

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

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www.library.uq.edu.au



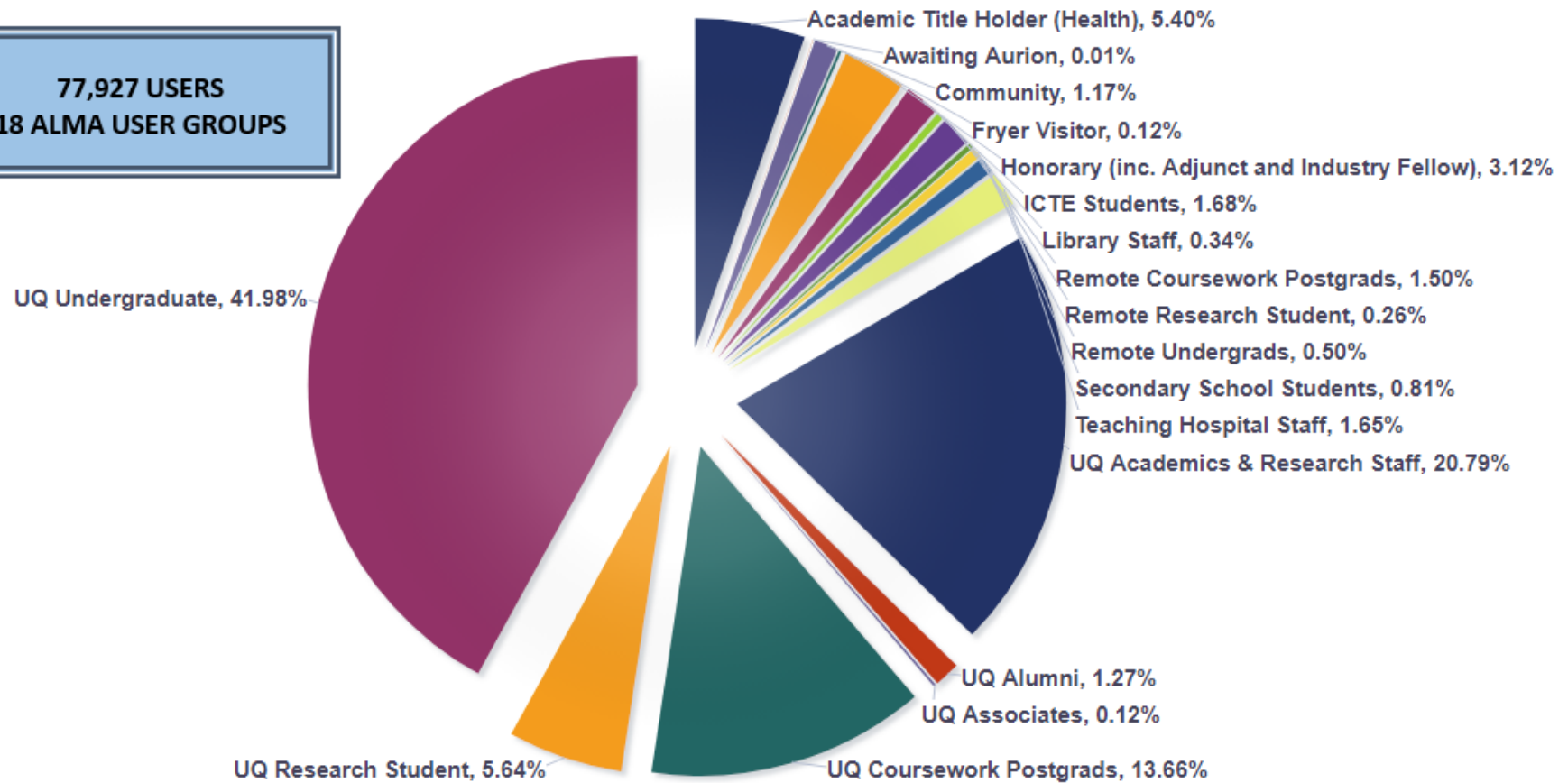
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What we're talking about

- 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 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

