



Moving Forward Together

a consortial discovery layer

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a consortial discovery layer

If you are going through hell, keep going.

Winston Churchill

Freeze-Dried Librarian

- ✦ Returned to an academic library after working at Ovid Technologies and HighWire Press
- ✦ Voyager OPAC essentially unchanged since 1996
 - ✦ Remember the Internet in 1996?

The University of Waterloo Electronic Library

http://web.archive.org/web/19970102104854/http://www.lib.uwaterloo.ca/

Getting Started Latest Headlines Google kgsr Musagetes News Nat Decants - Favorit... Primo Production Primo Admin : Login Primo Staging

Stumble! I like it! Send to Channels: All Favorites Friends Tools

LibX UW Keyword Search TRELLIS Clear Scholar

UWELib Electronic Library

University of Waterloo

[Welcome from the University Librarian](#)

News

[Library News](#) | [Daily Bulletin](#) | [Documents](#) | [Issues in Academia](#) | [and more](#)

Finding Information

- **Library Catalogues:** [University of Waterloo's WATCAT](#) | [Wilfrid Laurier](#) | [University of Guelph](#) | [and more](#)
- **Quick Reference:** [OED](#) | [Webster](#) | [UWdir](#) | [Scholarly Societies Project](#) | [OCUL Directory](#) | [and more](#)
- **Databases & Indexes:** [Electronic Data Service](#) | [UnCover](#) | [CUSS](#) | [TRACE](#) | [Watmedia](#) | [Bookstore](#) | [and more](#)
- **Resources:** [By Discipline](#) | [Government Information](#) | [Etexts](#) | [Ejournals](#) | [Career Services](#) | [and more](#)
- **Internet Starting Points:** [Search Tools](#) | [Sites Arranged Geographically](#) | [Directories](#) | [Guides](#)
- **Campus Information Systems:** [Waterloo's UWinfo](#) | [Wilfrid Laurier](#) | [University of Guelph](#) | [and more](#)

Using the Library

- **Orientation:** [UW Library Workshops](#) | [Grad Student Info](#) | [Electronic Walking Tours](#) | [Displays](#)
- **Quick Facts:** [Library Hours](#) | [Borrowing Policies](#) | [Facilities](#) | [Library Locations](#)
- **Services:** [Interlibrary Loan/Document Delivery](#) | [AskLib](#) | [Information Services](#) | [Guides](#)
- **Working together:** [Dear Library](#) | [Library Contacts](#) | [Gifts & Donations](#) | [Friends](#) | [and more](#)

Search UW Electronic Library

keyword: ... [Help](#)

[Description of UW Electronic Library](#): selection criteria, design principles, sources of information, server statistics
[Queries, Comments and Suggestions are welcome!](#)
[Internet Resources Committee](#) | [University of Waterloo Library](#)

Internet Archive: Jan 2 1997

Done

[UG Library
Catalogue](#)

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UG Library Web Site Map

University of Guelph Catalogue:

- link to [UG Library catalogue](#)

[Other Library Catalogues:](#)

- access to library catalogues around the world. Includes listing of Ontario universities.
- [Waterloo](#) and [Wilfrid Laurier](#)

[Subject Resources:](#)

- access to subject-related information and search tools; the major

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<head>

<BASE HREF="http://www.lib.uoguelph.ca/">

<meta http-equiv="Content-Type"

content="text/html; charset=iso-8859-1">

<meta name="GENERATOR" content="Microsoft FrontPage 2.0">

<title>Library Home Pge</title>

</head>

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- access to subject-related information and search tools; the major

Why Primo?

- ✦ Look and feel of current interface does not meet the expectation of web savvy users
- ✦ Engage with users with new features in an attempt to become relevant in their information seeking universe
- ✦ Begin to address our current disjointed library experience
 - ✦ Consolidate discovery and delivery of local and remote resources in all formats

Why Primo?

- ✦ ILS replacement not our goal. OPAC replacement also not our goal
- ✦ Integrate new types of metadata
 - ✦ XML ingestion and/or Deep Search for Scholars Portal
- ✦ Leverage our existing library expertise and recognize the fact that we are not development organizations
- ✦ Integration of systems and interfaces should be easier for the vendor that wrote them than for the library
- ✦ Opportunity with our current vendor to overcome the difficulties of their pricing model

Freeze-Dried Librarian

Motivated to return to an academic library because our traditional vendors have stopped doing the development work necessary to keep libraries vital in light of what was happening on the commercial internet.

“Enthusiastic Amateurs”

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- ✦ Staffing situation at Waterloo
 - ✦ People in Systems who do our programming =

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 - ✦ also sysadmins for Windows, RedHat and Debian
 - ✦ also database administrators for MSQL and Postgres

“Enthusiastic Amateurs”

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- ✦ 2
 - ✦ also sysadmins for Windows, RedHat and Debian
 - ✦ also database administrators for MSQL and Postgres
- ✦ Large development projects have depended on Co-op students.

Development Organization

Development Organization

- ✦ Quality Assurance
- ✦ Test Plans
- ✦ Regression Testing
- ✦ Release Management
- ✦ Change Control
- ✦ Bug Tracking
- ✦ Version Control
- ✦ Coding Standards
- ✦ Code Review
- ✦ Documentation
- ✦ Software Project Management

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Control
Standards
Review
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e Project
ment

TUG - Challenges

- ✦ distinguishing between what is local, TUG, OCUL, CARL, and CRKN
- ✦ communications and engaging staff across three institutions
- ✦ balancing our campus-wide practises in administration versus our shared library interests
- ✦ need for a governance review

TUG - Challenges

- ✦ being able to adapt to evolving environment
- ✦ setting priorities, strategic directions
- ✦ budgets: cuts, staffing, resource fluctuation

- ✦ 10 year old problems are pretty difficult to solve, especially when the environment has changed dramatically in that time.

