Primo out of the box:
Making the box work for you

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What we’re talking about

• UQ context – community, library, collections
• Our Library Services Platform (LSP) – philosophy, management, maintenance
• OTB and non-OTB – why, when, how to change
• Lessons learned & tips and tricks
• Some examples throughout
UQ Community

77,927 USERS
18 ALMA USER GROUPS

- UQ Undergraduate, 41.98%
- UQ Research Student, 5.64%
- UQ Coursework Postgrads, 13.66%
- UQ Alumni, 1.27%
- UQ Associates, 0.12%
- UQ Coursework Postgrads, 13.66%
- UQ Academics & Research Staff, 20.79%
- Teaching Hospital Staff, 1.65%
- Secondary School Students, 0.81%
- Remote Undergrads, 0.50%
- Remote Research Student, 0.28%
- Library Staff, 0.34%
- ICTE Students, 1.68%
- Honorary (inc. Adjunct and Industry Fellow), 3.12%
- Fryer Visitor, 0.12%
- Community, 1.17%
- Awaiting Admission, 0.01%
- Academic Title Holder (Health), 5.40%
UQ Campuses and Library Locations

• Campuses
  – St Lucia (main), Gatton, Herston

• Libraries
  – St Lucia x 7, including BDM
  – Hospitals / Health x 3
  – Rural and research x 8
  – Gatton + Warehouse

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UQ Collections

<table>
<thead>
<tr>
<th>Alma</th>
<th>Titles</th>
<th>Inventory</th>
<th>Use in 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibs</td>
<td>2,321,230</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical</td>
<td>966,796</td>
<td>1,263,035</td>
<td>190,038 loans on 92,188 titles</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>33,353 requests on 19,008 titles</td>
</tr>
<tr>
<td>Electronic</td>
<td>1,354,844</td>
<td>1,439,130</td>
<td>6,335,375 Alma Link Resolver requests</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>5,729,491 through Primo / Primo Central</td>
</tr>
</tbody>
</table>

- UQ eSpace institutional repository
  - 35,276 in Primo from 18 piped collections
- Primo Central Index (PCI)
  - 2,053 activated collections
  - With more than 451 million full text and 941 million expanded

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Library Services Platform - Background

<table>
<thead>
<tr>
<th>UQ Library - LSP Inventory &amp; Discovery</th>
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<tbody>
<tr>
<td>• Up to 1996 - <strong>Innopac</strong></td>
</tr>
<tr>
<td>• 1996 - <strong>Millennium</strong> (III) introduced to replace Innopac</td>
</tr>
<tr>
<td>• 2008 - <strong>Encore</strong> (III) introduced as first discovery layer. Millennium OPAC and Encore discovery layer are both available to users as separate search options</td>
</tr>
<tr>
<td>• Start of 2010 - <strong>Summon</strong> (Proquest) introduced to replace Encore</td>
</tr>
<tr>
<td>• April 2014 - UL direction to Library Staff to promote discovery via Summon discovery layer, rather than Millennium OPAC</td>
</tr>
<tr>
<td>• Mid 2014 - Go Live with <strong>Summon 2.0</strong></td>
</tr>
<tr>
<td>• November 2014 - Rebranding from Summon to <strong>UQ Library Search</strong></td>
</tr>
<tr>
<td>• End 2015 - New LSP project initiated, to replace Millennium &amp; Summon, with <strong>Alma &amp; Primo</strong> (ExLibris) on the <strong>Classic UI</strong></td>
</tr>
<tr>
<td>• 27 June 2016 - Go Live with Alma &amp; Primo. Separate OPAC concept is no longer supported, with all discovery via Primo discovery layer, branded as UQ Library Search</td>
</tr>
<tr>
<td>• 18 April 2017 - <strong>New Primo UI</strong> is released to users for an extended 10 week beta release as a new tab on the Library homepage called ‘Try the new look’. Both Classic UI and New UI are being run in parallel, on the same view</td>
</tr>
<tr>
<td>• 26 June 2017 - Full Go Live with the New Primo UI, and retirement of the Classic UI</td>
</tr>
</tbody>
</table>
Administration & Engagement

