UAB Libraries Primo VE Audit

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Introduction

Primo VE & Alma Overview

Primo VE is a patron-facing discovery service by Ex Libris that serves as UAB Libraries' catalog where users can discover and access the library's entire collection of resources, both print and electronic. The terms "Primo VE" and "catalog" will be used interchangeably throughout this documentation. Alma is the back-end management system used for making library resources and services available to the public. Alma also has a built-in capability of generating micro and macro analytical reports.

UAB Libraries' instance of Primo VE is accessible using the following link:

- https://uab.primo.exlibrisgroup.com/discovery/search?institution=01UALB&vid=01AL_UALB:UAB_Libraries

Primo VE Audit Process

The UAB Libraries Primo VE audit consists of many steps to find areas of improvement and to ensure an optimized, accessible, and user-friendly discovery platform.

The first process is to assess the current Primo VE environment. This involves framing out catalog features including filters, top-level navigational links, menu settings, basic and advanced search features, full text record features, and widgets.

To know what actions users are taking in the catalog, an analytical report is generated through Alma. The first report pulled shows every action that a user has taken within Primo VE. The goal behind generating such an extensive report is to look at areas that have low usage. Low usage can be interpreted as a feature of the catalog that may be unnecessary, or not considered useful by patrons. Another report was pulled from Alma that lists action usage for filters and facets. Low usage of certain filters can be ascertained as not useful and potentially removed from the catalog.

Additionally, catalog features not configured in the current environment are considered and implemented if deemed capable of enhancing the discovery experience for patrons. Ex Libris consistently publishes and releases new features on their website that can be compared with the library's active features and configurations.

This documentation is an in-depth overview of the auditing process, what areas of the catalog were considered, as well as proposed enhancements to the current Primo VE environment.

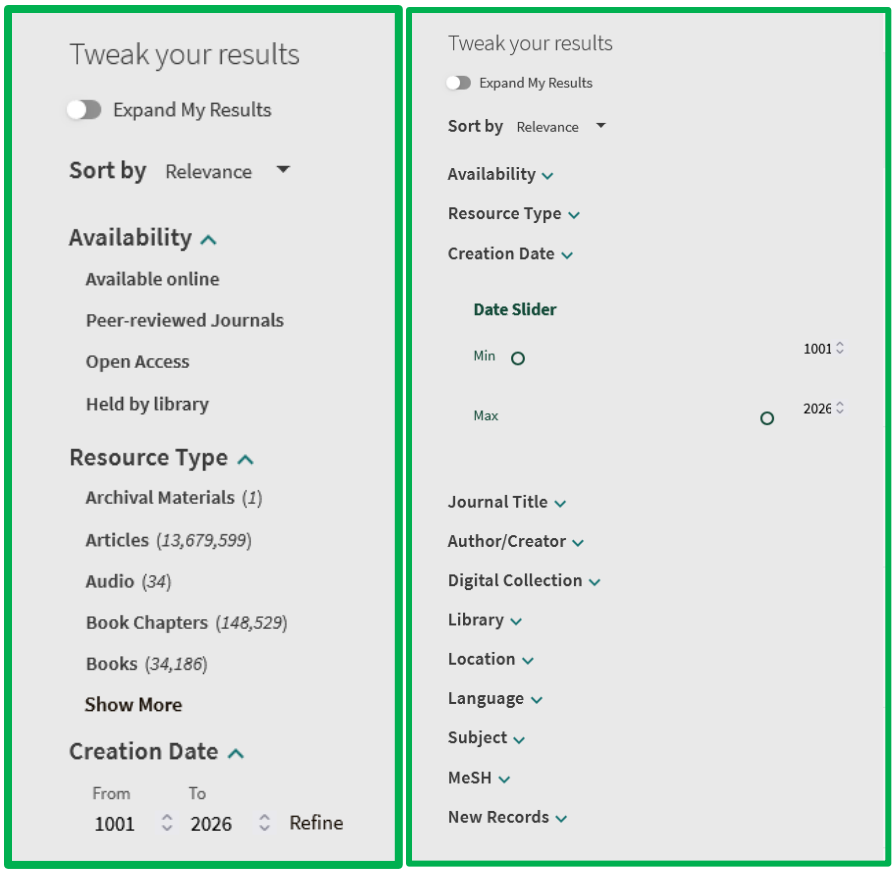
Current Primo VE Environment

This first section of the documentation highlights areas of the current Primo VE environment accessible by patrons.

