Primo Overview Workshop

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**Introduction**

Purdue University is one of over nineteen hundred institutions that utilize the power of *Primo*. Developed by the ExLibris Group a leader in online library management, *Primo* provides an efficient and effective means of locating information through its unique system architecture. “Through a single search box, users can now search across the full breadth of content from the library’s collection, exploring the library’s locally-managed collections, along with the global and regional resources from the *Primo* Central index”(Ex Libris, 2012). Successful academic research is a critical segment of a student success in academic writing. The goal of this workshop is to familiarize students with the three basic search functions of the *Primo* online library. By becoming acquainted with components, students will be able to perform a web-based search and locate information on a variety of subjects found in books and journal articles. “Library Search beta is a search engine that provides credible, relevance ranked results from the Library's online and print collections in a single search” (Purdue Library, 2013). This online, one-hour workshop will provide key steps in using *Primo* to locate and retrieve information via simple Web-browser interaction. The workshop would be web-based and accessible through the MyPurdue Career Account so that distance learning students may also participate.

**Section #1: Analysis**

After discussion with school administration and library staff, a group of graduate students in the Learning Design program at Purdue University have been tasked with developing a workshop to help students better utilize the online *Primo* research application. A continuous amount of assistance requests from students to library staff members on how to fully utilize the available features of *Primo* has been observed. Since the only primary resource available for the use of *Primo* is the integrated tutorial which is insufficient for comprehensive instruction, it was determined that a workshop needed to be developed. Supplemental instruction on *Primo* increases awareness of the applications capabilities and reduces the amount of questions library staff receives. The instruction will primarily be geared towards new and transfer students. The instructional goal is to teach students the skills necessary to successfully navigate through *Primo*. The skills being taught will be used by the students when they perform research for assignments and papers throughout their academic career.

**Front-end Analysis and Instructional Goals**

**Performance Analysis and Needs Assessment**

This instruction is necessary due to a large number of End of Semester Surveys being returned from the students that stated informational resources were not readily available or easily accessible.  In addition, a large number of emails from students to faculty members were sent inquiring where research material may be obtained pertaining to their specific research criteria.

**Instructional Goals**

The instructional goals for this workshop are the following:

* Student will be able to locate the *Primo* webpage and log in
* Student will be able to search for a specific topic
* Student will be able to refine and eliminate the search results
* Student will be able to save searches in the e-shelf function of  *Primo* for retrieval of resources at a later time

**Goal Analysis**

Participants of this workshop will be able to visually locate and identify terms necessaryto perform a web-based search and choose between several possible options for specific or desired information. It will also require the users of the interface to theorize and enter information deemed relevant to the data search. Based on the requirements, these could be classified as higher level intellectual skills. Learners performance primarily utilizes a combination Context-Centered and Goal-Centered criteria (Dick, Carey & Carey, 2009).

**Entry Level Skills** – The participants in the workshop will require a working knowledge of current web browsers, log in procedures, and basic search engines such as Google. A familiarity with keyboard entry, and menu selection is also helpful in addition to terminology (i.e. ISBN). An understanding of data retrieval and storage of electronic files on individual computers is also necessary.

**Review the search results   
and compare the findings.**

**Using the four separate drop-down menus, select appropriate criteria from the list to reduce or refine the search: A. Articles + Purdue Collections, B. All Items, C. That Contain My Query Words, D. Anywhere in the Record.**

**Using the text entry field   
on the main page of the Purdue online library, enter the test word relevant for the electronic search.**

**Locate the saved test item on   
the *e-Shelf* page.**

**Save the selected article(s) of interest to the account’s *e-Shelf*.**

**Select the test article of interest   
so that they can be saved to the account’s *e-Shelf* for later use.**

**From the menu options listed, refine the search by the criteria provided**

**From the list of search results displayed, view the descriptions,   
database locations, and availabilities**

**Using the computer, locate Purdue Primo On-line Library System Web Page**

**Locate the default *Simple Search* Box**

**Learner and Context Analysis**

The target population for this workshop consists of Purdue students who readily need to access scholarly information via the *Primo* web search engine for their academic studies. This will include a variety of individuals in a wide range of ages, and education levels.  These individuals will require prior knowledge and skills necessary to operate a computer interface with web-browser access to the Internet. In addition, they will need a basic command of search engine, database functions, and have registered log-in access to the Purdue Library systems.