HOURS	COMPUTERS	TRAINING
Arch Music	8am - 6pm	
AskUs	8am - 6pm	
Biol Sci	Open 24 hours	
Bundaberg	8:45am - 4:45pm	
DHEngSci	8am - 6pm	
Duhig Study	Open 24 hours	
Fryer	10am - 4pm	
Gatton	8:30am - 6pm	
GradEcoBus	Open 24 hours	
Herston	8am - 5pm	
HerveyBay	8:30am - 4:30pm	
Law	8am - 6pm	
Mater	8am - 5pm	
PACE	8am - 5pm	
Rockhampton	8:30am - 4:30pm	
SSAH	8am - 6pm	
Toowoomba	8:30am - 4:30pm	

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UQ Collections

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

- 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

UQ Library - LSP Inventory & Discovery

- Up to 1996 - **Innopac**
- 1996 - **Millennium** (III) introduced to replace Innopac
- 2008 - **Encore** (III) introduced as first discovery layer. Millennium OPAC and Encore discovery layer are both available to users as separate search options
- Start of 2010 - **Summon** (Proquest) introduced to replace Encore
- April 2014 - UL direction to Library Staff to promote discovery via Summon discovery layer, rather than Millennium OPAC
- Mid 2014 - Go Live with **Summon 2.0**
- November 2014 - Rebranding from Summon to **UQ Library Search**
- End 2015 - New LSP project initiated, to replace Millennium & Summon, with **Alma & Primo** (ExLibris) on the **Classic UI**
- 27 June 2016 - Go Live with Alma & Primo. Separate OPAC concept is no longer supported, with all discovery via Primo discovery layer, branded as UQ Library Search
- 18 April 2017 - **New Primo UI** 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
- 26 June 2017 - Full Go Live with the New Primo UI, and retirement of the Classic UI

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



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UQ Library Search vs Primo Homepage


THE UNIVERSITY OF QUEENSLAND AUSTRALIA | **UQ Library**

[UQ HOME](#) [CONTACTS](#) [STUDY](#) [MAPS](#) [NEWS](#) [EVENTS](#) [JOBS](#) [GIVE NOW](#) [MY.UQ](#)

[SITE SEARCH](#) [ASK US](#) [LOG IN](#)


- Library services ▾
- Research tools & techniques ▾
- Collections ▾
- Borrowing & requesting ▾
- Locations & hours ▾
- About ▾
- Contact us

UQ Library Search

[SEARCH HELP](#) [BROWSE SEARCH](#) [ADVANCED SEARCH](#)

HOURS	COMPUTERS	TRAINING
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FIND YOURSELF in the **UQ Library**



LIBRARY & INFORMATION WEEK
 21-27 MAY • #LIW2018

- Library
- Books
- Journal articles
- Video & audio
- Journals
- Physical items
- Databases
- Past exam papers
- Course reading lists

2017 Searches	Pre-filter action
1,878,966	excludes Newspaper Articles and Reviews (default)
63,288	includes Books
151,262	includes Journal Articles
8,300	includes Video & Audio
92,596	includes Journals, via Advanced Search on Title
2,559	includes Physical Items, by delcategory Alma-P top level facet
170,730	not Primo - searches our own Database Gateway
150,251	not Primo - searches our own Exam Papers interface
38,146	not Primo - searches Talis

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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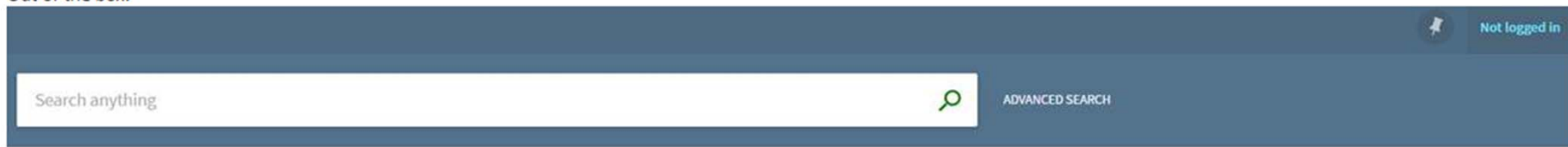


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February 2017 – New UI Project

OTB hover behaviour issue

Out of the box:



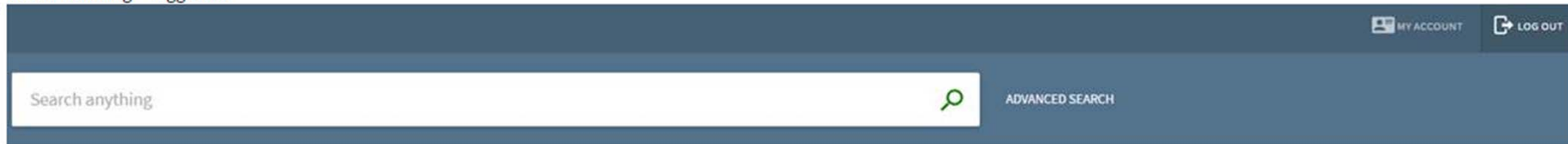
When hovering – not logged in



After logged in



When hovering – logged in



February 2017 – Local code for static display

Customised static links – not logged in

The screenshot shows the top navigation bar of the UQ Library website. The background is a dark purple color. On the left, there is the University of Queensland Australia logo and the text 'THE UNIVERSITY OF QUEENSLAND AUSTRALIA' and 'UQ Library'. On the right, there is a navigation menu with links: 'UQ HOME', 'CONTACTS', 'STUDY', 'MAPS', 'NEWS', 'EVENTS', 'JOBS', 'GIVE NOW', and 'MY.UQ'. Below the navigation menu, there is a white search bar with the placeholder text 'Search anything' and a blue search button with a magnifying glass icon. To the right of the search bar, there is a link for 'ADVANCED SEARCH'. In the top right corner, there is a white 'ASK US' button with a speech bubble icon. In the bottom right corner, there is a 'LOG IN' button with a person icon.

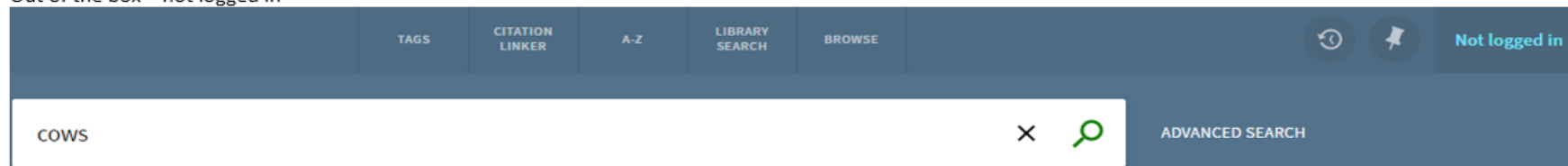
Customised static links – logged in

The screenshot shows the top navigation bar of the UQ Library website for a user who is logged in. The background is a dark purple color. On the left, there is the University of Queensland Australia logo and the text 'THE UNIVERSITY OF QUEENSLAND AUSTRALIA' and 'UQ Library'. On the right, there is a navigation menu with links: 'UQ HOME', 'CONTACTS', 'STUDY', 'MAPS', 'NEWS', 'EVENTS', 'JOBS', 'GIVE NOW', and 'MY.UQ'. Below the navigation menu, there is a white search bar with the placeholder text 'Search anything' and a blue search button with a magnifying glass icon. To the right of the search bar, there is a link for 'ADVANCED SEARCH'. In the top right corner, there is a white 'ASK US' button with a speech bubble icon. In the bottom right corner, there is a user profile section showing the name 'VAN GROLL, Stacey' with a person icon, a 'MY ACCOUNT' button with a person icon, and a 'LOG OUT' button with a person icon.

