Discoveries Panel I & II

Judy Drescher, Molloy College
Allen Jones, The New School
Christian Haenger, Universität Mannheim
James Hammons, Ball State University
Fen Lu, University of Texas at Arlington, et al.
Discovery Panel

Judy Drescher • Christian Haenger • Jim Hammons
Allen Jones • Fen Lu • Randy Oldham
<table>
<thead>
<tr>
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<th>FTE</th>
<th>Systems</th>
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Agenda

Part I 1:30 - 2:15
• Infrastructure, Configuration & Customization

Intermission 15 minutes

Part II 2:30 – 3:15
• Collections, Usability, Analytics & Support
Questions Part 1

• Why did you choose the discovery service that you did?
• How is Primo/ Summon integrated in the IT infrastructure of your institution?
• What are your experiences with configuring the discovery system?
• To what degree can the interface be customised?
Question 1

Why did you choose the discovery service that you did?
Why Primo?

1. Nothing existed in 2008 but Primo
2. Integration with Aleph E-Shelf functions
3. Flexibility in data normalization, data sources and interface flexibility
4. Multi-institutionality / Complex institution configuration
5. Integrated with the SFX/Aleph/MetaLib environment at NYU
6. Customization - root access to filesystem and database
Why Summon?

- Primo is not a viable option for many institutions that don’t have a library IT staff
- In 2013 a more likely choice would be between Summon and EDS - Summon was the more mature product
- A far superior index
- SerialsSolutions 360 suite of services (360 core, link, A-Z)
- In the context of an Alma migration, the familiar UI, and having chosen Summon over Primo years ago. (Ball State)
Question 2: IT Infrastructure

How is Primo/ Summon integrated in the IT infrastructure of your institution?
Primo or Summon - Infrastructure

- Primo started as a locally hosted discovery service
- Link Resolver is a separate component
- Primo has a local index of records + remote
- front-end customization has a robust dev environments
- patron enrichment in multiple ILS systems

- Summon has always been cloud-based
- Link Resolver is integrated into Summon
- Summon has a centralized index of records
- Front-End is customized with institutionally hosted angular scripts, CSS
- ILS functionality via Alma only
Summon - API Only customers

There is also a use-case where institutions use the Summon API, but don’t use the interface

- Columbia University
- Michigan State
- Molloy College
- Yale University

They only care about the API, not the interface…. 
VuFind Over Summon

PTSD

Molloy Librarian Recommendation: Looking for articles on PTSD? Try PILOTS: Published International Literature On Traumatic Stress. Note: a network or Canvas username/password is required to access articles from off campus.

Suggested Topics within your search:
- PTSD
- psychiatry
- post-traumatic stress disorder
- survivors
- adults
- veterans
- more...

Showing 1 - 20 results of 135,399 for search ‘ptsd’, query time: 1.27s

Apply filters to narrow or expand your results:
- Peer Reviewed/Scholarly Only
- Add Newspapers
- Add Book Reviews
- Add Dissertations
- Full Text Only
- Open Access Only
- Search More Libraries

Top Results: Books & Media
Summon over Alma
So...relationally speaking

If you’re single, *Summon* makes sense

If you’re married or if it’s complicated, *Primo* may fit the bill
Question 3

What are your experiences with configuring the discovery system?
Configuration
Advanced Configuration

General Configuration Wizard
Manage and configure the Installation Settings in Primo

All Code Tables
Manage all Code Tables

All Mapping Tables
Manage all Mapping Tables

Full Normalization Rule Configuration
Manage and configure Normalization Rules

Tags and Reviews Management
Manage and configure Tags and Reviews

Resource Recommender
Manage Recommended Resources

Search Engine Configurations
Manage the search engine configurations
Configuration

• A ton of work initially!
  • Norm rules!!!!
  • Testing, testing, testing
  • Consortia causes complexity
  • Discovery layers expose flaws in your bib records
• Recently norm rule to prepend all URLs from 856 in local records with our proxy urls (view-aware)
• Local changes to improve UX and integrate other systems (Ares, custom floor map apps...)
<table>
<thead>
<tr>
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<th>Manage Your Data</th>
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<td>Management</td>
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<td>Google Analytics Tracking Code</td>
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How the 360 Knowledgebase and Summon Work Together for Discovery

• Summon relies upon the 360 KB to help facilitate rights access to the content that resides within the index.

• Rights access is assigned by tracking a particular title by its ISSN or ISBN in 360 KB, or by assigning a Database ID (all or nothing rights).

• Summon utilizes the SSID found within the Authority Records by adding it to any records found within the Summon Index that match based on either the ISSN or ISBN.

• The 360 KB also helps Summon indicate when content has full-text availability.

