

# Listening to users to build a better Primo: Feedback without surveys

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IGeLU 2022 Conference

# Summary

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## The University of Queensland – All about UQ

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Community – Systems – Data – Admin

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## Looking for opportunities

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Feedback channels – Query types – Decision-making

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## Examples

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Example 1 – Consistent pathways

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Example 2 – Indicative glanceability

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Example 3 – Enhancing access

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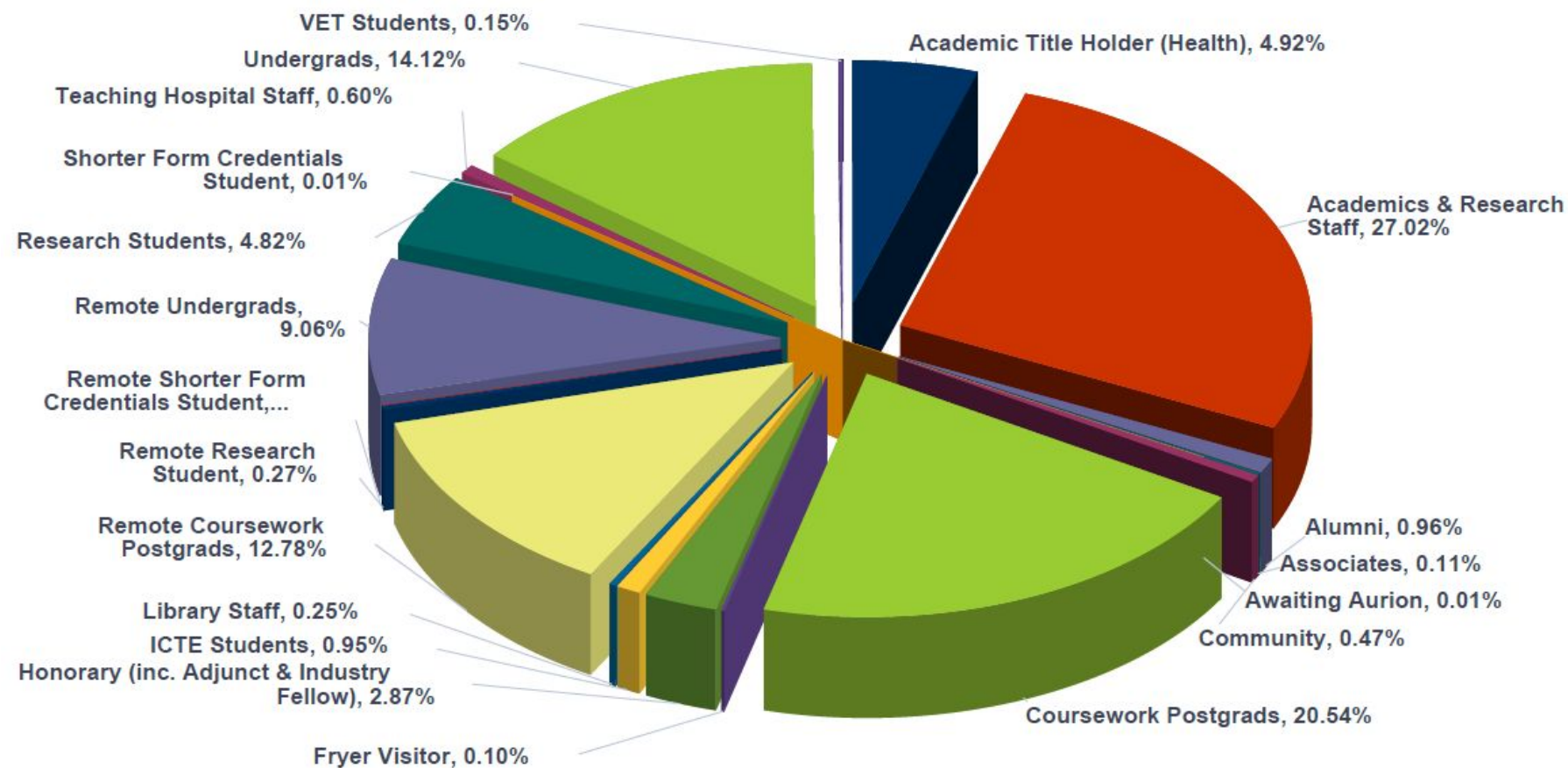
## Questions?

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# All about UQ

# UQ – Community

Source	COUNT	%
Students - Si-Net Enrolments	58,411	62.7%
Staff - Aurion Employment	32,662	35.1%
Extramural - Memberships App	2,097	2.3%
<b>Grand Total</b>	<b>93,170</b>	<b>100.0%</b>



User Group	COUNT	%
Academics & Research Staff	25,174	27.0%
Coursework Postgrads	19,134	20.5%
Undergrads	13,151	14.1%
Remote Coursework Postgrads	11,903	12.8%
Remote Undergrads	8,439	9.1%
Academic Title Holder (Health)	4,582	4.9%
Research Students	4,494	4.8%
Honorary (inc. Adjunct & Industry Fellow)	2,676	2.9%
Alumni	899	1.0%
ICTE Students	881	0.9%
Teaching Hospital Staff	559	0.6%
Community	438	0.5%
Remote Research Student	251	0.3%
Library Staff	230	0.2%
VET Students	139	0.1%
Associates	101	0.1%
Fryer Visitor	95	0.1%
Remote Shorter Form Credentials Student	14	0.0%
Awaiting Aurion	5	0.0%
Shorter Form Credentials Student	5	0.0%
<b>Grand Total</b>	<b>93,170</b>	<b>100.0%</b>

