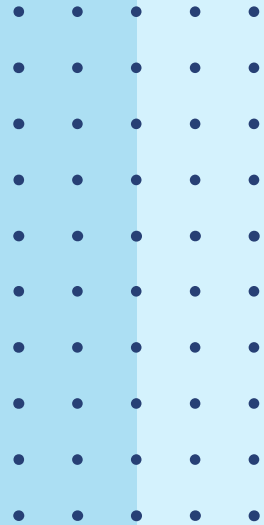
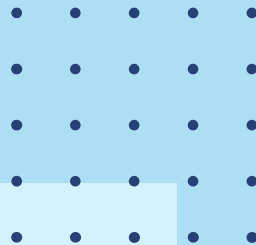


Primo VE Usability: Perspectives on Pain Points

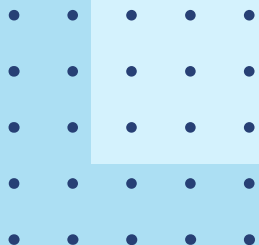
CARLI Discovery Primo VE Committee
July 11, 2023



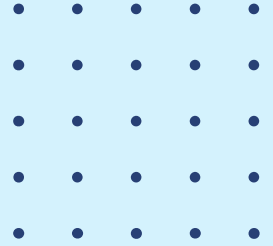
Our Plan for Today



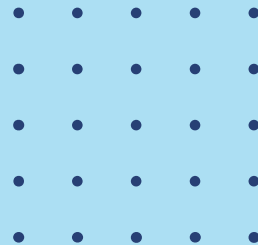
- Three pain points identified by usability testing:
 - Lack of awareness/clarity regarding search targets
 - Lack of clarity regarding availability of individual items
 - Lack of clarity regarding saving/sending options
- We want to hear from you! Add to our [Padlet](#) and/or take the mic!
- As we discuss pain points, we'll provide documentation for solutions



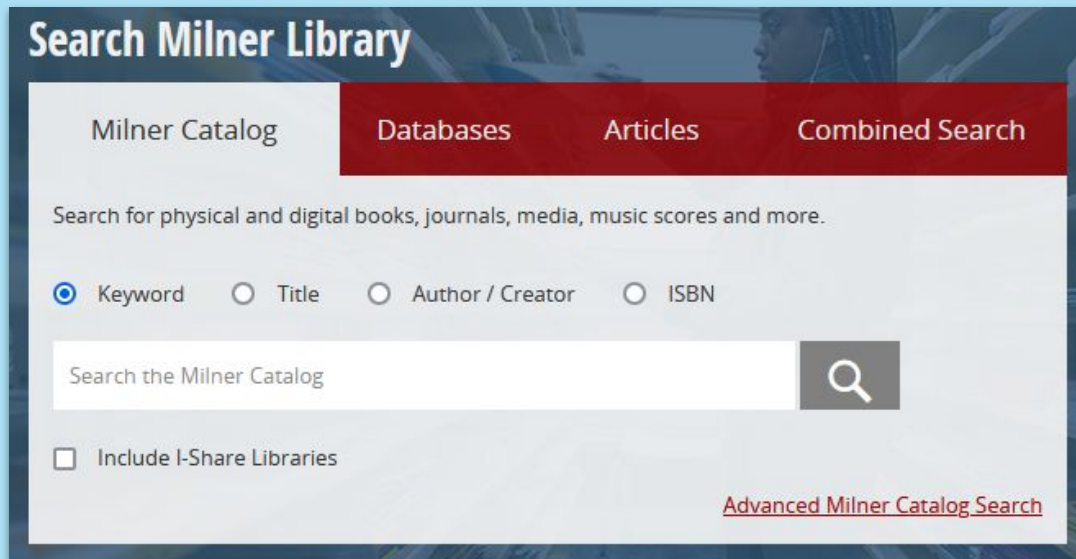
**#1: Lack of
awareness/clarity
regarding search
slots**



