Orbis Cascade Alliance
Primo Standardization Project Group: Final Report
January 17, 2018

The Primo Standardization Project Group (PSPG) does *not* recommend pursuing mandated standardization of Alliance institutions' Primo interfaces at this time. We recognize that Alliance libraries are currently sharing work and expertise in the management of Primo through the efforts of the Systems and the Discovery and User Experience Teams and their various working groups. This has led, voluntarily on the part of Alliance institutions, to a level of de facto standardization. The PSPG does not believe that significant additional efficiencies will be achieved at this point through more rigorous or mandated Primo standardization. Moreover, local control and local variation is valued at Alliance institutions. In the report below, we outline the work of the project group, the research we undertook, our findings, and a few additional recommendations.

Overview and process

The Orbis Cascade Alliance Primo Standardization Project Group (PSPG) was established to develop a comprehensive recommendation for standardizing Primo. Team members were nominated by Council and selected by the Systems and the Discovery & User Experience Teams. The membership is as follows:

Rami Attebury (Idaho)
Stewart Baker (Western Oregon)
Scot Harrison, Chair (Saint Martin's)
Kun Lin (Whitman)
Rebecca Marrall (WWU)
Lisa Molinelli (PCC)
Curtis Wyant (Alliance)

The PSPG has met regularly since September 14, 2017. The team first reviewed "Primo Standardization and the Orbis Cascade Alliance: A White Paper," which was written in the winter of 2017 by an ad hoc working group of the Systems Team, as well as both the June 2017 Primo Standardization Survey of Systems Team representatives and notes from the July 2017 Council discussion when the PSPG was authorized. In addition, we examined the University of Wisconsin system "Primo Guidelines on Consortium vs. Campus Decisions" and surveyed other consortia's practices. We reviewed the Alliance Systems Team's "Primo New UI: Manual." Finally, we surveyed the interfaces of the twenty Orbis Cascade Alliance institutions who were already live on the new UI as of September.

Guiding us

The summer Primo Standardization Survey found that many systems team representatives felt they were spending too much time managing Primo—this was the previous UI—and so were interested in efficiencies for this part of their work. At the same time, however, respondents noted that there were differences among Alliance institutions and that they had concerns about losing the flexibility to customize for local users. Many respondents also indicated that they had more confidence in the out-of-the-box usability of the new UI and so anticipated there would be significantly less need for customizations. One of the loudest concerns voiced was that of not having to undo work that had already been done. Respondents stressed a strong preference for opt-in recommendations rather than mandates for standardizations.

In the July Council discussions about whether to pursue standardization, Council members echoed many of the concerns expressed by their staff, especially concerns about mandates and having to roll back local modifications, work typically done to meet needs of local users. Nevertheless, there were also voices noting the potential efficiencies and other benefits of "doing things the same" or even "doing things together." For instance, several Council members emphasized the shared need to make certain Primo implementations meet accessibility standards.

As noted, the PSPG also reviewed the previous working group's white paper on standardization and the three potential goals for standardization that group had identified: 1) efficiency, 2) consistency, and 3) functionality and accessibility. The PSPG reached a consensus—given the survey, discussions at Primo Day, and Council feedback—that efficiency seems the most significant potential Alliance-wide goal for a potential standardization effort, but that consistency—at least simply for consistency's sake—is the most problematic. The PSPG recognizes that local institutions value the ability to address local needs and that customizations focused on those unique needs can add real value for their users. Finally, functionality and accessibility were treated in the white paper as a combined goal. The PSPG, however, views these as separate. Because the new UI seems more functional out-of-the box than the previous UI, the group believes Alliance institutions will need to pursue fewer and less complex local customizations. In other words, functionality is critical—Primo needs to work well for our users—but it does not seem to be a critical goal for standardization. Finally, accessibility is significant and a shared concern among Alliance libraries. However, accessibility is also critical to all Primo libraries, and, as such, should be addressed by Ex Libris, not directly by either local customizations or Alliance-wide shared customizations. For the PSPG, the question becomes would Primo standardizations lead to significant *efficiencies* for Alliance institutions. Then, would those possible efficiencies outweigh the value of customizations to meet needs of local users.

Survey of other consortia

Few consortia responded to our query about Primo standardization. Those that did were state systems—Montana, the Cal State schools, and the Wisconsin system—and so quite different from the Orbis Cascade Alliance. The Montana consortium had little standardization, only defining required scopes. The Wisconsin system had more. Their "Primo Guidelines on Consortium vs. Campus Decisions" specifies what decisions are made by the campus and what are made at the consortial-level, as well as distinguishing of campus versus central administrative responsibilities. The Cal State schools discovery systems are centrally administered and so have a greater level of standardization. These are all state systems, and as "consortia" are quite different from the Alliance. Moreover, the Wisconsin and Cal State systems have a much longer history of standardization that predates their adoption of Primo. The Alliance asks the question of *whether* to standardize, while these systems ask *what* to standardize.

