CARLI | Consortium of Academic and Research Libraries in Illinois

Welcome to the webinar!

KNOW BEFORE YOU GO (LIVE): ADVICE FOR CREATING PRIMO VE USER GUIDES

Krista Bowers Sharpe, Western Illinois University

Christina Norton, Bradley University

Dee Anna Phares, Northern Illinois University

- Your microphones are muted. Please turn off your video.

- Most questions will be answered after each presentation.

- Please type any questions into the chat box. Planning committee members are monitoring the chat.

- This session will be recorded and made available on the CARLI website.

User Guides & Tutorials Joint Subcommittee Members

Krista Bowers Sharpe, Western Illinois University (Public Services Committee)

Amy Hall, National-Louis University (Instruction Committee)

Molly Mansfield, Dominican University (Instruction Committee)

Christina Norton, Bradley University (Instruction Committee)

Nestor Osorio, Northern Illinois University (Public Services Committee)

Dee Anna Phares, Northern Illinois University (Instruction Committee)

**Elizabeth Sterner**, Governors State University (Public Services Committee)

With lots of help from CARLI Staff!

Ways to approach guide creation for Primo VE

Content covered

Delivery format used

LibGuides

Tutorials

Space in
Primo VE
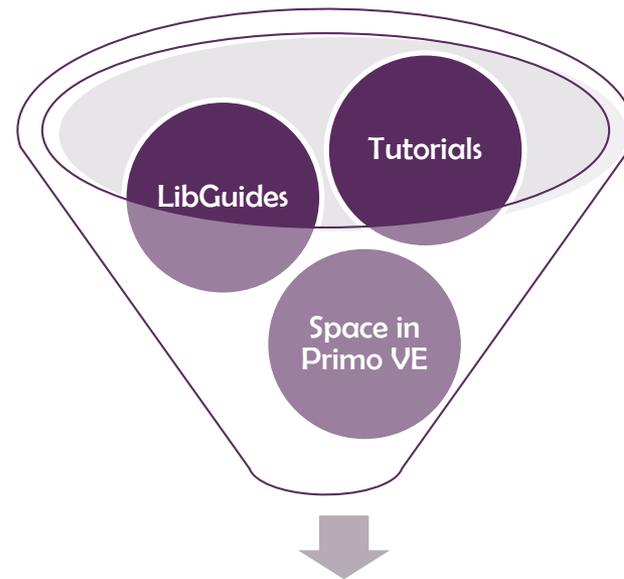
Knowledge of Primo VE

Content approach: Skills Necessary for Go-Live Date

- Basic searching
- Advanced searching
- Filtering results
- Brief results screen
- Full display screen
- How to get stuff in results lists: physical or electronic
- Paging Through Search Results
- My Library Card
- What is a discovery layer?

Selected and adapted from Ex Libris End User Guide page:
https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/End_User_Help?v=3

Existing Primo VE Help Online

Why didn't we find more?

- It's new
- Monthly updates
- A whole new beast

Sign In

In the right hand corner of Primo, you will see the option to sign in.

Signing into Primo can help optimize your search, and you have access to special features, such as saving your favorite results.

If you see your name there already, (instead of the words "Sign in"), then you are already signed into Primo!

Sign in   Menu ▼
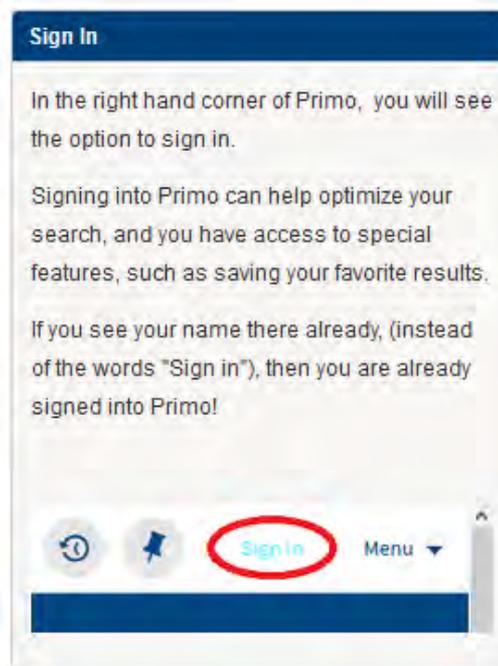
Finding Current Resources

There are two ways to find more current resources.