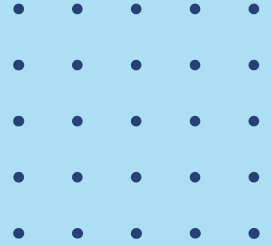
Background



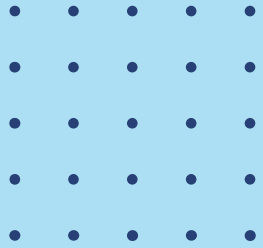
- Two rounds of usability testing (Summer 2021, Spring 2022)
- Most users started with the default “Milner Catalog” tab for all searches
- Second round: Explicitly asked participants to explain the difference between each tab



Findings

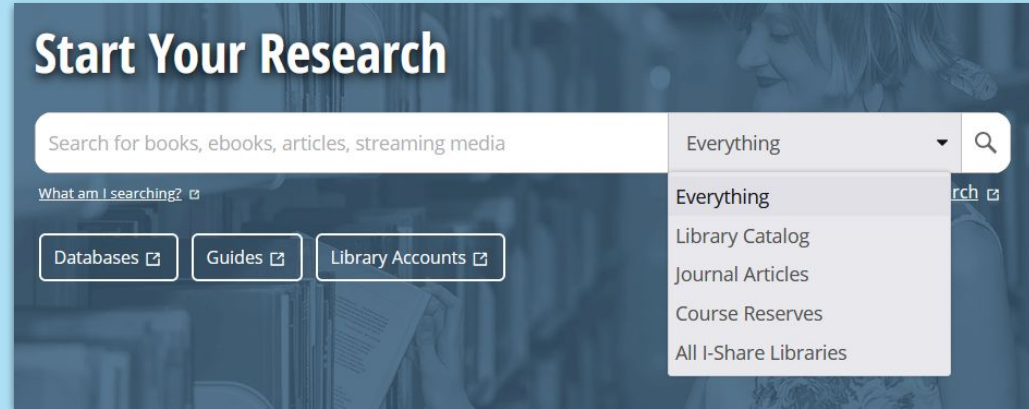


- Participants struggled to define “Combined Search”
 - Only 1/16 correctly defined the target
 - 25% assumed it included materials from other libraries (outside I-Share)
- 75% indicated that they did not use all search tabs
- Users noticed “Articles” search included other item types
- Several users assumed “Milner Catalog” was the largest target
 - “If I were looking at these for the first time, I’d think Milner Catalog was everything Milner has access to”
 - “Milner Catalog is anything ISU has access to, online or in the library”

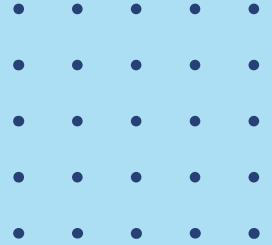


Solutions

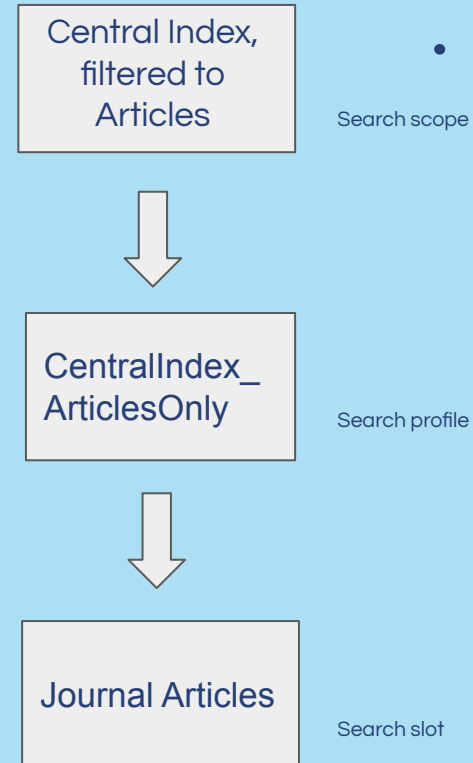
- Updated search box
- Relabeled **Combined Search** to **Everything** and expanded target to include I-Share
- Made **Everything** the default instead of **Library Catalog**
- Relabeled **Articles** to **Journal Articles** and limited CDI scope



Search Scopes, Profiles, Slots

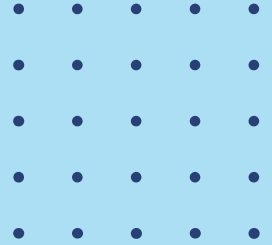


- **Scope:** A set of records from one source (e.g., CDI records or the library catalog)
 - Can be filtered to fit specific criteria (e.g., specific locations or resource types)
- **Profile:** A combination of one or more scopes to searched together
- **Slot:** A combination of one or more search profiles. This is what the end user sees, and is configured under “Search Profile Slots” in View Configuration



Where are these managed?

