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The Impression That I Get: Reference & Instruction Uses / Preceptions of Primo in a Consortial Environment

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THE IMPRESSION THAT I GET:

REFERENCE & INSTRUCTION
USES/PERCEPTIONS OF PRIMO IN A CONSORTIAL ENVIRONMENT
HELLO!

WE ARE:

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MOLLY GUNDERSON
PORTLAND STATE UNIVERSITY

HOLLI KUBLY
UNIVERSITY OF OREGON
1. BACKGROUND INFORMATION
WHAT IS THE ORBIS CASCADE ALLIANCE?

- **38 Member Consortia**
  - Private & Public Colleges, Universities, Community Colleges
  - **3 States**: Oregon, Washington, and Idaho

“The Orbis Cascade Alliance enables member libraries to advance institutional missions through collaboration and innovation”
STRUCTURE IN
ORBIS CASCADE ALLIANCE

Council

Board

Finance Team

Discovery & User Experience Team

Resource Sharing & Fulfillment Team

Shared Content & Tech Services Team

Systems Team

Unique & Local Content Team

Standing Groups

Project Groups
WHY WE LOOKED AT REFERENCE & INSTRUCTION PRIMO USE

- Reference & Instruction Staff are the gateway to our users
- We wanted to answer a few key questions:
  - Are there knowledge gaps?
  - What training is needed?
  - What are the perceptions of the system?
  - What improvements need to be made to Primo?
2. DATA GATHERING & ANALYSIS
DATA GATHERING METHOD: USING A SURVEY

▶ 44 Questions; Half Reference, Half Instruction
▶ Background Questions: who, where, what they do?
▶ Primo Questions: Do they use it, Strengths, Challenges, Wish List?
▶ Closing Questions: Anything we didn’t cover, How can we better support, What they want to know more about?
DATA ANALYSIS:
HOW TO HANDLE THE DATA

▸ 74 Individual Responses
▸ 32 Institutions Represented
▸ Reviewed via spreadsheet initially
▸ We decided to focus on the Challenges and Strengths questions in particular
▸ Coding Scheme to organize data in chunks
▸ Executive Summaries for each data topic
<table>
<thead>
<tr>
<th>Challenges</th>
<th>#</th>
<th>Strengths</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search function: Boosting/relevancy/ranking</td>
<td>31</td>
<td>Filters/facets/scopes</td>
<td>39</td>
</tr>
<tr>
<td>Inconsistent results</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overwhelming searches/Metadata</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Article/E-Book linking/access</td>
<td>30</td>
<td>Cross disciplinary/search function/Ranking/efficiency/search term help</td>
<td>32</td>
</tr>
<tr>
<td>Books access/Summit/ILL/WorldCat</td>
<td>25</td>
<td>citations/Save search/Save to list/email/print/permalinks/pin</td>
<td>29</td>
</tr>
<tr>
<td>Data &amp; function inconsistencies/Slowness/Keeping up with Primo changes</td>
<td>24</td>
<td>Visual appeal/user friendly/local customizations (undergrad focus)</td>
<td>17</td>
</tr>
<tr>
<td>Known item searching/browse function</td>
<td>17</td>
<td>Book access/Summit/ILL/</td>
<td>11</td>
</tr>
<tr>
<td>Filters/Facets/Navigation</td>
<td>14</td>
<td>Browse/Virtual</td>
<td>7</td>
</tr>
<tr>
<td>Print holdings/serials holdings</td>
<td>11</td>
<td>Find full text</td>
<td>5</td>
</tr>
<tr>
<td>citations/Save to list/email/print/permalinks</td>
<td>11</td>
<td>Advanced search</td>
<td>3</td>
</tr>
<tr>
<td>Boolean</td>
<td>9</td>
<td>Systemic reliability</td>
<td>3</td>
</tr>
<tr>
<td>Login/sign on/authentication</td>
<td>7</td>
<td></td>
<td></td>
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<tr>
<td>Limit to location/</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaching/Libguides</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alma issues?</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display issues</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Search</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Actions Menu Analysis
Includes tools for sharing, saving, and citations

Executive summary of this problem:
Overall, people are pleased with the functionality provided in the Actions menu especially after the refresh it received in the Primo new UI giving it a more clear and discoverable interface. Areas specially called out were permalinks, citations and the new My Favorites section (lots of love for the pin icon). The major pain points were limited to printing, sharing with others, and Zotero. Printing has been a struggle for some time within Primo, one of the areas users would like to see enhanced is the ability to print from the search results screen which currently is only at best. In particular users would like to see the ability to customize (call number and title only for example) what they are printing rather than the entire record. One struggle many spoke of is the ability to share search and lists with patrons and faculty. This is one area that Primo lacks functionality in and would like to see improved to provide ease of instruction. Lastly, Zotero and Primo have had a problematic relationship since the Primo new UI was launched causing the link between the two to sever. However, as of March 2018 the functionality has been restored and users now have the ability to use Zotero with Primo again.