- Information Systems and Resource Services
  - 2 admins: Resource Delivery and Physical Collections
  - 2 admins: Information Resources
  - 6 admins: Library Technology Service
  - 1 UX Analyst and Online Content Coordinator: Business & User Experience Analysis

- Collaborative decision-making via representatives from teams and services across the library
  - Alma Forum
  - AGDA – Action Group for Discovery and Access
  - CMG – Collection Management Group
  - AAWG – Alma Analytics Working Group

- Includes Idea Exchange, NERS, release evaluation & testing

- 27 staff with Alma Sandbox access
  - Premium Alma Sandbox and Standard Primo Sandbox

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LSP Core Philosophy

• Maintain OTB, unless strong use case, user feedback, or bug
• Focus on ‘core’ high use features like Basic Search and search refinement, rather than low use additional features such as Browse Search and My Account
• Stable and reliable discovery interface, with continuity and consistency of display and behaviour
• Quick and seamless resource access, with optimized and minimal user interactions
• 1st Back Office, 2nd SalesForce, 3rd In-house development
Yes!

- “UQ Library Search” with UQ stylesheet
  - 1 Blended search scope for local and PCI
  - One view with one tab
  - Our own prefilters
- In-built search enhancements
  - Basic Search, Advanced Search, Browse Search
  - Virtual Browse and Citation Trail
  - Autosuggest, Snippets, Silent Login
  - Controlled Vocabulary, Personalisation
  - Basically OTB features and functionality
- PCI management, with a focus on discovery
  - Proactive activation and reactive deactivation
UQ Library Search vs Primo Homepage
No!

- Journals A-Z
- Citation Linker
- Purchase Requests
- Main Menu
- EBSCO API
- Featured Results
- Collection Discovery
- Tags & Reviews
- Database Search (for now...)
- Newspaper Search (for now...)
- Resource Recommender (for now...)

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Dev work – Keeping it simple

• Tweaks in place
  – Facet locking icon
  – Some bumping down of user area for header
  – Minor design eg numbering placement and prominence and requesting buttons
  – Alma delivery skins

• Remove local code as soon as OTB code is available
  – User area static buttons
  – Hiding Tags

• UQ Stylesheet – customization package
  – UQ header, but no footer
  – Styling
  – Branding
  – Accessibility fixes

• UQ Library Search homepage
  – Prefilters
  – Browse Search, as no Main Menu
  – Advanced Search
  – Search help link in lieu of Primo homepage

A bit of a learning curve to the New UI in learning angular for the customization manager

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February 2017 – New UI Project

OTB hover behaviour issue
February 2017 – Local code for static display

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May 2017 Release – OTB buttons moved and new Search History icon
May 2017 Release – Button behaviour fixed but local code broken 😞
May 2017 Release – More dev work to fix the stacking issue
August 2017 Release

• Status quo – No OTB changes to user area login, and no broken local code
• But, we’re nervous now and spend time doing extra testing across several browsers to make sure all is well

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November 2017 Release – Sigh...broken again 😞

61UQ Sandbox view, with broken code:

DEV_LOGIN, with no local CSS is working:

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November 2017 Release – Back to OTB
February 2018 and May 2018 Releases

- Status quo – No changes to user area login, and no broken local code
- Area is stable on OTB, with no burden of extra local testing
Considering going non-OTB?

- What are the drivers for change? Are there good use cases?
- Current environment: How significant is the problem and how many users are affected? Who thinks it is a problem?
- Future: Will there be a significant improvement in search, behaviour, design for the majority of users?
- Resource investment: How much work is involved both initially and ongoing?
- In-product: Is there existing functionality we’re not using yet that might meet the need?
- Roadmap: Is it on the Roadmap? Can we wait?
- Feedback: Can we try to get it on the Roadmap?
- Finally, how do we measure a successful change?
  - Analytics?
  - User testing?
  - No user complaints?
  - Library staff are happy?