- **Scopes & Profiles:** *Configuration > Discovery > Search*
Configuration > Search Profiles
- **Profile Slots:** *Configuration > Discovery > Display*
Configuration > Configure Views





**Let's look in the
browser...**



Solution Documentation

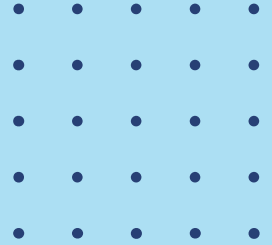
CARLI Documentation

- [Add I-Share Results to "Everything" Search](#)
- [Primo VE Customizations: View Configuration Tabs](#)


Ex Libris Documentation

- [Configuring Search Profiles for Primo VE](#)
- [Search Scopes and Profiles \(Video\)](#)

Approaches at Other Institutions



Bradley University

BU Books and More
All I-Share Libraries
Course Reserves
Articles
Almost Everything 

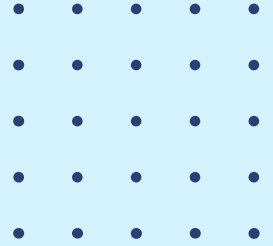
UIC

UIC Catalog & Articles
UIC Catalog only
All I-Share Libraries
Course Reserves

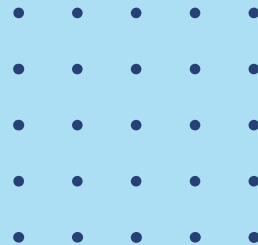
SIU

Morris Library Catalog
All I-Share Libraries
Almost Everything (Library Catalog & Articles)
Articles
eBooks
Special Collections
Course Reserves

**#2: Lack of clarity
regarding
availability of items**



Background



Tasks:

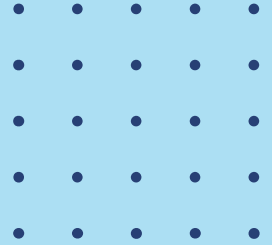
- 1) You are looking for the book “Why We Sleep: Unlocking the Power of Sleep and Dreams.”
 - a) Does the library have a copy?
 - b) How do you know?
 - c) Is it available for check out?
 - d) If you really need it, how would you get it?

Results:

Tasks a - c: 100% completion rate, short time on tasks

Task d: 80% completion, “minor issue” to “strong suggestion”

Findings



- Availability of items in home library fairly clear; availability of I-Share items much less so

BOOK
Why we sleep : unlocking the power of sleep and dreams
Walker, Matthew P., author.
2017
 Not Available
 [Book reviews \(2\)](#)

LOCATION ITEMS
Cullom-Davis Library, Bradley University
Out of library , General Collection - Basement ; QP425 .W44 2017
(1 copy, 0 available, 0 requests)
On loan until 04/21/2023 17:00:00 CDT
Loanable

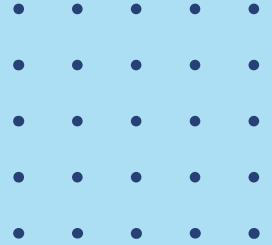
Not Available - Out of library - On loan

Illinois State University (ISU) —Normal, IL
Available in Institution

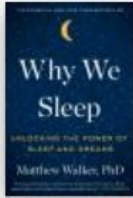
LOCATION ITEMS
Milner Library
Out of library , Floor 5 Shelves ; QP425 .W44 2017
(1 copy, 0 available, 0 requests)
On loan until 03/06/2023 23:59:00 CST
Loanable

Available in Institution - Out of library - On loan

Solutions



1



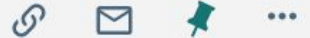
BOOK

Why we sleep : unlocking the power of sleep and dreams

Walker, Matthew P., author.

2017

 No available copies at Cullom-Davis Library - Check here for for availability in I-Share Libraries >



Illinois State University (ISU) —Normal, IL

Owned by this institution

Changed to [what we consider] more accurate labeling with more explanation. Second round of testing will confirm if it's clearer to users or not.