TUG - Benefits

- ✦ **benefits to our users**

- ✦ TUGdoc services
- ✦ Annex
- ✦ TRELLIS
- ✦ opportunity to pilot/create new services
- ✦ staffing efficiencies and skill/knowledge sharing
- ✦ sharing of management expertise
- ✦ Stats & Reports Group (user surveys/studies)
- ✦ financial benefits (cost sharing program)
- ✦ cooperation and collaboration
- ✦ history of success

“a new search and discovery interface”

- ✦ it has been clear for quite some time now, that there is a need for a concerted effort to investigate and introduce a new “search and discovery interface” for access to resources both within the catalogue (i.e. TRELIS) and the many other electronic information resources available to our user communities.

Process

- ✦ Agree that we should start by **decoupling the front end problem (OPAC)** from the back end and begin our explorations by seeking solutions for our users now and our processing needs later.
- ✦ Discuss the business models with ILS systems both now and into the future. Recognize that we have invested money for ILS solutions, but **the consolidation of the options and the age of their underlying architecture argue for frank discussion** of directions for OCUL Libraries and include the possibility of OCUL ILS initiatives for various modules in the future.

Options

- Bibliocommons
- Endeca
- Evergreen
- Ex Libris Primo
- Georgia Tech's Communicat
- Scholars Portal, leveraging Mark Logic
- University of Rochester eXtensible Catalog (XC) Project
- University of Virginia's Blacklight Project
- others...
 - Aquabrowser
 - Other enterprise search services (ESS) companies like Endeca

there is no one right answer

- ✧ A primary lesson of TUG
 - ✧ One size does not fit all

Considering Primo in June 2007

Features	+
User Expectations	+
Time to market	+
Integration	+?
Maintainability	+?
Scalability	+?
Ability to migrate	?
Cost	-



Course set

U of T discovery RFI

August 14th, 9am-12pm	2nd Floor, Robarts Library	ExLibris
August 15th, 9am-12pm	2nd Floor, Robarts Library	Proquest
August 17th, 9am-12pm	2nd Floor, Robarts Library	Siderean
August 20th, 1pm-4pm	2nd Floor, Robarts Library	Endeca
August 21th, 9am-12pm	Rm. 4049, Robarts Library	SIRSIDynix
August 21th, 1pm-4pm	2nd Floor, Robarts Library	Bowker
August 23th, 9am-12pm	Virtual	Integration New Media
August 23th, 1pm-4pm	Rm. 4049, Robarts Library	Coveo
August 27th, 9am-12pm	Canceled - Vendor Withdrew	IBM
August 27th, 1pm-4pm	2nd Floor, Robarts Library	Mark Logic
September 6th, 11am-1pm	2nd Floor, Robarts Library	Autonomy

✱ “...OPAC replacement also not our goal”

- ✧ “...OPAC replacement also not our goal”
- ✧ ...but it is a major milestone

Project Timeline

- ✦ June - December 2007
 - ✦ Created a TUG Initiatives Blog
 - ✦ Held a series of TUG days describing the plans
 - ✦ Received access to Primo documentation
 - ✦ Completed a prerequisite Voyager upgrade

Project Timeline

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- ✦ January – May 2008
 - ✦ Primo Implementation Team established (8)
 - ✦ Received training from Ex Libris

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- ✦ Primo Mascot chosen



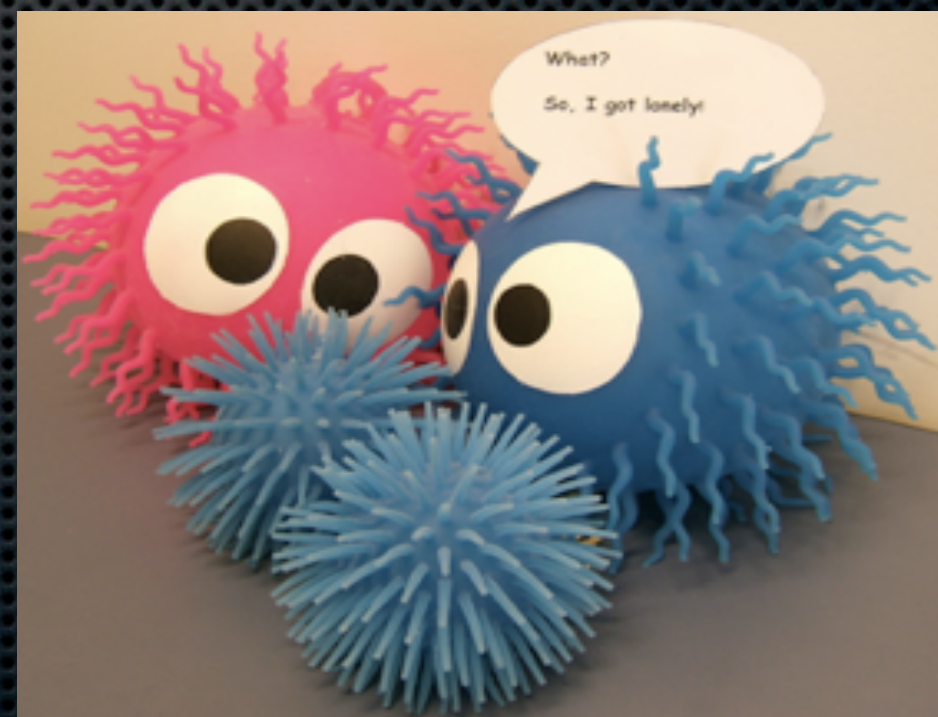
Project Timeline

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- ✦ January – May 2008 (cont'd)
 - ✦ Team began weekly meetings to strategize
 - ✦ Began weekly conference calls with Ex Libris
 - ✦ Installed Primo on servers

