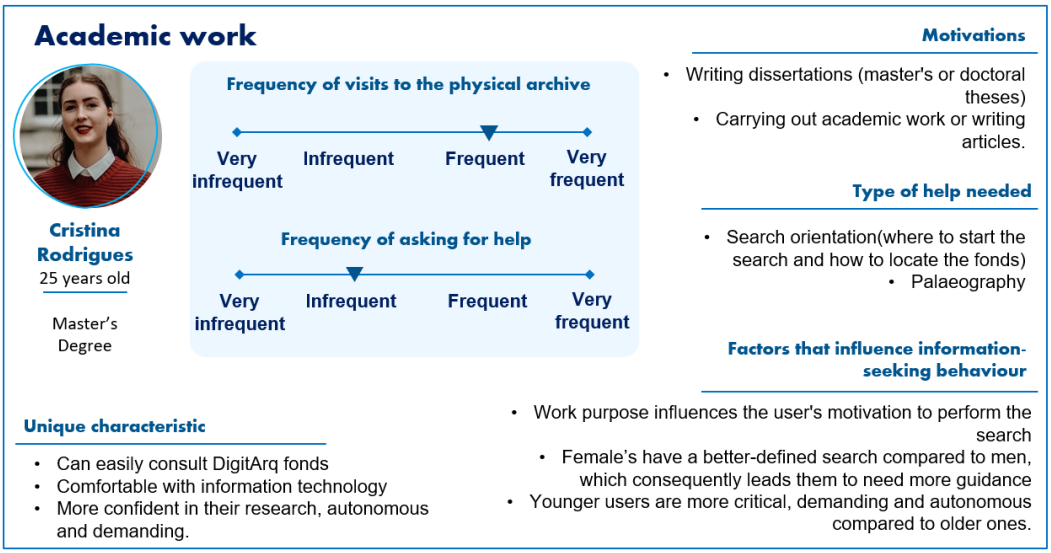


Figure 25: Academic Work Persona

Source: Own

shown (percentages) represents the representation of the results regarding the global results, that is, the other profiles and totals. Figure 25 presents the persona created based on this profile.

The ages between 20 and 30 were the most commonly mentioned (five statements), as can be seen in Table 7. Regarding this age range, and given that the initial persona was characterised as 28-32 years old, the age to assign to the final profile is 25. This way, and also taking into consideration that younger ages such as 18-28 and 17-19 were mentioned, the

age assigned is younger than 28-32 but close to this range.

The most frequent answer in the interviews for the educational qualification (Table 8) in this profile was "*Bachelor's Degree*", which is not the same as the most frequent in the surveys, which is "*Master's Degree*". This way, the second most frequent answer in the interviews was analysed, and it is Master's Degree. Since this value is common to the mode in the surveys, the persona remained characterised as having a "*Master's degree*".

This persona was characterised as being a "*frequent*" visitor to the physical archive, with five responses. They are considered seasonal users as they are frequent and continuous in the archive during their research. The motivations (Table 10) that attracted most attention and were attributed to the final persona are essentially based on the gathering of information for writing dissertations or theses or for carrying out academic work and writing articles.

> Évora District Archive: "*Yes with some regularity (...). If they are really doing a job, generally, as long as there's material, (...) that they can collect, they are capable of being there, (...) one month, two months, three months doing research.*"

It is "*infrequent*" for these users to ask archivists for help, being mentioned five times in all the interviews. The help they need is based on the need for research guidance, that is, what, how and where to search for the information they require, caused by the lack of research habits, which may be an aspect that leads them to need guidance. They are also users who lack palaeographic knowledge, i.e. they have difficulty reading old documents.

> Évora District Archive: "*It is usually palaeography (...), but they also ask, (...), at the level of fonds. Sometimes even that orientation (...)*"

The factors influencing their behaviour (Table 13) are based on gender, age and work motivation. Regarding gender, women have a better-defined search in comparison to men, which leads to the fact that they need more guidance. The purpose of the work can be a determining factor for the success of the research. As it is known when an individual feels motivated in what he/she is working on and likes the topic he/she is researching, his/her motivation to achieve what he/she wants is higher. Regarding age, younger people are more critical, demanding and autonomous. Their demanding and critical nature may be a result of their need for information to complete academic work, for example, which they have deadlines for.

The unique characteristics (Table 14) attributed to the persona is that she finds it easy to consult the description of the fonds in DigitArq and feels comfortable accessing the information online via computer. Since they are younger users, they are more used to new technologies, which increases their ease of navigating the research platform.

> Faro District Archive: "*They easily consult the description of the fonds on Digitarq and are very comfortable with the informatic part.*"

6.2.5 Institutional Purposes

This profile became quite particular because of the answers obtained in the interviews. Seven archives did not mention whether most users were male or female, and some present difficulties in attributing the remaining characteristics, i.e. age and academic qualifications. This situation is due to the fact that the users of this profile are institutions. Figure 26 shows how this profile is portrayed.

