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)

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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!

Rachelle Orodio - Monash University

- 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

MONASH University
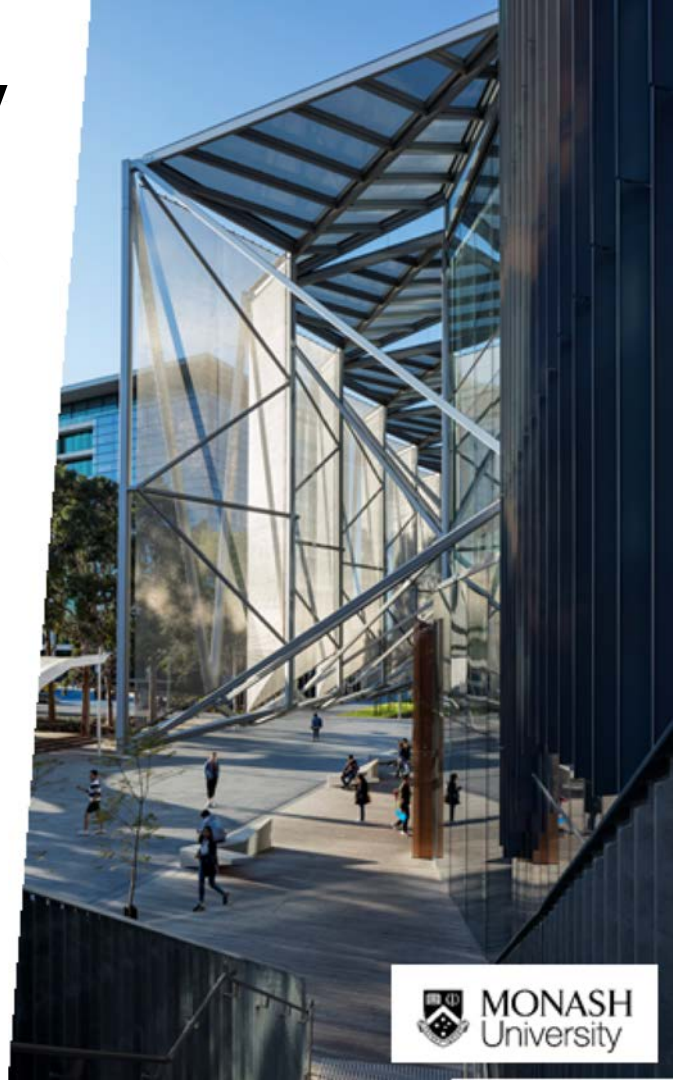
Stacey van Groll - The University of Queensland