# UQ – Systems specs & philosophy

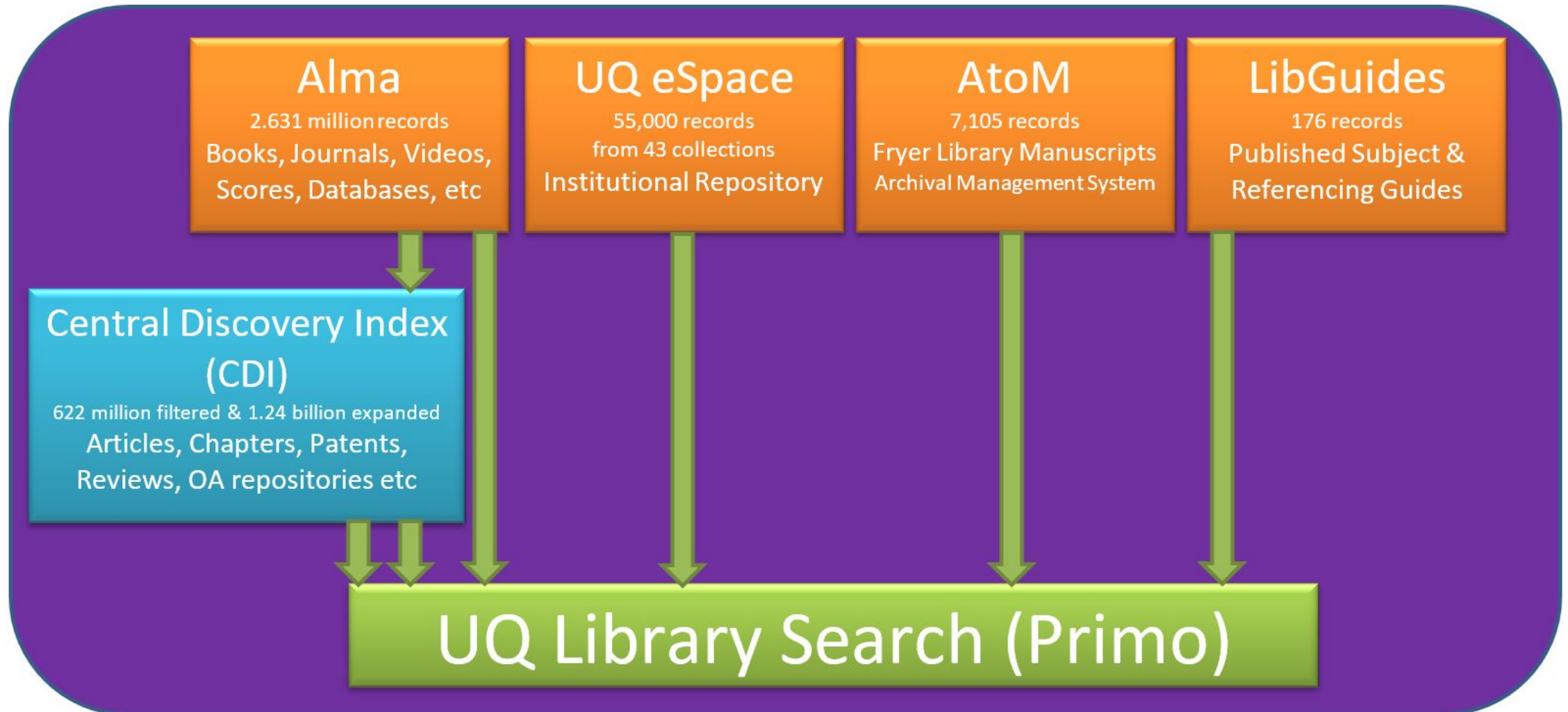
## Library Services Platform – Systems specs

- Go Live Alma & Primo June 2016 > New UI June 2017
- **Single institution Multi-Tenant hosted on Primo Back Office**
- Premium Alma Sandbox & Standard Primo Sandbox
- **One Prod view, in a ‘Google-like’ search** with single blended search scope and tab
  - Also Direct Linking and Silent Login active
  - Average 8m searches a year, across 3.5m sessions
- **4 local data sources:** Alma, UQ eSpace, AtoM, Libguides + Central Discovery Index (CDI)

## Stable and reliable user interface, with consistency of display and behaviour, for seamless discovery and access

- **Maximise discovery + emphasise access**
- **Evidence-based practice** > initial and ongoing
- **Risk averse**, preferencing opt-in well-tested functionality
- **Incremental change** with small continuous improvements
- **Scaled-up services** aiming for best possible online self-help

# UQ – Data sources



# UQ – Administration & engagement

## Administration and system configuration centralised in 2 services with 10 Alma Admins

- **Library Technology Service**

- Associate Director
  - Discovery and Access Manager
  - Solutions Architect/Team Lead, Library Operations
  - Senior Library System Engineers x 3
- + Application Development team for customization work

- **Information Resources, within Collections & Digital Services**

- Associate Director
- Manager, Resource Management
- Manager, Resource Delivery
- Physical Collections Administrator

## Collaborative decision-making, by team and service representatives from across the Library

- **Action Group for Discovery and Access (AGDA)**

- Primo focus > fortnightly meetings

- **Alma Forum**

- Alma focus > monthly meetings

- **Collections Management Group**

- Content focus > monthly meetings

- **Web Content Team**

- Web content focus > monthly meetings

Looking for  
opportunities...