Project Timeline

- ✦ January – May 2008 (cont'd)
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 - ✦ Began weekly conference calls with Ex Libris
 - ✦ Installed Primo on servers
- ✦ Mascot met partner and sired fraternal twins



Project Timeline

Project Timeline

- ✦ June 2008
 - ✦ First data load (200,000) on staging server
 - ✦ asked for feedback on PIT communications, tried to gauge TUG interest, learn how best to communicate

Project Timeline

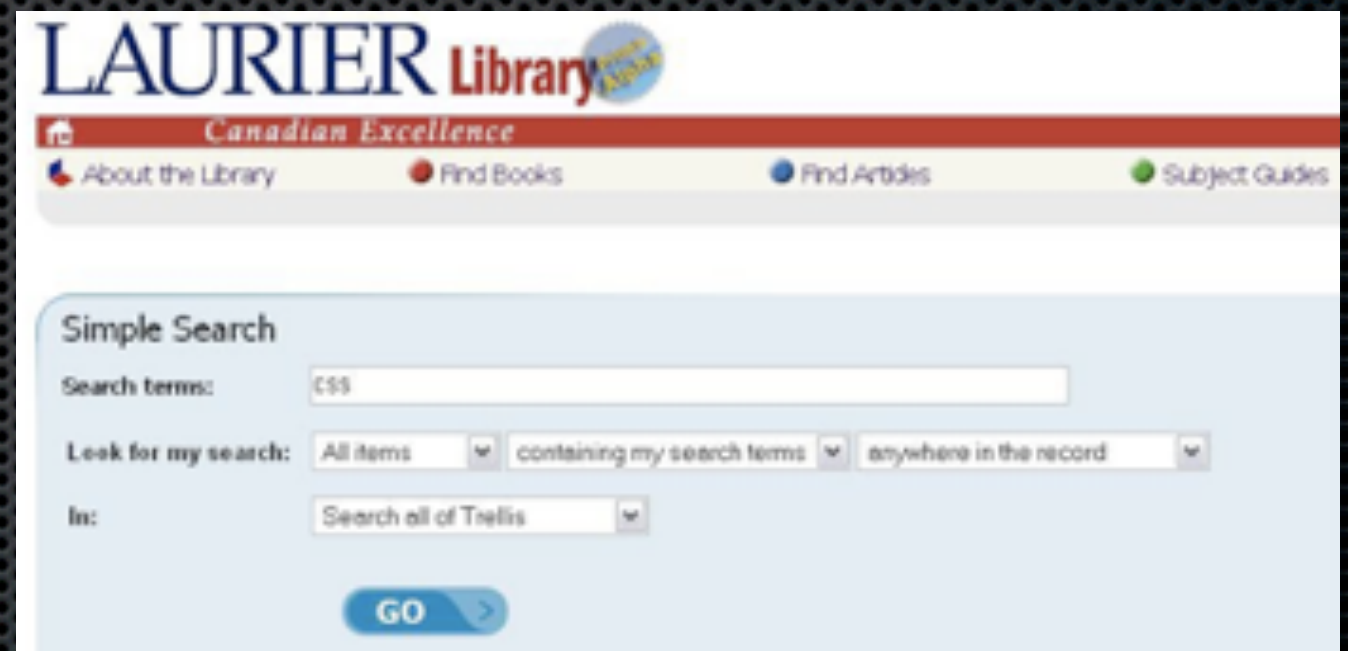


to
ate



- ✦ Primo's extended family and pets grew

Project Timeline

- ✦ July 2008
- ✦ Offered TUG staff a look with Primo Alpha
- ✦ to get some initial feedback
- ✦ to help keep staff informed and engaged



Project Timeline

- ✦ August 2008
 - ✦ Reviewed Primo Alpha feedback
 - ✦ migrated from v1 to v2
 - ✦ Loaded 3.7m records on Production server
 - ✦ Set August 26 for Primo Beta
 - ✦ Discovered data extract and data update issues
 - ▶ August 26  September 3  September 10...