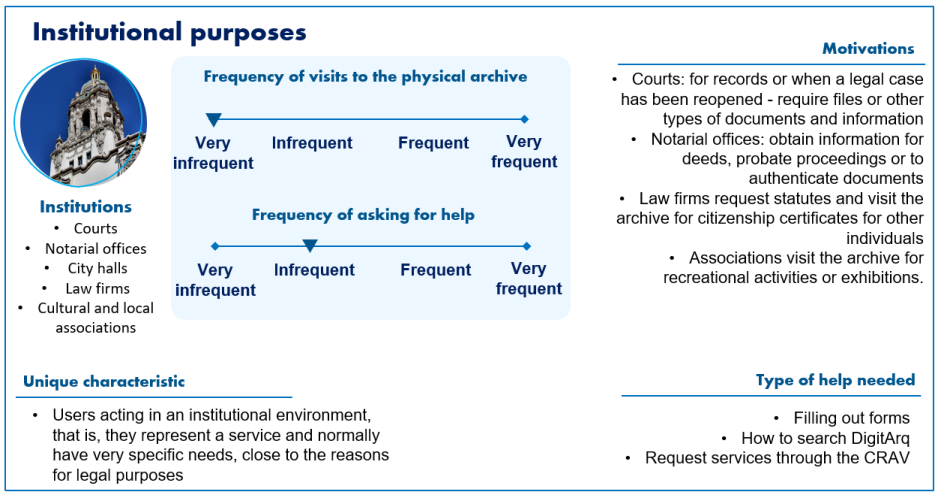


Figure 26: Institutional Purposes Persona

Source: Own

Although some demographic characteristics were assigned to the users of this profile by the archivists during the interviews, these symbolise the representatives of the entities or institutions with whom the archivists interact. During the interviews, archivists hesitated to answer these questions and showed difficulty with this profile, even those who identified characteristics. In this way, it was considered not to attribute demographic characteristics to this profile being characterised only by entities or institutions as the users of this profile. The photo of the persona is a building of a city hall, taken from stock images, and does not have a name, unlike the other personas.

> Porto District Archives: "*The institutions that seek us out most are the registry offices, consulates, notarial offices, city halls, courts and universities.*"

Although there was a tie between the "*infrequent*" and "*very infrequent*" answers, in Table 11, this persona was considered to be a "*very infrequent*" visitor to the physical archive. This choice is due to the fact that, during the interviews, it was considered a profile that carries out most of their requests or exposes their doubts online through the electronic counter.

The motivations (Table 10) attributed were distinguished by types of entities, namely courts, notary offices, law firms and other associations. Courts request processes and registration for study or when legal cases that need to be investigated are reopened. Notaries' offices request information regarding procedures for the certification of heirs, obtaining nationality

(for their clients), and information for deeds. They also visit the archive to authenticate documents. Lawyers or law firms need information for legal purposes. Other institutions require information for leisure activities or exhibitions, such as commemorating historical days.

This profile was considered autonomous since it is "*not very frequent*" to ask for help, with seven answers. Their need for help is based on knowing how to use CRAV and DigitArq as well as how to fill in forms. Table 12 shows that it is an autonomous profile.

> Beja District Archive: "*This is also exactly what happens with the user who comes here for legal purposes. It is when filling in the forms (...)*"

For this profile, no factors were identified that would influence users' information-seeking behaviour (Table 13). However, unique characteristics were mentioned, and the one that stood out the most was that users who go to the physical archive and those who make online requests are representatives of a service and act in an institutional environment with needs very close to legal purposes.

> Santarém District Archive: "*Usually have a very specific need close to Legal Purposes.*"

6.2.6 Publication Purposes

Finally, Figure 27 presents how publication purposes profile was portrayed. This persona was maintained as belonging to the male gender, as it was the most common response in the surveys and the interviews with five responses (Table 6). In this profile, entities were also mentioned institutions, publishers or universities that require information for exhibitions, works or publications. However, they were not attributed to the persona, but it is relevant to mention them.

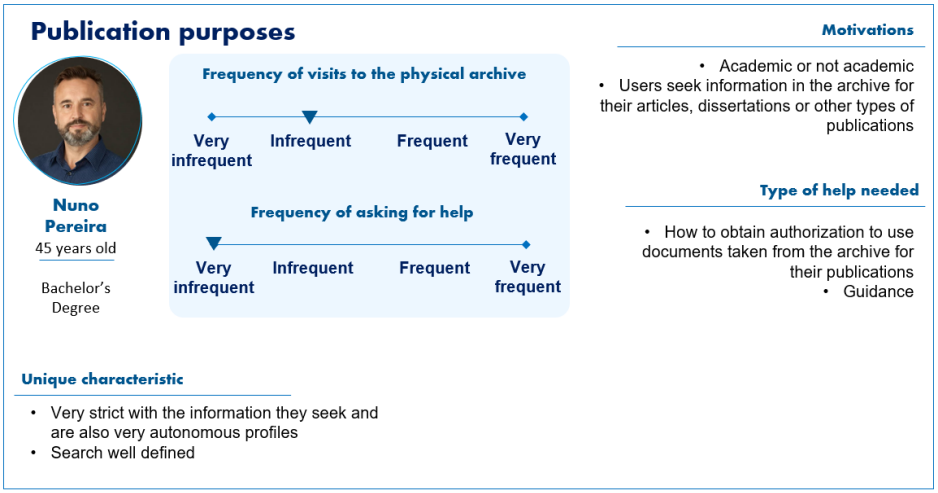


Figure 27: Publication Purposes Persona

Source: Own

The age attributed was 45 years old. Although the most common range is 40-50 in Table 7, with 3 answers, there are younger ranges, such as 35-45, and older ones, such as

50-60. Thus, as the most common range is close to the range attributed to the initial profile, the age attributed was 45.

The most common degree of education (Table 8) among the responses to the interviews was "*Bachelor's Degree*" with four responses. There were also 3 responses with only "*Higher education*" i.e. unspecified academic degree. Thus, since the qualification mode is the same in both sources of information, i.e. the survey and the interviews, the persona was characterised as having a "*Bachelor's degree*".