Source: “Content Ingestion: The Trials and Triumph” by Dave Hovenden - Used with permission.
PrimoVE/Summon Over Alma

• Alma Discovery configuration page
• Most Summon configuration is done in the familiar Summon
  • Admin Console. Exceptions (learned so far):
    • IP range, EZProxy base URL are configured in Alma
    • Require a content publication cycle to become effective
  • Primo VE normalization, etc. in Alma
• Services Page configuration is done in Alma for both
• Nice surprise for Summon: Alma Services Page is also the link resolver landing page
Summary

This is the trend:

- Shared institution configurations to both within Alma
- Shared service page configurations within Alma
- Simplified administration
Normalization
Normalization
Normalizing Data - Summon

• Process called "Match & Merge"
• Multiple records, full-text and other metadata along with "value added" info for an item merged into one record
• Various format types update at different intervals
• Relevance of results based on Dynamic & Static ranking
 Summon Match & Merge Rules

ISSN Match Rule

ISSN + Title + Publication Date + Content Type = Match & Merge

ISBN Match Rule

ISBN + Title + Publication Date = Match & Merge

DOI Match Rule

DOI + Fuzzy Title = Match & Merge

source: “Content Ingestion: The Trials and Triumph” by Dave Hovenden - Used with permission
Summon Relevance Ranking

Dynamic Ranking
- Term frequency
- Field weighting
- Term stemming
- Stop word processing
- Subject terms
- Synonym mapping
- Inverse document frequency

Static Ranking
- Content type
- Publication date
- Scholarly/peer review
- Highlight local collections
- Citation counts

Pros & Cons for Both

• With great power comes great responsibility (=internal support burden AKA the app won’t love you back...)
• Local indexes provide a lot of institutional customization, but also won’t dedup with remotely held records ( Summon only has one index)
• Oh the tweaking, tweaking, tweaking....
• ILS/patron fulfillment easier to do across institutions/consortia in Primo
• If one university solves an issue in Primo, the community may not find out about their local customization (Primo Apps to the rescue!), in Summon, everybody wins
• Improvements to metadata are on someone else’s schedule ( summon)
• Consortium views of holdings much harder to do in Summon
Question 4

To what degree can the interface be customised?
New School Customization
New School Customization

Send to

Get It

View Online

Get It

Please sign in to see request options and to place requests. Login

LOCATIONS:
NEW SCHOOL

New School List Center
Available, Main Collection; (B3279.H48 S45736 1999)

OTHER INSTITUTIONS

NYU Bobst
Available, Main Collection; (B3279.H48 S45736 1999)
U of G: Simple Customisations

- Boolean search example
- New Search link
U of G: Advanced Customisations

Custom building map & item location integration
Inject links to export to Ares to simplify staff/faculty course reading lists
Advantages

• No customer server-side code running, customer device (phone, tablet, or desktop) is making calls to central primo app and then displaying customizations within the browser (saving time and processing power from cloud)
• Customers still able to build customizations and integrations with metadata provided by Primo
• Common development framework and platform makes code exchange between institutions easy...Yay! Primo Apps!
Disadvantages

- Loss of root access to the server means no un-mediated database queries (security) or code running that takes lots of CPU cycles
- Loss of access to the filesystem means there is no code-level access to Primo, but higher requirements of APIs to provide info needed for apps (like configuration values, etc.)
- Documentation burden of the primo-explore environment is much higher because of the loss of access to source-code
- Increased security will not allow primo to speak to third-parties without some type of externally hosted mediator script (need way to store API keys securely)
Customization is great but...

- Regression testing is required for each service pack
- Every customization slows performance
- Networked customization means your app’s responsiveness is dependent on other networks, not just your own or the cloud.
Summon Customization

• There's several branding aspects, and a few display aspects
• More advanced modifications have to happen via the "Custom Script URL" option in the Summon Admin console
• With a skilled developer, Summon can be modified fairly extensively
• But Summon's strength lies in the adage of: "Less is More"
• AngularJS update (Summer 2017) required recoding of some customizations
Summon Customization with Jim @ Ball State

- Two paths to customize Summon
  - Summon API
    - Roll your own Summon UI
  - External Custom Script
    - Leverage Angular JS to insert code into native Summon UI
    - Call PHP, Jquery, override CSS and system messages
Summon Customization with Jim @ Ball State

Text-a-Call Number and Stack Locator (custom PHP/MySQL)
Palliative Care - Creating a More Sustainable Model
by Quill, TE; Abernethy, AP

NEW ENGLAND JOURNAL OF MEDICINE, 03/2013, Volume 368, Issue 13

... of care, reduce overall costs, and sometimes even increase longevity. The field grew out of a hospice tradition in which palliative treatment was delivered...

Journal Article: Full Text Available
View Article & Complete Issue: Browse Now via Browzine

Custom Link

| CUSTOM | Url | http://browzine.com/libraries/XXXX |
| CUSTOM | Text | Browse eJournals |

WEB OF SCIENCE
360
Intermission
Discovery Panel

Judy Drescher ▪ Christian Haenger ▪ Jim Hammons
Allen Jones ▪ Fen Lu ▪ Randy Oldham
Agenda

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• Infrastructure, Configuration & Customization

Intermission 15 minutes

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<th>Systems and Services</th>
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Questions: Part 2

- How important is your local content vs. remote content?
- What do your patrons say about the product (usability)?
- What challenges or successes have you encountered on the public services front?
- What tools do you use to gather analytics, built-in, external or both?
- What benefits have you seen emerge as a result of primo and summon being under one roof?
- What are your experiences with the user community engagement, e.g., enhancements, collaboration
Question 1

How important is your local content vs. your content delivered from elsewhere?
Primo catalog

Please select your search area:

University Library Holdings
Find the library’s more than 2.2 million media: books, e-books, journals, e-journals, CDs, DVDs and psychological tests.

