Teaching Librarians Meet-Up February 17, 2017

Attending: Carolyn Boulay, Tunxis; M’lyn Hines, QVCC; Paula Pini, Manchester; Naomi Toftness, Pam Williams, Three Rivers.

Conversation Starters

- In what way have you incorporated Primo into your teaching so far?
- Reflecting on that initiative, what’s working? What’s not working?
- What feedback have you received from students regarding Primo?
- What’s your next Primo objective?

Notes from the Discussion

How we are teaching Primo so far...

1. Strategies for Instruction

   TIMING: Two opposite approaches are in play: some folks are starting instruction with Primo, then pointing out limitations of the facets and the advantages of directly choosing a relevant database; some folks are teaching database selection based on specific disciplines or assignments and saving Primo for the end, as a 'new cool thing' to try.

   SELECTIVITY: Pam Williams at Three Rivers is using Primo to teach library catalog searches and to show students how to request items from other libraries. She is using the databases directly for articles searches. Pam reports students get more focused and relevant results using this split.

   CRITICAL THINKING: Naomi Toftness shared a successful strategy to get students to think about the kind of information they need and then the types of resources that would provide that information. She uses a grid to get students thinking about things like background information, current events/news, academic studies, alternative opinions, etc. Students complete the grid, identifying where/what type of resource is likely to yield that information. Someone commented this is a great strategy to slow down the rush to find "articles" when the student might really need something different. Naomi shared this link to pictures of a developing grid: https://drive.google.com/open?id=0B_d9ePdsX7uvMUhaTkdVS3A4dFU

2. The Search Box

Several institutions have already embedded the search box in LibGuides, their library homepages and other interfaces; others are planning to do so.

3. Assessment

   Informal Observation: Generalizing, some younger students are quickly grasping the Google-like aura of the discovery tool approach; some older students are struggling and preferring to work directly in the databases as are some students in higher-level courses.
who are already familiar with database searching. While some faculty know exactly what database they need, others are demonstrating an openness to delving into Primo and discovering its features.

Level 1 Assessments / Student Reported Satisfaction: With insufficient numbers to be more than anecdotal at this time, some students from at least two colleges are responding to satisfaction surveys and reporting excitement and interest in the new discovery tool.

**Frustrations with Primo**

1. **Dead ends**
   Several librarians report too many instances in which they drill down through several layers to access an online resource, only to get an error message or land on a publication’s serials index with no article access, or land on a different article entirely.

2. **Unexpected results**
   Several librarians discussed getting unexpected results, with standard advanced keyword strategies or facet usage yielding items that didn't seem to belong in the results list. The current unpredictability of the discovery tool is leaving several folks hesitant to rely on Primo during instruction or to feel confident that students will get the results they require when working on their own. Pam suggested that results from ABI Inform may be skewing the hits list.

3. **Facet Frustration**
   Facets change. It makes sense, of course, when subject facets change based on the topic being researched. But it gets frustrating when the user sometimes can limit to "reference entries," for example, and other times cannot.

   Facets don't exist. Sometimes a subject heading that seems obvious for the search just isn't there.

   Too many facets. It was pointed out that the subject facet often offers so many options that students may be discouraged from drilling down. The layout of these options is dense.

   Order of facets. Some librarians were frustrated with the order of the facets. QVCC was able to request a re-ordering of the facets. See #4 under "Current Solutions to Primo Frustration."

4. **Too many layers**
   Some frustration with the number of clicks it takes to drill down through “online access” and then a list of database and then, finally, an article. (See Pam’s direct linking configuration, below.)
**Current Solutions to Primo Frustration**

1. **Actively Teaching and Using Primo AND Library Databases**
   Everyone seemed to agree that they will maintain a two-pronged strategy, using Primo where it works best and providing and teaching quick access links to individual databases. Several reasons were cited: This approach is essential to access those databases that are not included in Primo. Many of our faculty know exactly what they need from the specific database and many require students to utilize (or avoid) specific databases. In addition, reverting to a specific database may be the easiest solution for a student who is overwhelmed by too many Primo results and cannot drill down to a manageable number of hits.

2. **Boolean Searching with CAPITALIZATION**
   It isn't made obvious anywhere, but Boolean operators only work in Primo if they are capitalized. M'lyn was asked to share the Primo documentation on Boolean operators. The link is below. The note about capitalizing the operators AND, OR, NOT can be found about half-way down, just before the section on "Excluding Words or Phrases." [https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/New_Primo_User_Interface/End_User_Help/010Performing_Basic_Searches](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/New_Primo_User_Interface/End_User_Help/010Performing_Basic_Searches).

3. **Dead ends**
   Pam reports a substantial reduction in the error rate at Three Rivers when she activated the Ebsco API. M'lyn suggested some of her error results might be due to the free resources QVCC activated. M'lyn will check with QVCC's system librarian to isolate the free resources and test.

4. **Comparing results**
   Several librarians are double-searching, comparing results in Primo to those in, for example, Academic Search Premier. This approach may help us get a better handle on the facets and the 'unexpected' results we've been observing.

5. **Request Facet Order Change**
   Facet order is currently an institution-level decision, although access to the back-office is limited. Libraries have to put in a request to re-order the facets. [Update: Michael Lynch, systems librarian at QVCC, reports it may be possible to request a relabeling of facets as well.]

6. **August roll-out of "personalize my results'**
   M'lyn reported the planned August 2017 roll-out of this feature, which can be viewed now only in the "Browse Search" option (it displays only after you select a result in the browse list). This feature allows students to define the academic lens through which they want to consider their topic. It is not clear to what extent this tool will duplicate or enhance the current subject facets, but it *seems* to offer more explicit discipline selection.
7. **Direct Linking Configuration**
   
   In an email follow-up to this meeting, Pam Williams (Three Rivers) shared an option to configure Primo to go directly to an article without the intermediary page listing the database(s) that contain the article.

   ![Direct Linking Configuration Image]

   I had Enable direct linking set to yes, which results in the article coming up if there is only one database that contains the article, but I’m going to try Enable direct linking when multiple services are available and see if I like that better.

   ![Enable direct linking when multiple services are available Image]

   **OUR NEXT MEETING:** Friday, March 17, 9:30 Middlesex. Room TBA

   We brainstormed ideas for our next meeting. To focus our discussion on solutions and strategies, we're asking folks to do some **minimal prep work** between now and 3/17:

   1. **Track any issues you have with Primo.** What happened? If a link is dead, what database caused the issue? We might be able to request some fixes if we find patterns in the errors.
   2. **Identify your favorite search tips** to share at the meeting.
   3. **If you are using any formal assessment strategies,** please share your approach.
   4. **If there's time,** interest was expressed in each library demonstrating its Primo interface.

   * **CHALLENGE:** Winner gets the admiration and wide-eyed wonder of his/her peers. Is it possible, in one Primo search, to get results that are limited to reference entries in both print and online resources?