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Potential reasons</th>
<th>Fixes</th>
</tr>
</thead>
<tbody>
<tr>
<td>No good way to create a list of printable items from Primo results</td>
<td>Actions haven’t been added to the results page but are available via the individual item.</td>
<td>This is on the roadmap currently. You can print your entire favors list which can be just as helpful.</td>
</tr>
<tr>
<td>Saving items to a useful list in order to email, print, or otherwise share with users. I work with students to identify items for further exploration, we need some way to record our findings/results in a meaningful way. I’d like to be able to save items to a list, sort the list, and share it directly from the catalog. I’d like to make lists that include bibliographic info + local holdings call number, etc. Other IDs do this successfully, why not Primo? There is no good way to create a list from Discovery results. We should be able to sort and preference elements of bibliographic record that is meaningful for users. In an order that mimics how they want to use the list (sort by call number, title, etc.).</td>
<td>Enhancement request or idea exchange as sharing isn’t a current option for lists.</td>
<td></td>
</tr>
</tbody>
</table>

Strengths

Permalinks work. That makes it easier to help students contacting us through Chat or email.

The pin icons vs My Favorites. I especially like how it displays on the results screen. Not so much in the records, but I think it works much better than the stars that were there before. And I like showing students the feature of saving things and organizing them into folders, practical and popular option for students.

The ability to grab citations (although they are sometimes incorrect) and the permalink feature are both helpful. Also appreciate the ability to easily get articles from Primo into Zotero, but wish it were easier to get books from Primo into Zotero.

The tab bar - Students are excited about having multiple options to keep track of their search results, I enjoy the favorites feature, and the cute icons of the pushpin.

My Favorites - As in reference, students in instruction settings appreciate the ability to organize their search results.

I like the “Send To” bar, especially the permalink option. Previously we had to customize a permalink button and it often broke with new updates. The “Send To” bar is very visible and easy to use.

The pin icons vs My Favorites in general is a good feature. The pins are easy to use and attractive, and this is a good way to help students save their results and their searches.

Permalinks are great. I can send a link to a specific item to student or faculty member.

Enhancement request or idea exchange as sharing isn’t a current option for lists.
3. OVERVIEW OF FINDINGS
OVERVIEW OF FINDINGS: WHAT WE LEARNED -- PRIMO FOR INSTRUCTION

- **55 participants** indicated they use Primo for instruction [often or sometimes]
- **14 participants** indicated they did not use Primo for instruction [rarely or never]
OVERVIEW OF FINDINGS:
WHAT WE LEARNED --
PRIMO STRENGTHS

▸ Facets
  ▶ Selecting multiple
  ▶ Locking facets
  ▶ Date facet

▸ Actions Menu

▸ Advanced Search
OVERVIEW OF FINDINGS:
WHAT WE LEARNED -- PRIMO CHALLENGES

- Number of clicks to request items
- General slowness/Unreliability
- Book reviews and other reviews appearing before intended item / issues with known item searches
- Linking issues
- Inability to share lists and searches with patrons
- Printing from Search screen
OVERVIEW OF FINDINGS:
WHAT WE LEARNED --
PRIMO WISH LIST

- **Standardize** Primo’s appearance across browsers/devices
- Widget to get **PDF** from brief result
- Show **new items** bought by the library
- Ability to control boosting for specific resource types like book reviews or reference entries to make them less prominent
OVERVIEW OF FINDINGS: WHAT WE LEARNED -- CONSORTIAL SUPPORT

- Need for Improved **Communication**
- Increased need for online **tutorials**, demos and **workshops**
- **Reporting** problems
4.

RECOMMENDATIONS
RECOMMENDATIONS: WHAT IS NEXT

- **Reviewing** the wish list for future enhancements/idea exchange items
- **Establishing** a new consortial standing group dedicated to discovery workshops
- **Improving** communication
THANKS!

Any questions?