Survey of Alliance implementations of the new UI

By the start of fall classes this year, twenty of the Orbis Cascade Alliance's thirty-nine institutions were live with the Primo new UI, two others had public betas, and others had begun configuring and testing in their sandboxes. While the variations and level of customizations are not as significant as in the previous UI, we found only one element that was consistent across twenty live Alliance instances: having a Show/Hide option for Summit libraries on the full-record display. Every library so far has implemented this customization. For thirty-two other elements examined, the PSPG found some local variation across implementations. (A selected list is available in the attached table "Common Variations in the Primo Instances across the Alliance.")

One of the primary reason libraries make changes to their local Primo installation is to make the interface more usable for local users. We see variation in the customizations made because, it is asserted, users at different libraries vary and so have unique needs. Graduate students at an R1 have different expectations of a search interface than do a community college students. Variations seen can include, for instance, facets or filters available or advanced search options.

An even more important reason for customization and variation is to build the image, brand, and/or reputation of the local institution. As important as a welcoming building and helpful library staff is a discovery system where students and faculty can easily find and then access what they need. Institutions have established unique names for Primo and adopted institutional color palettes. In addition, Alliance institutions have a variety of third-party systems integrated with or linked in Primo: LibGuides, citation managers, various chat tools, payment portals, etc.

Finally, some of the variations are carried over from the previous UI via existing PBO configurations and/or Alma Discovery Display Logic settings. These are not customizations institutions made to the new UI so much as they are customized configurations made to the previous UI that were inherited by the new UI. Some of the inherited configurations were local decisions. Other variations were the result of Ex Libris working from implementation recommendations that change or evolve from one cohort to the next. It would be difficult to unravel these variations, whatever their origin, and to reach a consensus on a standardized configuration.

While there is variation for almost every element we examined, there seems to be less locally unique JavaScript changes and CSS (stylesheet) modifications, the kinds of modifications that Ex Libris would not be able to take into account in its release testing. CSS modifications can be used to modify color schemes or to hide fields that are irrelevant for an institution (e.g., pick-up location options when the library has only one). Customized JavaScript is used by some institutions, for instance, to embed chat widgets or provide text-a-call-number functionality. In this sense, the complexity of local customizations in the new UI is somewhat less than what we see with the previous UI. This may be attributed to a more robust out-of-the-box usability for the new UI. However, it also may be because Alliance libraries have only been live on the new UI for a few months and so have not had as much time to customize. There is also a learning curve with the version of JavaScript used in the new UI (Angular) that some libraries have not had the capacity or time to climb. Libraries have different level of expertise with Primo, and this will likely lead to increased variation among Primo instances. Different libraries and librarians will have differing views both of what is *good enough* in terms of usability and of the value of making an implementation better than "good enough."

Recommendations

The PSPG does *not* recommend pursuing *mandated* standardization of the new Primo UI at this time:

- Many, if not all libraries, value the flexibility to address their local user needs.
- Twenty-plus libraries are live on the new UI, and there is already variation in the local instances as a result of both local configuration decisions and customizations. This means that significant standardization could not be achieved without asking some institutions to change or rollback work previously done.
- Stronger usability in the Primo UI promises less need for significant local customizations.
- Moreover, with fewer customizations needed, both initial implementation of the new UI (for those institutions not yet live) and ongoing Primo management should be simpler and more

efficient. The Systems Team has also developed an implementation manual to walk local Primo administrators through the implementation process.

We do recommend the following:

- Significant usability issues—those not unique to individual Alliance libraries or especially those not unique to the Alliance—should be addressed through support cases or other development channels as appropriate. Ex Libris should have primary responsibility for usability.
- Similarly, meeting accessibility requirements should be the responsibility of Ex Libris. As this is a concern shared by most, if not all, libraries with Primo—not just Alliance libraries—it needs to be addressed by the vendor, not locally. This expectation should be included in any future contract. As importantly, Ex Libris should be expected to provide clear documentation of how they meet accessibility standards by:
    - Providing a Voluntary Product Accessibility Template (VPAT) or similar document that describes clearly how the new UI complies with guidelines and standards identified on this page.
    - Creating and sharing a development roadmap with timeline of future accessibility milestones to be delivered.
- As most Alliance institutions do not have the sufficient human resources or expertise to test for accessibility features, we recommend that the Primo Release Testing Group include screen reading and keyboard navigation testing as part of the routine release testing for the Alliance.
- When pursuing customizations, Alliance libraries should consider working through the Primo Customization Standing Group, especially with customizations involving functionality changes (not necessarily look-and-feel changes) using JavaScript that could be implemented through the central package. The PCSG is charged with identifying customization needs, evaluating customization proposals for their potential benefit and usefulness Alliance-wide, and coordinating the development, documentation, and ongoing testing of selected customizations. We encourage the PCSG to also consider the impact of any customizations on accessibility. The PCSG anticipates reworking the central package by spring 2018 to eliminate (or lessen) the possibility of local customizations conflicting with the central package. Limiting customizations to those vetted and documented by the PCSG will increase the level of standardization across the Alliance, providing efficiencies in implementation, ongoing Primo administration, and release testing (because of fewer variations to test) for those Alliance institutions that opt-in.
- DUX is planning to conduct usability testing in order to develop best practices, and libraries should look to adopt these changes where applicable and practical.
- Finally—not a recommendation so much as a reality—each institution should decide how much time and effort to put into developing local customizations. Local customizations can conflict with the central package customizations developed by the PCSG, which can lead to additional work locally in debugging the conflicts. Local customizations can also conflict with subsequent Primo releases, thus requiring local testing with each new release and possible revisions to local customizations.

Note for the future

The Alliance is closely tracking Ex Libris's Primo VE initiative. Primo VE is a new implementation of Primo that moves administrative functions to Alma and streamlines publishing from Alma to Primo. While Primo VE would offer major improvements in many areas, it is likely that it will allow for less flexibility at the institution level, and Alliance institutions may have to more closely align their configurations.

Moving Primo administration to Alma should make it easier to administer multiple Primo institutions from a single point, as opposed to the current Primo Back Office while makes central administration very difficult. Washington Research Library Consortium (WRLC) has agreed to be an early consortium adopter of Primo VE (migrating in mid-2018). Ex Libris and the Alliance plan to start seriously discussing Primo VE in 2019.

Addendum: Common Variations in the Primo Instances across the Alliance

Variation Type	Brief Description	Examples
Local Branding Requirements	Most institutions commonly brand their Primo instance with university- or college-affiliated colors, fonts, and more.	WASU Lewis & Clark University of Puget Sound
Field or Function Suppression	Some institutions have chosen to hide fields which that are irrelevant for their services and/or users (e.g., language selection; pickup location; full display sidebar, etc.)	*Note*: It's difficult to identify which fields are suppressed at another institution.
Embedded Chat Widgets	Whether home-grown or a third party chat product, many institutions have embedded a chat function into their Primo instance.	Western Washington University (Classic UI) University of Washington
SMS / Text-A-Call Number	Some institutions have incorporated an SMS / text message functionality into the item records.	University of Idaho Central Washington University
Report a Problem / Error	Some institutions have incorporated an error reporting functionality into the item records or in another location within the discovery layer.	Portland State University Central Washington University
Estimated Search Results Per Scope	Some institutions have incorporated a search results estimate, organized by scope.	Western Washington University

Central Package Inheritance	Allows libraries to use the Alliance's shared Central Package which includes customized resource type icons (on by default) and the Show/Hide Summit libraries button (opt-in).	Portland State University Eastern Washington University
Different Names for Primo	Many institutions call their discovery layer by a unique name (rather than Primo).	SearchIt OneSearch 1Search Libraries Search Primo
Different Descriptions of Shared Key Services	Many institutions call the same key services by different names or phrases (presumably due to organizational history).	Retrieve vs. Request Find vs. Locate Search Scope Names Course Reserves vs. Reserves
Opt-In Features (Inherent in New UI)	Different institutions are taking advantage of different opt-in features that are built into the new UI environment.	bx Recommender Resource Recommender Citation Manager Tags Personalization
Facets: Presence, Organization, and Orientation	Many institutions are organizing the facets panel with significant variation with regards to *which* search filters are present or suppressed in the post-search facet panel; in what order these search filter categories are organized within the post-search facet panel; and on what side of the page these panels present themselves.	Panel Location / Orientation: Right vs Left side of the page.

Advanced Search	Many institutions have modified their Advanced Search interface to reflect local research and academic needs.	Searchable fields. Material types. Language options.
Integration of Other Systems	Some institutions have chosen to integrate third-party (i.e., non-Ex Libris) systems into discovery layer in order to enhance the user's overall experience or ability to complete functions within the discovery layer.	SpringShare: LibGuides, LibAnswers. Cashnet (A fines / fees portal intended for patrons).
Worldcat link for zero search results (customization)	Some institutions have added a Worldcat link for zero search results in order to help researchers when they reach a "dead end" in their search.	WSU