Project Timeline

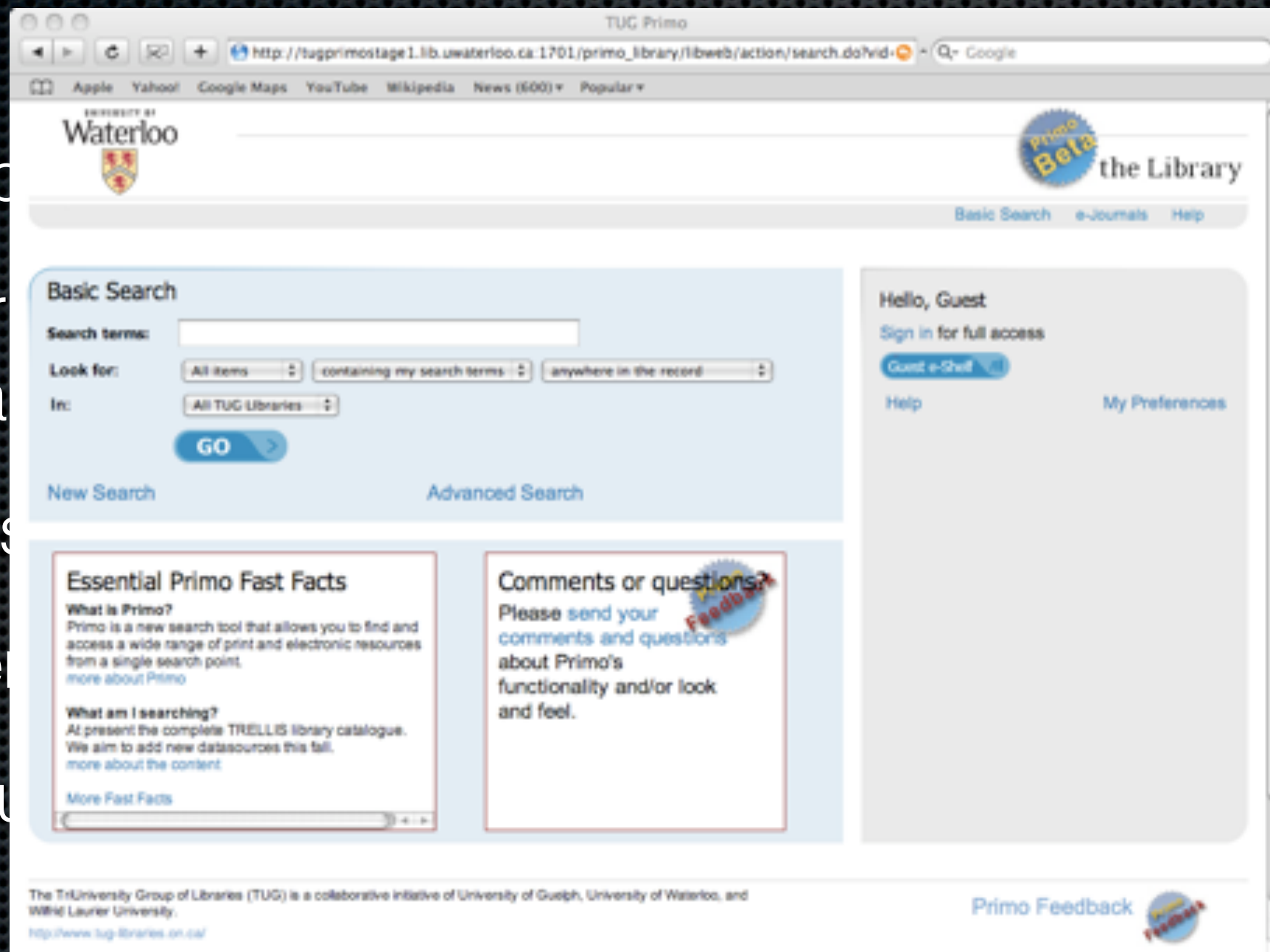
- ✦ September 2008
 - ✦ with Ex Libris, decided to delay Primo Beta launch until a re-examined list of criteria were met
 - ✦ Re-evaluated basic requirements/must haves with two things in mind
 - ✦ Basic Primo functionality (seen at other sites)
 - ✦ understanding the importance of first impressions
 - ✦ Develop criteria and rigorous testing procedures
 - ✦ Ex Libris delivered fixes

Project Timeline

- ✦ October 2008
- ✦ Major fixes were (are) put into place to address the data and authentication issues
- ✦ v2.1 is just out, will now install
- ✦ Currently in a period of extreme testing
- ✦ Announce Primo Beta

Project Timeline

- ✦ October
- ✦ Major
- and a
- ✦ v2.1 is
- ✦ Current
- ✦ Annou



the data

Project Timelines

- ✦ November 2008 and beyond...
 - ✦ Solicit and review feedback
 - ✦ Focus on 2.1 enhancements
 - ✦ live tags and reviews, Real Time Availability
 - ✦ eShelf folder management, CSS customization

Project Timelines

- ✦ Integrate with current catalogue (TRELIS)
- ✦ Define different views for TUG campuses and libraries
- ✦ Revisiting cataloging policies: ejournals & ebooks
- ✦ Communicating Primo: “what does Primo mean to me?”
- ✦ Handling project fatigue

What is Primo

- What we have come to expect in a search and discovery layer
 - Single search box
 - FRBR and dedupe
 - Facets (available, online)
 - Did you mean...
 - Cover art
 - Tags & reviews
 - Google/Amazon links
 - RSS (searches and folders)

What is Primo

W

LAURIER Library

Canadian Excellence

About the Library Find Books Find Articles Subject Guides How do I... Ask us

TRELLIS library catalogue TriUniversity Group (TUG)
Guelph | Laurier | Waterloo

new search browse headings search results your account favourites request item from TRELLIS request item NOT in TRELLIS search history end session TRELLIS comments & help

search results: Displaying 1 through 25 of 379 entries.

find this: Internet find results in: title (omit initial article: a, the, etc.)

25 records per page search reset

go to result: 1 26 51 76 101 126 ... 376 next

sort by: Post Limit

#	title <	author	date	library
[1]	Internet	Kretschmer, Bern	19uu	Guelph
	location: Alfred College (UG) Book Stacks - Alfred, Ont. call #: 004.67 K885 1996 status: In Library			
[2]	The Internet /		1998	Guelph
	location: Guelph McLaughlin Book Stacks call #: TK5105.875.I57 I536 status: In Library			
[3]	Internet /	Cantoni, Lorenzo,	2006	Laurier
	location: WLU Book Shelves call #: TK5105.875.I57 C365 status: In Library			
[4]	Internet & personal computing abstracts [computer file]		199u	Waterloo
	location: Waterloo users only - call #: * status: For available items, click on title			
[5]	Internet & society,	Harvard Conference on the Internet & Society (1996 : Cambridge, Mass.)	1997	Guelph
	location: Guelph McLaughlin Book Stacks call #: TK5105.875.I57 H39 1996 status: Multiple volumes: see record for details			

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- What we have come to expect in a search and discovery layer
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What is Primo

The screenshot displays the Laurier Library Primo search interface. At the top, the browser address bar shows the URL: [http://tugprimostage1.lib.uwaterloo.ca:1701/primo_library/libweb/action/search.do?vi\(13494767UI1\)=](http://tugprimostage1.lib.uwaterloo.ca:1701/primo_library/libweb/action/search.do?vi(13494767UI1)=). The search bar contains the text "laurier library".