You can use the publication date filter and adjust the from date and click on refine.

Publication Date ^

From	to	
2010	2019	**Refine**

You can also scroll down to find the recently added box and make a selection.

Recently Added ^

New From Last Month *(14)* ☒

New From Last 3 Months *(23)* ☒

Get It or View It

PRINT BOOK
The silent clowns
Walter Kerr, 1913-1996, author.
New York : Knopf; 1975

A physical item available in ▓▓▓ indicates the collection / location and its call number

Available at ▓▓ Library Books Floor 3 PN1995.9.C55 K4

PRINT BOOK
Serious play : modern clown performance
Louise Peacock
Bristol, UK ; Chicago : Intellect; 2009

A physical item not currently available connects you to ▓▓ copies...

Check holdings and other locations

Delivery format approach: **Where** do you explain **what**?

	LibGuides	Video Tutorials	Primo VE Landing Page
Content	Various skills and aspects of Primo VE	Features not as likely to change	►"What is this?" ►Links to guides, etc.
Graphics	Use good graphical representation rules		►Use good graphical representation rules ►Make mobile-friendly
Currency	Easiest to update, but still consider monthly updates	Harder to change, so limit to basics	Discuss feasibility of updates with your Primo VE admin
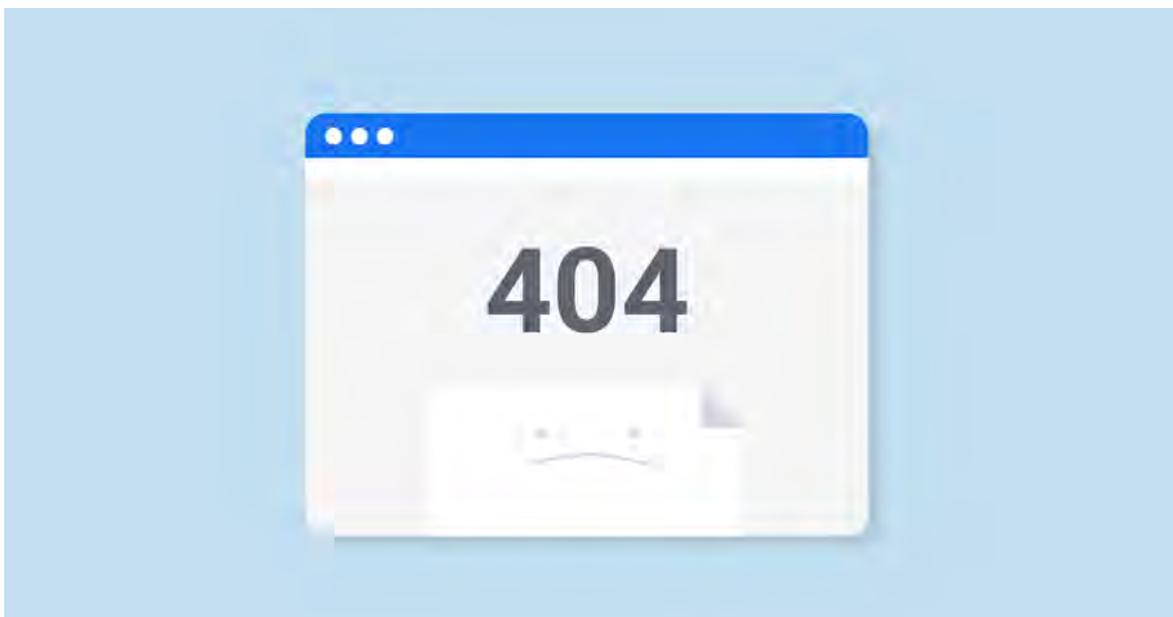
We wanted tutorials to use as models

What did we find?