Filters/Facets

After conducting a basic or advanced search, users can filter results based on their research needs. The catalog lists a total of fourteen (14) filter options. Example 1 below is a screenshot of the available filters, open and closed collapse. Full set of filters are as follows:

- **Expand My Results** – includes records owned by UAB Libraries and records available in the Central Discovery Index (CDI), a centralized index managed by Ex Libris that includes a mix of scholarly materials.
- **Sort by** – sort results by relevance, date, author, or title.
- **Availability** – filters through four options: available online, peer-reviewed, open access, and held at library.
- **Resource Type** – filters by the format of the resource such as audio, articles, books, databases, etc.
- **Creation Date** – filters by the publication date of resource.
    - Includes **Date Slider**, an interactive piece for setting a publication date range for resources.
- **Journal Title** – filters by articles published in certain journals.
- **Author/Creator** – filters by who wrote a resource (article, book chapter, recordings, etc.)
- **Digital Collection** – filters by the collection of an electronic resource; mostly pertains to digital collections published by UAB Libraries.
- **Library** – filters by the library location of a physical resource.
- **Location** – filters by a more specific location of a physical resource; instead of specifying just the library it is held, also includes what floor, or if it's a part of Special Collections.
- **Language** – filters by language options.
- **Subject** – filters by subject the resource pertains to (located in metadata).
- **MeSH** – filters by Medical Subject Headings which are terms that PubMed uses to tag articles with.
- **New Records** – filters by the most recently imported or activated resources.



Example 1: Filters/Facets

Search Scopes & Criteria

When performing a new search, there are four (4) scopes that help in refining a search.

- **Everything** – keyword search for all titles and articles available, owned by UAB Libraries.
- **Library Catalog** – items owned by UAB Libraries only.
- **Articles** – articles owned by UAB Libraries.
- **Course Reserves** – any records that are linked to an active course.

Located directly under the search bar are more filter options: two drop-down menus with additional criteria that can be included in a search. Example 2 is a screenshot of the search bar with the allowable scopes and options for filtering results.

- First drop-down options (one of the following):
    - That contain my query words
    - That contain my exact phrase
    - Begins with
- Second drop-down (one of the following):
    - Anywhere in the record
    - As author/creator
    - In the title
    - In subject
    - MeSH
    - TOC
    - ISBN
    - ISSN

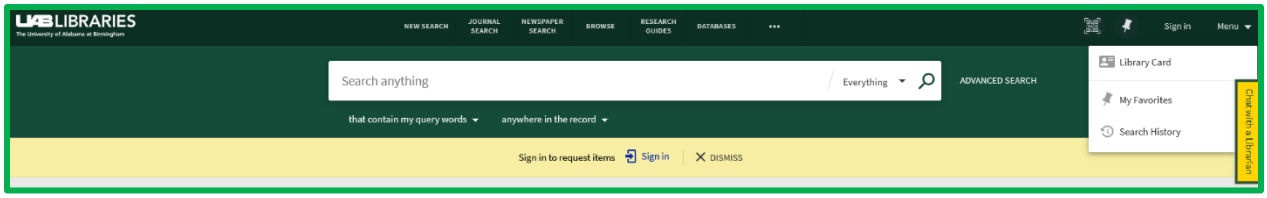
Example 2: Search Scopes & Criteria

Top-Level Linking

There are two sets of static top-level linking available in Primo VE, both shown in screenshot Example 3 and Example 4. The first set of links are located at the top right corner of the catalog; the second set of links are located at the top center of the catalog.

Links on the top-right corner of the catalog page and are as follows (Example 3):

