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Selecting and Implementing ExLibris Primo in the NC-PALS Consortium

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Selecting and Implementing the ExLibris *Primo* Discovery Tool in the NC-PALS Consortium

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The NC-PALS Consortium

○ Small-FTE regional consortium in Greensboro and Winston-Salem, NC (Bennett, Greensboro, Guilford, and Salem Colleges, and Salem Academy).

○ Shared, vendor-hosted ILS (SirsiDynix SaaS) with individually branded OPACs and unique user authentication schemes.

○ Reciprocal borrowing arrangement with item transfer among campuses.

Rationale for Discovery

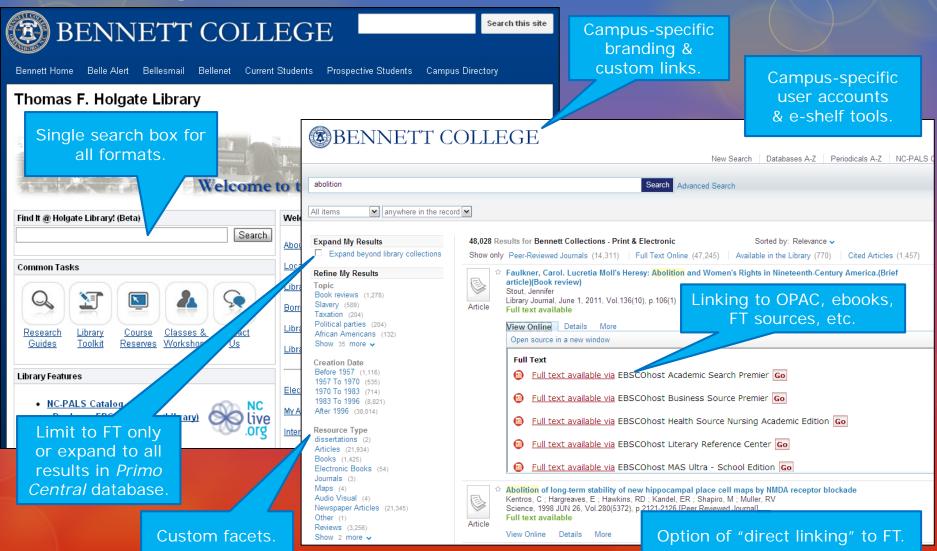Connaway and Dickey (2010) identify contemporary search/discovery challenges:

- Despite disciplinary differences in information seeking behavior, users foremost value speed and convenience.

- Users' preference is for simple searching, natural language, and ranked results with simplified faceting similar to Google and other Internet search engines.

- Users' preference is for a streamlined search experience absent the granularity presented by traditional research tools (e.g., a resource-limited OPAC, multifarious database interfaces, scattered full text, and marginally integrated interlibrary loan services).

Connaway, Lynn S., and Timothy J. Dickey. 2010. *The Digital Information Seeker: Report of the Findings from Selected OCLC, RIN, and JISC User Behaviour Projects.* Higher Education 0f Funding Council 0f England.
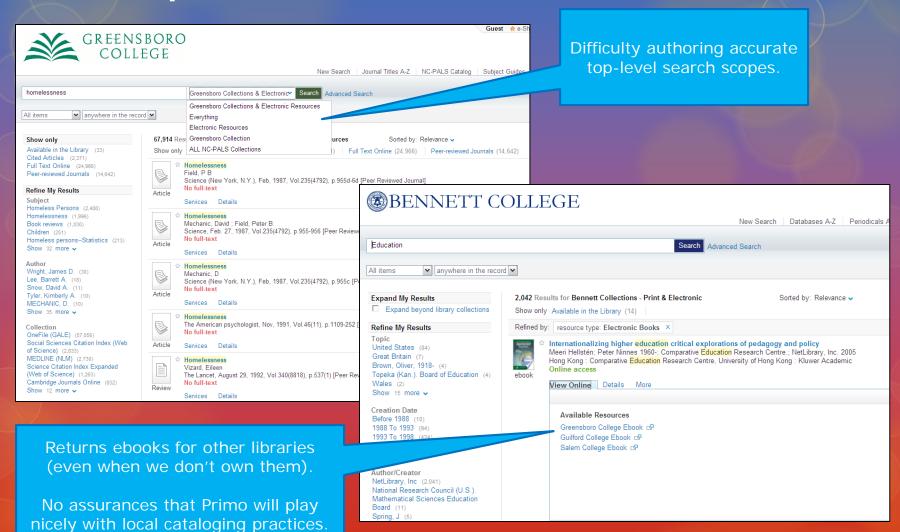
Selecting ExLibris *Primo*

○ Few vendors marketing discovery services to small-FTE consortia at affordable price.

○ Vendor-hosting (cloud-based service).

○ Comprehensive technical support.

○ "Vendor neutrality."

○ "Out of the box" functionality.

…So, we went with *Primo*, *SFX*, and ExLibris's *TotalCare* support package.

Implementation: The Good

Campus-specific branding & custom links.

Campus-specific user accounts & e-shelf tools.

Single search box for all formats.

Linking to OPAC, ebooks, FT sources, etc.

Limit to FT only or expand to all results in *Primo Central* database.

Custom facets.

Option of "direct linking" to FT.

Implementation: The Bad

Difficulty authoring accurate top-level search scopes.

Returns ebooks for other libraries (even when we don't own them).

No assurances that Primo will play nicely with local cataloging practices.

Implementation: The Ugly

Bad FT links, especially with EBSCO databases. "Direct linking" becomes a liability.

Does not direct users to familiar interfaces such as PsychINFO or ERIC via EBSCO*host*.

ExLibris and EBSCO are *competitors* in the discovery market, meaning that Primo's access to resource and FT metadata is in flux.

So far, ExLibris's strategies for resolving to EBSCO FT have been piecemeal.

Implementation: The Ugly

Availability notes for catalog items are one hour stale.

Catalog links resolve to the OPAC of the library that holds the item rather than the user's home library OPAC, creating authentication problems and making transfer requests impossible from Primo.

ExLibris and SirsiDynix are *competitors* in both the ILS and discovery markets.

SirsiDynix has been reticent to support integrating Primo with ILSs running in their SaaS environment.

Integration has entailed additional costs from SirsiDynix and results in stale availability data.

Discovery Considerations

Discovery *IS* the next step in the evolution of the catalog and has significant resource delivery and instructional value. However,

- Discovery remains cutting edge. Prepare to bleed until the market matures.
- Discovery tools are not "plug and play" (*especially for consortia*).
- Don't expect vendors to play nicely with each other.
- Don't expect discovery tools to reveal or link to everything available through your collection.