The workshop will be available via the Internet and will take approximately one hour to complete. It can be accessed at any time through MyPurdue, Blackboard, or the main library website. It can be repeated as many times as necessary until satisfactory completion of the proficiency task is achieved. It has been recognized and established that most of the students who participate will have intermediate computer skills, including but not limited to: web navigation, social networking skills, operating system exposure (i.e. Windows) and word processing experience. The target population for the workshop will consist of incoming and transfer students Purdue University.

These students will be required to finish the *Primo* library workshop in order to begin course material. The workshop will be web based through the My Purdue portal (http://mypurdue.purdue.edu). Students will be given the option of completing the workshop at their leisure prior to courses at their own personal computer or within any of the Purdue University libraries.  Requiring students to engage in this training will eliminate a large portion of negative surveys and student composed emails received by faculty regarding the ease of finding academically accepted sources.

Due to negative survey feedback, teacher support would be necessary to make this workshop worthwhile for the student. Professors could put emphasis on scholarly articles, journals, etc., found within *Primo*. In addition, discussions with university administration and library staff have all conveyed positive feedback when broached with the subject of including this web based workshop.

Library staff has been notified of a possible influx of individuals wishing to take the workshop online and at their facilities. Each library will reserve ten computers for this program during the beginning of every semester. A sign-up sheet will also be available to schedule a pre-approved time for students to complete their individual workshop.  Library staff will also have the web address available for individual students to utilize their own personal internet accessible devices.

The format of the instruction is similar to the material itself as they are both based on online application. Since the search topics themselves are supplied for each student’s given search, the workshop can be adapted when the students utilize it for actual research.

**Section #2: Design**

**Performance Objectives**

|  |  |
| --- | --- |
| **Main Instructional Goal** | **Terminal Objective** |
| Participants of this workshop will visually locate and identify terms necessary to perform a web-based search via the *Primo* web page and choose between several possible options to retrieve specific or desired information. | Given access to the *Primo* web page, participants will be able to enter the necessary information to perform a database search for local and remote resources, such as books, journal articles, digital objects and save them for future reference. |
| **Main Step in Instructional Goal** | **Objective** |
| 1. Identify the location of the *Primo* Simple Search text entry field and drop-down menus. | The participant will use the default *Primo* page display to begin the process of searching for information using the Simple Search option. |
| **Subordinate Skills** | **Objective** |
| 1.1 Using the text entry field, enter the given test word relevant for the electronic search. | The participant will be able to locate and identify the text entry field, select it and type a specific word in order to perform a search relevant to the word. |
| 1.2 Using the four separate drop-down menus, select appropriate criteria from the list to reduce or refine the search: A. Articles + Purdue Collections, B. All Items, C. That Contain My Query Words, D. Anywhere in the Record | The participant will be able to locate and select terms necessary to refine the search for specific results. |
| 1.3 Review the generated search results of publications possibly containing relevant and desired information. | The participant will be able to locate, identify and select from the list of publications generated from the subsequent database search. |
| **Main Step in Instructional Goal** | **Objective** |
| 2. From the list of search results displayed after a search, view the descriptions, database locations, and availabilities for relevance and desired information. | The participant will be able to locate, identify and select from the list of publications generated from the subsequent database search appropriate information to review. |
| **Subordinate Skills** | **Objective** |
| 2.1 Using the menu options listed; refine and reduce the number of publications generated by the search. | The participant will be able to locate and select terms necessary to refine the search for specific results. |
| 2.2 From the new list of possible database locations, locate the test location. | The participant will be able to identify and select an appropriate source of information from a refined list of search results. |
| **Main Step in Instructional Goal** | **Objective** |
| Using the test subject from the previously searched, select and save certain results in e-Shelf. | After refining the results based on desired literature, the participant will be able to save those results in the *Primo* e-Shelf. |
| **Subordinate Skills** | **Objective** |
| 3.1 Locate the test item and select its check box. | Given the results, the participant will select the articles of interest so that they can be saved to the account’s e-Shelf for later use. |
| 3.2 After the check mark appears by the test item, select Add page to e-Shelf. | The participant will save the selected article(s) of interest to the account’s e-Shelf. |
| 3.3 Select e-Shelf page to review its content and locate the saved test item. | The participant will locate the saved test item on the e-Shelf page. |

**Assessment Plan**

**Entry Skills Assessment**

The participants in the workshop will require a working knowledge of current web browsers, log in procedures, and search engines such as Google. A familiarity with keyboard entry, menu selection, and an understanding of computer and library-based terminology is also helpful (i.e. ISBN). An understanding of data retrieval and storage of electronic files on individual computers is essential.