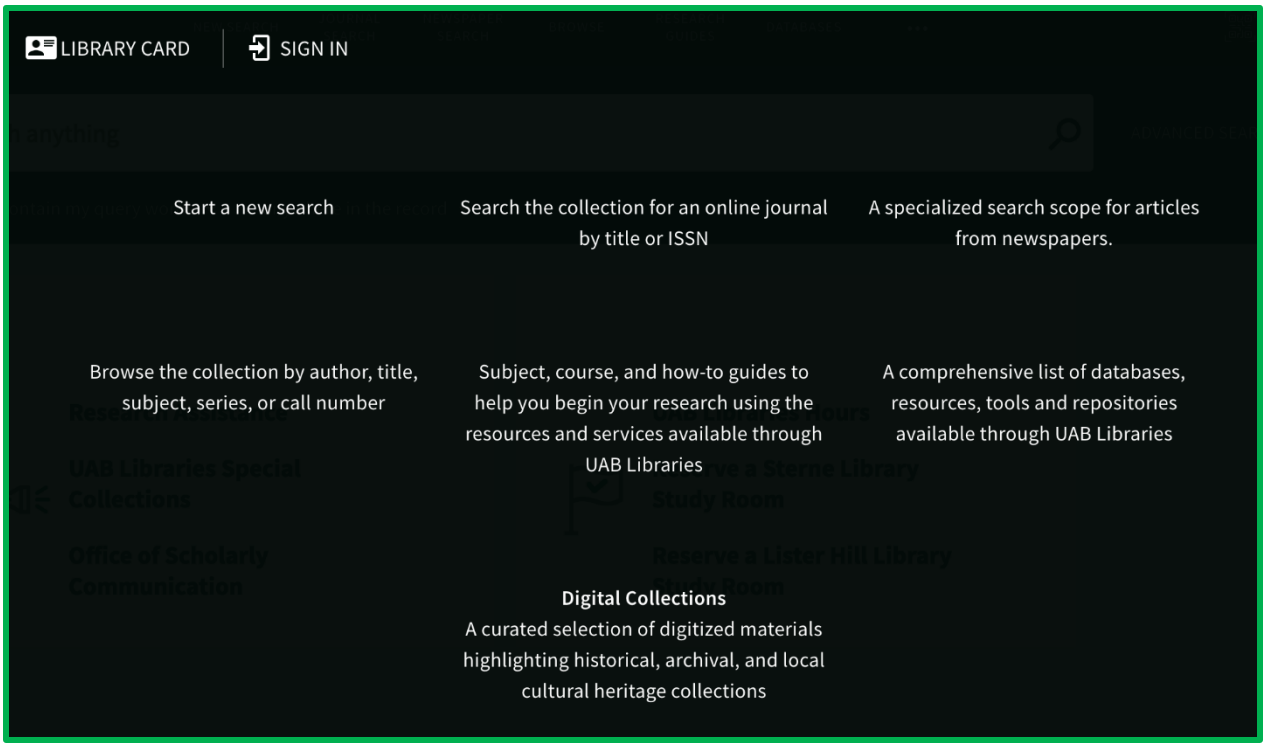
- **QR code** – scannable code that copies a link to the catalog, including any session information from the user.
- **Favorites** – a list of records patrons have saved.
- **Sign-in** – directs users to sign into their library account.
- Side-menu options:
    - **Library card** – directs users to sign into their library account.
    - **Favorites** – a list of records patrons have saved.
    - **Search history** – a list of search terms and keywords performed by the user.



Example 3: Top-level Linking, Right Side

The second set of links are located at the top center of the catalog page and are as follows (Example 4):

- Start a new search
- Search by online journal title or ISSN
- Search by newspaper articles
- Browse collection by author, title, subject, series, or call number
- Research guides
- Databases
- Digital Collections



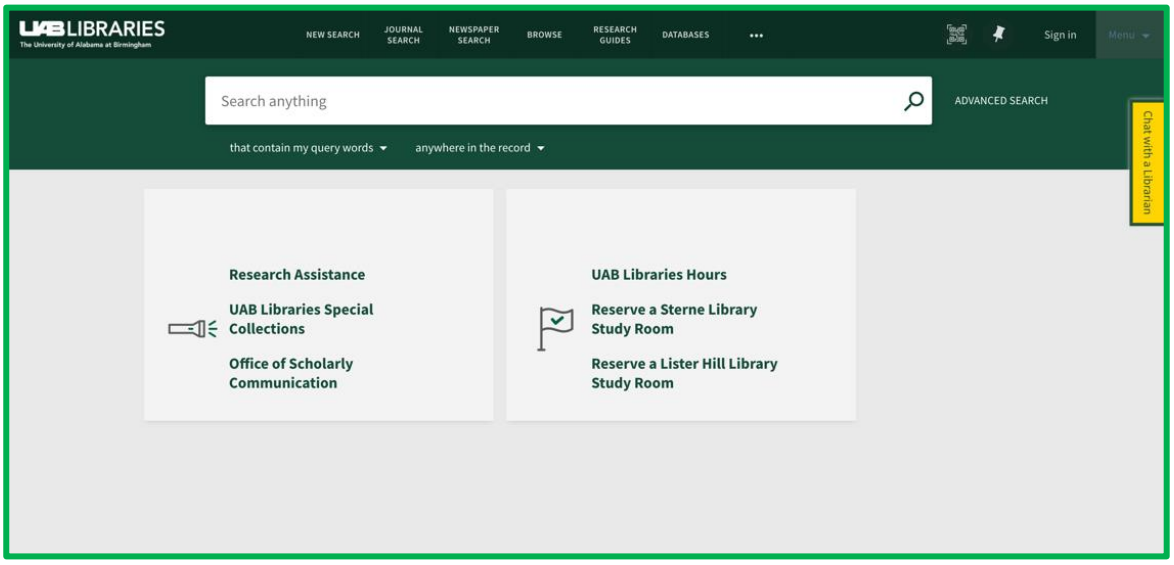
Example 4: Expanded Top-level Linking, Center