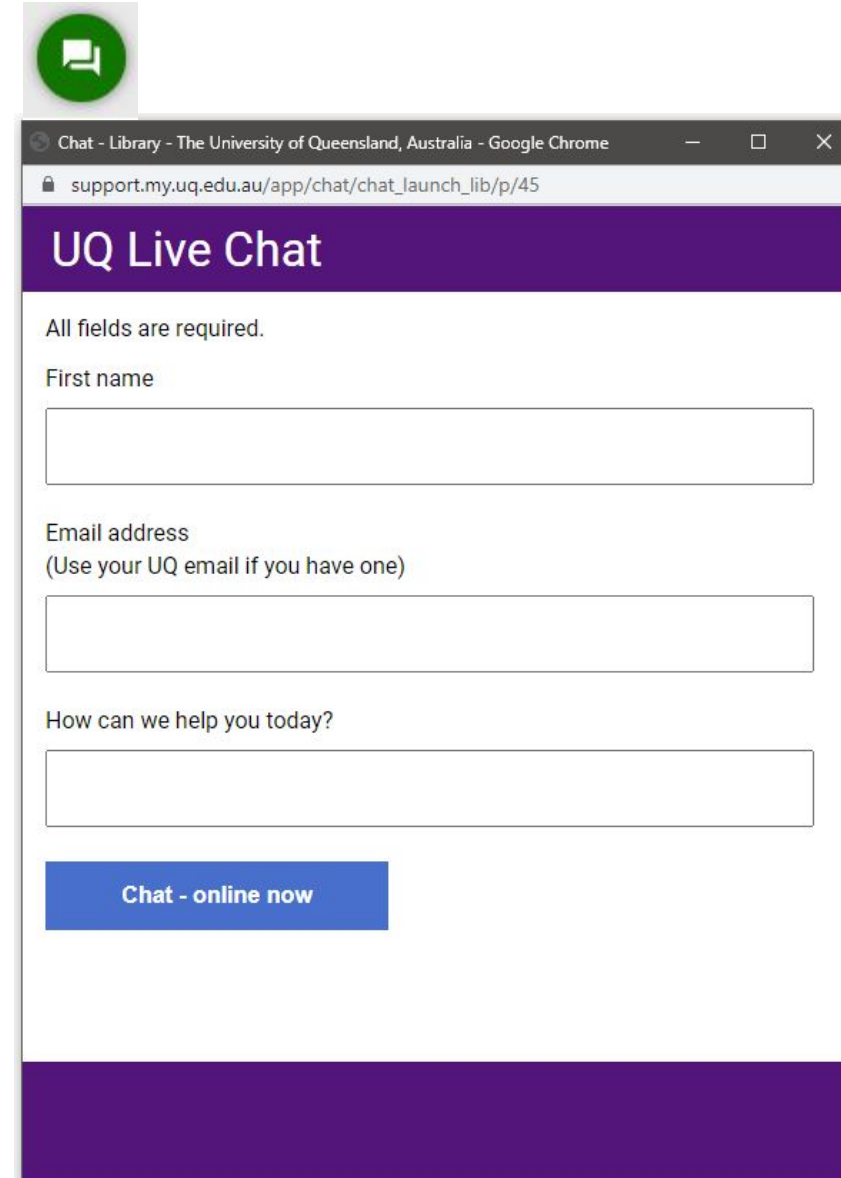
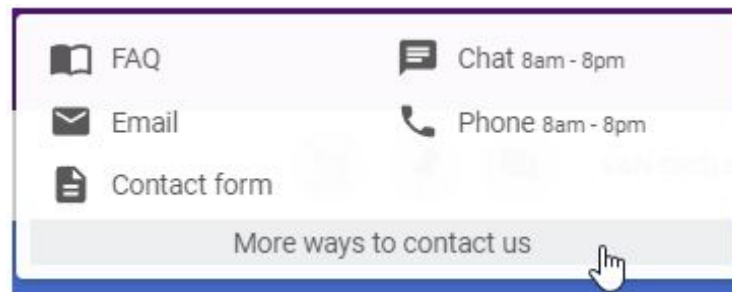
# And finding them

- UQ Library uses **RightNow** as our **CRM system (Customer Relationship Management)**
  - A variety of submission points managed by several teams
    - **AskUs service** by our **Client Experience team** in person, live chat, and email
    - **Report a Problem** in Primo records, by our **Resource Management team**
    - **Library Feedback form**, triaged by our **Strategic Planning team**
    - **New! 29th August: Faculty Liaison Librarian**, by direct email and triage
  - All query and feedback channels are open ie not restricted to authenticated patrons
    - *Yes, this does lead to trolls and spam!*

View It

[UQ eSpace - View online \(Open Access\)](#)

[REPORT A PROBLEM](#)



Chat - Library - The University of Queensland, Australia - Google Chrome

support.my.uq.edu.au/app/chat/chat\_launch\_lib/p/45

## UQ Live Chat

All fields are required.