**Pretest:** For this instruction a pretest would not be necessary. For this particular subject, the likelihood of individuals randomly selecting answers is high. This is due to the unlikelihood of students having experience (or known experience) with the *Primo* within the confines of Purdue Universities Library system.

**Practice Test:**Due to the informative nature of this workshop, the practice test will be given in the form of hypothetical questions throughout the workshop.  The narrator will pose rhetorical questions during the workshop in order to prepare students for the upcoming posttest question. Each group of questions will correspond with the appropriate cluster.

**Post Test:**There will be a brief posttest which will be comprised of short answers and true/false answers for assessment in order to evaluate the student’s ability to identify essential components of *Primo* and their specific uses.

**Design Evaluation Chart**

|  |  |  |
| --- | --- | --- |
| **Main Instructional Goal** | **Terminal Objective** | **Test Item** |
| Participants of this workshop will visually locate and identify terms necessary to perform a web-based search via the *Primo* web page and choose between several possible options to retrieve specific or desired information. | Given access to the *Primo* web page, participants will be able to enter the necessary information to perform a database search for local and remote resources, such as books, journal articles, digital objects and save them for future reference. | Type the word provided into the *Primo* search field. Select to refine the search from the appropriate modifier fields. Perform the search and select an item from search results for review. |
| **Main Step in Instructional Goal** | **Objective** | **Test Item** |
| 1. Identify the location of the *Primo* Simple Search text entry field and drop-down menus. | 1. The participant will use the default *Primo* page display to begin the process of searching for information using the Simple Search option. | 1. Locate the *Primo* text entry field, drop-down menus and Simple Search option. |
| **Subordinate Skills** | **Objective** | **Test Item** |
| 1.1 Using the text entry field, enter the given test word relevant for the electronic search. | 1.1 The participant will be able to locate and identify the text entry field, select it and type a specific word in order to perform a search relevant to the word. | 1.1 Type the test word provided into the *Primo* search field. |
| 1.2 Using the four separate drop-down menus, select appropriate criteria from the list to reduce or refine the search: A. Articles + Purdue Collections, B. All Items, C. That Contain My Query Words, D. Anywhere in the Record | 1.2 The participant will be able to locate and select terms necessary to refine the search for specific results. | 1.2 Select to refine the search from the appropriate modifier fields. |
| 1.3 Review the generated search results of publications possibly containing relevant and desired information. | 1.3 The participant will be able to locate, identify and select from the list of publications generated from the subsequent database search. | 1.3 Review search results and compare the finding to the provided list of terms. |
| **Main Step in Instructional Goal** | **Objective** | **Test Item** |
| 2. From the list of search results displayed after a search, view the descriptions, database locations, and availabilities for relevance and desired information. | 2. The participant will be able to locate, identify and select from the list of publications generated from the subsequent database search appropriate information to review. | 2. Locate the test item from search results for review. |
| **Subordinate Skills** | **Objective** | **Test Item** |
| 2.1 Using the menu options listed; refine and reduce the number of publications generated by the search. | 2.1 The participant will be able to locate and select terms necessary to refine the search for specific results. | 2.1 Select to refine the search from the appropriate modifier fields. |
| 2.2. From the new list of possible database locations, locate the test location. | 2.2. The participant will be able to identify and select an appropriate source of information from a refined list of search results. | 2.2. Type the test word provided into the *Primo* search field. |
| **Main Step in Instructional Goal** | **Objective** | **Test Item** |
| 3. Using the test subject from the previously searched, select and save certain results in e-Shelf. | 3. After refining the results based on desired literature, the participant will be able to save those results in the *Primo* e-Shelf. | 3. After refining the results based on desired literature, save those results in the *Primo* e-Shelf. |
| **Subordinate Skills** | **Objective** | **Test Item** |
| 3.1. Locate the test item and select its check box. | 3.1. Given the results, the participant will select the articles of interest so that they can be saved to the account’s *e-Shelf* for later use. | 3.1. Select the test article of interest so that they can be saved to the account’s *e-Shelf* for later use. |
| 3.2. After the check mark appears by the test item, select Add page to e-Shelf*.* | 3.2. The participant will save the selected article(s) of interest to the account’s e-Shelf. | 3.2. Save the selected article(s) of interest to the account’s e-Shelf. |
| 3.3. Select e-Shelf page to review its content and locate the saved test item. | 3.3. The participant will locate the saved test item on the e-Shelf page. | 3.3. Locate the saved test item on the e-Shelf page. |