- **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

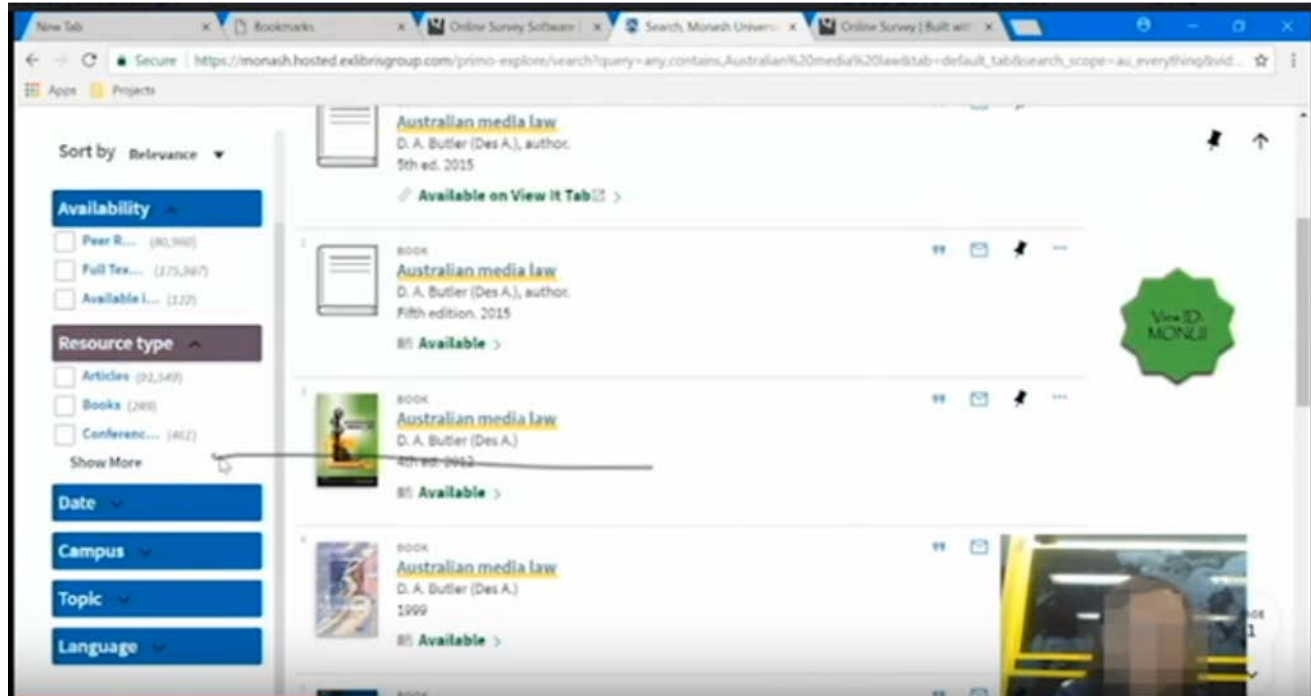# User experience testing using Morae

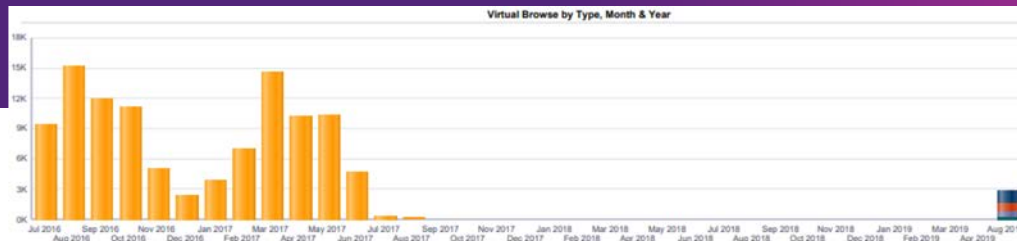●Session recording to review mouse movements & analyse sessions better.

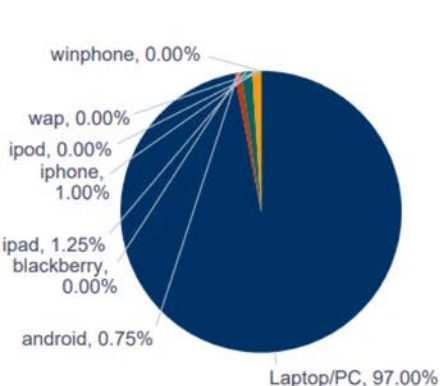# How do you incorporate analytics into your data-driven decision making?
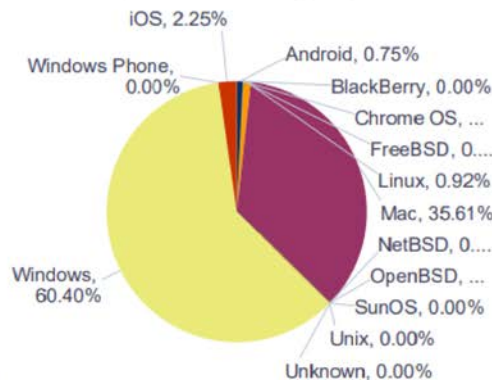
UQ - Primo Analytics

- 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

Actions per Device Type

- winphone, 0.00%
- wap, 0.00%
- ipod, 0.00%
- iphone, 1.00%
- ipad, 1.25%
- blackberry, 0.00%
- android, 0.75%
- Laptop/PC, 97.00%

Actions per Operating System

- iOS, 2.25%
- Windows Phone, 0.00%
- Android, 0.75%
- BlackBerry, 0.00%
- Chrome OS, ...
- FreeBSD, 0....
- Linux, 0.92%
- Mac, 35.61%
- NetBSD, 0...
- OpenBSD, ...
- SunOS, 0.00%
- Unix, 0.00%
- Unknown, 0.00%
- Windows, 60.40%

Actions per Browser Type

- Unknown, 0.00%
- BlackBerry, 0.00%
- Silk, 0.00%
- Safari, 16.68%
- Puffin, 0.00%
- Opera, 0.2...
- Netscape,...
- Mozilla, 0....
- MSIE, 2.54%
- Firefox, 9.55%
- Epiphany, 0.00%
- Chromium, 0.02%
- Chrome, 70.96%
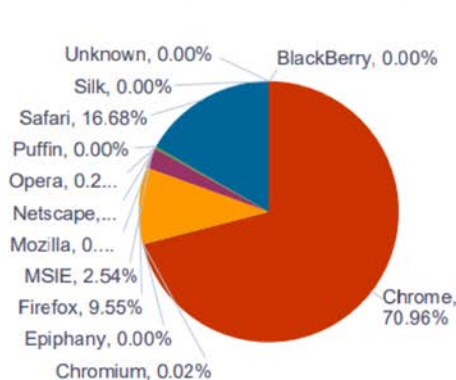
The biggest 4 scenarios of Primo use

Device	OS	Browser	%
Laptop/PC	Windows	Chrome	50.4
Laptop/PC	Mac	Chrome	19
Laptop/PC	Mac	Safari	14.5
Laptop/PC	Windows	Firefox	7.2
			91.1