First name

Email address  
(Use your UQ email if you have one)

How can we help you today?

[Chat - online now](#)

# Harnessing the data


- From July 2019 >

- Major pain points within the CRM > not designed for job-by-job review
- Collaboration with central ITS for custom reports, including a **'Full Text Search'**
  - *But patrons rarely use the 'right' words!*
- **Emailed reports** > twice weekly (5pm Mon & Thurs), 200-700 row spreadsheets
  - Benefit of **qualitative review of direct word-of-mouth patron experiences**
  - Adding to **feedback and suggestions by our front-facing staff**
  - Supplemented by **our quantitative data** in various Analytics platforms

Queue	Subject
Library - AskUs (General)	Hi,
Library - AskUs (General)	open UQ library
Library - AskUs (General)	How to search for book
Library - AskUs (General)	I can't open New Scientist issues online
Library - Librarians	Finding full text in Endnote
Library - Librarians	Expert Searching - Research Question Query
Library - AskUs (General)	i want to find an article but not sure
Library - AskUs (General)	Library access not working
Library - Librarians	Accessing JAMA Journal Article
Library - AskUs (General)	Broken Library Link
Library - AskUs (General)	Can I extend the time to return the book?
Library - Fryer	can I please order this to look at ?
Library - AskUs (General)	library database for alumni
Library - Librarians	OpenURL resolver for Zotero
Library - Resource Management	Purchase request cancellation
Library - AskUs (General)	request an article
Library - Librarians	Required reading unavailable
Library - AskUs (General)	tell me how to fix it
Library - AskUs (General)	UQ BookIt access
Library - AskUs (General)	Why can't I open past exam examples

Scheduled report for "Library Data Analyst SvG Chat and Enq v1"

CS crmreports@uq.edu.au  
To undisclosed-recipients@custhelp.com

 Library Data Analyst SvG Chat and Enq scheduled.xls  
1011 KB

# Types of queries

- **Peaks and troughs** of queries across the year > Alumni access at graduation time and Past Exam Papers during exam preparation time
- **Access issues** > electronic resource access, license restrictions, gaps in availability, issues with platform shifts, and authentication with local and external resources
- **Gaps in web content** > requesting materials and information on variations such as closed stack collections
- **Search help** > how to search Primo effectively for certain types of resources and unexpected failure to find records
- **Patron account problems** > unexpected loss of access
- **Follow-up queries for Library communications** > unclear information in Alma letters
- **Physical navigation support** > inconsistent signage in-person and info on online floor plans
- **Referencing support** > Citation Style languages available in Primo
- **Technical issues** > integrated systems including auto-loans, auto-returns, laptop loans, and charging lockers
- **Understanding Primo UI** > confusion for availability and use of features and functionality
- **Help with other discovery options** > both our own other than Primo: UQ eSpace and Fryer Library Manuscripts and others: Google Scholar, Trove, OCLC, etc
- **Interest in additional software and tools** > browser addons and EndNote functionality like Find Full Text

# Decision-making factors

- **Considering transition from idea to action** >

- **How strong** is the feedback and **how many** of the same theme?
  - **Note!** A few comments could be a clue for many who feel the same, but don't let us know
  - **But!** One very strong comment does not imply that everyone feels similarly
- Is the feedback **reasonable and doable**?
- **How much work** would be required, both initially and ongoing?
- Is the amount of work **balanced** with the beneficial outcome?
- Will the change **solve one problem but potentially cause another**?
- Is there **existing functionality** that might meet the need, but just isn't obvious or has pain points?
- Is the solution on the **Roadmap**? Can we wait? Can we get it on the Roadmap?
- Is there any way to **measure** the success of the change? Hard numbers or reduction in queries?



# Example 1: Consistent pathways

# Consistent pathways – Why?

**Goal:** Streamline steps to key services and features across our web presence, supporting both patrons and staff

**Methods:** Primo user area menu + UQ's MyLibrary menu



**Staff:** “You might just file this email under “R” for rants, which is fine. Is it possible to have the same way of accessing My Library on every instance of the Library website?”

It would be **easier to communicate** to students how to view their library account if the first step was the same wherever they are.

Such a change would also make it **easier to determine** if patrons are actually logged in when they are having trouble accessing an article.”



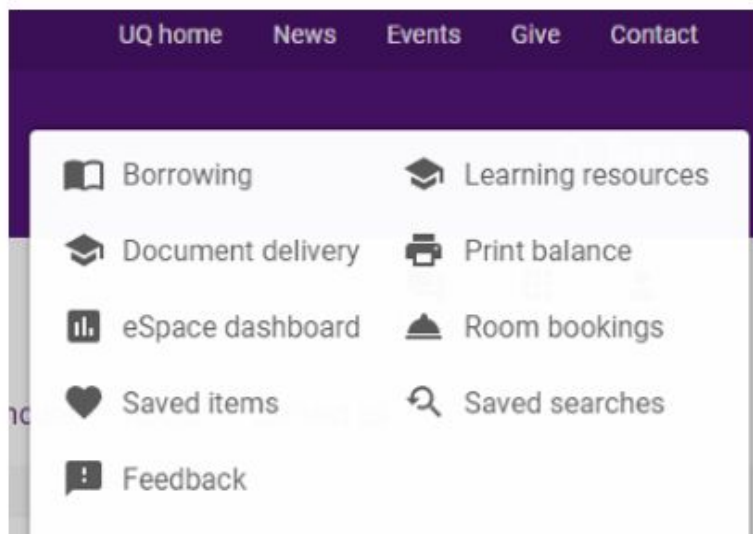
**Patron:** “Request you to please renew the book issued. Thanks.”