They also don't understand what I-Share is or how to use it - but that's a different issue.

Solution Process

- **Determine the Label's Code**

BOOK
Magill's literary annual, 2009 : essay-reviews of 200 outstan
United States during 2008, with an annotated list of titles
Wilson, John D.; Kellman, Steven G., 1947-
c2009
Includes bibliographical references.

1 → **Check for available services**

BOOK
Debris : stories
Hardcastle, Kevin, 1980- author.
2015

→ **Check for available services**


- Back
- Forward
- Reload
- Bookmark Page...
- Save Page As...
- Save Page to Pocket
- Select All
- Take Screenshot
- View Page Source
- Inspect Accessibility Properties
- Inspect**

2 →

Solution Process

- **Determine the Label's Code**

```
▶ <span id="alma991078042749705816titleForAccessibilityAvailabilityLine0"  
  class="accessible-only">...</span>  
▼ <span id="alma991078042749705816availabilityLine0" class="button-content">  
  <span class="availability-status no_inventory " ng-style=":::$ctrl.getNgrsStyle()"  
    ng_class="::!{!text-rtl: $ctrl.switchToLtrString()}"  
    translate="delivery.code.no_inventory" translate-  
    values=":::$ctrl.getPlaceholders($ctrl.result)" translate-compile="">  
    Check for available services</span>  
  <!-->  
  whitespace  
  <!-->
```



3

"delivery.code.no_inventory"

Solution Process

2. Go to Alma Labels Configuration

Discovery > Display Configuration > Labels

Solution Process

3. Find the Code Table

Search for Labels **1.** Language **2.**

Solution Process

4. Customize the Table & Find the Code

Table Name	Sub System	Description	Updated By	Customized	Patron Facing	
1 Calculated Availability Text Labels	Discovery UI Labels	Contains code tables of Calculated Availability Text	-		✓	⋮

A red arrow points to the 'Customize' option in the dropdown menu that appears when clicking the three dots icon in the 'Patron Facing' column.

Browse or search (CTRL + F) label code name

Solution Process

5. Update the Label



Then click the “Customize” button at the top of the page

Solution Process

6. Check Your Results

2



BOOK

Magill's literary annual, 2009 : essay-reviews of 200 outstanding books published in the United States during 2008, with an annotated list of titles

Wilson, John D.; Kellman, Steven G., 1947-
c2009

Includes bibliographical references.

 **No available copies at COD - Check here for copies at I-Share libraries >**

Solution Documentation

CARLI Documentation

- [Customizing Primo VE Labels](#)
- [Example of Labels that I-Share Institutions Have Changed](#)
- [How to Determine a Label's Code Using Your Web Browser](#)

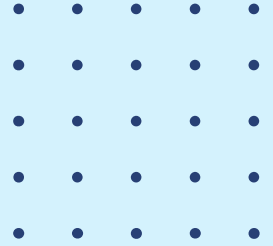
ExLibris Documentation

- [Configuring Display Labels for Primo VE](#)

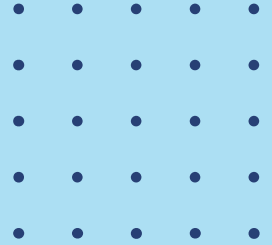
Labeling Choices

Default Text	Bradley	College of DuPage	ISU
Available Online	Available Online	Available Online	Available Online
No Online Access	No Online Access	No Online Access	Check If Available
Available in institution	Owned by this institution	Available in institution	Owned by institution
Not Available	No available copies at Cullom-Davis Library - Check here for availability in I-Share Libraries	No available copies at COD - Check here for copies at I-Share Libraries	<i>Enabled "broaden_availability_status" in Customer Settings</i>

#3: Lack of clarity regarding sending/saving options



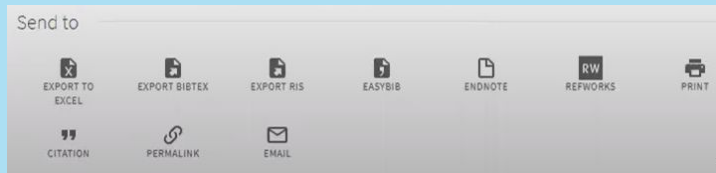
Background & Findings




Task (after locating an article): How would you save this article if you wanted to come back to it later?