**Instructional Strategy**

**Terminal Objectives**

Given access to the *Primo* web page, participants will be able to enter the necessary information to perform a database search for local and remote resources, such as books, journal articles, digital objects and save them for future reference.

**Content Presentation**

Introduction of Primo

Workshop slides with practice questions at intervals according to agenda

Workshop post-test

**Student and Media Selection**

The participant will be directed to a web link that will present a self-guided workshop on using the *Primo* Simple Search engine and database.

**Student Participation**

The participantwill activate, read and make selections using the workshop’s interactive interface.

**Feedback**

Upon completion an immediate response as to the correctness of their entry will be given. Learners will be given the option to retake the posttest if the results show a failing score. Learners will have the option to re-watch the workshop as needed. A completion grade will be recorded and submitted to academic advisors.

**Clusters**

**Cluster 1 – Search Criteria: Steps 1, 1.1, 1.2, 1.3**

**Objectives**

1. The participant will use the default *Primo* page display to begin the process of searching for information using the Simple Search.

2. Students should be able to differentiate between publication types in the “Articles + Purdue Collections” drop down box in order to select individual’s desired selection.

3. Students should be able to differentiate between query types in the “Items”, “contains query words” and “anywhere in the record” dropdown boxes in order to select individual’s desired selection.

4. Students should be able to initiate *Primo* Simple Search for their desired academic literary material based on previous set criteria.

**Content Presentation**

**Context/Example:**  For this cluster systematic instruction focuses on engaging the Simple Search. In this portion of instruction the narrator will inform students as to where the Simple Search box is located. The narrator/instructor will illustrate how students can set search parameters within the *Primo*. The specific sections of instruction will cover how to specify which selection students will need when selecting options within “All items”, “that contain my query words”, “Anywhere in the record”,  and “Articles + Purdue Collections”.

**Student Participation**

**Practice Items and Activities:** Students will be encouraged to pause the video workshop at any time to attempt previously shown material.

**Feedback:** Students will be given an email address at the beginning of each cluster to email any questions regarding the film. The email will be sent to a library assistant or librarian on campus, and will only be answered if sent from a Purdue University email address.

**Student Grouping and Media Selection:** Students will work independently to accomplish all video workshops.

**Cluster 2 – Refine Simple Search Results: Steps 2, 2.1, 2.2**

**Objectives**

1. Students will be able to locate, identify and select from the list of publications generated from the subsequent database search appropriate information to review.

2. Students will be able to locate and select terms necessary to refine the search for specific results.

3. Students will be able to locate, identify and select from the list of publications generated from the subsequent database search.

**Content Presentation**

**Context/Example:** In addition the narrator will cover how to refine search criteria utilizing the “Refine My Results” located on the left frame after a search has been complete. As an example the narrator will illustrate the ease at which students can narrow their search results. Narrator will also explain when the parentheses mean next to each refinement option.

**Student Participation**

Practice Items and Activities: Students will be encouraged to pause the video workshop at any time to attempt previously shown material.

The participant will locate and select a specific modifier term provided by the tutorial instructions to refine the search options.

**Feedback:** Students will be given an email address at the beginning of each cluster to email any questions regarding the film. The email will be sent to a librarian assistant on campus, and will only be answered if sent from a Purdue University email address.

**Student Grouping and Media Selection**: Students will work independently to accomplish all video workshops.

**Cluster 3 – E-Shelf: Steps 3, 3.1, 3.2, 3.3**

**Objectives**

1.  After refining the results based on desired literature, students will be able to save those results in the *Primo* e-Shelf.

2. Given the results, the students will select the articles of interest so that they can be saved to the account’s e-Shelf for later use.

3. The students will save the selected article(s) of interest to the account’s e-Shelf.

4. The students will locate the saved test item on the e-Shelf page.

**Content Presentation**

**Context/Example**: For this portion of instruction, the narrator will illustrate how to utilize e-shelf.  This will provide students with the ability to save articles that are relevant to their academic research.  By saving articles students will save time when returning to *Primo*.