**Staff:** “In case you are not aware, you can also manage your loans, requests and overdue items, and check your borrowing history by logging into the Library home page. The following page provides more information: <https://web.library.uq.edu.au/borrowing-requesting>”

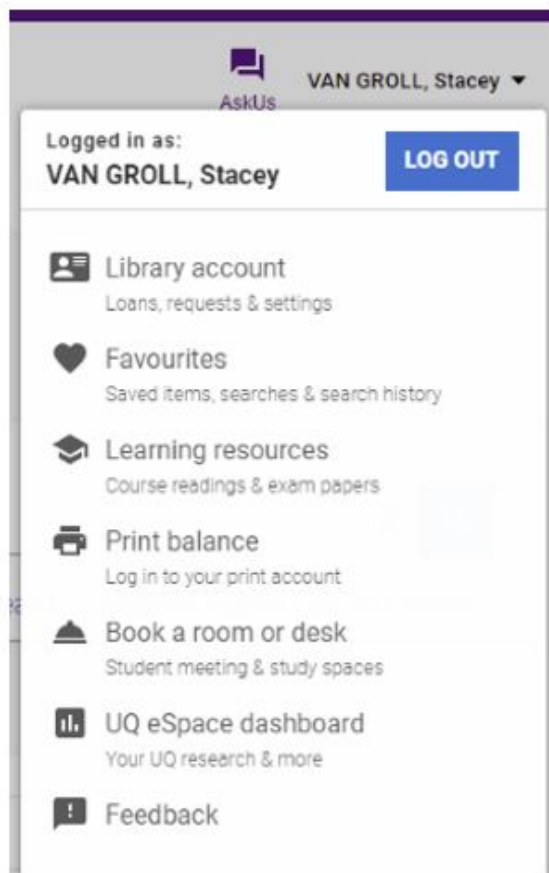
# Consistent pathways – Methods & outcomes