The Laurier Library logo is prominently displayed, along with the tagline "Canadian Excellence". Navigation links include "About the Library", "Find Books", "Find Articles", "Subject Guides", "How do I...", and "Ask us". A "Basic Search" button is also visible.

The "Basic Search" section shows the search terms "internet". The "Look for:" dropdown is set to "All items", and the "In:" dropdown is set to "All TUG Libraries". A "GO" button is present. Below the search bar, there are links for "New Search" and "Advanced Search".

On the right side, a "Hello, Guest" message is displayed, along with a "Sign in for full access" link. A "Guest e-Shelf" button is also visible, along with "Help" and "My Preferences" links.

The "Results for All TUG Libraries" section shows 917 results, sorted by "Popularity". The "Show only:" filters are set to "Online Resources (358)" and "Available (870)".

The results list shows two items:

- Intelligent Java applications for the internet and intranets (View details)**
Watson, Mark, 1951-
Morgan Kaufmann c1997
Book
Add to e-Shelf
Available at my institution (Get It)
- The zapatista "social netwar" in Mexico (View details)**
Ronfeldt, David F.; Arroyo Center
Rand 1998
Book
Add to e-Shelf
Available within a TUG library (Get It)

The "Refine My Results" section on the right allows users to narrow results by limiting the search to:

- Library:**
 - > University of Guelph Library (308)
 - > Wilfrid Laurier University (292)
 - > University of Waterloo Library (246)
- Subject:**
 - > Internet (181)
 - > Computer networks (86)

Primo Customers

- ✦ 50+ worldwide
 - ✦ Boston College
 - ✦ Bridgeport University
 - ✦ Emory University
 - ✦ Iowa State University
 - ✦ New York University
 - ✦ Royal Library of Denmark
 - ✦ University of Iowa
 - ✦ University of Minnesota
 - ✦ Vanderbilt University