For the frequency of visits, this profile was assumed as "*infrequent*" based on Table 11. Although there was a tie between the answers "*infrequent*" and "very infrequent", it was concluded that the most negative answer should not be attributed as the publication purposes may be associated to academic purposes or historical research. In this sense, the chances of publication of academic works, theses, dissertations or articles are not very low or even null, so "*infrequent*" was a way of presenting some regularity, even if low, in the publication associated with the motivations of the persona.

The motivations (Table 10) may be academic or non-academic and mostly rely on the search for information for users to write and publish their findings and research, whether for final projects such as theses or dissertations or scientific articles published in journals or conferences, for example.

The persona of this profile has assigned "*very infrequent*" regarding the frequency of help requests (Table 11), as it is more frequent with seven answers. Having been considered a very autonomous profile with five answers, the help that was mentioned is based on how to use the documentation consulted and requested in the publications and, sometimes, may need some guidance.

Finally, no factors influencing the ISB of the profile were mentioned, and as such, were not attributed to the persona as seen in Figure 27. Their unique characteristics are based on the fact that they are very strict with the information they seek since it will be published and seen by others. Associated with this, they usually have their research very well defined as they know what they need and what they want to look for.

> Vila Real District Archive: "*They are people who are going to exhibit and therefore have a greater concern for rigour, because they are going to exhibit something publicly and therefore have an image to defend, (...) there is this concern (...) that what they are going to present is rigorous (...) and with the product of their work, too.*"

7 Conclusions

Through this study, it was possible to define archive users by collecting information through two different methods – surveys and in-depth interviews with archivists. It also provided information about users' research motivations and the types of assistance they often requested.

To characterise the final personas, DGLAB satisfaction surveys and the interviews data were analysed. Interviews are an excellent method to collect information because the interviewee can speak spontaneously about his/her experiences and interactions with users. However, since this is a lot of information, it needs to be processed. Thus, for the interviewee data and in order to facilitate analysis, methods and processes were used to standardise and summarise the information gathered.

When crossing demographic data from both sources, ambiguities arose when the answers differed. Therefore, a flowchart (Section 3.4) was created, representing the decisions made to assign the characteristics when they were unclear. In addition to demographic information, the frequency of visits and requests for help led to some ambiguity since tied answers were common. For these decisions, a flowchart was not created to make the decisions explicit, but only a justified explanation of each one. This data became more challenging to attribute since having a fixed guideline to attribute these characteristics is impossible.

It was vital to collect data at both stages to verify the validity of the users' characteristics and to collect new information about their motivation for visiting the archive and the difficulties they faced searching for archival information.

Each profile has demographic aspects in common except for academic work and institutional purposes. It is predominantly represented by the male gender between the ages of 40 and 50. All the profiles, except for legal purposes, have a university degree. The fact that the legal purposes profile has only secondary education is not only because it is the most frequent answer for this profile but also due to one of the factors mentioned by one of the archivists saying that men are more likely to have lower educational qualifications than women[2]. Since the male gender represents this profile, it was assigned this level of education. Among the profiles, academic work is the youngest and the only one represented by female users. Although in the interviews, there were more results of "*no gender distinction*" for the academic work profile, it was necessary to assign a gender. Thus, when analysing the annual data, it was confirmed that is more common to have female than male users. The institutional profile is the most peculiar since the users of this profile are institutions with different motivations.

The motivations for searching in the archive vary from profile to profile. However the ones for historical, academic work and publication purposes are quite similar, mostly related to academic research or not, intending to publish or finish a project, such as a thesis or dissertation. The most common issues among the profiles are the need for guidance, i.e. how to start and carry out research and the need for help in reading old documents, that is,

[2]Based on *PORDATA*, in Portugal, since 2001 there has been more female residents with higher education, compared to the male gender population. Information on the female gender is available at `https://www.pordata.pt/en/db/portugal/search+environment/table/5835800`. Information on male gender is available at: `https://www.pordata.pt/en/db/portugal/search+environment/table/5835801`.

most users need palaeographic knowledge. Accessing CRAV and DigitArq are also common challenges faced by the profiles.

7.1 Future work

To validate the information from the interviews in more depth, it is important to conduct direct interactions with the users of the different profiles. Through the Think Aloud method, it would be possible to observe how users seek information in the archive by verbalizing their actions. Through this method it is possible to gather information on specific information needs of each profile, as well as behaviours and search habits.

Beyond the Think Aloud method, it is possible to conduct a study that focuses on the log analysis of the DGLAB information systems to analyse in detail the documentation accessed by users. Therefore, in addition to information needs and behaviours, it is also possible to access the type of documentation consulted and link it to information needs.

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A Appendix – DLGAB Survey

Questionario Rede de Arquivos DGLAB

Inquérito à Satisfação dos Clientes do Arquivo

Comunicação ao Cliente

O presente Questionário tem por objetivo medir e avaliar o desempenho dos serviços e a satisfação dos clientes da Rede de Arquivos DGLAB, tendo em vista identificar prioridades de intervenção para a melhoria dos serviços atualmente prestados.

O inquérito encontra-se Online durante todo o ano e acessível a partir de qualquer dos Arquivos da Rede DGLAB, podendo preenchê-lo sempre que assim entender.

Para a boa prossecução dos objetivos enunciados, é muito importante que responda às questões colocadas tendo sempre presente a sua experiência mais recente com os nossos serviços ou produtos.

O tempo de resposta a este Questionário não excede, em média, 10 minutos.

As respostas resultantes do presente Questionário destinam-se a tratamento estatístico. Para assuntos relativos a pedidos de consulta ou afins, utilize os canais disponíveis para esse efeito.

A Direção Geral do Livro, dos Arquivos e das Bibliotecas garante o anonimato e a confidencialidade das respostas e assegura a divulgação dos resultados em (http://dglab.gov.pt/dglab-2/instrumentos_gestao/).

