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The Googlization of Library Research:
Implementing Primo Discovery Tool at St. Francis College Library
by Alex Kustanovich

In the past decade Google has profoundly changed the world of libraries and education. Clean interface, large index, elegant display of results. Everyone likes Google, so why should library users be different? But how can librarians stay relevant by trying to persuade their patrons to use different search methods of exploring individual databases when Google's simple search box is staring them in the face?

That's where discovery tools come in. A discovery tool, (a.k.a Discovery Service or Web-scale discover -- WSD) provides a Google-like experience with a single point of access to all the library resources -- print and electronic books, streaming video, images, and journals -- through a simple search box. Discovery tools are becoming more and more popular with libraries, especially academic libraries. Multiple user studies have shown that library patrons are interested in obtaining relevant results using one interface. But how well do these discovery tools work? How different are they and why did we choose one over another? Below, I describe how my colleagues and I compared several discovery tools, as well as the process of working with the Primo implementation team on modifying the discovery layer for our library.



Why Primo?

There are several discovery services on the market. The biggest and most popular are EDS (Ebsco Discovery Service), Summon (ProQuest), and Primo (Ex Libris Group). Our checklist of critical elements consisted of ease of use, reliability, interface, design, and cost. The first step was to visit academic libraries that had already implemented discovery services; we spent quite a bit of time on their websites, testing various searches and comparing results. Our second step was to invite representatives of the three WSD companies to visit SFC Library and present a case for their product. Although each company had its strengths and weaknesses, one of the reasons we decided to go with Primo was its seamless integration of our local resources. The other reason, a more important one, was Primo's content neutrality. Ex Libris is not a content provider and so there is no conflict of interest between the business side and the discovery side.

Primo Direct or Primo Total Care?

Primo comes in two cloud-based packages. Primo Direct offers full access to Primo administrative interface, and Primo Total Care, the ultimate form of Primo in the cloud, provides all application services and technical support. Several users on Voyager-L listserv dissuaded us from going with Primo Direct as it requires a lot of maintenance

and customization work, plus it was more expensive than Primo Total Care, a hosted service that requires no local hardware to maintain, limits its impact on staff workflows, and provides excellent Ex Libris technical support.

Implementing Primo

The Primo sales representative who brokered our contract assured us that the implementation process would take no more than six weeks. The Implementation Team (I-Team) rolled up their sleeves almost immediately. We got our own sandbox, two user manuals, and several questionnaires to help I-Team harvest the local data quickly and efficiently. They did warn us, however, that the entire process could take up to eight weeks. That was March 16. They were off by almost three months. I-Team moved us from the sandbox server to the production server on July 15.

Yes, it took much longer than we had expected, but the experience of working with I-Team was fantastic. They took every single suggestion, question or complaint we lobbed at them with utmost seriousness and diligence. They answered our emails promptly, scheduled WebEx meetings every three weeks, and did their best to apply the necessary changes as soon as their programmers and developers made them.

Why did it take so long? Perhaps we were too eager to fix everything at once and too diligent in spotting every kink and hiccup. Not every fix worked. Often fixing a problem in one area created a different problem in another. When Ebsco was first integrated into Primo Central Index, it prevented the server from processing queries, resulting in error pages. I-Team suggested we search Ebsco separately. That, however, created an even bigger problem, since Ebsco would provide imprecise results and our testers (mostly student workers and their friends) found the two-search solution confusing. We finally removed Ebsco from Primo altogether until a service pack was installed at the end of June. Now Ebsco is back in Primo Central Index.

Another hurdle was Primo's log-in system. Users need to log in to Primo in order to renew overdue books, put a hold on a book that has been checked out, and/or authenticate themselves for off-campus use of our electronic resources. A single sign-on software was needed to work with our local Voyager directory and EZ Proxy, our off-campus authentication software. Ex Libris suggested we go with Shibboleth, which required installation and configuration. Our IT department worked closely with Ex Libris to make that happen. It took three weeks of installation and one week of testing.

What is Primo Central Index?



Primo Central Index, also known as PCI, is an aggregation of millions of scholarly e-resources, which includes journal articles, ebooks, reviews, dissertations, legal and


government documents harvested from multiple publishers, aggregators, public and private agencies, and open-access and public domain repositories. The scope of the content and details of the metadata are as important as the size of the index. What's inside the index also depends on what a library chooses to include during implementation. We've added all of the SFC Library's proprietary databases to Primo Central Index Collection list. Some databases are not yet part of the index. The biggest omission as of this writing is ProQuest. Although the two companies announced a collaboration to make their key services work better together to improve user experience and support customer choice, ProQuest databases have yet to be integrated into PCI.

Interface and Search Results

The default Primo search box is a Google-like interface, which provides dropdown menus for pre-search options, such as type of material, collection, and a few other simple limitors. Post-search, however, there are lots of choices. Users can choose from multiple options in the left sidebar's faceted navigation to refine results by collection, resource type, topic, creator, creation date, and language.