Expectations

Experience



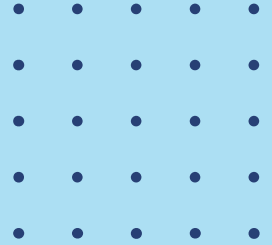
Everybody got there, but...

1  BOOK
Why we sleep : unlocking the power of sleep and dreams
Walker, Matthew P., author.
2017

!!! No available copies at Cullom-Davis Library - Check here for for availability in I-Share Libraries >

Solutions



Action	Usage, Last 6 Mo.
Citation	906
E-Mail	163
Permalink	149
Print	109
Excel	102
EasyBib	37
BibTeX	27
RIS	26
RefWorks	19
EndNote	10

Configure Views -> Brief Record Display

Record Actions			
	Active	Code	Description
1	<input checked="" type="checkbox"/>	e-shelf	Add/Remove record to Favorites
2	<input checked="" type="checkbox"/>	EndNote	Push record to EndNote
3	<input checked="" type="checkbox"/>	RefWorks	Push record to RefWorks
4	<input checked="" type="checkbox"/>	RISPushTo	Create RIS export
5	<input checked="" type="checkbox"/>	BibTeXPushTo	Push record to Bibtex
6	<input checked="" type="checkbox"/>	EasyBib	Push record to EasyBib
7	<input checked="" type="checkbox"/>	Excel	Push record to Excel
8	<input checked="" type="checkbox"/>	Print	Print the record
9	<input checked="" type="checkbox"/>	Permalink	Create a Permalink for the record
1...	<input checked="" type="checkbox"/>	E-mail	Send record via Email
1...	<input checked="" type="checkbox"/>	Citation	Create a citation for the record



Save and Send

Solution Process

Configure views > [Edit view] > Brief Record Display > Record Actions

Solution Process

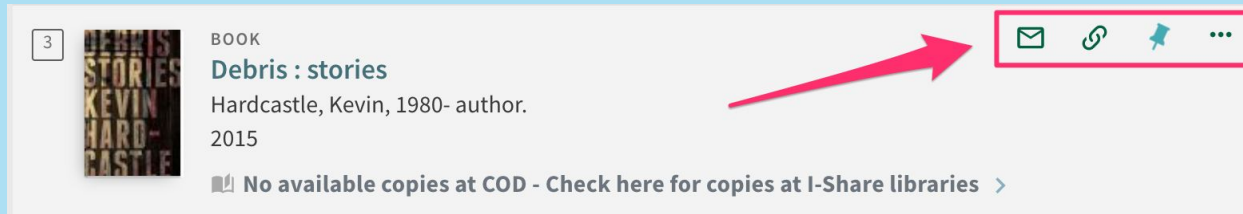
Record Actions

Restore  

	1.	Active	Code	Description	2.	3.
1	<input type="checkbox"/>	<input type="checkbox"/>	e-shelf	Add/Remove record to Favorites	<input checked="" type="checkbox"/>	
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Permalink	Create a Permalink for the record	<input checked="" type="checkbox"/>	<input type="text"/>
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	E-mail	Send record via Email	<input checked="" type="checkbox"/>	<input type="text"/> <input type="text"/>
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	QR	QR	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Print	Print the record	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Citation	Create a citation for the record	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EasyBib	Push record to EasyBib	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EndNote	Push record to EndNote	<input type="checkbox"/>	<input type="text"/> <input type="text"/>
9	<input type="checkbox"/>	<input type="checkbox"/>	RefWorks	Push record to RefWorks	<input type="checkbox"/>	<input type="text"/> <input type="text"/>

Solution Process

1. Activate or deactivate services
2. Choose up to three “up front services”



3. Change order of services
(In the configuration top to bottom translates to right to left in the interface)
4. Changes will autosave

Solution Documentation

CARLI Documentation

- [Brief Records Display Tab](#)
- [Primo VE Analytics 101](#)

ExLibris Documentation

- [Configuring the Brief Record Display](#)



Thank you!

**Slides + documentation
available on CARLI's site**