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May 2017 Release – OTB buttons moved and new Search History icon

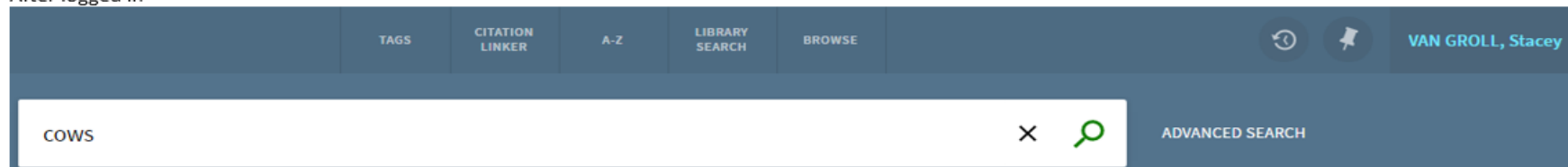
Out of the box – not logged in



When hovering – not logged in



After logged in

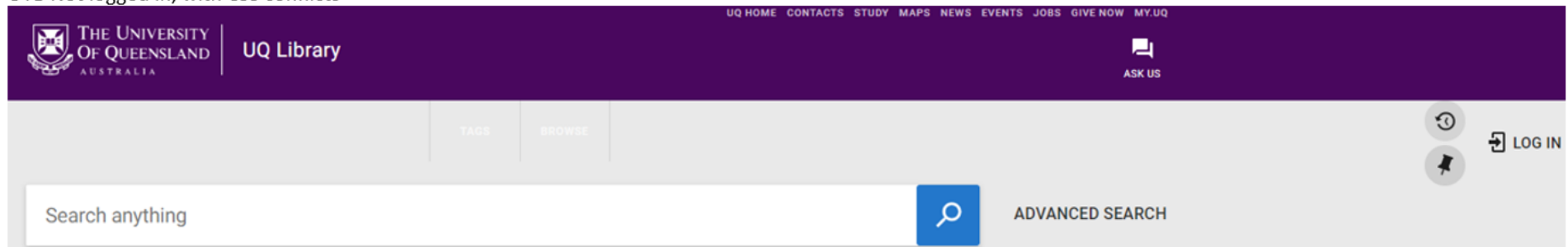


When hovering – logged in



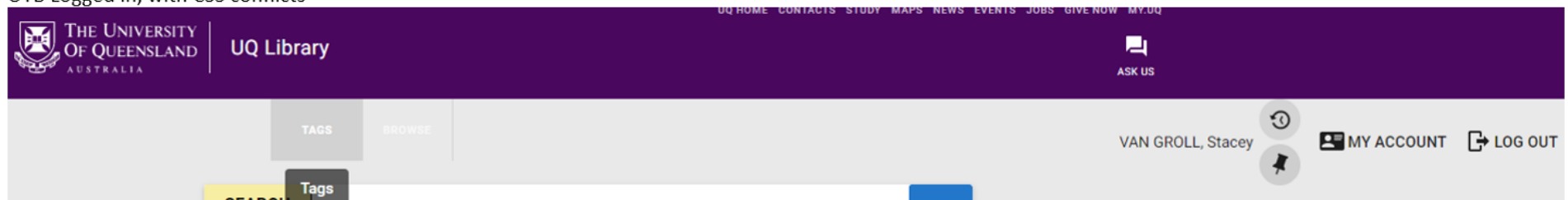
May 2017 Release – Button behaviour fixed but local code broken 😞

OTB Not logged in, with CSS conflicts



The screenshot shows the top navigation bar of the UQ Library website. The header is purple with the University of Queensland logo and 'UQ Library' text on the left. On the right, there is an 'ASK US' button. Below the header, there are navigation tabs for 'TAGS' and 'BROWSE'. A search bar contains the text 'Search anything' and a magnifying glass icon, followed by an 'ADVANCED SEARCH' button. On the far right, there are icons for a refresh button, a notification bell, and a 'LOG IN' button.

OTB Logged in, with CSS conflicts



The screenshot shows the top navigation bar of the UQ Library website when a user is logged in. The header is purple with the University of Queensland logo and 'UQ Library' text on the left. On the right, there is an 'ASK US' button. Below the header, there are navigation tabs for 'TAGS' and 'BROWSE'. A search bar contains the text 'Tags' and a magnifying glass icon, followed by a blue button. On the far right, there is a user profile for 'VAN GROLL, Stacey' with a refresh icon, a 'MY ACCOUNT' button, and a 'LOG OUT' button.

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May 2017 Release – More dev work to fix the stacking issue

The image displays two screenshots of the UQ Library website's search interface, illustrating a change in the user interface. Both screenshots show a search bar with the text "COWS" and a search button labeled "ADVANCED SEARCH".