Primo uses FRBR (Functional Requirement for Bibliographic Records), an entity-relationship model of metadata for information objects to group related titles. It also re-duplicates and merges related titles.


Primo's native link resolver is SFX, but because our users were already familiar with 360 Link from Serials Solutions (ProQuest), and because my colleagues and I are happy with the way it functions, we decided to keep it. It did take extra time and work for I-Team to configure the 360 Link. To get to it, users had to click on the More tab just below brief results. But we opted to replace the More tab with the 360 Link image.



Article

☆ **Euthanasia**
Rosner, J F
Archives of internal medicine, 1995, Vol.155(9), pp.985, 990 [Peer Reviewed Journal]

● **Check for full text**

 **360 LINK**
Check for full text

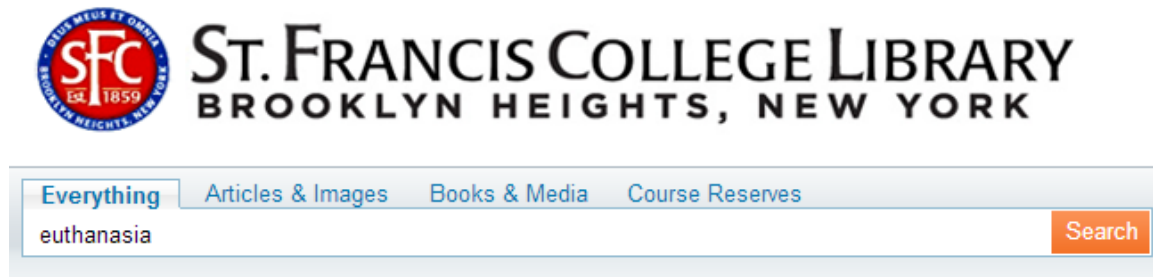
[Details](#)

Primo provides a “Did you mean...” option, similar to Google’s. It recognizes common misspellings and offers an alternative. The default is 50 entries, but that number can be adjusted. For example, if you enter “facebook” the system will respond with “Did you mean ‘casebook’? if there are fewer than fifty entries containing the word “facebook.”

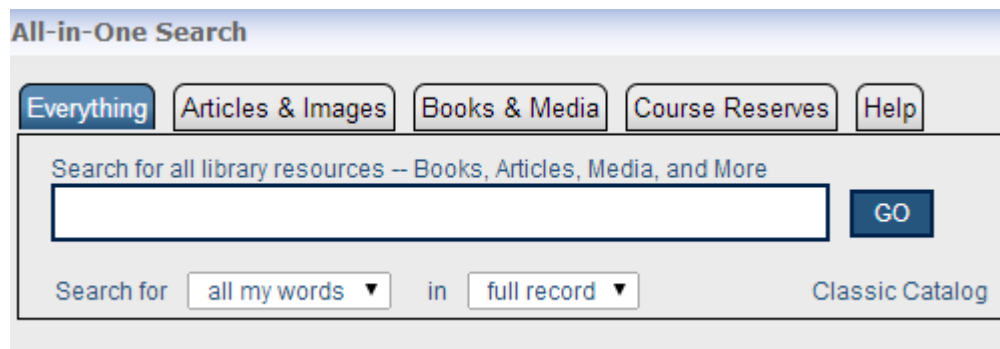
Many **social** networking features such as tagging are present on the results page. You can also print and email results, send them to a third-party application (e.g. delicious.com) or save individual records and queries to E-Shelf.

Although tab / scope searching was not part of our contract, I-Team worked with Ex Libris to accommodate us. Now we have four separate scopes --

Everything (searches all local holdings plus Primo Central Index); Articles & Images (searches PCI minus our local collection); Books & Media (searches our catalog only); and Course Reserves (searches textbooks and Professors' Reserves).



In order to facilitate the search process and make it more intuitive for users, we decided to modify the library website to include a search box that's compatible with Primo. Now users can perform a scoped search right from our homepage.



Primo's mobile interface enables users to search the entire library collection—books, e-books, print and electronic articles, digital media, and other types of resources—directly from their mobile device. Using a simple mobile web interface, users can search for library content when they are off-site or out of usual opening hours.

Primo or All-in-One?

Primo is a catchy name. It consists of only five letters and is easy to pronounce. It has two meanings: the leading part of a duet or something of importance or value. But what does it have to do with library or discovering relevant results? We looked at a few custom names: Everything Search, Search@SFC, One Search, and All-in-One Search, or simply All-in-One. Our student workers and a few faculty members who chose to teach summer classes and had nothing else to do during the hot summer days took a vote. All-in-One (AIO) was an overwhelming winner.



Conclusion

The experience of working with Primo Installation Team was very positive. A few glitches still remain, but we hope get them sorted eventually. All-in-One provides an integrative search environment that we hope our students will appreciate as much as we do. We will put a link to a feedback form on our homepage to encourage input from students and faculty.