— Alma tutorials

— Ex Libris Knowledge Center

— Monthly updates make them impractical

Separation of Audio Visual Facet in CDI

March 2020

Primo VE has added separate Resource Type facets for Audio and Video, which allows users to filter their audio/visual results separately for CDI searches.
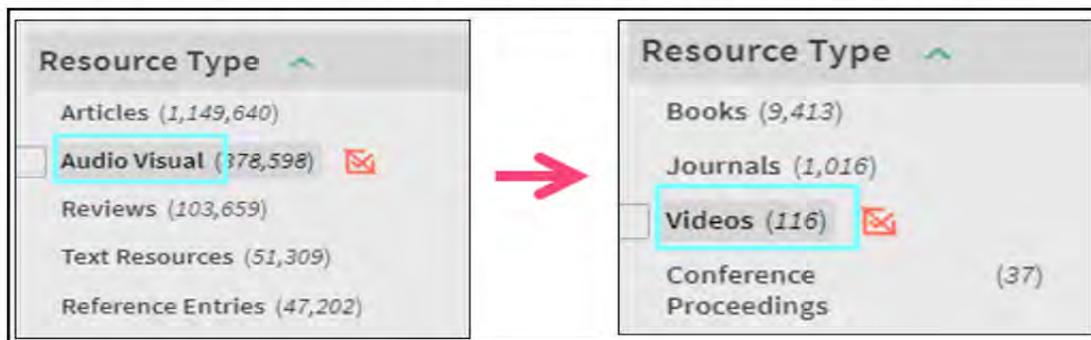

Splitting Audio Visual Facet in CDI Searches

For more information regarding the new CDI resource Types, see Resource Types in CDI.