The top screenshot shows the navigation menu with the following items: UQ HOME, CONTACTS, STUDY, MAPS, NEWS, EVENTS, JOBS, GIVE NOW, MY.UQ. The user is logged out, and the "LOG IN" button is visible. The "ASK US" button is also present.

The bottom screenshot shows the navigation menu with the following items: UQ HOME, CONTACTS, STUDY, MAPS, NEWS, EVENTS, JOBS, GIVE NOW, MY.UQ. The user is logged in as "VAN GROLL, Stacey", and the "LOG OUT" button is visible. The "ASK US" button is also present.

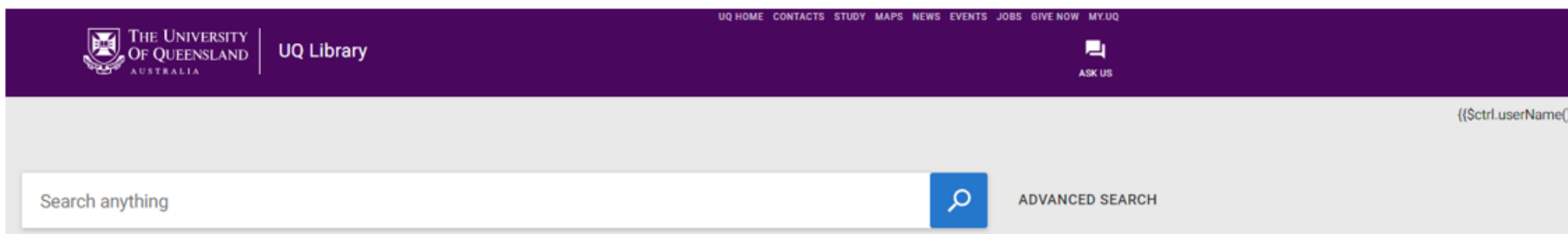
August 2017 Release

- 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

November 2017 Release – Sigh...broken again ☹️

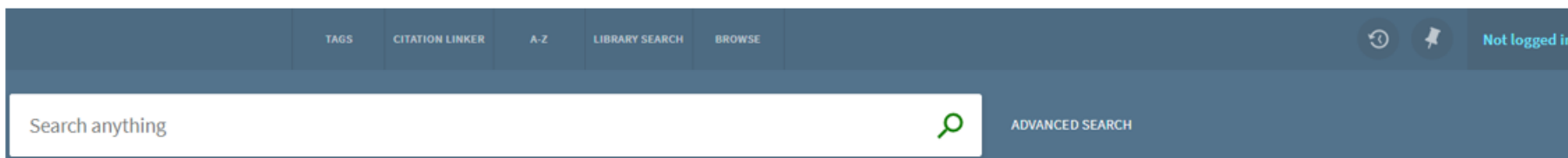
61UQ Sandbox view, with broken code:

<https://uq-edu-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=61UQ&sortby=rank>