Body Links

Links within the body of Primo VE are shown when first navigating to the catalog without conducting a search. Once a search is performed, the body links are replaced by the search results. These links are navigational options to resources and services offered by UAB Libraries.

Body links are as follows:

- Research assistance
- UAB Libraries Special Collections
- Office of Scholarly Communication
- UAB Libraries Hours
- Reserve a Sterne Library study room
- Reserve a Lister Hill Library study room



Example 5: Body Links

Record Features

Brief Record Features

For all brief records, a set of features are located at the top-right corner of the individual record. To expand the set of features, patrons must click on the ellipsis icon ("..."). The following is the list of features:

- **Share** – creates a permalink for the individual record; can be shared through social media accounts for X (formerly Twitter), WhatsApp, Facebook, and LinkedIn.
- **Endnote Online** – connects with an EndNote Online account where citations of individual records can be imported.
- **Export RIS** – creates a RIS file format of the record's citation information so it can be shared with citation managers like Endnote.
- **Export BIBTEX** – creates a bibliographic file that can be used with citations managers like EndNote and Zotero.
- **Citation** – generates a citation for the record in the following formats: MLA, APA, Chicago/Turabian, and Harvard.
- **Permalink** – generates a static link for an individual record.
- **Export to Excel** – creates a .csv or .xlxs file of citation information that can be imported into Excel.
- **QR** – generates a QR code of the permalink for the record; can be scanned by mobile devices and tablets.
- **Print** – generates a PDF of the citation information that can be printed or saved on one's computer or mobile device.
- **Email** – sends citation information of a record via email address.

For articles, there is an additional citation tracking feature that appears at the top-right corner of the record, indicated by a red arrow icon.