Monthly updates are both an advantage and a challenge

- Requires vigilance and flexibility
- Think small, bite-sized bits
- Consider LibGuides or other research guides instead of tutorials
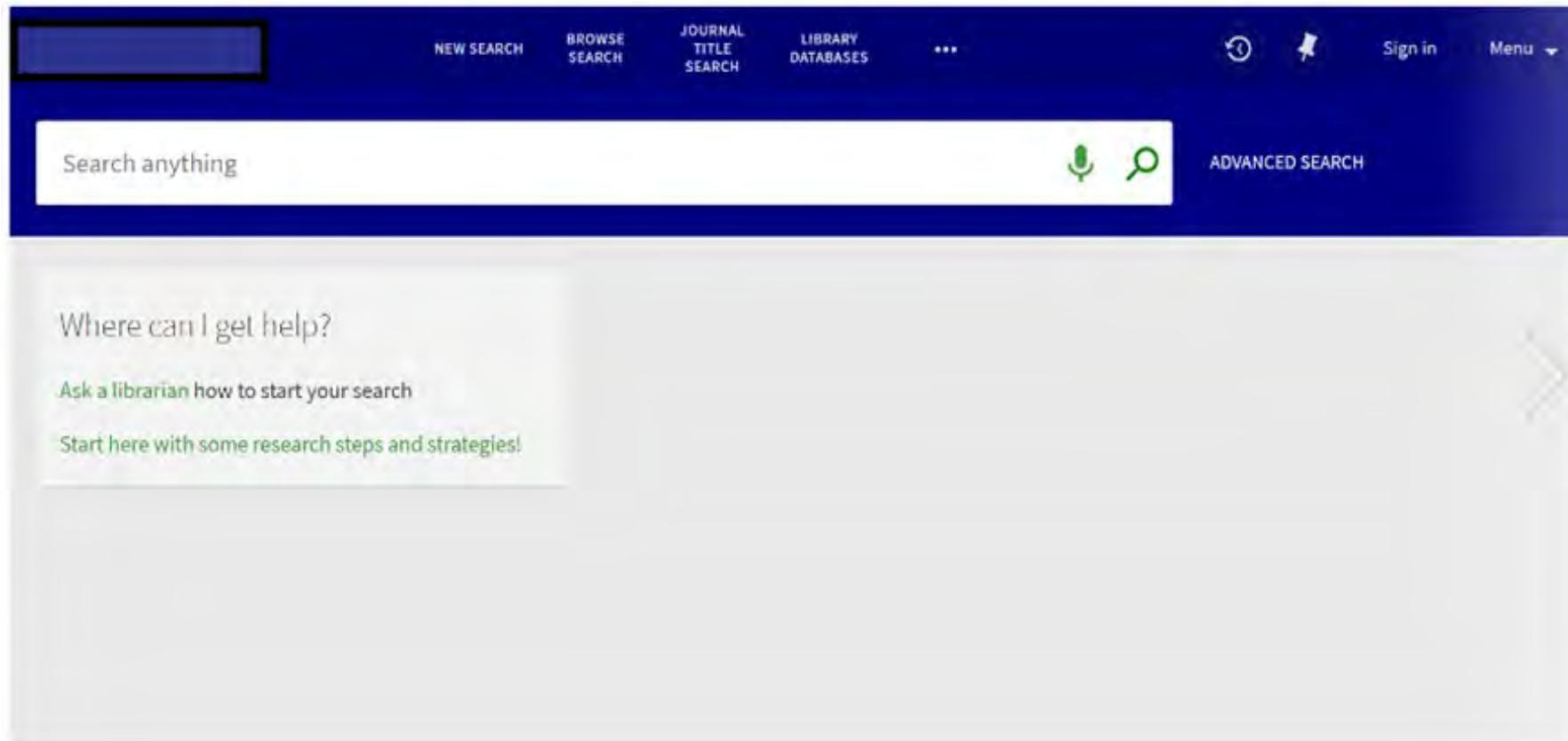
Since the landing page is the first thing patrons will see, it is important to provide information and guidance
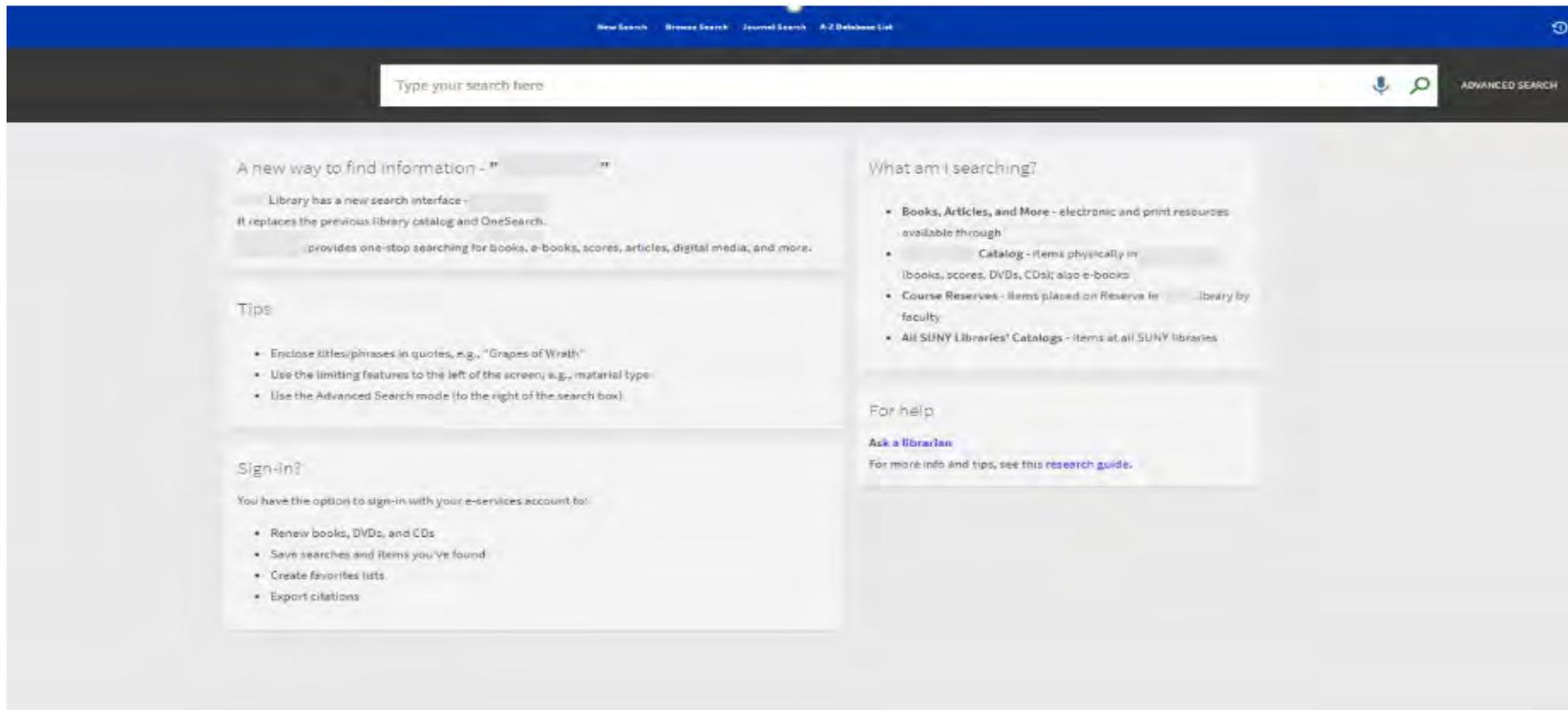
- Users need to have basic questions answered
- They need to know where to go when they have further questions

