Welcome to the webinar!

**Know Before You Go (Live): Advice for Creating Primo VE User Guides**
Krista Bowers Sharpe, Western Illinois University
Christina Norton, Bradley University
Dee Anna Phares, Northern Illinois University

- Your microphones are muted. Please turn off your video.
- Most questions will be answered after each presentation.
- Please type any questions into the chat box. Planning committee members are monitoring the chat.
- This session will be recorded and made available on the CARLI website.
User Guides & Tutorials Joint Subcommittee Members

Krista Bowers Sharpe, Western Illinois University (Public Services Committee)
Amy Hall, National-Louis University (Instruction Committee)
Molly Mansfield, Dominican University (Instruction Committee)
Christina Norton, Bradley University (Instruction Committee)
Nestor Osorio, Northern Illinois University (Public Services Committee)
Dee Anna Phares, Northern Illinois University (Instruction Committee)
Elizabeth Sterner, Governors State University (Public Services Committee)

With lots of help from CARLI Staff!
Ways to approach guide creation for Primo VE

Content covered

Delivery format used

Knowledge of Primo VE

LibGuides

Tutorials

Space in Primo VE
Content approach: Skills Necessary for Go-Live Date

• Basic searching
• Advanced searching
• Filtering results
• Brief results screen
• Full display screen
• How to get stuff in results lists: physical or electronic
• Paging Through Search Results
• My Library Card
• What is a discovery layer?

Selected and adapted from Ex Libris End User Guide page:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help?v=3
Existing Primo VE Help Online

Why didn’t we find more?

– It’s new
– Monthly updates
– A whole new beast

**Finding Current Resources**

There are two ways to find more current resources.

You can use the publication date filter and adjust the from date and click on refine.

<table>
<thead>
<tr>
<th>Publication Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>From 2010 to 2019</td>
</tr>
</tbody>
</table>

You can also scroll down to find the recently added box and make a selection.

<table>
<thead>
<tr>
<th>Recently Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>New From Last Month (14)</td>
</tr>
<tr>
<td>New From Last 3 Months (23)</td>
</tr>
</tbody>
</table>
# Delivery format approach: Where do you explain what?

<table>
<thead>
<tr>
<th></th>
<th>LibGuides</th>
<th>Video Tutorials</th>
<th>Primo VE Landing Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content</strong></td>
<td>Various skills and aspects of Primo VE</td>
<td>Features not as likely to change</td>
<td>➤“What is this?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>➤Links to guides, etc.</td>
</tr>
<tr>
<td><strong>Graphics</strong></td>
<td>Use good graphical representation rules</td>
<td></td>
<td>➤Use good graphical representation rules</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>➤Make mobile-friendly</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Easiest to update, but still consider monthly updates</td>
<td>Harder to change, so limit to basics</td>
<td>Discuss feasibility of updates with your Primo VE admin</td>
</tr>
</tbody>
</table>
We wanted tutorials to use as models

What did we find?

— Alma tutorials
— Ex Libris Knowledge Center
— Monthly updates make them impractical
Monthly updates are both an advantage and a challenge

- Requires vigilance and flexibility
- Think small, bite-sized bits
- Consider LibGuides or other research guides instead of tutorials
Since the landing page is the first thing patrons will see, it is important to provide information and guidance.
• Users need to have basic questions answered
• They need to know where to go when they have further questions
Conceptual Graphics:
• Convey an idea or concept visually
• Tips for conceptual graphics:
  • Keep them simple
  • Add text outside the graphic

Procedural graphics:
• Show a step-by-step, technical process, usually in the form of screenshots
• Tips for good screenshots:
  • Include an appropriate amount of visual information
  • Be aware of contrast when annotating
  • Keep track of screenshots and update them when necessary
AN EXAMPLE OF A GRAPHIC THAT NEEDS WORK

- Has a lot of text
- Circles aren’t labeled
- Just an overwhelming amount of info in general
Minimal text within the graphic  ● Clarifying text included outside to avoid crowding
Explaining how to search, so only shows the search bar. Annotations (arrows) are high-contrast.
Please type your questions into the chat box.

This session has been recorded and will soon be available on the CARLI website.

Next session:
Usability Basics: Test With Your Users

will begin at 2:30 PM