Primo Customers

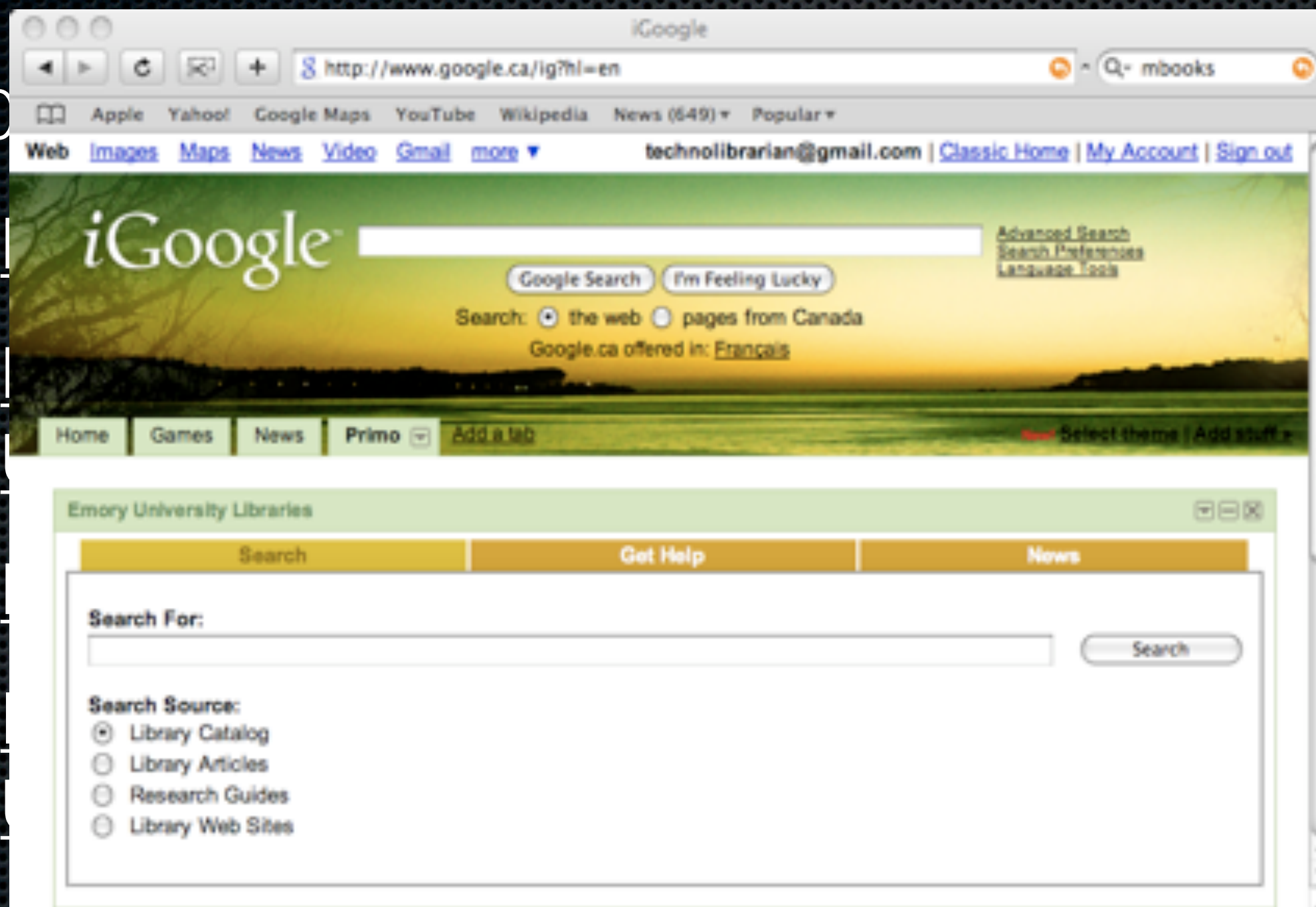
✦ 50

✦

✦

✦

✦



city

a

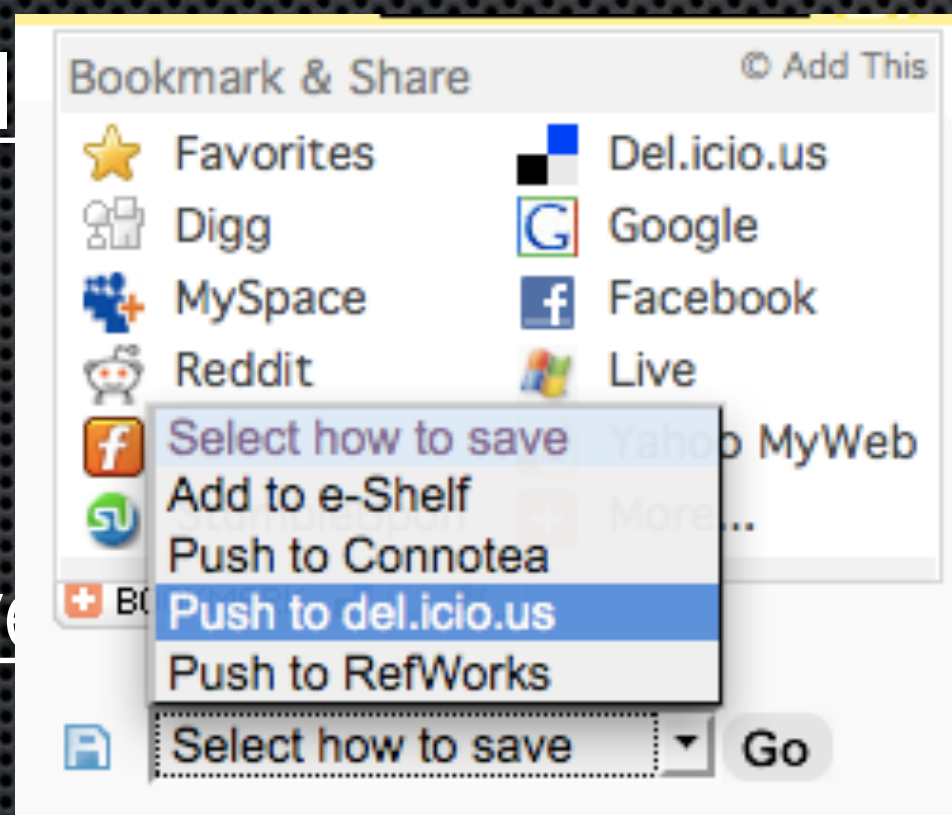
city

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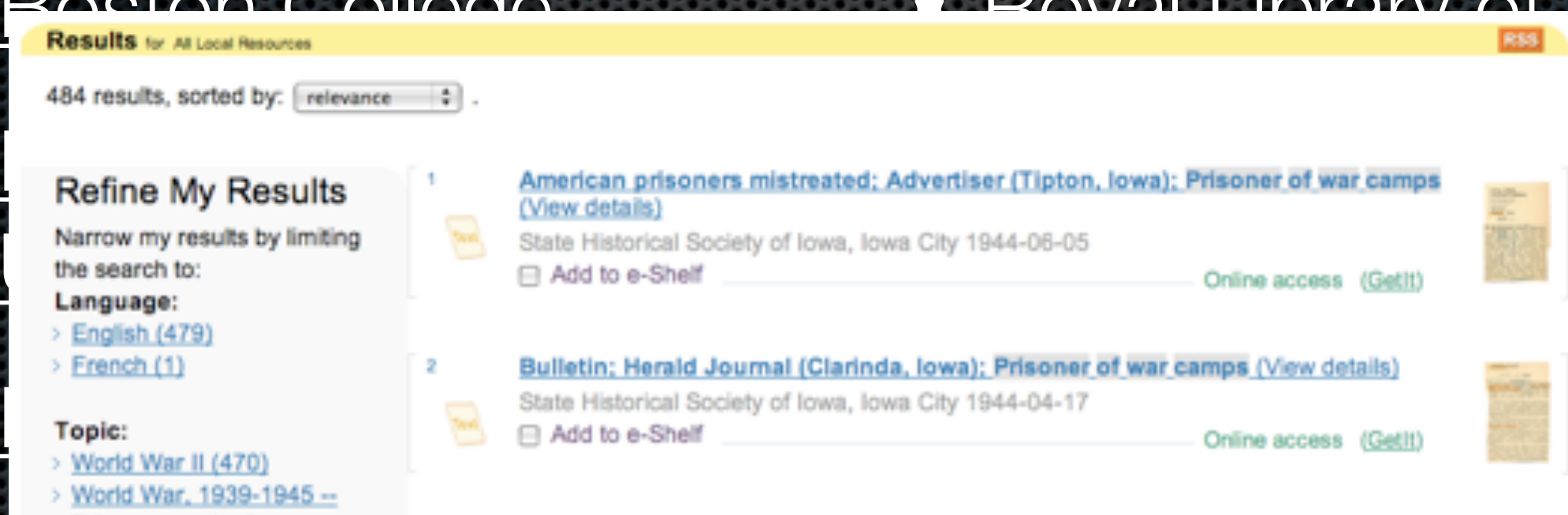