Logged in local menu, including on our Library homepage

Before

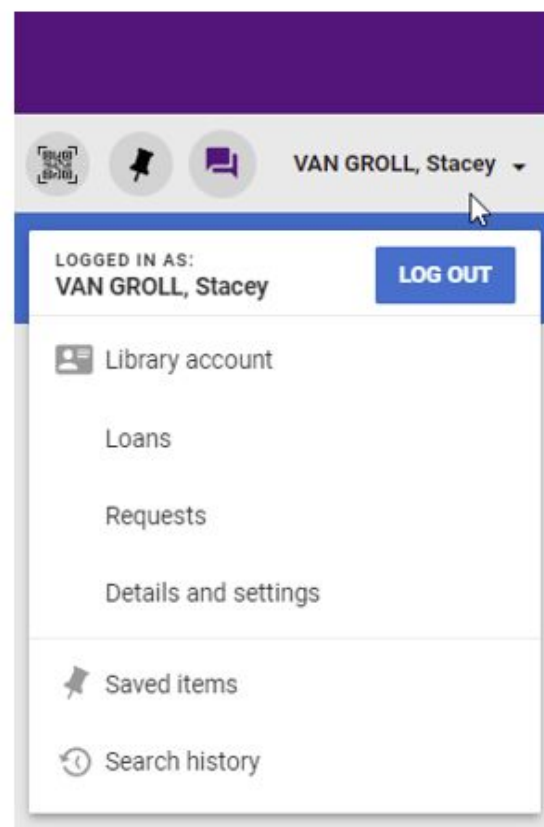


After

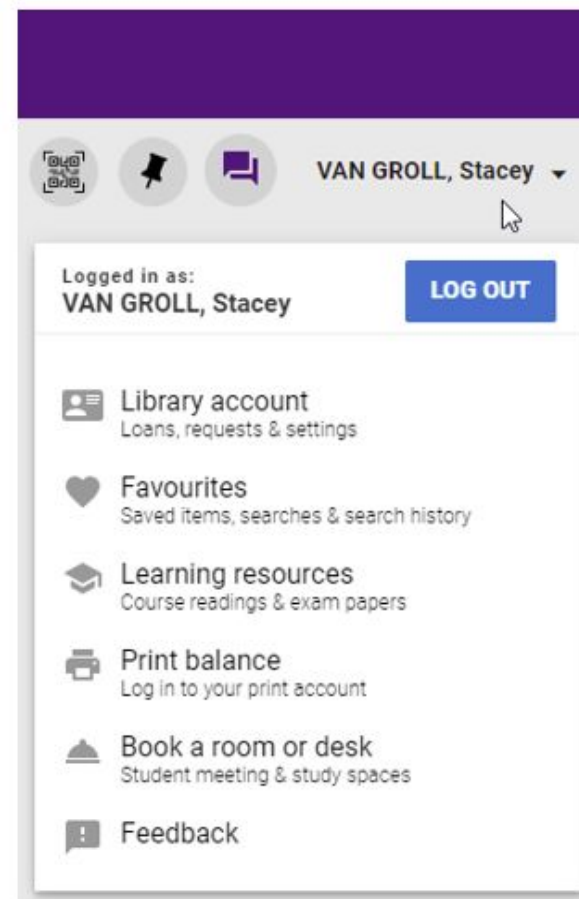


Logged in Primo menu

Before



After

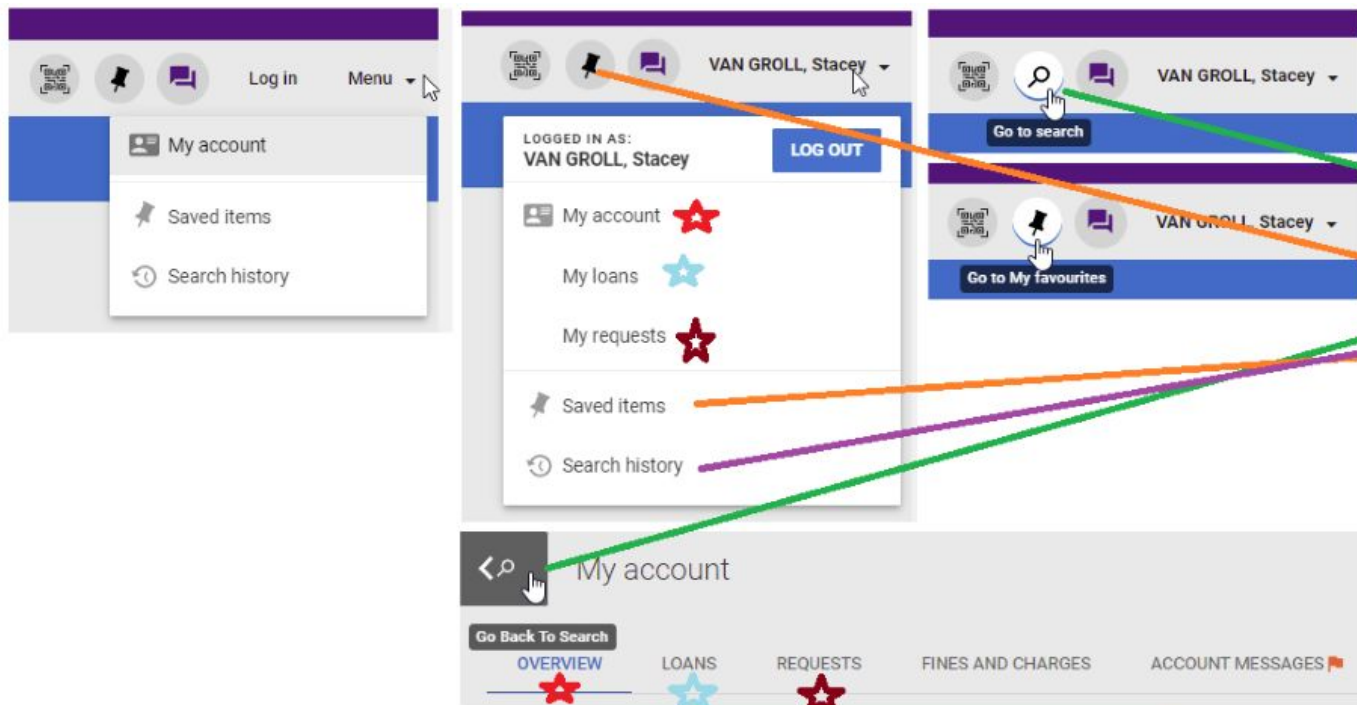


# Consistent pathways – Methods & outcomes

- **Full redesign** bringing both menus into alignment
  - Go Live 16th August (*waited until after August Release*)
- **Consolidation of multiple options** > one link to Favourites and one link to Account
- **Addition of sub-text** > to indicate options available within
- **Removal of redundant options** > removed 'Document delivery' with an existing link in Primo's Account > Requests
- **Additional personalisation** > copied Primo's name display to our local menu
- **Greater Feedback channel visibility** > added to all menus
- **Retired branding** for UQ's 'MyLibrary' brand + Primo's 'My' focus eg My Account > shifted to **Library account**
- **Some rollout continues** > eg Central ITS forms
- **Testing considerations**
  - Keeping the same tab or open a new browser tab
  - Ensuring authentication pathways preserved
  - Retention of search state, for links staying within Primo
  - Checking ongoing analytics beacons
  - Allowing one inconsistency, with personalised UQ eSpace dashboard difficult within Primo
  - Limited adjustment of the guest menu
  - Dealing with the Primo mobile menu (*a nightmare!*)
    - *Accepted some aspects of undesirable behaviour as mobile use is less than 2.5% average in Primo*



# Consistent pathways – Analytics



Action	Actions		Actions
	2021	2022	
Blocks and Messages	2,824	1,273	<b>4,097</b>
Click on the QR link	1,355	600	<b>1,955</b>
Fine and Fees	5,010	2,046	<b>7,056</b>
Go to Search	4,573	2,383	<b>6,956</b>
Go to Search History	1,248	513	<b>1,761</b>
Go to eShelf	23,414	10,729	<b>34,143</b>
Loans	25,095	11,414	<b>36,509</b>
Overview	18,969	8,551	<b>27,520</b>
Requests	9,388	4,836	<b>14,224</b>
<b>Grand Total</b>	<b>91,876</b>	<b>42,345</b>	<b>134,221</b>

Borrowing	Learning resources
Document delivery	Print balance
eSpace dashboard	Room bookings
Saved items	Saved searches
Feedback	
Website alerts	Website spotlights

From 12<sup>th</sup> January 2021 through 30<sup>th</sup> June 2022  
MyLibrary was clicked on 72,360 times, and then 74% selections of a menu item (53,749 times).

