Essential values of discovery system

The National Chung Hsin University, Taiwan
September 27, 2013

Alan Ng
Library, The Chinese University of Hong Kong
Agenda

• Essential criteria for choosing discovery system
• Integrating discovery system with ILS via OVP
• Extending discovery system into union catalog
• Sharing your development with others
• Summary
Essential criteria for choosing discovery system
• Yes, it is very important, **BUT** not the only one

• consider the true and relevant coverage

• coverage in the central index + your subscription + coverage by link resolver = your **TRUE** coverage

• HK PolyU chose Primo Central because it has higher coverage in peer reviewed journals
Strong CJK support

- very common to have material in both Traditional and Simplified Chinese
- in 2011, only Primo supported cross searching
- searching 中國 also covers 中國, and vice versa
Integrated with federated search

• so far, impossible for any central index to cover all journal database, esp. for Chinese periodicals

• important to provide federated search as a backup

• in 2011, only Primo was integrated with MetaLib in the unified interface

• no such option from Summon and EDS at that time
Harvesting local collections

• may have many local collections
• e.g. Institutional repositories, e-theses database
• important to be able to harvest data via OAI
• Primo readily support any OAI compliant system, e.g. DSpace
Control the MARC update process

- important to keep discovery in sync with your OPAC
- do you know when exactly your new MARC data is loaded?
- Summon and EDS require you to send them the data
- important to be able to change the MARC mapping and indexing on your own at any time
Providing Web OPAC features

• real time availability for physical volumes
• complete list of library holdings
• patron circulation record (reading history, fines record)
• book request, renewal
• all in the same unified discovery interface
Integrating discovery system with ILS via OVP (OPAC via Primo)
Choosing Primo for OVP

• OVP (OPAC-via-Primo) is the exact solution to provide the OPAC features

• only available with Primo

• a compelling reason for HK PolyU to adopt Primo in 2012, besides all other technical advantages
Primo adoptions continue

- after HK PolyU, other HK local university libraries continued to adopt
- The Chinese University of Hong Kong (2013 Jan)
- The University of Hong Kong (in progress)
- The Hong Kong University of Science and Technology (in progress)
- 50% of HK Government funded universities
Origin of OVP

- based on the DLF ILS Discovery Interface Task Group (ILS-DI) Technical Recommendation
- “Berkeley Accord” signed in 2008 April
- version 1.1 released in 2008 Dec
- signed vendors include Talis, Ex Libris, LibLime, BiblioCommons, SirsiDynix, Polaris, VTLS, California Digital Library, OCLC, AquaBrowser
What is OVP?

- three basic functions
  - 1. Display of library holdings (locations)
  - 2. Requests (such as hold, ILL booking ... etc)
  - 3. Display of the patron’s library account (My Account)
- Summon and EDS can only do the first one
How OVP works?

- Primo talks with ILS via ILS gateway
- ILS gateway uses an ILS-specific adaptor
- adaptors for Alma, Aleph, Voyager, Talis
ILS gateway

-diagram showing Primo connected to ILSG which connects to Aleph Adaptor, Voyager Adaptor, and III Adaptor, leading to Aleph, Voyager, and III systems.
OVP for non-Ex Libris ILS

• NO official adaptor for III Millennium
• CUHK successfully built the adaptor gateway between Primo and Millennium ILS
• based web scraping and CGI scripting
• suitable with ANY ILS with a Web OPAC, including III Sierra
List of all physical items of a book title
List of holdings of a journal title

<table>
<thead>
<tr>
<th>Location</th>
<th>Details</th>
<th>Reviews &amp; Tags</th>
<th>FindIt@CUHK</th>
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Summary Holdings: UL has v.5, no.1-2 (1979); v.12 (1986)-v.33 (2007);

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Making book hold request
List of current loans

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### List of Historic Loans

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<td>Jordan, Lucas.</td>
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<td>图书馆：不落幕的智慧盛宴 = The library : an illustrated history</td>
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List of hold request

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<td>HTML, CSS, &amp; JavaScript mobile development for dummies / by William Harrel</td>
<td>Tue 19 Feb 2013</td>
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<td>02</td>
<td>阿生人的糖果 / 亦舒</td>
<td>Sat 03 Aug 2013</td>
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Fines Balance: 3.0
Extending discovery system into union catalog
Turning discovery into union catalog

• Primo is extremely flexible in harvesting and indexing
• can harvest MARC data from members of consortium
• holdings information can be retrieved from each library and displayed real time using the OVP
• technically feasible NOW
Turning discovery into ALL4UST (ver. 2)

• take one step further from the union catalog
• use “external broker” to handle the inter-library request transactions
• Ex Libris has proposed such system to Hong Kong to replace HKALL Inn-Reach system
• more details to be seen
Sharing your development with others
Channels for Ex Libris customers

• individual product listserv
• annual user group meetings
• EL Commons
Annual user group meetings

- IGeLU (International Group of Ex Libris Users)
- ELUNA (Ex Libris Users of North America)
- CUHK’s OVP was presented at IGeLU conference (Berlin, Sept 2013)
EL Commons

• platform for sharing experience
• provide additional technical documentations
• sharing local development to benefit everyone
Description
This distribution includes a number of shell and Perl scripts used to report on and "fix" MARC records for importing into Primo.

Author: Eric Lease Morgan
Institution: University of Notre Dame
Year: 2009

License: GNU Public License
Short description: This program is free software; you can redistribute it and/or modify it under the terms of the GNU General Public License version 2, as published by the Free Software Foundation.
Link to terms: Detailed license terms

*Skill required for using this code: Intermediate
Primo / Blackboard Adaptor Plugin

(this page still being added to)

Tags: Blackboard Plugin Adaptor

Last Updated: 20120723

Description

Northwestern desired to partner with other departments around campus. Since the two most visited websites on campus were the Blackboard CMS site and the Library Catalog OPAC, a collaborative project here was an obvious choice. This resulted in a collaborative project for cross-departmental development to integrate Primo and the Blackboard CMS applications. This project was successful in integrating the Primo search results and e-Shelf folders with Blackboard's Course Documents webpages for faculty to use in organizing student's study resources.

There were two phases of this project: First we developed a "push" feature (to push individual resources from Primo "into" Blackboard). Second, we created a "pull" feature (whereby an entire Primo e-Shelf folder can be pulled "into" Blackboard).

The "push" feature is a "static" function, and the "pull" feature is a dynamic feature. With this dynamic function, changes to the e-Shelf will be dynamically reflected into the Blackboard Course documents page.
Summary
Essential aspects of discovery

• Truly relevant journal coverage
• Strong CJK support
• Integrated with federated search
• Harvest other local collections
• Control the MARC update and indexing
• Provide Web OPAC features (OVP)
• Extend to be union catalog for ILL
• Platforms and channels for sharing
Q & A
Contact: alanng@cuhk.edu.hk
Thank You