**Student Participation**

**Practice Items and Activities**: Students will be encouraged to pause the video workshop at any time to attempt previously shown material.

**Feedback:** Students will be given an email address at the beginning of each cluster to email any questions regarding the film. The email will be sent to a librarian assistant on campus, and will only be answered if sent from a Purdue University email address.

**Section #3: Development**

**Agenda Data**

Using a projector, the instructor will run through all search, save and organize results of resources for subjective research. The instructor will run through all aspects that will be evaluated in the assessment which should last no longer than 20 minutes. After the demonstration, the students will conduct their own searches based on individually provided sample search topics and reference materials.

|  |  |  |
| --- | --- | --- |
|  | **Length** | **Agenda Item** |
| **Welcome and Preparation** | 10 min. | Introduction and Course Overview |
| **Demonstration** | 20 min. | Instructor Leads Live Demonstration |
| **Practice Test and Assistance** | 15 min. | Student Practice Time and Assistance |
| **Post Test** | 10 min. | Test Administered |
| **Conclusion** | 5 min. | Final Questions |

**Workshop Storyboard**

|  |
| --- |
| C:\Users\Kelli\Desktop\JPG\Intro Google.jpg |
| Narration Slide One: In order to access the Primo Library Search Engine, open a web browser. Once open insert the Purdue library page by entering www.lib.purdue.edu into the address bar. |
| C:\Users\Kelli\Desktop\JPG\My Account Lib.jpg |
| Narration Slide Two: The Purdue library main page will open. On the top of the page on the right side, click on “My Account”. |
| C:\Users\Kelli\Desktop\JPG\My Account Guest.jpg |
| Narration Slide Three: The library is still available to those guests that do not have a Purdue account username and password. However, not all functions will be available. For example, E-shelf is not an option while using the library as a guest.C:\Users\Kelli\Desktop\JPG\Purdue Login Blank.jpg |
| Narration Slide Four: Once you click on “My Account” on main library page, the login prompt will follow on the next page. Enter your Purdue career account username and password exactly as you would to access your career account. Please contact Purdue ITAP for any log-in problems or difficulties.C:\Users\Kelli\Desktop\JPG\Purdue Login Filled.jpg |
| Narration Slide Five: After entering, note that password will not appear as being entered to protect the privacy and safety of the user. |
| Blank Primo |
| Narrative Slide Six: Once logged in under yourself, the search page will appear. |
| Primo Sit Learn wcats |
| Narration Slide Seven: Enter your subject of interest. Note that the option to find exact search query is available along with any literature that may just start with your search phrase. |
|  |
| Narrative Slide Eight: To the right of the search bar is another way to narrow down results. Click the “Articles and Purdue Collections” to choose how to refine the results. |
|  |
| Narrative Slide Nine: Underneath search bar, you may again use the drop box to limit your results. |
|  |
| Narrative Slide Ten: This drop down box allows students to limit how the individual words within the search topic will be located within an individual record. |
| Primo Sit Learn wcats anywhere |
| Narrative Slide Eleven: This drop down box allows students to refine where the search box topic is located within an individual search result. |
| C:\Users\Kelli\Desktop\Purdue\Spring 13\B\572\Group Project\JPG\Results.jpg |
| Narrative Slide Twelve: Without refinement, this is what the search results look like if you were to search for situated learning theory. Note that the total number of results is bolded in the top center of the page. |
| C:\Users\Kelli\Desktop\Purdue\Spring 13\B\572\Group Project\JPG\Result Record.jpg |
| Narrative Slide Thirteen: By selecting an individual result title, you will see the actual record content in full. Note: To return to a list of search records students may hit the browsers back button. |
| C:\Users\Kelli\Desktop\Purdue\Spring 13\B\572\Group Project\JPG\EShelf Check.jpg |
| Narrative Slide Fourteen: After the search has been made and refined, there is an option to be able to save the results for later retrieval. This is called the e-shelf, which can be accessed next to the “My account” button. |
| C:\Users\Kelli\Desktop\Purdue\Spring 13\B\572\Group Project\JPG\Select for Eshelf.jpg |
| Narrative Slide Fifteen: On your search results page, click the boxes of the titles you would like to save. A check mark will appear in the selected boxes. |
| C:\Users\Kelli\Desktop\Purdue\Spring 13\B\572\Group Project\JPG\EShelf after added.jpg |
| Narrative Slide Sixteen: Now, if you click again on e-shelf, the source will be filed away for your convenience. |

## Workshop Posttest

1. Type in “situated learning theory” in search bar and hit search. What is the first title in your search results?

Click here to enter text.