Menu Item	Clicks	%	Menu Item	Clicks	%
<b>Borrowing</b>	10,110	13.97%	<b>Learning resources</b>	19,100	26.40%
<b>Document Delivery</b>	1,545	2.14%	<b>Print balance</b>	3,892	5.38%
<b>eSpace dashboard</b>	739	1.02%	<b>Room bookings</b>	4,374	6.04%
<b>Saved items</b>	11,526	15.93%	<b>Saved searches</b>	2,118	2.93%
<b>Feedback</b>	42	0.06%			
<b>Website alerts</b>	54	0.07%	<b>Website spotlights</b>	155	0.21%
<b>Masquerade</b>	94	0.13%			

# Example 2: Indicative glanceability

# Indicative glanceability – Why?

**Goal:** Remove confusion and add consistency and clarity, for both online discovery and physical wayfinding

**Methods:** Availability statement + View It + Get It



**Patron:** "Question about checking out a physical book"

**Staff:** Hi, I can see you're enquiring about borrowing a book. How can I help?

**Patron:** Hi, I'm actually inside the main library now

**Patron:** I was curious to see if I could actually check out a book rather than reading it online

**Staff:** You can definitely borrow books from the library. Some books we have in both physical and online forms

**Staff:** I can see that book is only available online."



**Patron:** "I'm looking for a book, it says that the book is available at Warehouse General. where is it actually?"



**Patron:** "Can an external user access UQ espace theses?"

**Staff:** "The e version will not be accessible to you, only the print copy to view"

**Note:** This was incorrect, and the patron was able to access online, but Open Access info unclear

# Indicative glanceability – Methods & outcomes

## Availability statement

- **Colour consistency and alignment with our UQ stylesheet**

- **Blue > available now** either online or physically, with some variations such as for requests between campuses
- **Grey > available later** by request, with some variations such as UQ eSpace restricted to staff and students

- **Terminology consistency and consolidation**

- **Yes: Available online – Available at – Check availability – Access conditions apply**
  - **Note:** To emphasise physical format by Library > added 'Library' eg Central Library to availability statement and Library location facet (*by Primo BO mapping to avoid bigger Alma change*)
- **No: Check holdings – Unavailable – No full text**

### Available online

- *Online from CDI, Alma, LibGuides, and eSpace (when Open Access)*

### Available at {Library Location (Call number)}

- *At least one Alma physical item on shelf*

### Available at {Library Location (Call number)} and other locations

- *At least one Alma physical item on shelf, and items in multiple locations*

### Check availability at {Library Location (Call number)}

- *Physical holdings but no items OR All Alma physical items not on shelf*

### Check availability at {Library Location (Call number)} and other locations

- *Physical holdings but no items, and holdings in multiple locations*

### Check availability

- *Expanded search for CDI records OR Services page when no access*

### Access conditions apply

- *AtoM and UQ eSpace (when not Open Access)*

# Indicative glanceability – Methods & outcomes

View It

System	Original	Change	Notes
Alma & CDI	Full text available at:	View online: {{provider}}	Portfolios. Common
Alma	Resource available at:	View online: {{provider}}	Databases. Common
Alma & CDI	Selected full text available at:	View online: {{provider}}	Portfolios. Uncommon
Alma & CDI	view full text	View	Rare. Accompanied by static text - View online: View
Alma & CDI	No full text available	This resource is not currently available. You can let us know by using the <b>Report a problem</b> button.	Only when Link Resolver fails
CDI	View full text at {{provider}}	View online: {{provider}}	Link in Record
CDI	View full text in collection	View online	Link in Record
CDI	View record in {{provider}}	View record in {{provider}} View record from {{provider}} View full text at {{provider}} View in {{provider}}	Link in Record. Cannot be changed
AtoM	View detailed manuscript record	View detailed manuscript record	Link in Record. Section label is 'Access'
LibGuides	View Library guide	View Library guide	Link in Record
eSpace	UQ eSpace – Available online UQ eSpace – Available online for staff and students (Log in required) UQ eSpace – Citation only (embargoed) UQ eSpace – Citation only (Request access)	UQ eSpace – View online (Open Access) UQ eSpace – View online for staff and students (Log in required) UQ eSpace – Citation only (embargoed) UQ eSpace – Citation only (Request access)	Link in Record Section label is 'View It' for 1 <sup>st</sup> one and 'Access' for last 3

# Indicative glanceability – Methods & outcomes

## Get It

- **More location info** > added **View location** button to closed stack locations, including our Warehouse
- **More access info** > added more meaningful information to external location names eg **(by appointment)** or **(Level 3 or 4)**
- **Consistent terminology and format clarity for access**
  - Availability > **Physical availability**
  - Status > **Availability**
  - Item in place > **Available**

Year	All	Volume	All	Description	All
Warehouse > Journal > KS05156					
Holdings: 1(1962)-Jun(2000)					
lacking 2:1 11:4(1972) 12:2(1973)					
					<a href="#">View location</a>
Architecture Music > Journal > TH435 .B8					
Holdings: Jun(2001)-Sep(2014)					
lacking Jun(2014)					
					<a href="#">View location</a>