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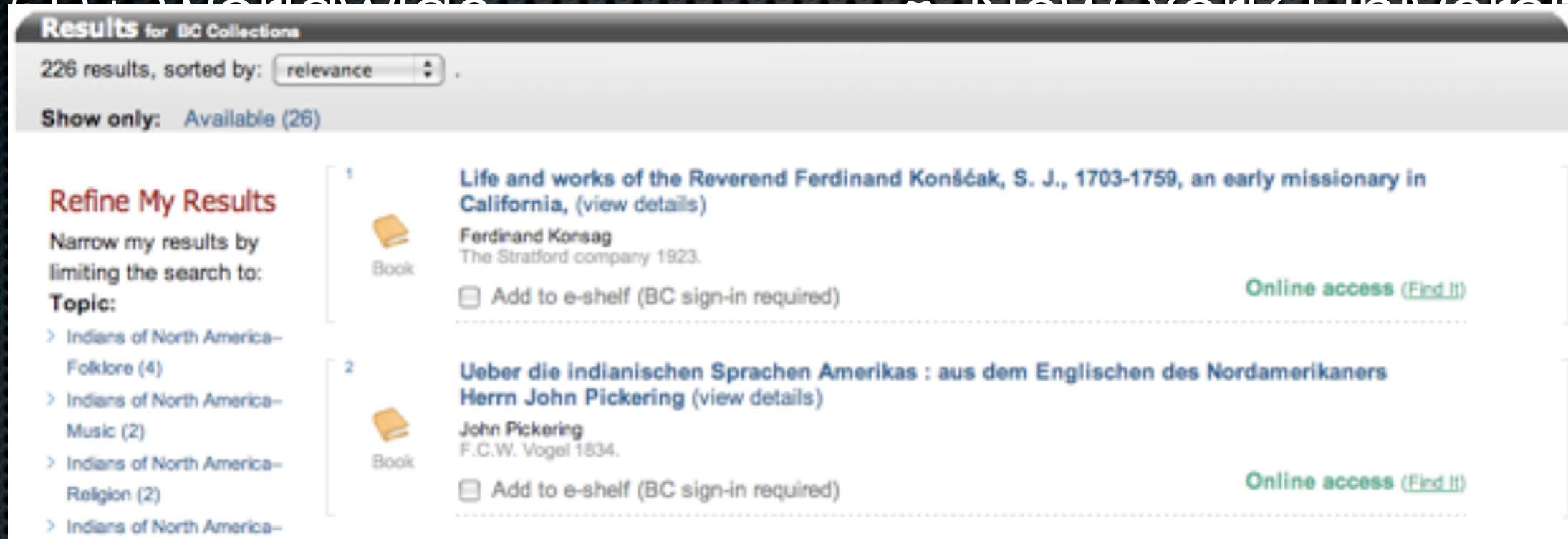


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Primo Customers

- ✦ 50+ worldwide University of New York University



- ✦ Iowa State University

- University of Minnesota
- ✦ Vanderbilt University

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Primo Customers

✦ 50

✦ E

✦ E

✦ E

✦ E

NEW YORK UNIVERSITY
LIBRARIES

HOME FIND RESOURCES ▾ RESEARCH ASSISTANCE ▾ SERVICES ▾



SEARCH

Search:

[BobCat](#) [Articles via Databases](#) [e-Journals, e-Books, etc.](#)

Primo Customers

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Deep Search



DET KONGELIGE BIBLIOTEK

[New Search](#) [se og forny lån](#) [Tags](#) [FAQ](#) [Read More](#) [Help](#)

[Books, journals, and more](#)

[Articles](#)

Search for

[My Preferences](#)

[Advanced Search](#)

results for Articles

1,421,000 results, sorted by:

Deep Search

- ✦ Royal Library of Denmark
 - ✦ Querying DADS repository of 65M articles
- ✦ Excellent performance & ranking quality
- ✦ No need to duplicate the index

- ✦ Scholars Portal

Deep Search



DET KONGELIGE BIBLIOTEK

[New Search](#) [se og forny lån](#) [Tags](#) [FAQ](#) [Read More](#) [Help](#)

[Books, journals, and more](#)

[Articles](#)

Search for

united

Go

[that contain my query words](#)



[anywhere in the record](#)



[My Preferences](#)

[Advanced Search](#)

results for Articles

1,421,000 results, sorted by: [relevance](#)



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New Opportunities

- ✦ Focus on access and delivery as the goals
- ✦ Becoming relevant: integrating Primo into our user experiences
- ✦ Engaging with our users
- ✦ Usability tests (with other web presences)
- ✦ Calibrating and leveraging: did you mean, FRBR, deduping, tags, reviews
- ✦ Another tool in arsenal to reduce steps between discovery and delivery

New Opportunities

- ✦ Accessibility for Ontarians with Disabilities Act
- ✦ Regain control of our interfaces
 - ✦ DeepSearch
 - ✦ MBooks
- ✦ OAI feeds
- ✦ OurOntario
- ✦ Working within the EL Commons

New Opportunities

The screenshot shows the EL Commons website interface. At the top, there's a navigation bar with links to Apple, Yahoo!, Google Maps, YouTube, Wikipedia, News (615), and Popular. Below this is a header section with the EL Commons logo, a search bar, and links for 'Welcome gsennema', 'Preferences', and 'Log out'. The main content area features a central 'Cross Product' image of a hummingbird feeding from a flower, surrounded by colored boxes for 'DigiTool', 'Primo', 'Preservation', 'Aleph', 'Voyager', 'Verde', 'SFX', and 'MetaLib'. To the right, there's a 'Developer Zone' section with 'Recently Updated Code' listing several updates with their creators and dates. At the bottom left, a 'Most recent Wiki updates' section lists recent updates with their authors and dates. At the bottom right, there's a 'Tags' section with various tags like '00api00', '00apishome00', etc.

