Primo Testing
Best Practice Panel

Panel members:
Amelia Rowe, Lee Houghton, Rachelle Orodio, Sue Harmer, Stacey van Groll
Which questions would you like us to focus on?

Pick your top 3

Login to the poll via your laptop / mobile

Slido.com

Enter code:

PrimoTopics
Amelia Rowe - RMIT University

Senior Coordinator, Discovery & Library Systems

System setup = Alma + Primo (local) 2013 | Primo BO MT 2014 | Primo New UI 2017 | SAML2 auth for Primo + Alma

RMIT Library = 5 campuses in Melbourne, 4 with a library, 2 campuses in Vietnam

RMIT stats (80,000+ students | 5,310,910 searches in 2018)
Lee Houghton
Librarian (Digital Library Support)

About the University:
34,000+ students, 8 main libraries plus 1 off site store
Started with a local Primo installation in 2011, moved to SaaS in 2016, moved to the new Primo UI in 2017, moved from Aleph to Alma in April 2019

Independent Nottingham degree awarding campuses in Ningbo, China and Kuala Lumpur, Malaysia
They also now run Alma and Primo new UI
To date, all 3 Primo systems still managed by UK staff!
Application Administrator, Library IS Team

Primo from June 2010, and New UI from Feb 2019
- Site: Direct Hosted Back Office (can SSH), multi-institution
- Design: Multi-search scopes, streamlined search design and OTB philosophy
- Data: 3 local data sources + PCI
- Authentication: SAML Okta (Multi-factor authentication)
- SP Upgrade 2x a year (July & December)

78,257 students, 17,469 staff, 206 library staff
4.1M physical visits to library
2.1M electronic, 1.6M print, 3.2M searches a year
4 campuses, 6 libraries in Melbourne, 2 overseas: Malaysia & South Africa
Stacey van Groll - The University of Queensland

- **Discovery and Access Coordinator, Library Technology Service**

- **System**: Alma & Primo June 2016 | New UI June 2017 | MT BO Single institution | No search scopes | Direct linking | SAML SSO

- **Sites**: Brisbane, Australia | 3 campuses | 18 libraries

- **Collection**: 4 local data sources - Alma 2.5m (1.28m eBook, 151K eJournal) | UQ eSpace | AtoM | LibGuides

- **Users**: 58.7K students, 24.6K staff (259 Library), 3.2K extramural

- **Searches**: 5.8m searches in 2018
Sue Harmer - UNSW Sydney

- Associate Director, Digital Experience and Innovation
- Primo from Oct 2008, and New UI from June 2018
  - Site: MT BO 2017, multi-institution, premium sandbox
  - Design: single/blended search scope and OTB philosophy, UX driven
  - Authentication: Active Directory
- 60,000+ students
- 5,854,332 searches in 2018
What do you do about accessibility?
What do you do about accessibility?

VPAT® (Voluntary Product Accessibility Template)
- Used by Ex Libris for their Accessibility Conformance Report

Doing a basic accessibility check if you can’t do a detailed one

WCAG 2.1 Primer (UK Government)

Open University provide comprehensive disabled library user support
What do you test, when, and why?
How do you incorporate the user experience & user stories into your testing?
User experience testing using Hotjar

Heatmaps & feature usage

Feedback & screenshots
User experience testing using Morae

- Session recording to review mouse movements & analyse sessions better.
How do you incorporate analytics into your data-driven decision making?
UQ - Primo Analytics

- Area not covered? - Virtual Browse on New UI (finally fixed August 2019)
- Defect? - Facets on New UI: was Classic UI inflated or is New UI broken?
- Hard to find? - Citations Trail (Brief Results icon February 2019, tweaked locally June 2019)
- Not needed? - Personalise it
- Who is using it, and why? - Library staff focus on Advanced Search
- Core service focus - Basic Search, Access, Facets, Citations, Sort
RMIT - Analytics in Primo display decisions

**Lateral Linking**
Usage of Lateral Linking up >300%
Jan-June 2017 = 33,554
Jan-Dec 2016 = 9,867

**Citations**
Increased usage
Jan-June 2017 = 72,396
Jan-Dec 2016 = 63

Purchase requests submitted by RMIT students and staff (excluding library staff):
When do you release new features? And why do you wait?
How do you let users know about known issues?
System downs and long standing issues
Do you use automated testing?
Automated testing using Katalon Plugin & Network Ping

<table>
<thead>
<tr>
<th>Test Type</th>
<th>Start</th>
<th>End</th>
<th>Duration</th>
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<td>11:52:16</td>
<td>12 seconds</td>
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<td>11:04:21</td>
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<td>10 ml sec</td>
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<tr>
<td>Add to Eshelf</td>
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<td>12:36:47</td>
<td>8 seconds</td>
<td>11:07:26</td>
<td>11:07:33</td>
<td>7 ml sec</td>
</tr>
</tbody>
</table>

![Graph showing network ping results](image-url)
Continue the conversation...

Post questions and share ideas on the primo-list

Upload your test plans to Google Drive:
https://drive.google.com/drive/folders/1LFqJCPrK3gBW903dpg2yz4C6Ex42pySn?usp=sharing

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