BOOK  
**Child & adolescent development in context / Tara L. Kuther, Western Connecticut State University.**  
 Kuther, Tara L.  
 2021  
 Available at Central Library General (Level 3 or 4) (BF721 .K88 2021) >

Get It

REQUEST OPTIONS: [Place a request](#) / [Help for requests](#)

Central General (Level 3 or 4) BF721 .K88 2021

[Hide details](#)

[View location](#)

Physical availability:

(1 copy, 1 available, 0 requests)

1 - 1 of 1 Records

BARCODE	TYPE	POLICY	DESCRIPTION	AVAILABILITY
34067034933209	Book	84 Days Loan		Available

# Example 3: Enhancing access

# Enhancing access – Why?

**Goal:** Provide the quickest online access possible, while supporting patron choice and allowing for failure

**Methods:** Direct linking + most stable services + all link options + support Open Access



**Patron:** "I need to access journal but it not accessible"

**Staff:** Hi, I can see you're enquiring about accessing a journal. Let me have a look.

**Patron:** its ask for institutional access

**Staff:** I can see there's something strange happening with that SpringerLink link, but you can access it using the other link. Click on the title in the Library search results. You should see **two options for accessing the article**. Choose the DOAJ link, which should allow you to access the title for free.

**Patron:** ok thank you. let me try this option. **Thank you it worked. I got the full article.** Thank you so much. Cheers.

**Staff:** You're welcome. I've sent a message to our team regarding the other link on the page. You can always use Report a problem on our pages as it helps us maintain our collection."



**Patron:** "When I attempt to search the article after logging in and searching using the UQ Library search I get this error meesage when my browser attempts to open the article. I have tried on multiple browsers and **it occurs regardless of whether I click 'access PDF', 'access HTML' or 'available online'.**"



**Patron:** "400 error or bad gateway for **every link** to access pdf/online version of reference"



# Enhancing access – Methods & outcomes

- **Direct Linking** > except for journals
- **Portfolio activation** > lots! for failsafes and options
- **Collection activation for CDI** > lots! Including Open Access
- **Display Logic Rules** > n/a no hiding links
- **Online Services Order** > demoting if known poor linking
- **Unpaywall GES** > "Look for Open Access version"
- **CDI QuickLinks** > **enabled 13th February**, as stable & direct
- **CDI Show More Links** > enabled with May 2022 release, but **disabled 19th July** as breaking Direct Linking



1  ARTICLE  
**Boys Will Be Boys; Cows Will Be Cows: Childrens Essentialist Categories and Animal Species**  
Taylor, Marianne G ; Rhodes, Marjorie ; Gelman, Susan A  
Child development, 2009, Vol.80 (2), p.461-481

 PEER-REVIEWED  OPEN ACCESS

 Access PDF  >  Access HTML  >

 Available online  >

View It

View online: [Oxford University Press Journals Current](#) 

Available from 01/03/2000 volume: 1 issue: 1.

SHOW LICENSE 

Additional services

[Look for Open Access version](#) 

# Enhancing access – Analytics

## Consistently popular

Action Groups	Actions		
	2020	2021	2022
Document - General - Display full record	20.3%	19.8%	20.6%
Search - Search - Basic search	23.0%	21.5%	20.3%
Document - General - Click on availability statement	21.7%	20.9%	19.0%
Document - General - Click on title	8.4%	11.2%	10.6%
Document - Actions - Citation	4.2%	4.7%	4.4%
Results List - General - Next page	5.0%	4.3%	3.0%
Results List - General - Facet filtering	2.7%	2.7%	2.6%

## Adding CDI Quicklinks

Month (long desc)	Actions					
	Availability	CDI HTML	CDI PDF	Full Record	Icon	Title
August 2022	321,403	6,574	25,587	343,419	886	185,053
July 2022	143,661	2,747	14,049	158,372	487	76,306
June 2022	271,236	6,856	20,117	287,395	677	159,306
May 2022	494,735	14,563	45,485	521,817	1,102	288,489
April 2022	422,486	8,643	36,305	459,757	1,037	242,282
March 2022	366,185	6,267	27,704	416,805	1,087	205,051
February 2022	180,758	1,185	7,644	205,223	653	91,308
January 2022	152,610			161,175	342	69,192
<b>Grand Total</b>	<b>2,353,074</b>	<b>46,835</b>	<b>176,891</b>	<b>2,553,963</b>	<b>6,271</b>	<b>1,316,987</b>

Action	Actions	% Actions	Average by day
Full Record	2,553,963	39.6%	10,510
Availability	2,353,074	36.5%	9,683
Title	1,316,987	20.4%	5,420
CDI PDF	176,891	2.7%	884
CDI HTML	46,835	0.7%	234
Icon	6,271	0.1%	26
<b>Grand Total</b>	<b>6,454,021</b>	<b>100.0%</b>	<b>26,560</b>

# Summary

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## The University of Queensland – All about UQ

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Community – Systems – Data – Admin

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## Looking for opportunities

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Feedback channels – Query types – Decision-making

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## Examples

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Example 1 – Consistent pathways

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Example 2 – Indicative glanceability

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Example 3 – Enhancing access

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## Questions?

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# Contact

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