RMIT - Analytics in Primo display decisions

LATERAL LINKING

Usage of Lateral Linking up >300%

Jan-June 2017 = 33,554
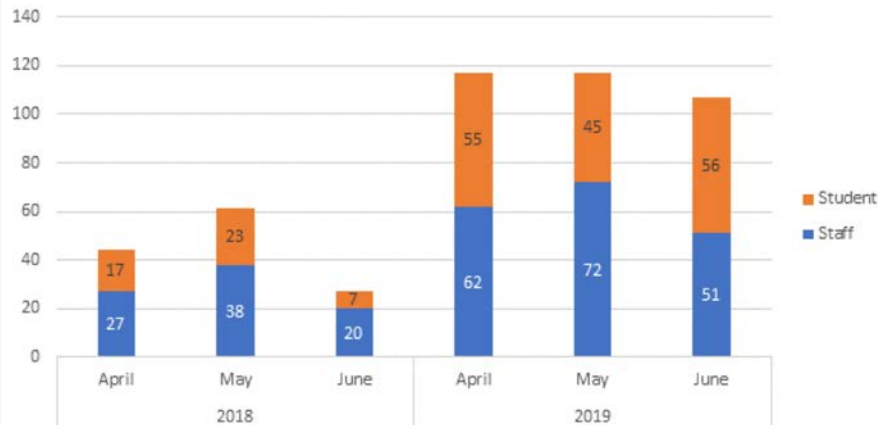Jan-Dec 2016 = 9,867

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

Purchase requests submitted by RMIT students and staff (excluding library staff)

	April	May	June	April	May	June
Student	17	23	7	55	45	56
Staff	27	38	20	62	72	51
	2018			2019		

■ Student
■ Staff

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When do you release new features? And why do you wait?

How do you let users know about known issues?
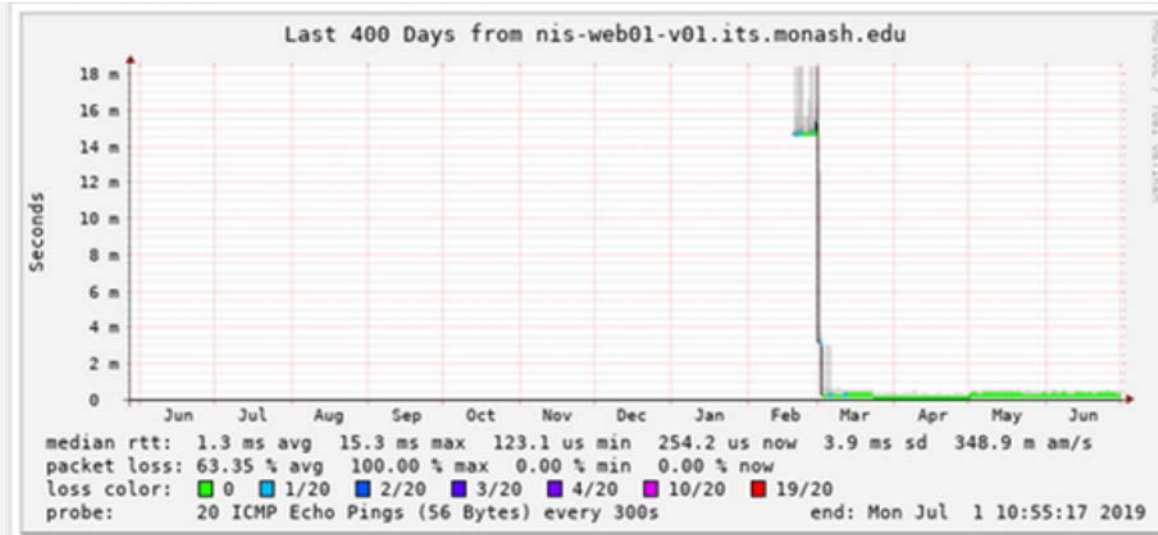# System downs and long standing issues

Do you use automated testing?

Automated testing using Katalon Plugin & Network Ping

Testing via Katalon Plugin Browser on Firefox	Start	End	May 30, 2019	Start	End	July 1, 2019
Basic Search	11:52:04	11:52:16	12 seconds	11:02:52	11:02:55	3 ml sec
Advanced Search	12:00:42	12:00:53	11 seconds	11:04:21	11:04:31	10ml sec
AZ Ejournals	12:15:18	12:15:27	9 seconds	11:05:12	11:05:23	11ml sec
Add to Eshelf	12:36:39	12:36:47	8 seconds	11:07:26	11:07:33	7ml sec

Last 400 Days from nis-web01-v01.its.monash.edu

median rtt: 1.3 ms avg 15.3 ms max 123.1 us min 254.2 us now 3.9 ms sd 348.9 m am/s
packet loss: 63.35 % avg 100.00 % max 0.00 % min 0.00 % now
loss color: 0 1/20 2/20 3/20 4/20 10/20 19/20
probe: 20 ICMP Echo Pings (56 Bytes) every 300s end: Mon Jul 1 10:55:17 2019

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

Or contact us via email:

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