Desde já gratos pela sua colaboração,
A Direção Geral do Livro, dos Arquivos e das Bibliotecas

Questionario Rede de Arquivos DGLAB

1. Identificação do Arquivo

Antes de iniciar a sua avaliação, solicitamos que tenha em atenção a correta identificação do Arquivo sobre o qual irá incidir a sua análise .

1. Selecione o Arquivo sobre o qual a sua análise irá incidir.

Questionario Rede de Arquivos DGLAB

1.1 Seleção de Questionários

Se a sua última experiência com os serviços do arquivo selecionado foi via on-line ou remota (e-mail, carta, Fax), escolha a opção A.

Se a sua última experiência com os serviços do arquivo selecionado implicou deslocação física ao Arquivo, escolha a opção B.

1. Selecione a opção de questionário de acordo com a sua experiência mais recente com os nossos serviços.

◯ A) Contacto via on-line ou remota ◯ B) Contacto presencial

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Online

Por favor, assinale a situação que melhor descreve a sua experiência mais recente com o serviço ou com o produto a que abaixo nos referimos.

1. É a primeira vez que utiliza os serviços online do Arquivo?

◯ Sim ◯ Não

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Presencial

1. É a primeira vez que utiliza os serviços do Arquivo?

◯ Sim ◯ Não

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Online

1. Com que frequência utiliza os serviços online do Arquivo?

2. Alguma vez encontrou o site do Arquivo indisponível?

◯ Nunca ◯ Quase nunca ◯ Algumas vezes ◯ Quase sempre ◯ Sempre

3. Assinale a resposta que melhor descreve o seu nível de concordância com a afirmações seguinte.

	Discordo Inteiramente	Discordo	Nem Discordo, Nem Concordo	Concordo	Concordo Inteiramente	Ns/Nr
Globalmente, o nível de Qualidade do Site é Muito Bom	◯	◯	◯	◯	◯	◯

4. Qual o motivo da sua visita ao site do Arquivo?

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Presencial

1. Com que frequência utiliza os serviços do Arquivo?

2. Qual o motivo da sua visita ao Arquivo?

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Online

1. Especifique que Outro motivo

2. Por favor, clique no botão "Avançar" e depois no botão de página "Seguinte"

◯ Avançar

Questionario Rede de Arquivos DGLAB

2. Acessibilidade ao Arquivo: Grupo Presencial

1. Especifique que Outro motivo

2. Por favor, clique no botão "Avançar" e depois no botão de página "Seguinte"

◯ Avançar

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Online

1. Utilizou algum dos Instrumento de pesquisa documental disponibilizados no site do Arquivo?

◯ Sim ◯ Não

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Online

1. Qual foi o Arquivo (grupo de Fundos / Coleção documental) consultado?
(Assinale apenas uma opção e considere toda a análise subsequente tendo presente apenas essa situação específica)

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Presencial

1. Utilizou algum dos Instrumentos de pesquisa documental disponibilizados no Arquivo?

◯ Sim ◯ Não

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Presencial

1. Qual foi o Arquivo (grupo de Fundos / Coleção documental) consultado?
(Assinale apenas uma opção e considere toda a análise subsequente tendo presente apenas essa situação específica)

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Online

1. Por favor, especifique uma única opção de Outro Arquivo (grupo de Fundos / Coleção documental) consultado, e considere toda a análise subsequente tendo presente apenas essa situação específica.

2. Selecione o tipo de Instrumento de pesquisa a que teve acesso

- ◯ Instrumento de pesquisa documental electrónico: DIGITARQ (CRAV)
- ◯ Outro Instrumento de pesquisa documental electrónico
- ◯ Outros Instrumentos de pesquisa documental (em PDF)

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Online

1. Especifique o nome de Outro Instrumento de pesquisa documental electrónico em Base de Dados que consultou.

2. Por favor, clique no botão "Avançar" e depois no botão de página "Seguinte"

- ◯ Avançar

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Presencial

1. Por favor, especifique uma única opção de Outro Arquivo (grupo de Fundos / Coleção documental) consultado, e considere toda a análise subsequente tendo presente apenas essa situação específica.

2. Seleccione o tipo de Instrumento de pesquisa a que teve acesso

- ◯ Instrumento de pesquisa documental electrónico: DIGITARQ (CRAV)
- ◯ Outro Instrumento de pesquisa documental electrónico
- ◯ Outros Instrumentos de pesquisa documental (em papel ou PDF)

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Presencial

1. Especifique o nome de Outro Instrumento de pesquisa documental (em papel ou PDF) que consultou.

2. Por favor, clique no botão "Avançar" e depois no botão de página "Seguinte"

- ◯ Avançar

Questionario Rede de Arquivos DGLAB

3. Instrumento de Pesquisa Documental: Grupo Online

1. Assinale as respostas que melhor descrevem o seu nível de concordância com as afirmações seguintes.

	Discordo Inteiramente	Discordo	Nem Discordo, Nem Concordo	Concordo	Concordo Inteiramente	Ns / Nr
A. O Instrumento de pesquisa documental disponibilizado permite uma busca conveniente da informação.	◯	◯	◯	◯	◯	◯
B. Os resultados apresentados pelo Instrumento de pesquisa documental são precisos.	◯	◯	◯	◯	◯	◯
C. O Instrumento de pesquisa documental demonstra capacidade de resposta às minhas necessidades de investigação.	◯	◯	◯	◯	◯	◯
D. O Instrumento de pesquisa documental é intuitivo.	◯	◯	◯	◯	◯	◯
E. A informação de ajuda disponível no site é suficiente.	◯	◯	◯	◯	◯	◯

2. Tendo em consideração a sua experiência com o Instrumento de pesquisa documental electrónico, como avalia o nível de qualidade?