Conceptual Graphics:
- Convey an idea or concept visually
- Tips for conceptual graphics:
  - Keep them simple
  - Add text outside the graphic
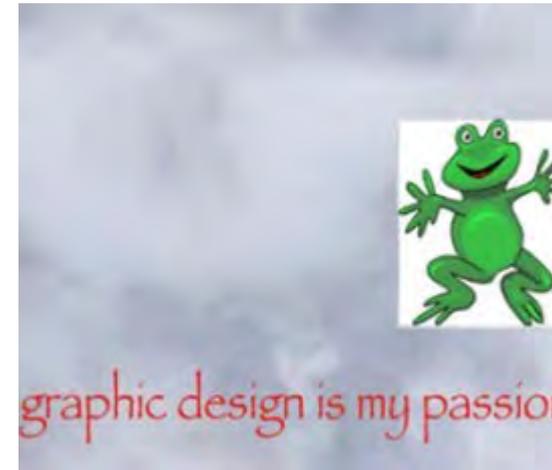
Procedural graphics:
- Show a step-by-step, technical process, usually in the form of screenshots
- Tips for good screenshots:
  - Include an appropriate amount of visual information
  - Be aware of contrast when annotating
  - Keep track of screenshots and update them when necessary
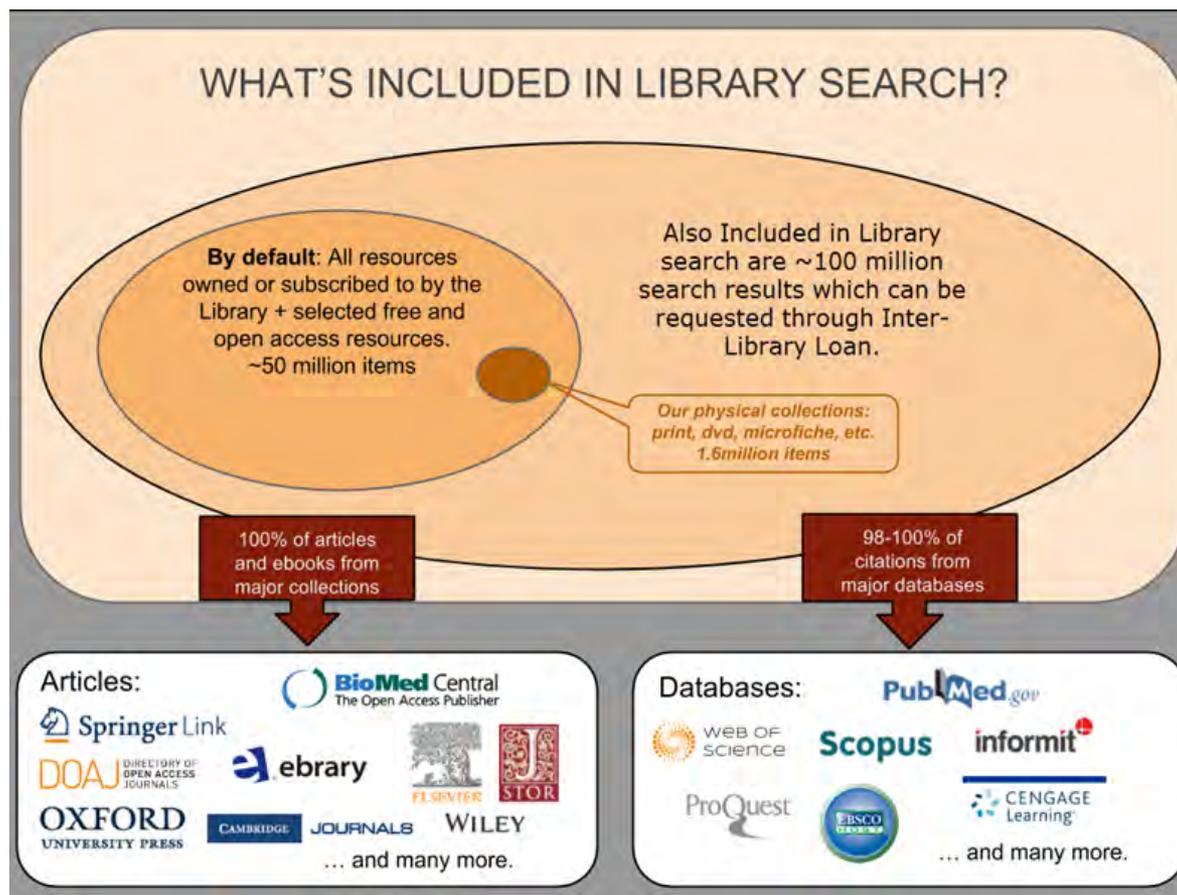
Has a lot of text ●Circles aren't labeled ● Just an overwhelming amount of info in general