2. Now, select “peer-reviewed journals” on left side. What is the fifth title in your search results?

Click here to enter text.

3. Furthermore, refine your results by selecting “text resources” under resource type. What is the first search result title?

Click here to enter text.

4. Now, click on the check box next to the previously mentioned title. A check mark will appear in your box. At the top of the page next your name, click the e-shelf link. Does your selected article appear in your basket?

Click here to enter text.

5. “Find in Print” will inform students if the item is available in print at a Purdue Library.



6. Search “situated learning theory”, the total number of results are under 70,000.



7. You do not need to provide advanced search criteria in order to generate resulting records.



8. You are able to search for specific images while utilizing the Primo Search Box?

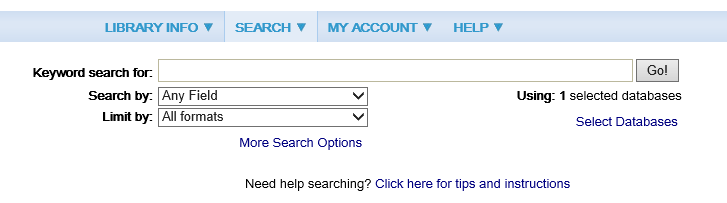


9. “Arts + Humanities – Legacy Search” is an option for search criteria.



Test continued on next page

10. This is the Primo search page.





**Section #4: Implementation, Evaluation, and Revision**

**Implementation report**

Our workshop was implemented with the usage of screen shots. While the format for this workshop is online instruction, a supplemental version of instructions incorporated with specific captured screen frames of *Primo* were used for the sake of efficiency and for the purposes of initial assessment. Instructions were provided with each screenshot to provide the students practice with searching and saving within *Primo*. Six of our classmates were sent the preliminary version of our workshop via email to work through. They were also given the posttest at the end of instruction. The workshop covered all the instructional goals and objectives outlined in our design. The test items were all included in the content of the posttest. Our group contact information was provided in case any of the students had any questions and also for feedback after workshop completion.

**Assessment report: Learner performance**

The learners who participated in our training were members of the Online Learning Design & Technology program. As students of Purdue University our learners were an ideal test group for the initial phase of our video based workshop. Overall, the participants did not have any trouble completing the assessment and answered all questions correctly. Primarily, learners did not report any confusing aspects from the storyboard or testing material. This supports the level of performance following the workshop based on our specific request to provide feedback for our storyboard.

**Formative Evaluation and Revision Report: Instruction / Workshop Components**

As a whole, the workshop components proved to be effective. The topic when illustrated via our storyboard format, learners were able to successfully complete posttest material with ease.  Specifically, one learner reported that the information was helpful in utilizing the e-shelf function found within the storyboard for the workshop.

Since the format of the evaluation and delivery appear to be successful, the only general discrepancy seems to exist in some of the questions themselves. This suggests that a better balance between questions as they relate to overall format would be beneficial. One of the learners was confused by question six due to the fact that results returned varied from the time of capture for the established assessment and the time that the participant completed the assessment. This may reveal that this is not the best type of question of evaluating the learner’s understanding of the application. Additionally, because the number of results will likely change as new articles and sources are added to the database, the questions will need to be changed with each evaluation. Upon further reflection, our group noticed similar flaws with other questions in the assessment indicative of the fact that more basic questions related to functionality may be more appropriate, rather than results-based questions.

**Conclusion**

While Purdue University utilizes *Primo* for the purpose of student research, Ex Libris designs a variety of library search applications for non-academic single branch libraries as well (Ex Libris, Our Vision, 2012). Recognizing the capabilities of *Primo* and what it offers to current Purdue students yields the observation that these skills will be beneficial outside of academia. Even as early as the advent of the Dewey Decimal System, the ability to search for library materials has been essential to research, whether it be for an extensive research paper or locating a novel. Students may not immediately know it, but this workshop instills skills that will be used for years to come.

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