Example 6: Article Brief Record, Features Expanded

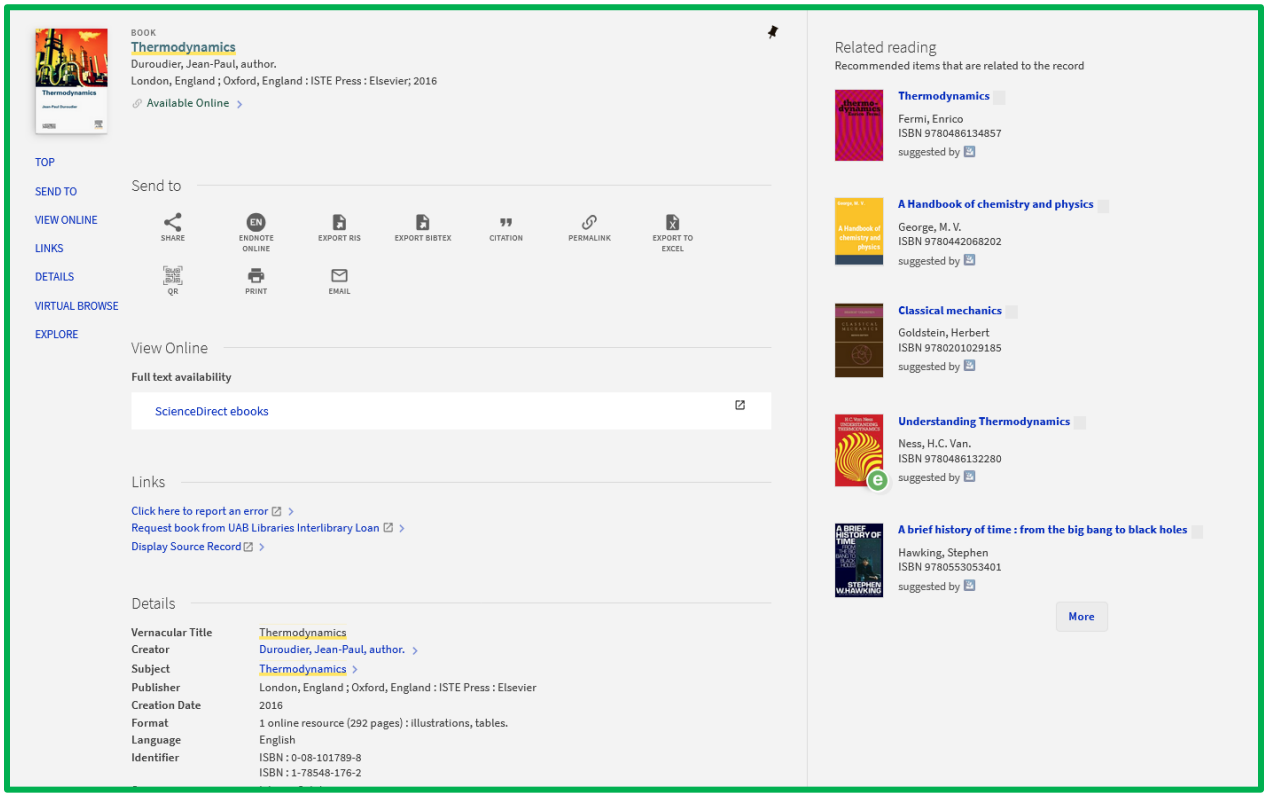
Detailed Record Features

When users click on a record, they can view the full details of the resource. Not only does the full record have the record's metadata (titles, ISSN, etc.), it also hosts various features that allows users to browse similar works.

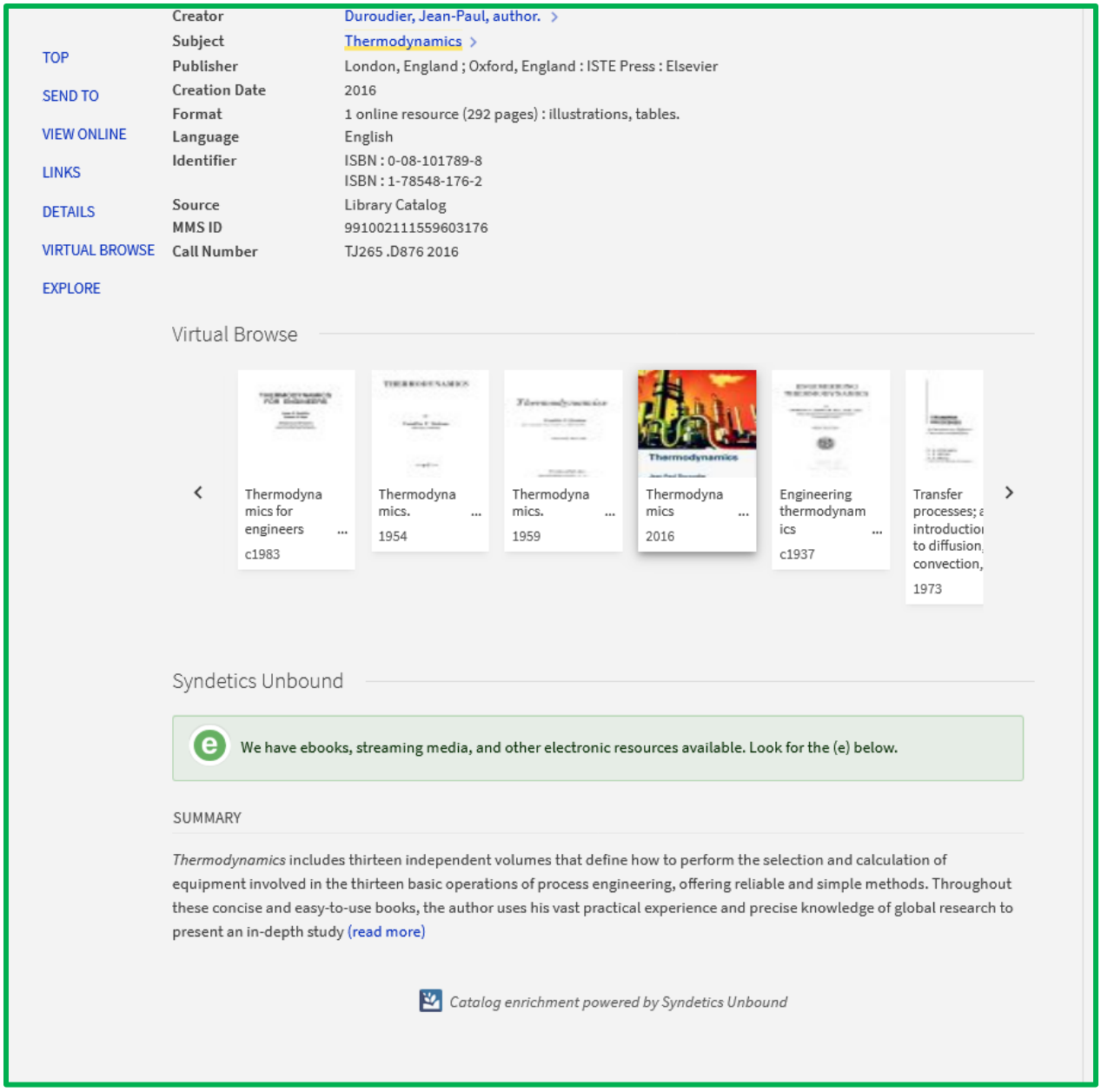
As Example 7 shows, on the right-side panel of the full record is a list of related books that share the same subject.