	Muito Mau	Mau	Nem Mau, nem Bom	Bom	Muito Bom
Nível de Qualidade	◯	◯	◯	◯	◯

3. Indique uma área, das acima identificadas como A, B, C, D e E, que considere prioritária para ser alvo de melhoria.

◯ A ◯ B ◯ C ◯ D ◯ E

Questionario Rede de Arquivos DGLAB

3. Instrumentos de Pesquisa Documental: Grupo Presencial

1. Assinale as respostas que melhor descrevem o seu nível de concordância com as afirmações seguintes.

	Discordo Inteiramente	Discordo	Nem Discordo, Nem Concordo	Concordo	Concordo Inteiramente	Ns/Nr
A. Os instrumentos de pesquisa documental permitem uma busca razoavelmente rápida da informação.	◯	◯	◯	◯	◯	◯
B. Os instrumento de pesquisa documental são precisos.	◯	◯	◯	◯	◯	◯
C. As várias formas de acesso aos instrumentos de pesquisa documental são adequadas .	◯	◯	◯	◯	◯	◯
D.Os instrumentos de pesquisa documental são auto-explicativos.	◯	◯	◯	◯	◯	◯

2. Tendo em consideração a sua experiência com o Instrumento de Pesquisa Documental, como avalia o nível de qualidade?

	Muito Mau	Mau	Nem Mau, nem Bom	Bom	Muito Bom
Nível de Qualidade	◯	◯	◯	◯	◯

3. Indique uma área, das acima identificadas como A, B, C e D, que considere prioritária para ser alvo de melhoria

◯ A ◯ B ◯ C ◯ D

Questionario Rede de Arquivos DGLAB

4. Desempenho Serviços

1. Solicitou a prestação de qualquer outro tipo de serviço / informação?

◯ Sim ◯ Não

Questionario Rede de Arquivos DGLAB

4. Desempenho Serviços

1. Que outro serviço / informação solicitou?
(Por favor, especifique uma opção e considere toda a análise subsequente tendo em mente apenas essa situação específica.)

◯ Requisição para consulta de Documentos
◯ Reserva de Documentos para consulta no Arquivo
◯ Reprodução de Documentos a efetuar pelo Arquivo
◯ Pedido de pesquisa a efetuar pelo Arquivo
◯ Outro / Pedidos múltiplos

Questionario Rede de Arquivos DGLAB

4. Desempenho Serviços

1. Especifique que "Outro" Serviço / Informação solicitou ou, quais os "Pedido múltiplos" que solicitou.

2. Por favor, clique no botão "Avançar" e depois no botão de página "Seguinte"

◯ Avançar

Questionario Rede de Arquivos DGLAB

4. Desempenho Serviços

1. Conseguiu obter o serviço / informação que solicitou?

◯ Sim ◯ Não ◯ Apenas em parte

Questionario Rede de Arquivos DGLAB

4. Desempenho Serviços

1. Por que razão não lhe foi prestado, ou apenas lhe foi prestado em parte o serviço / informação que solicitou?

2. Quanto tempo considera aceitável aguardar pela recepção do serviço / informação (s)?

3. Assinale as respostas que melhor descrevem os seus níveis de concordância com as afirmações seguintes.

	Discordo Inteiramente	Discordo	Nem Discordo, Nem Concordo	Concordo	Concordo Inteiramente	NS / Nr
A. O tempo de espera pelo serviço / informação foi razoavelmente curto	◯	◯	◯	◯	◯	◯
B. O serviço / informação foi-me prestado de forma precisa.	◯	◯	◯	◯	◯	◯
C. O serviço oferece várias formas de acesso ao produto / informação (pedido / remessa por mail; por CTT; visualização online).	◯	◯	◯	◯	◯	◯
D. As questões por mim colocadas obtiveram respostas consistentes	◯	◯	◯	◯	◯	◯
E. O preço de serviço / produto é razoável	◯	◯	◯	◯	◯	◯

4. Indique uma área, das acima identificadas como A, B, C, D e E, que considere prioritárias para ser alvo de melhoria

◯ A ◯ B ◯ C ◯ D ◯ E

Questionario Rede de Arquivos DGLAB

5. Avaliação Global

1. Por favor, assinale as respostas que melhor descrevem o seu nível de concordância com as seguintes afirmações acerca do serviço globalmente prestado e pelo pessoal de atendimento.

Caso a situação não seja aplicável, seleccione a opção N/A.

	Discordo Inteiramente	Discordo	Nem Discordo, Nem Concordo	Concordo	Concordo Inteiramente	N/A
A. Globalmente, o pessoal do serviço foi Competente	◯	◯	◯	◯	◯	◯
B. Globalmente, o pessoal do serviço foi Cortês	◯	◯	◯	◯	◯	◯
C. Globalmente, o pessoal do serviço foi Flexível (i.é capaz de sugerir vias alternativas para resolução dos problemas)	◯	◯	◯	◯	◯	◯
D. Globalmente, o tempo de espera de resposta à minha solicitação foi razoavelmente curto.	◯	◯	◯	◯	◯	◯
E. Globalmente, o Arquivo demonstrou capacidade de resposta às minhas necessidades.	◯	◯	◯	◯	◯	◯
F. Globalmente, estou satisfeito com o nível da qualidade dos serviços / produtos prestados pelo Arquivo.	◯	◯	◯	◯	◯	◯
G. No fim da minha experiência com os serviços do Arquivo, consegui obter o que necessitava.	◯	◯	◯	◯	◯	◯