Articles & University Library Holdings
Search 100 million additional data sets for articles in e-journals, more e-books and scientific papers.

Inter-Library Loan
Your search delivered no results? Search the holdings of academic libraries in Germany and order an item with just a few clicks.

Library News
- Bibliotheken am 1. Mai geöffnet
- ZWÖLFREISSIG im Mai
- Baustelle Learning Center - Ende in Sicht
- Noch Plätze frei beim Vertiefungskurs Politikwissenschaft und Soziologie
- Literaturverwaltungsverkurse im Frühjahr-Sommersemester 2018
Forced blending

- Primo allows you to “boost” local results in the special-sauce blending that occurs
- Configure facets to allow you to drill down to local content
- Configure pre-search scopes/tabs
Summon

- Summon doesn't offer a way for customers to boost institutional records...but there is some built-in boosting through the algorithm.
- Some boosting of key resources can be handled with Best Bets, Database Recommender and Topic Pane features of Summon.
- Some institutions choose not to include their local holdings for various reasons: bento, very small index, etc.
Question 2

What do your patrons say about the product (usability)?
Customer satisfaction Primo at Mannheim

2016

2012
Primo UX Tests

<table>
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<tr>
<th>Primo Study (#1)</th>
<th>W2010</th>
<th>How do users navigate Primo? Do users interact with Primo’s features like hold and recall, reviews and tags, my account, etc.?</th>
<th>Usability testing</th>
<th>Undergrad students</th>
<th>Graduate students</th>
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<td></td>
<td></td>
<td>Users do not understand the scope of Primo searches, nor how Primo relates to other search options on the Library website, such as Scholars Portal, other journal indexes, and the e-journal A-Z list.</td>
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<td>Users are confused about most of Primo’s features.</td>
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<td>They found Primo hard to use and “not user friendly”</td>
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</table>

- Primo v3 interface
- Pre website redesign
Primo UX Tests

- Primo v4 interface
- Post web redesign
- Users found it easy and intuitive; staff struggled
Question 3

What challenges or successes have you encountered on the public services front?
Primo Public Services

• Intuitive & easy to use; great place to start

• Worked with Ex Libris to get U of Guelph theses and dissertations (D-Space) loaded as a Primo Central resource

• Some ‘blindspots’ in Primo Central Index (Geography)

• Influences where we purchase online resources from
Summon Public Services

- Students and most faculty got Summon right away; UX even better with Summon 2.0.
- Librarians took a while longer: hard to let go of Boolean searching, pre-search limiters in favor of relevancy and facets.
- Some librarians believe discovery is dumbing down the research experience, taking away from critical evaluation of sources.
- Librarians have trouble trusting discovery results, as sometimes it’s difficult to explain why Summon is doing what it’s doing.
Question 3

What tools do you use to gather analytics, built-in, external or both?
Primo Analytics

Facet usage example
Primo Usage

- Primo integrated analytics
- Google analytics

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<td>[NEW] Search Terms by Letter</td>
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<td>[NEW] Top Search Terms</td>
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Summon Analytics

- Usage reports are available through Summon Admin Console and Summon supports Google Analytics in order to track additional user activity not covered in Summon admin console reports.
- Summon reports are built with Oracle Business Intelligence (OBI).
- Summon analytics reports: action usage searches, device usage, facet usage, popular searches, session usage and zero result searches.
Summon Analytics Example
Question 4

What benefits have you seen emerge as a result of primo and summon being under one roof?
Feature creep....

- Resource Recommender
- Topic API expansion within Primo
- Introduction of metadata into Summon Index first has led to cleanup of PCI article metadata and reduction of resource types
Summon is loading many data sources now!

- Ball State librarians turned the corner around 2015.
- Inclusion of IR content is a given with Summon. Ball State loads both CONTENTdm and DSpace.

Patron Enrichment!

- Addition of Alma Services Page to SOA is a major improvement
Question 5

What are your experiences with the user community engagement, e.g., enhancements, collaboration?

(..if you want to bring people together...give ‘em a common problem....)
Primo Community

- Ex Libris support has always been really great
- The NERS process has been around for 10+ years
- Primo developers blog: [https://developers.exlibrisgroup.com/blog/tag/primo](https://developers.exlibrisgroup.com/blog/tag/primo)
- Many ways to communicate with the user community
  - listserv
  - github
  - primo apps
  - slack
  - conferences
  - devday
  - youtube channel
  - summits
  - Ideas exchange
Summon Community

- An ever evolving dialog between Ex Libris, the Summon Working Group and the Community - now 2 years old
- The introduction of the NERS process / commitment to enhancements within a certain timeframe
- Idea Exchange gives the larger community a voice which is factored into the enhancements process by the WG
- Sharing customizations is less formalized, but it happens
- An opportunity to participate in Regional User Groups
- This conference!