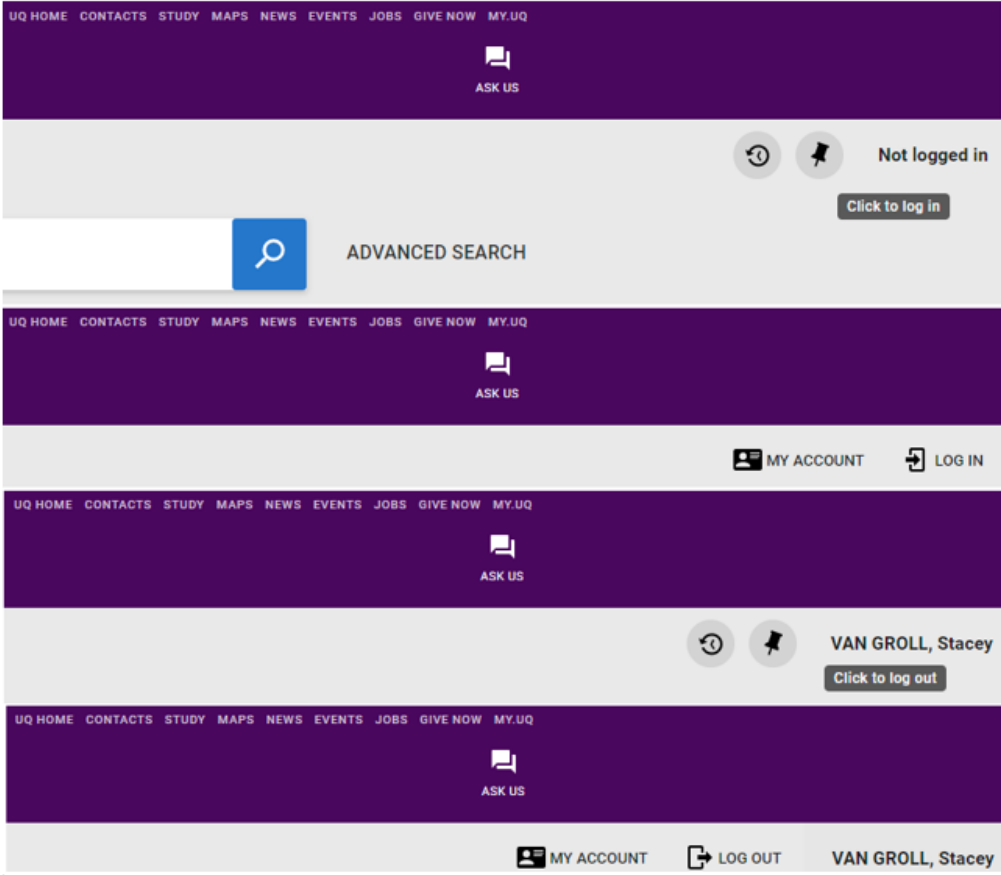
DEV_LOGIN, with no local CSS is working:

https://uq-edu-primo-sb.hosted.exlibrisgroup.com/primo-explore/search?vid=61UQ_DEV_LOGIN&sortby=rank



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November 2017 Release – Back to OTB



February 2018 and May 2018 Releases

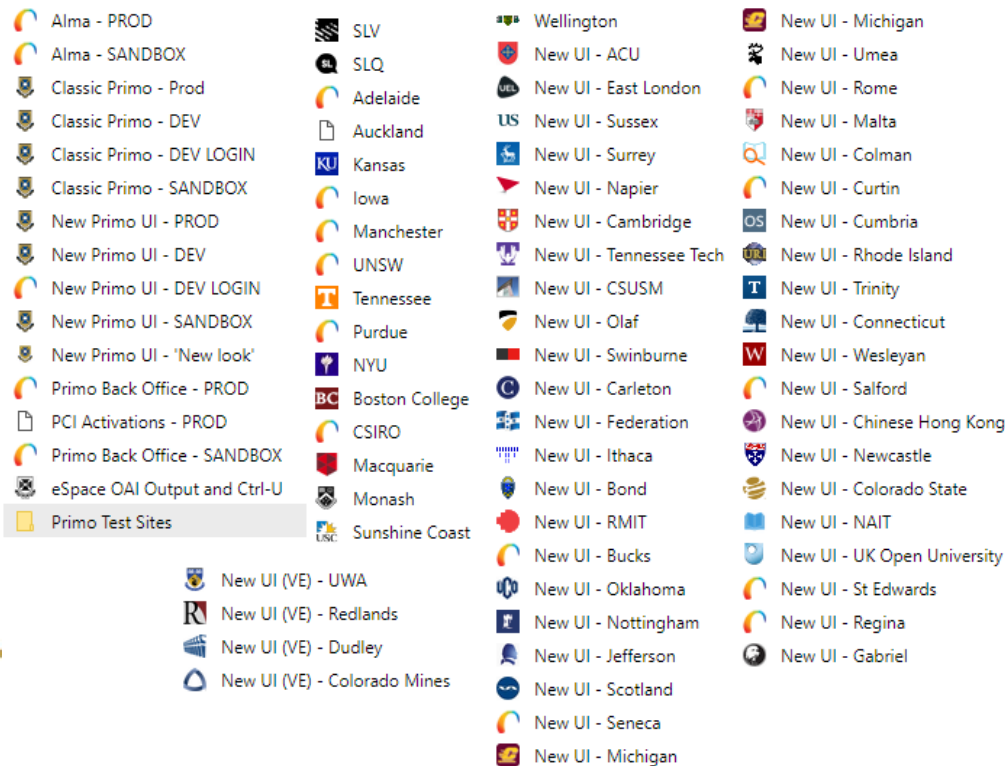
- Status quo – No changes to user area login, and no broken local code
- Area is stable on OTB, with no burden of extra local testing

