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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).

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

BENNETT COLLEGE

Bennett Home | Belle Alert | Bellesmail | Bellenet | Current Students | Prospective Students | Campus Directory

Thomas F. Holgate Library

Single search box for all formats.

Find It @ Holgate Library! (Beta)

Common Tasks

- Research Guides
- Library Toolkit
- Course Reserves
- Classes & Workshops
- Contact Us

Library Features

- NC-PALS Catalog

Custom facets.

Expand My Results

- ☐ Expand beyond library collections

Refine My Results

Topic

- Book reviews (1,278)
- Slavery (589)
- Taxation (204)
- Political parties (204)
- African Americans (132)
- Show 35 more

Creation Date

- Before 1957 (1,116)
- 1957 To 1970 (535)
- 1970 To 1983 (714)
- 1983 To 1996 (8,821)
- After 1996 (38,014)

Resource Type

- dissertations (2)
- Articles (21,934)
- Books (1,425)
- Electronic Books (54)
- Journals (3)
- Maps (4)
- Audio Visual (4)
- Newspaper Articles (21,345)
- Other (1)
- Reviews (3,256)
- Show 2 more

48,028 Results for Bennett Collections - Print & Electronic

Sorted by: Relevance

Show only Peer-Reviewed Journals (14,311) | Full Text Online (47,245) | Available in the Library (770) | Cited Articles (1,457)

Linking to OPAC, ebooks, FT sources, etc.

Full Text

- Full text available via EBSCOhost Academic Search Premier Go
- Full text available via EBSCOhost Business Source Premier Go
- Full text available via EBSCOhost Health Source Nursing Academic Edition Go
- Full text available via EBSCOhost Literary Reference Center Go
- Full text available via EBSCOhost MAS Ultra - School Edition Go

Option of "direct linking" to FT.

Campus-specific branding & custom links.

Campus-specific user accounts & e-shelf tools.

Implementation: The Bad

The screenshot shows the Greensboro College library website. The search term 'homelessness' is entered in the search bar. The results show 67,914 records. A dropdown menu is open, showing 'Greensboro Collections & Electronic Resources' as the selected scope. The left sidebar shows filters for 'Show only' (Available in the Library, Cited Articles, Full Text Online, Peer-reviewed Journals) and 'Refine My Results' (Subject, Author, Collection). The main results list several articles, including one by Field, P B, titled 'Homelessness', which is marked as 'No full-text'.

Difficulty authoring accurate top-level search scopes.

The screenshot shows the Bennett College library website. The search term 'Education' is entered in the search bar. The results show 2,042 records for 'Bennett Collections - Print & Electronic'. A dropdown menu is open, showing 'Education' as the selected scope. The left sidebar shows filters for 'Expand My Results' (Expand beyond library collections) and 'Refine My Results' (Topic, Creation Date, Author/Creator). The main results list several books, including one by Meeri Hellstén, titled 'Internationalizing higher education critical explorations of pedagogy and policy', which is marked as 'No full-text'.

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

The screenshot shows the Bennett College library website. At the top, it says "BENNETT COLLEGE" and "e-Shelf". Below the search bar, it says "Search" and "Advanced Search". The search results show "54,934 Results for Bennett Collections - Print & Electronic". The results are sorted by "Relevance". The first result is "Wheat fungus.(RESEARCH)(Brief article)" from "Nature, June 3, 2010, Vol.465(7298), p.530(1) [Peer Reviewed Journal]". It has a "Full text available" link. Below this, there are links to "Full text available via EBSCOhost Academic Search Premier", "Full text available via EBSCOhost MAS Ultra - School Edition", and "Full text available via EBSCOhost MasterFILE Premier".

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 EBSCOhost.

The screenshot shows the EBSCOhost search results page. It says "No results were found." and "We were unable to find an exact match to your full text article. It is possible the article is not yet available on our service. You may want to try your search again after following this tip." Below this, there is a "Verify request:" section with fields for "Article Title", "Journal", "Volume", "Issue", "ISSN", "Starting Page", "Date", "Author Last Name", and "Author First Name". The "Journal" field is filled with "Nature", "Volume" with "465", "Issue" with "7298", "ISSN" with "0028-0836", "Starting Page" with "530", and "Date" with "2010-06-03". There are "Submit" and "Reset" buttons at the bottom. Below the form, there are links for "Top of Page", "EBSCO Support Site", "Privacy Policy", "Terms of Use", and "Copyright".

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

The screenshot shows the Bennett College catalog interface. The search bar contains 'fungus'. The results show 195 results for Bennett Collections - Print & Electronic. The results are sorted by Relevance. The first result is 'Illustrated genera of imperfect fungi' by H. L. Barnett (Horace Leslie), 1909- Barry B Hunter 1972, Minneapolis, Burgess Pub. Co. The result is shown in two versions. The 'Locations' tab is selected, showing availability and locations in other institutions. The table shows two locations: Guilford Library and Greensboro Library. The call number for both is QK625.A1 B3 1972 c.1. The status for both is 'Available'. A red circle highlights the call number and status for the Guilford Library entry. A red arrow points from this entry to the Guilford College catalog entry shown in the bottom right.

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.

The screenshot shows the Guilford College catalog entry for 'Illustrated genera of imperfect fungi' by H. L. Barnett and Barry B. Hunter. The entry includes the ISBN 0808702661, the title, edition (3d ed.), publication information (Minneapolis, Burgess Pub. Co. [1972]), physical description (v. 241 p. illus. 29 cm.), and subject terms (Fungi imperfecti, Fungi identification). The entry is added by Hunter, Barry B. and Hunter, Barry B. The entry is titled 'Imperfect fungi'.

Library	Location	Call Number	Material	Due Date	Public
Guilford College	Main Collection	QK625.A1 B3 1972 c.1	BOOK		
Greensboro College	Main Circulating Collection	QK625.A1 B3 1972 c.1	BOOK		

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.