Like the related reading feature, there is also an option for virtual browsing. Screenshot Example 8 is a visual of this feature, located at the bottom of the record. Powered by Synthetics Unbound, the virtual browse feature shows related readings to the record.

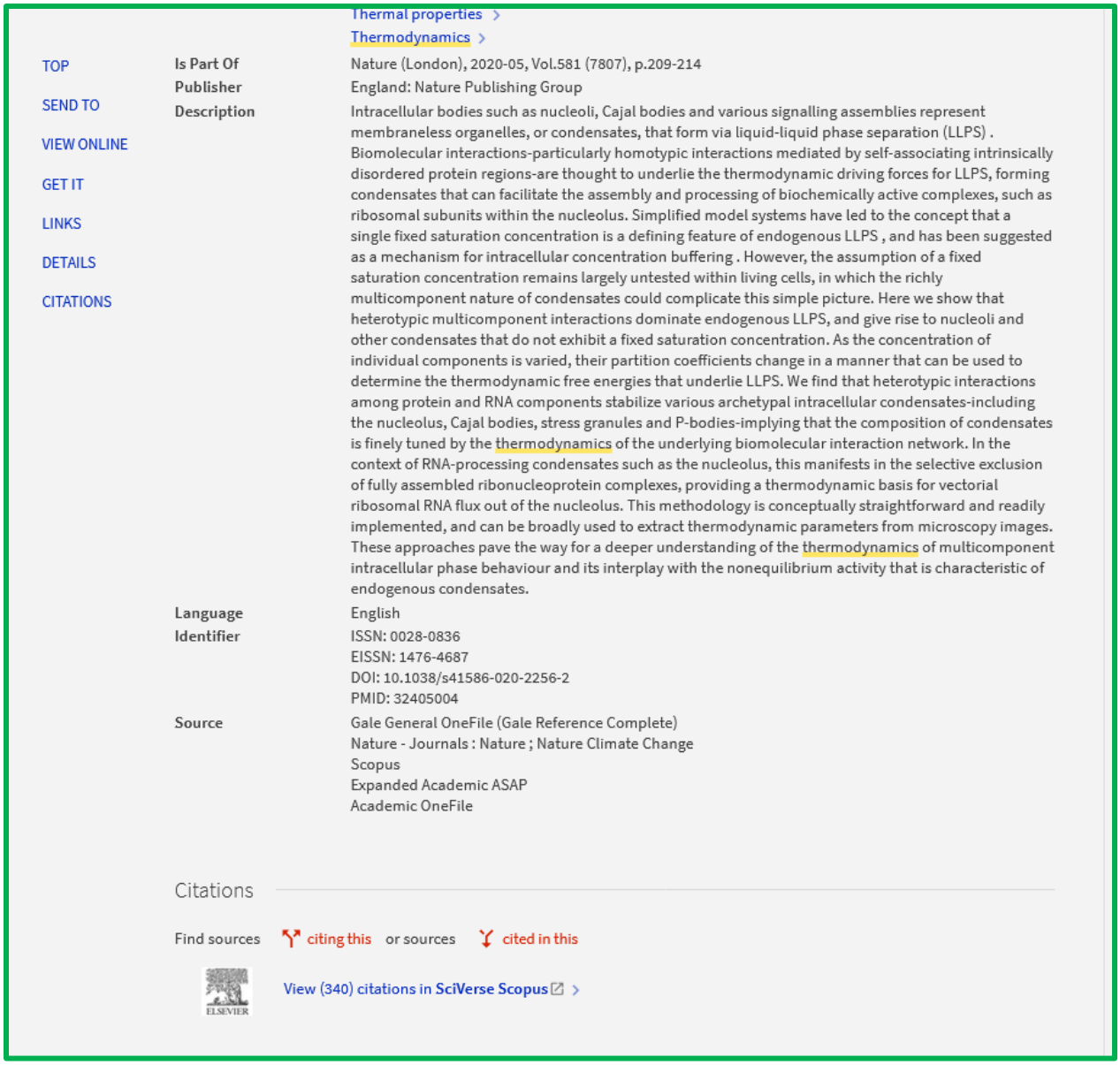
Another feature offered in the catalog is citation tracking for articles. As the screenshot in Example 9 shows, users can click the "cited by" link located at the bottom of the detailed record to see what other articles have sited another.