2. Indique três áreas que considera prioritárias para serem alvo de melhoria. Utilize, por favor, os números 1,2 e 3 a fim de hierarquizar a ordem das suas prioridades

	1 Máxima Prioridade	2 Média Prioridade	3 Baixa Prioridade
Tempo de espera para obtenção do serviço / produto (certidões, reproduções, informações diversas, pedidos de autorização...)	◯	◯	◯
Tempo de espera para entrega dos documentos para consulta	◯	◯	◯
Precisão dos instrumentos de pesquisa documental	◯	◯	◯
Rapidez na obtenção de informação através da consulta dos instrumentos de pesquisa documental	◯	◯	◯
Capacidade auto-explicativa dos instrumentos de pesquisa documental	◯	◯	◯
Diversidade das formas de acesso a serviços / informação / produtos (i.é: via Internet, correio electrónico, Fax...)	◯	◯	◯
Cortesia do pessoal dos serviços	◯	◯	◯
Competência do pessoal dos serviços	◯	◯	◯
Facilidade do acesso à informação sobre os serviços / produtos	◯	◯	◯
Consistência e pertinência da informação	◯	◯	◯
Razoabilidade dos preços	◯	◯	◯

Questionario Rede de Arquivos DGLAB

6. Informação Demográfica e Comentários

1. Sexo

◯ Feminino ◯ Masculino

2. Idade

3. Qual a sua habilitação académica

Outro (especifique)

4. Qualquer comentário, crítica ou sugestão, relativamente à qualidade do serviço que lhe prestamos será para nós de extrema utilidade para a concepção de processos de melhoria futuros. Este espaço é seu, utilize-o

B Appendix – Interview Script

Interview script for DGLAB archivists

Presentation

Good morning,

Thank you for accepting my invitation to participate in this interview. I am Luana and I am a student of the master's in information science at the Faculty of Engineering of the University of Porto. In the context of my dissertation, "Study of archives usage profiles and their needs", information was analysed to define the profiles of users of DGLAB's archives. After analysing the information provided by the institution, profiles were created based on the users' reasons for visiting, age, gender, and educational qualifications. The creation of the profiles was achieved through the analysis of the Satisfaction Surveys published annually by DGLAB (from 2015 to 2022).

This interview aims to validate the characteristics of each user profile and to complement it with information about their information-seeking behaviour in the archive.

Please feel free to intervene and give your opinion on any question or subject addressed. Any questions please do not hesitate to ask.

*** start recording - record the consent response****

Consent to recording

Before the interview begins, I would like your permission to record this interaction so that I can later analyse the data in more detail. These recordings will not be published and will only serve the scientific purpose of this dissertation.

Questions to validate the characteristics of the profiles

When analysing the data from the DGLAB Satisfaction Survey, I found that there are 6 different reasons for visiting the archives, these being: Genealogical Research; Historical Research, Legal Purposes, Academic Work, Institutional Purposes and Publication Purposes. The profiles I created were based on these reasons. Therefore, I would like you to answer some initial questions about their characteristics and their behaviour.

1) The majority of users whose reason for visiting is *mention which, in order*, are male or female?
2) What is the most frequent age range for users visiting the archive for this reason?
3) What is the most frequent educational background among users visiting the archive for this reason?

*** Presentation of the profile I created with DGLAB data ***

Questions about the behaviour of the profiles

1) Do these users often visit the physical archive?
2) Although the reason is *mention which, in order*, their information needs are not explicit (e.g., creation of family tree/search for historical information to present in a history lesson). What is the most frequent motivation or information need among these users? If possible, please give some examples.
3) When visiting the archive, do these users often need help?
    a. What kind of help do they ask for?

4) Do you think that the behaviour of these users differs according to their age, gender and/or education?

5) Any characteristic that distinguishes them from other users?

*** stop recording (if accepted initially) ***

Closing of the interview

Thank you very much for your contribution to my work and thank you again for accepting my invitation.

C Appendix – Form

Questionário para a definição de perfis de utilizador dos arquivos da DGLAB e do seu comportamento

O meu nome é Luana e sou estudante do Mestrado em Ciência da Informação na Faculdade de Engenharia da Universidade do Porto. No âmbito da minha dissertação, "Estudo dos perfis de utilização de arquivos e suas necessidades", foi analisada informação para definir os perfis dos utilizadores dos arquivos da DGLAB. Após a análise da informação fornecida pela instituição, foram criados perfis com base nos motivos de visita, idade, género e habilitação literária dos utilizadores. A criação dos perfis foi conseguida através da análise dos Inquéritos de Satisfação publicados anualmente pela DGLAB (desde 2015 a 2022).

Este questionário tem como objetivo conhecer as características de cada perfil de utilizador e complementar com informação sobre o seu comportamento de pesquisa de informação no arquivo.

O questionário é anónimo e os resultados serão utilizados apenas para fins científicos no contexto desta dissertação. Tem a duração de aproximadamente 10 a 20 minutos. Algumas respostas são de escolha múltipla ou direta, outras são de resposta aberta e requerem escrita.

É pretendido que as respostas sejam facultadas com base na experiência dos arquivistas ao interagir diariamente com os visitantes do arquivo, através do que observam.

* Indica uma pergunta obrigatória

1. Selecione o Arquivo em que se encontra a trabalhar *

Marcar apenas uma oval.