Home

http://www.exlibrisgroup.org/display/ThePod/Home

Apple Yahoo! Google Maps YouTube Wikipedia News (615) Popular

EL Commons

Welcome gsennema Preferences Log out

Search

DigiTool Primo Preservation

Cross Product

Aleph Verde

Voyager SFX MetaLib

Developer Zone

Recently Updated Code

Cal State SFX menu theme
Creator: David Walker; Updated by David Walker 01 Oct

WebVoyage 7 (Tomcat) Timeout Message Alternative
Creator: Jim Robinson; Updated by Jim Robinson 29 Sep

EZB holding fetch (SFX Plug-In)
Creator: Inga Overkamp; Updated by Inga Overkamp 28 Sep

akismet spam checking of SFX Feedback targets
Creator: Jonathan Rockkind; Updated by Sharon Adams 23 Sep

Browse Code

Most recent Wiki updates

watch	Aleph	9/25/08 2:29 PM	Yoel Kortick, How to use an expand procedure to retrieve records according to the contents of a position of a bibliographic field
watch	Voyager	10/2/08 3:40 PM	John Detwiler, Tomcat WebVoyage Sites
watch	SFX	9/28/08 10:54 PM	Inga Overkamp, ISI's Journal Citation Report (JCR) as SFX target
watch	MetaLib	9/17/08 11:58 PM	yoni meidan, IRDs needed
watch	Primo	9/19/08 5:42 PM	Lee Smith, How to add a Primo index for Author, Title

Tags

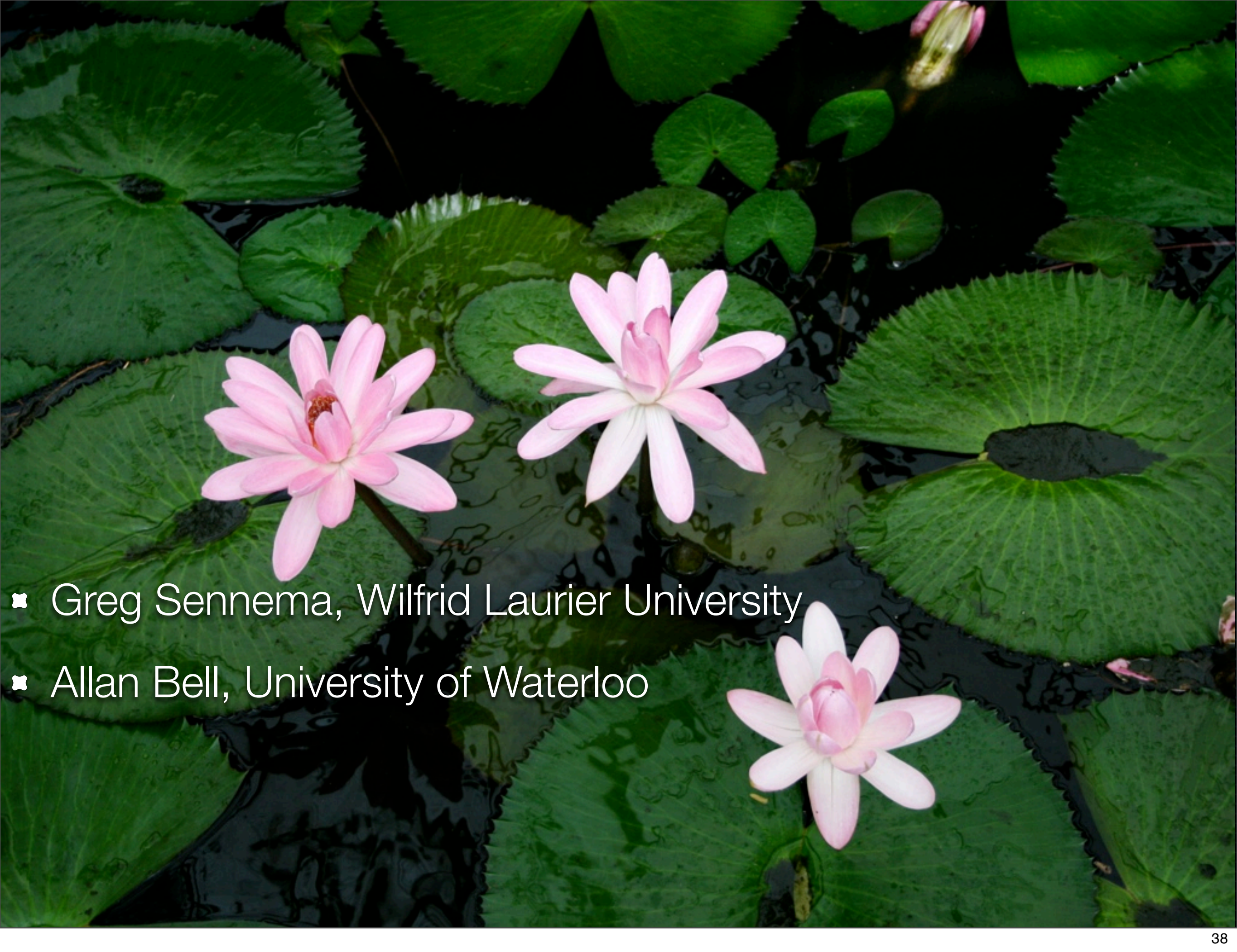
%space% 00api00 00apishome00

00code00 00development00 00meta00

00section00 acc adaptor advanced

Moving Forward Together

- ✦ TUG Initiatives projects will provide the basis for an updated governance model for the consortium
- ✦ Initial steps with Basecamp for improved PM processes
- ✦ Improved Communication - Adobe Connect, Skype
- ✦ Test plans being written
- ✦ We have begun to explore regression testing options
- ✦ Cataloguing and Metadata Librarian working with XML and asked for my *Mastering Regular Expressions* book



- Greg Sennema, Wilfrid Laurier University
- Allan Bell, University of Waterloo