Example 7: Book Detailed Record



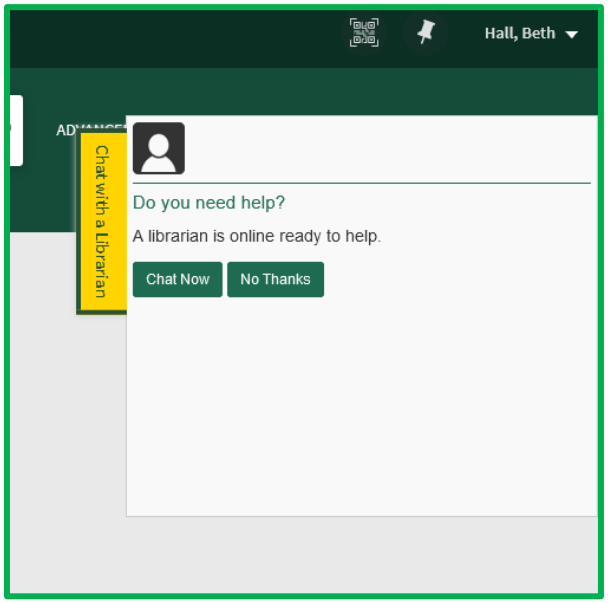
Example 8: Book Detailed Record



Example 9: Article Detailed Record

Widgets

Widgets are applications or a program that integrates into the libraries' Primo VE environment. Chat with a Librarian is the only available widget that allows patrons to speak in real-time with a library professional.



Example 10: Chat with a Librarian Widget

Proposed Primo VE Enhancements

This portion of the documentation is dedicated to proposed changes to the current Primo VE environment accompanied by analytics from Alma when appropriate. Clarivate recommendations were made during the Primo VE Audit meeting. Recommendations based on analytics are changes based on Alma analytics of patron catalog/Primo VE usage.

Clarivate Recommendations

Update Citations	• MLA 8th → MLA 9th edition • Chicago/Turabian 16th → Chicago/Turabian 17th edition
License Access Models	• Displays license terms of use in Primo VE.
Broaden Availability Status	• Expands on "Not available" status; indicates why the resource is not available.
Linked Data	• Person entity feature that includes person entity cards in search results.
Expand My Results	• Expands results to CDI when search has 0 results.
Search Queries	• Removes parentheses from a search when 0 results.
Locations Ordering	• Prioritize item locations displayed in Primo VE.
DEI Exclude List	• Excludes certain terms from subject headings (terms till can be used for search).

Other Recommendations

Filters	• Auto close collapse. • Title change: "Tweak your results" to "Filter your results". • Remove "Expand my Results" from filters and auto-include for all searches.

Top-level linking	• Top-right corner links, remove duplicates:
	  ○ Library Card
	  ○ My favorites
	• Top-center links
	  ○ Remove newspaper search

Body linking	• Make link headers visible.

Filters/Facets

Auto Close Collapse

When patrons first navigate to the search results page, the list of filters is automatically opened, revealing every subsection of each filter. This makes the list of filters lengthy and cluttered which can ultimately become a pain point for users. The first proposed change for filters is to auto-close collapse the filters, allowing patrons to select which filter to expand based on their search needs.

