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

Anne M. Pepitone  
*University of Washington*

Barbara Valentine  
*Linfield College*

Molly Gunderson  
*Portland State University*, mgun2@pdx.edu

Holli Kubly  
*University of Oregon*

Follow this and additional works at: [https://pdxscholar.library.pdx.edu/ulib_fac](https://pdxscholar.library.pdx.edu/ulib_fac)

Part of the Cataloging and Metadata Commons, and the Information Literacy Commons

Let us know how access to this document benefits you.

Citation Details

This Presentation is brought to you for free and open access. It has been accepted for inclusion in Library Faculty Publications and Presentations by an authorized administrator of PDXScholar. Please contact us if we can make this document more accessible: pdxscholar@pdx.edu.
THE IMPRESSION THAT I GET:

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

WE ARE:

ANNE M. PEPITONE
UNIVERSITY OF WASHINGTON

BARBARA VALENTINE
LINFIELD COLLEGE

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”
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/</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 books/knowing item searching</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>
</tr>
<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>1</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 recent updates to the Primo New UI giving it a more clean and discoverable interface. Areas specially called out were permalinks, discussion, 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 to is the ability to share searches and links 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.

Strengths

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

Like the pin for saving to lists; 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 toolbar - Students are excited about having multiple options to keep track of their search results. I enjoy the Favorites feature, and the cute aerobics 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 and 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.

<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 favorites 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 biblio info + local holdings call number, etc. Other lists 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 biblio record that is meaningful for users. In an order that mimics how they want to use the list (sort by call # to navigate the stacks, etc.). Should allow email/print/export. Here is an example of an emailed report (Note: NO CALL NUMBER but a whole lot of irrelevant info). Example title from survey: WACK! art and the feminist revolution Using Zotero and Primo together: Students who come to me with questions about Zotero don’t know the difference between when Zotero is acting weird and when Primo is acting weird. Primo’s Zotero limitations make both of the research tools look ineffective.</td>
<td>Enhancement request or idea exchange on sharing isn’t a current option for lists.</td>
<td></td>
</tr>
</tbody>
</table>

Could be before Zotero fix resolves the bigger issues with the two working together.

Fix came in March 2018.
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?