What am I searching?

WorldCat: Search holdings of libraries from around the world

Catalog: Search print holdings across Campuses

Search: Search Library holdings plus hundreds of databases for print and online content

Course Reserves: Search for items on reserve at

TERC: Search for items in the Teacher Education Resource Center

WorldCat

Catalog

Search

Course Reserves

TERC

Minimal text within the graphic ● Clarifying text included outside to avoid crowding

Books, Articles, Databases, etc.

For books, articles, databases, and other collection resources, simply type your information (such as title, author, or subject) into the search bar and click **Submit**. This searches the library's **One Search**.
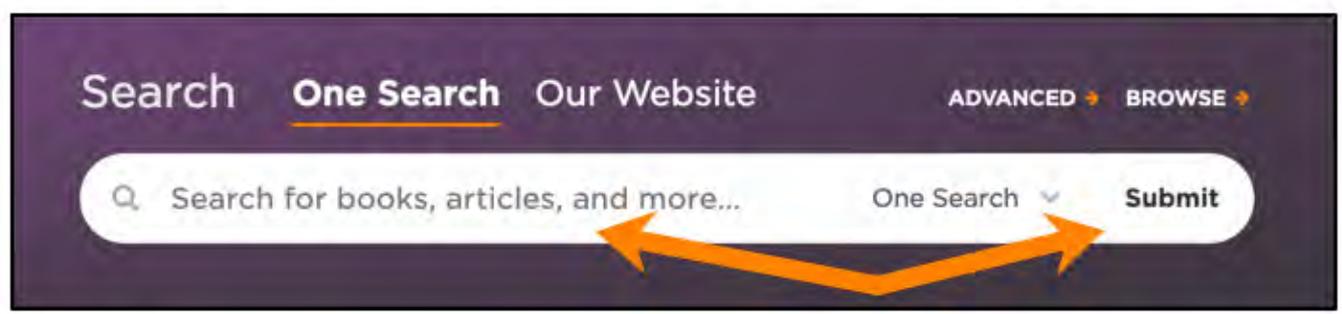
Explaining how to search, so only shows the search bar ● Annotations (arrows) are high-contrast

Please type your questions into the chat box.

This session has been recorded and will soon be available on the CARLI website.

Next session:

Usability Basics: Test With Your Users

will begin at 2:30 PM