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
• • •

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

	Classic UI	New UI	Total 2017
Go to My Account	7,205	15,486	22,691
Classic UI - My Account - My Library	8,231		8,231
New UI - My Account - Overview		36,326	36,326
New UI - My Account - Loans	663	21,387	22,050
New UI - My Account - Requests	3,140	9,544	12,684
New UI - My Account - Fines & Fees	686	4,943	5,629
New UI - My Account - Blocks & Messages	226	3,423	3,649
New UI - My Account - Personal Settings	305	203	508

	Classic UI	New UI	Total 2017
Basic Search	2,730,945	2,950,954	5,681,899
Advanced Search	209,306	228,573	437,879
Classic UI Get It Link 1	1,301,319		1,301,319
Classic UI Title	2,232,046		2,232,046
Classic UI Details Tab	388,631		388,631
New UI Availability Statement		1,038,588	1,038,588
New UI Full Record	1,498	2,848,597	2,850,095
Facet filtering	2,528,954	371,506	2,900,460
Next page	274,079	585,886	859,965

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Release Evaluation

- New features and changes

Decision notes

❓ Decisions to be made: Do we want to change any labels, and label local resources if possible?

+ Recommendation: Leave labels as is and merge.

★ AGDA decision: Recommendations accepted in meeting of 27.4.18 SvG

★ Work to be done: No label changes. Check our local records for both Alma & eSpace and change local configuration so that these are also included in this facet. IR Team manages activation of PCI collections as 'business as usual', so this aspect is covered

- Expected fixes
- Sneak preview notes
- Existing functionality list

Pages / ... / Primo - Configuration

✎ Edit

☆ Save for later

👁 Watching

🔗 Share

⋮



Primo - Release Checklist Template

Created by Stacey van Groll, last modified on Apr 17, 2018



- These Release Checklists have been used from the May 2017 release, as implemented as part of the Primo New UI Project
- The latest template is copied and updated for the upcoming release by [@Stacey van Groll](#), when the release notes are available
- Be aware that these Checklists are a moment in time in the two week period between Sandbox release and Production - check [Alma & Primo - Known Issues](#) for ongoing updates

Checklists to date

- 2017 August - Primo Release Checklist
- 2017 May - Primo Release Checklist
- 2017 November - Primo Release Checklist
- 2018 February - Primo Release Checklist
- 2018 May - Primo Release Checklist

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

The screenshot displays a search interface for a library. At the top, a search bar contains the text "61uq_alma" and a magnifying glass icon. To the right of the search bar is a button labeled "ADVANCED SEARCH". Below the search bar, there are options for "PAGE 1", "Save search or create alert", and a toggle for "Personalise".

The main search result is for a journal: "Lambung Mangkurat law journal." It includes a book icon, the text "JOURNAL", and two status icons: "PEER REVIEWED" and "OPEN ACCESS". Below the journal title, there is a link that says "Available online >".

On the right side of the interface, there is a section titled "Active filters" which lists three filters: "Journals", "Peer-reviewed journals", and "Open Access", each with a close button (X). Below the filters is a "Reset filters" button.

At the bottom of the search result, there is a unique identifier "61UQ_ALMA51169075120003131" and three links: "Show Pnx", "Show Source Record", and "Show RIS".

Two green arrows are overlaid on the image: one pointing left towards the journal title and one pointing right towards the active filters.

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. ListServes
3. Salesforce & escalation
4. PWGs & ANZREG
5. Idea Exchange & NERS

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?

- 1st preference
 - ListServs – Let's help the lurkers too
- 2nd preference
 - s.vangroll@library.uq.edu.au

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