Filters Title

The current title of the list of filters is "Tweak Your Results." The advised change is to "Filter Your Results" due to it being the most familiar term for filtering items.

Filter Analytics

User actions as it relates to the usage of each filter was generated and analyzed. The following is a list of the active features as well as their usage from **January 2022 – present**. "Uses" refers to how many times a user has chosen the following filters.

- **Expand My Results** – 17 uses
- **Sort by: Relevance, Date, Author, Title** – 9,168 uses
- **Availability** – 277,647 uses
- **Resource Type** – 126,287 uses
- **Creation Date** – 74,984 uses
- **Journal Title** – 5,978 uses
- **Author/Creator** – 1,431 uses
- **Digital Collection** – N/A
- **Library** – 2,400 uses
- **Location** – 1,513 uses
- **Language** – 3,647 uses
- **Subject** – 16,214 uses
- **MeSH** – 2 uses
- **New Records** – 135 uses

Based on usage, the least used filters are: Expand My Results, MeSH, and New Records. The only filter that's recommended to remove is expand my results. Although UAB Libraries serves a large

medical population, most MeSH searches are done in PubMed directly which may explain the low usage from Primo VE. It's also possible that some of our newer medical students may not know what MeSH searching entails. Finally, new records is not a feature often used by the UAB population; this feature may be useful to Metadata Librarians, but new records can also be viewed within Alma.

Expand My Results

The Expand My Results feature is one of the least used filters. This may be due to the public not understanding what this filter does. As previously mentioned, Expand My Results includes records owned by UAB Libraries as well as CDI results. To resolve this low usage, I propose to remove this option from the public and have the results auto-generate to show UAB Libraries and CDI records for every search. By having search results automatically include both the library and CDI records, patrons will experience more search results for their research needs. This will also help reduce the number of times users get zero results from a search.

Search Scopes & Criteria

A useful feature that has not been configured for Primo VE is the DEI Exclude List which would hide subject headings deemed offensive, inappropriate, or outdated. Not only does this function work with local records, but it also helps with uncontrolled subject headings from CDI records which are managed by Ex Libris.

Some examples of terms for the DEI Exclude list can be found in the following Google Doc from California State University:

- https://docs.google.com/document/d/1m_xuN6NF_CTDE4k42aCJ9WG-Cmw9d_elmnRG4LTU7AM/edit

Top-Level Links

The following set of links is located at the top center of the catalog page. Usage for each is from **January 2022 – present**.

- **Start a new search** – 4,168 uses
- **Search by online journal title or ISSN** – 14,734 uses
- **Search by newspaper articles** – 1.620 uses
- **Browse collection by author, title, subject, series, or call number** – 7,090 uses
- **Research guides** – NA
- **Databases** – 103,056 uses
- **Digital Collections** – NA

The lowest usage for this set is for searching newspaper articles. Since comparatively this is an under-used link, it's advised to remove it.

The second set of links is located at the top-right of the catalog page. Since these links are pertinent features for patrons, only duplicate links will be removed. Links to be removed will not be based on analytics. Following links are:

- **QR Code**
- **Favorites**
- **Sign-in**
- Menu expanded:
    - **Library card**
    - **Favorites**
    - **Search history**

Duplicate links for this set are favorites and library account sign-in. Only one of each should be available.

Body Linking

Links within the body of the catalog only appear when users navigate to the catalog without performing a search.

The only proposed change for this section is to make the headers visible; currently there is a gap of whitespace where headers for the links should be.

Resource Record Features

For both brief and detailed records, the only proposed change is updating the citation styles to be current. MLA 8 → MLA 9; Chicago 16 → Chicago 17.

Compiled List of Proposed Changes to Primo VE

Filters	• Auto close collapse. • Title change: “Tweak your results” to “Filter your results”. • Remove “Expand my Results” from filters and auto-include for all searches.
Search results	• Activate DEI exclude list. • Broaden availability status of physical items • Remove parentheses from search query when results are 0.

Top-level linking	• Top-right corner links; remove duplicates:
	  ○ Library Card
	  ○ My favorites
	• Top-center links
	  ○ Remove newspaper search

Body linking	• Make link headers visible.

Record features	• Update citations to be current.
	  ○ MLA 8th → MLA 9th
	  ○ Chicago 16th → Chicago 17th