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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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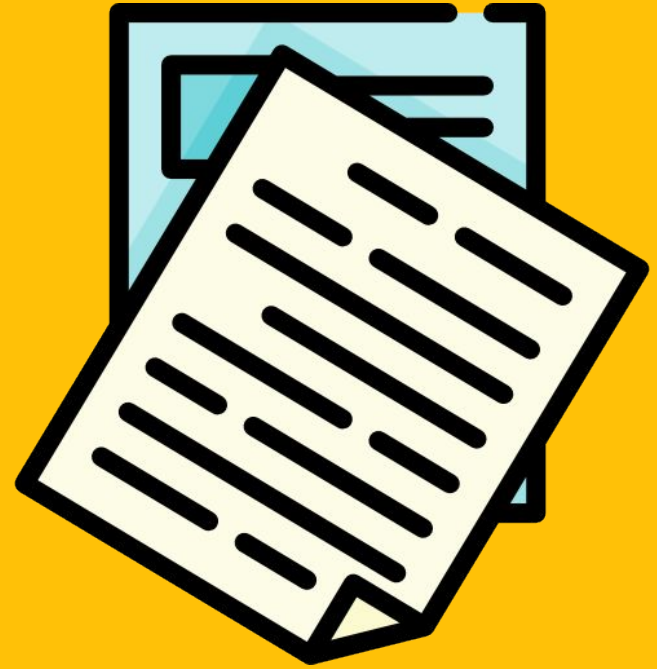
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1.

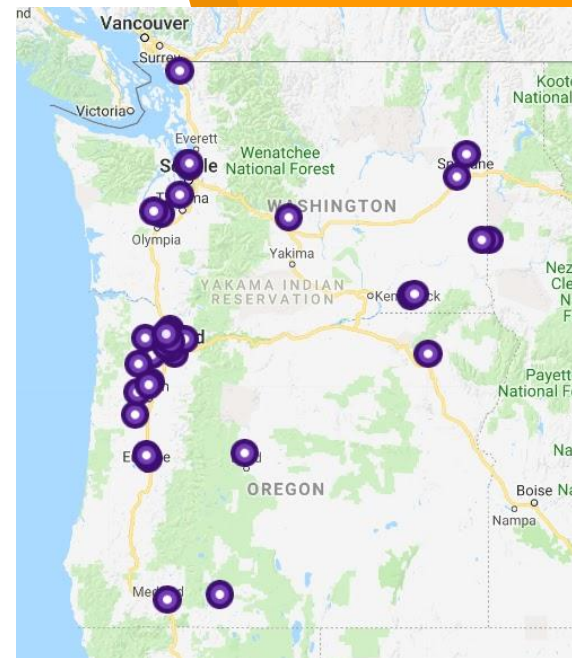
BACKGROUND INFORMATION



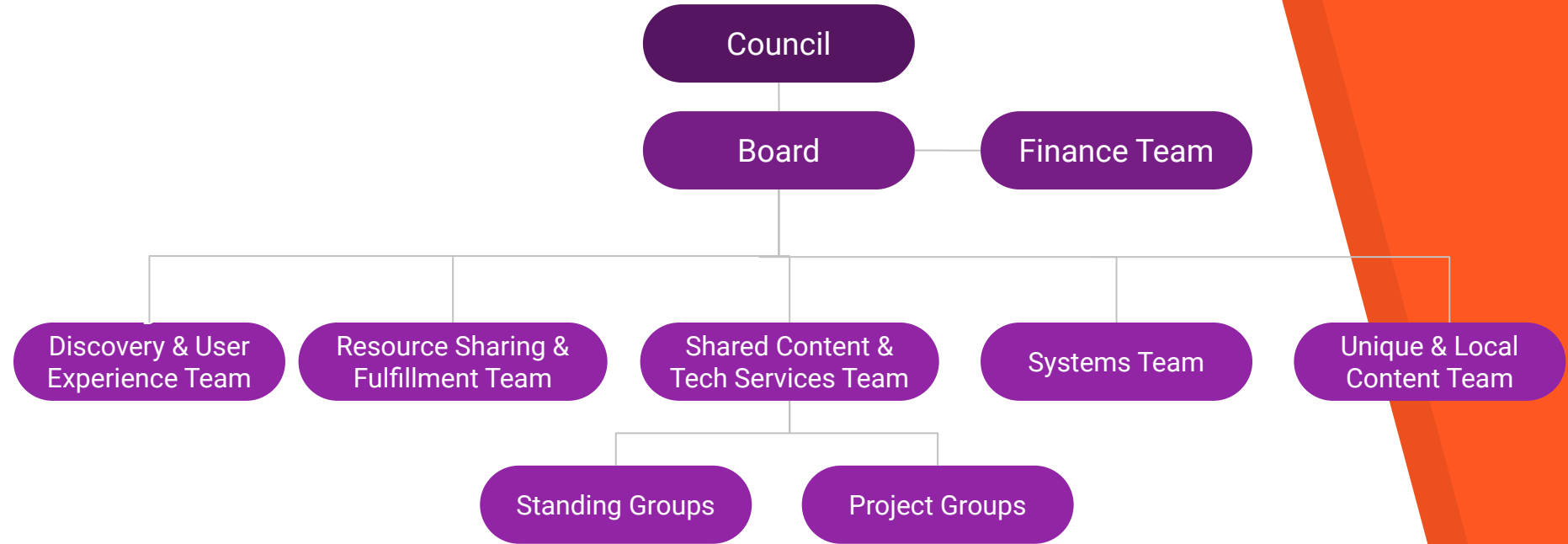
WHAT IS THE ORBIS CASCADE ALLIANCE?

- ▶ **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



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



Example: Coding Schema Used

Challenges	#	Strengths	#
Search function: Boosting/relevancy/ranking Inconsistent results Overwhelming searches/Metadata	31	Filters/facets/scopes	39
Article/E-Book linking/access	30	Cross disciplinary/search function/Ranking/efficiency/search term help	32
Books access/ Summit/ILL/WorldCat	25	citations /Save search/Save to list/email/print/permalinks/pin	29
Data & function Inconsistencies/Slowness/ Keeping up with Primo changes	24	Visual appeal/user friendly/local customizations (undergrad focus)	17
Known item searching/browse function	17	Book access/Summit/ILL/	11
Filters/Facets/Navigation	14	Browse/Virtual Browse/books/known item searching	7
Print holdings/ serials holdings	11	Find full text	5
citations /Save to list/email/print/permalinks	11	Advanced search	3
Boolean	9	Systemic reliability	3
Login/sign on/authentication	7		
Limit to location/	4		
Teaching/Libguides	3		<input type="checkbox"/>
Alma issues?	2		
Display issues	2		
Advanced Search	1		

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 facelift 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 unruly 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 searches 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.

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 acrobatics 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.

Challenges	Potential reasons	Fixes?
No good way to create a list of printable items from Primo results	Actions haven't been added to the results page but are available via the individual items.	This is on the roadmap currently. You can print your entire favorites list which can be just as helpful.
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 that list, and share it directly from the catalog. I'd like to make lists that include biblio info + local holdings call number, etc. Other ILSs 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/txt. Here is an example of an emailed record (note NO CALL NUMBER but a whole lot of irrelevant info): Example title from survey: WACK! : art and the feminist revolution		Enhancement request or idea exchange as sharing isn't a current option for lists.
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.	Could be before Zotero fix resolved the bigger issues with the two working together.	Fix came in March 11, 2018



Example: Executive Summary

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?