- Arquivo Nacional da Torre do Tombo
- Centro Português de Fotografia
- Arquivo Distrital de Aveiro
- Arquivo Distrital de Beja
- Arquivo Distrital de Bragança
- Arquivo Distrital de Castelo Branco
- Arquivo Distrital de Évora
- Arquivo Distrital de Faro
- Arquivo Distrital da Guarda
- Arquivo Distrital de Leiria
- Arquivo Distrital de Portalegre
- Arquivo Distrital do Porto
- Arquivo Distrital de Santarém
- Arquivo Distrital de Setúbal
- Arquivo Distrital de Viana do Castelo
- Arquivo Distrital de Vila Real
- Arquivo Distrital de Viseu
- Arquivo Histórico Ultramarino

Definição dos perfis e do comportamento dos utilizadores dos arquivos da DGLAB

Ao analisar os dados do Inquérito de Satisfação da DGLAB, concluiu-se que existem 6 principais motivos de visita ao arquivo , sendo estes: **Investigação Genealógica; Investigação Histórica, Fins Legais, Trabalho Académico, Fins Institucionais e Fins de publicação.** Os perfis criados foram baseados, essencialmente, nestes motivos.

O objetivo das seguintes perguntas é caracterizar os perfis de utilizador e o seu comportamento de pesquisa de informação no arquivo. As perguntas encontram-se divididas em diferentes secções, uma para cada motivo.

Perfil 1 - Investigação Genealógica

2. Qual o género mais frequente nos utilizadores cujo motivo é Investigação Genealógica? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

3. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Investigação Geanealógica? *

Marcar tudo o que for aplicável.

- ☐ 20-30
- ☐ 30-40
- ☐ 40-50
- ☐ 50-60
- ☐ 60-70
- ☐ 70-80
- ☐ mais de 80
- ☐ Não sei

4. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Investigação Genealógica? *

Marcar tudo o que for aplicável.

- ☐ Ensino Primário
- ☐ Ensino Secundário Completo
- ☐ Licenciatura
- ☐ Pós-graduação
- ☐ Mestrado
- ☐ Doutoramento
- ☐ Não sei

5. Quantas vezes recebem visitas de pessoas cujo motivo é Investigação Genealógica? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

6. Apesar do motivo ser Investigação Genealógica, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

7. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

8. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- [ ] Ajuda para fazer pesquisas através do DigitArq
- [ ] Ajuda a fazer o registo e a solicitar serviços no CRAV
- [ ] Ajuda para a leitura ou interpretação de um documento consultado
- [ ] Não sei
- [ ] Outra: _____

9. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

_____

_____

_____

_____

_____

10. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- ◯ Sim
- ◯ Não
- ◯ Não sei

11. Alguma característica que os distingue dos restantes utilizadores?
Mencionar alguma característica comportamental que seja única deste perfil

Perfil 2 - Investigação Histórica

12. Qual o género mais frequente nos utilizadores cujo motivo é Investigação Histórica? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

13. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Investigação Histórica? *

Marcar tudo o que for aplicável.

- ☐ 20-30
- ☐ 30-40
- ☐ 40-50
- ☐ 50-60
- ☐ 60-70
- ☐ 70-80
- ☐ mais de 80
- ☐ Não sei

14. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Investigação Histórica? *

Marcar tudo o que for aplicável.

- [ ] Ensino Primário
- [ ] Ensino Secundário Completo
- [ ] Licenciatura
- [ ] Pós-graduação
- [ ] Mestrado
- [ ] Doutoramento
- [ ] Não sei

15. Quantas vezes recebem visitas de pessoas cujo motivo é Investigação Histórica? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

16. Apesar do motivo ser Investigação Histórica, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

17. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

18. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- ☐ Ajuda para fazer pesquisas através do DigitArq
- ☐ Ajuda a fazer o registo e a solicitar serviços no CRAV
- ☐ Ajuda para a leitura ou interpretação de um documento consultado
- ☐ Não sei
- ☐ Outra: _____

19. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

_____

_____

_____

_____

_____

20. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- ◯ Sim
- ◯ Não
- ◯ Não sei

21. Alguma característica que os distingue dos restantes utilizadores?

Mencionar alguma característica comportamental que seja única deste perfil

Perfil 3 - Fins Legais

22. Qual o género mais frequente nos utilizadores cujo motivo é Fins Legais? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

23. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Fins Legais? *

Marcar tudo o que for aplicável.

- [ ] 20-30
- [ ] 30-40
- [ ] 40-50
- [ ] 50-60
- [ ] 60-70
- [ ] 70-80
- [ ] mais de 80
- [ ] Não sei

24. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Fins Legais? *

Marcar tudo o que for aplicável.

- [ ] Ensino Primário
- [ ] Ensino Secundário Completo
- [ ] Licenciatura
- [ ] Pós-graduação
- [ ] Mestrado
- [ ] Doutoramento
- [ ] Não sei

25. Quantas vezes recebem visitas de pessoas cujo motivo é Fins Legais? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

26. Apesar do motivo ser Fins Legais, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

_____

_____

_____

_____

_____

27. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

28. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- ☐ Ajuda para fazer pesquisas através do DigitArq
- ☐ Ajuda a fazer o registo e a solicitar serviços no CRAV
- ☐ Ajuda para a leitura ou interpretação de um documento consultado
- ☐ Não sei
- ☐ Outra: _____

29. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

30. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- Sim
- Não
- Não sei

31. Alguma característica que os distingue dos restantes utilizadores?
Mencionar alguma característica comportamental que seja única deste perfil

Perfil 4 - Trabalho Académico

32. Qual o género mais frequente nos utilizadores cujo motivo é Trabalho Académico? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

33. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Trabalho Académico? *

Marcar tudo o que for aplicável.

- ☐ 20-30
- ☐ 30-40
- ☐ 40-50
- ☐ 50-60
- ☐ 60-70
- ☐ 70-80
- ☐ mais de 80
- ☐ Não sei

34. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Trabalho Académico? *

Marcar tudo o que for aplicável.