Quantitative AND Qualitative

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Environmental Scans

- Evidence of other sites who have felt the need to go non-OTB. We are not alone!
- Examples of implementation to copy and save time
- Examples to show local decision-makers, to help make their decision easier

Scans are pretty quick to do, but that does depend on how easy the feature is to check and how many sites you check.
Data analysis

Evidence-based practice

• Dedicating resources on the basis of demonstrated use
• My Account vs Big Ticket items

• Leads to:
  • No local dev work to fix various bugs
  • Submitting quick and relatively low effort Normal priority SalesForce cases, and no active follow up, many of which are still open in Development several months later
  • Some minor quick Back Office work only, for example adjusting some brief Loans display and removing some detailed Loans display

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Release Evaluation

- New features and changes
- Expected fixes
- Sneak preview notes
- Existing functionality list

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Local Customization – Open Access & Peer-reviewed journals

- Piggybacking on PCI OA facet and display icon and PCI Peer Reviewed display icon and facet, and Alma CZ MARC data
- Blending display and facet functionality for local and remote records, with just a few small changes:
  - Mapping Table, Norm Rule x 4, deploy, run the update pipe x 2, wait for overnight hotswap, testing, done
User Feedback

Most common comments
• Reducing clicks to full text content – fixed locally with New UI configuration options in Back Office
• Slow speed – improvements every release
• Refreshing tabs bug – not fixed at Go Live, but since resolved
• Authentication jumping reduction – New UI has improved loading over Classic UI, for better refresh behaviour

Mentioned several times
• Time out period too short – not fixed at Go Live, but since resolved
• Mobile display bugs – some issues fixed and some ongoing
• Non-sticky facets – not available at Go Live, but introduced in the August 2017 release, along with multiple facet selection
• Endnote RIS export bugs – some issues fixed and some ongoing
• Increase number of results – still an issue
• Search field type and operator not available in Basic Search – now available in May 2018 but not yet enabled
• Facets list placement – Some liked it on the left and some didn’t, mostly because it was different

Mentioned a couple of times
• Full Record overlay – still the same, but changes coming in August 2018 with pagination improvements
• Title wrapping bug – not fixed at Go Live, but fixed locally in Back Office, and now resolved
Feedback Avenues and Hit Rates

1. Knowledge Centre Feedback feature
2. ListServs
3. SalesForce & escalation
4. PWGs & ANZREG
5. Idea Exchange & NERS

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Troubleshooting Tips

Basics

• Clear your cache
• Keep up to date: releases, hotfixes, PCI cycle, scheduled jobs
• Dev tools in-browser
• Bookmarklets, addons, debugging
  – Custom, No Custom, Performance, Directives, OAI, New UI
    (including VE, Newspaper Search, RIS, Record ID, PNX)
• Local and PCI record hunting
  – 61uq_alma, 61uq_espace, tayfranc*, asp*summonwomen*
• Emails
  – Saved search alerts for new content
  – Scheduled Jobs
  – System Status
  – Local alerts eg xymon, big brother
  – Analytics dashboards

Config

• Keep the Classic UI active
• Untouched Prod view with no local customization
• Check Alma config & Primo config
• Sandbox sync’d to Production
• Link your Sandboxes
• Test in the Sandbox first
• If config is sound and all else fails
  – Sync again
  – Deploy again
  – Wait again for next hotswap
Lessons Learned

Documentation
- Take screenshots of everything
- Version control in system 😐 = do your own eg OTB & current, why you did it, and when
- When the guides don’t make sense: write your own version in your own words
- Monthly PCI checks trend analysis

Asking for help
- Do this before you get to crying stage
  - Local, Listservs, Feedback
- Check for published SalesForce cases
- Write up the SalesForce case to help spot the problem
- Submit a good SalesForce case
  - Expected vs unexpected behaviour
  - Evidence of issue
  - 1 case = 1 problem
- Know when to cut your losses
More?

• 1\textsuperscript{st} preference
  – ListServs – Let’s help the lurkers too

• 2\textsuperscript{nd} preference
  – s.vangroll@library.uq.edu.au