- ☐ Ensino Primário
- ☐ Ensino Secundário Completo
- ☐ Licenciatura
- ☐ Pós-graduação
- ☐ Mestrado
- ☐ Doutoramento
- ☐ Não sei

35. Quantas vezes recebem visitas de pessoas cujo motivo é Trabalho Académico? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

36. Apesar do motivo ser Trabalho Académico, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

37. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

38. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- [ ] Ajuda para fazer pesquisas através do DigitArq
- [ ] Ajuda a fazer o registo e a solicitar serviços no CRAV
- [ ] Ajuda para a leitura ou interpretação de um documento consultado
- [ ] Não sei
- [ ] Outra: _____

39. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

_____

_____

_____

_____

_____

40. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- ◯ Sim
- ◯ Não
- ◯ Não sei

41. Alguma característica que os distingue dos restantes utilizadores?
Mencionar alguma característica comportamental que seja única deste perfil

Perfil 5 - Fins Institucionais

42. Qual o género mais frequente nos utilizadores cujo motivo é Fins Institucionais? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

43. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Fins Institucionais? *

Marcar tudo o que for aplicável.

- ☐ 20-30
- ☐ 30-40
- ☐ 40-50
- ☐ 50-60
- ☐ 60-70
- ☐ 70-80
- ☐ mais de 80
- ☐ Não sei

44. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Fins Institucionais? *

Marcar tudo o que for aplicável.

- [ ] Ensino Primário
- [ ] Ensino Secundário Completo
- [ ] Licenciatura
- [ ] Pós-graduação
- [ ] Mestrado
- [ ] Doutoramento
- [ ] Não sei

45. Quantas vezes recebem visitas de pessoas cujo motivo é Fins Institucionais? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

46. Apesar do motivo ser Fins Institucionais, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

47. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

48. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- ☐ Ajuda para fazer pesquisas através do DigitArq
- ☐ Ajuda a fazer o registo e a solicitar serviços no CRAV
- ☐ Ajuda para a leitura ou interpretação de um documento consultado
- ☐ Não sei
- ☐ Outra: _____

49. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

_____

_____

_____

_____

_____

50. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- ◯ Sim
- ◯ Não
- ◯ Não sei

51. Alguma característica que os distingue dos restantes utilizadores?

Mencionar alguma característica comportamental que seja única deste perfil

Perfil 6 - Fins de Publicação

52. Qual o género mais frequente nos utilizadores cujo motivo é Fins de Publicação? *

Marcar apenas uma oval.

- ◯ Masculino
- ◯ Feminino
- ◯ Não existe diferença entre ambos os géneros
- ◯ Não sei

53. Qual/quais a(s) faixa(s) de idade(s) mais frequente nos utilizadores cujo motivo é Fins de Publicação? *

Marcar tudo o que for aplicável.

- [ ] 20-30
- [ ] 30-40
- [ ] 40-50
- [ ] 50-60
- [ ] 60-70
- [ ] 70-80
- [ ] mais de 80
- [ ] Não sei

54. Qual/quais a(s) habilitação(ões) literária(s) mais frequente(s) nos utilizadores cujo motivo é Fins de Publicação? *

Marcar tudo o que for aplicável.

- [ ] Ensino Primário
- [ ] Ensino Secundário Completo
- [ ] Licenciatura
- [ ] Pós-graduação
- [ ] Mestrado
- [ ] Doutoramento
- [ ] Não sei

55. Quantas vezes recebem visitas de pessoas cujo motivo é Fins de Publicação? *

Marcar apenas uma oval.

- ◯ 1 vez por semana
- ◯ 1 vez de 15 em 15 dias
- ◯ 1 vez por mês
- ◯ 1 vez de 6 em 6 meses
- ◯ 1 vez por ano
- ◯ Não sei

56. Apesar do motivo ser Fins de Publicação, as suas necessidades de informação não são explícitas *(p.e. criação de árvore genealógica/ pesquisa de informação histórica para apresentar numa aula de História)*. Qual a finalidade ou necessidades de informação mais frequentes entre estes utilizadores? Se possível, refira alguns exemplos. *

57. Ao visitar o arquivo, os utilizadores deste perfil necessitam frequentemente de ajuda? *

Marcar apenas uma oval.

- ◯ Nunca necessitam de ajuda
- ◯ Raramente pedem ajuda
- ◯ Pedem ajuda muito frequentemente
- ◯ Não sei

58. Se pedem ajuda, raramente ou frequentemente, que tipo de ajuda pedem?

Marcar tudo o que for aplicável.

- ☐ Ajuda para fazer pesquisas através do DigitArq
- ☐ Ajuda a fazer o registo e a solicitar serviços no CRAV
- ☐ Ajuda para a leitura ou interpretação de um documento consultado
- ☐ Não sei
- ☐ Outra: _____

59. Quando acompanha os utilizadores deste perfil, quais as dificuldades que apresentam mais frequentemente?

60. Considera que o comportamento destes utilizadores varia conforme a sua idade, género e/ou habilitação literária? *

Marcar apenas uma oval.

- ◯ Sim
- ◯ Não
- ◯ Não sei

61. Alguma característica que os distingue dos restantes utilizadores?

Mencionar alguma característica comportamental que seja única deste perfil

Conclusão do questionário

Agradeço a sua disponibilidade e colaboração na minha dissertação de mestrado "Estudo dos perfis de utilização de arquivos e suas necessidades".

62. Algo que ficou por dizer ou alguma característica adicional sobre os utilizadores do arquivo?