

## Integrating information resources: The tale of the Primo development partnership at Vanderbilt

Jody Combs and Dale Poulter  
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## Primo Development Partnership

- Vanderbilt was approached at ALA mid-winter last year regarding our interest in joining a development partnership
- After a good deal of discussion and reflection we agreed that this type of effort fits well with our new user-centric strategic plan, that we had the resources to contribute, and that it would benefit the larger community
- We agreed to a two year partnership

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## The User Interface Now

- Designed for searching, not finding
- Too complex
- Need to re-type search for different types of materials (books,articles,videos)
- Designed with physical items in mind
- Logs show users were attempting to find articles in the OPAC

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## Other Needs

- Desire to "be where users are"--take library services to users
- Desire to add more access points—RSS, web services
- Desire to add "social computing" services (social tagging, reviews, myspace, etc.)
- Desire to offer a user interface that can be personalized
- Desire to expose more of our local collections

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## Vanderbilt University: Primo Development Partnership (Phase 1)

- Develop two "pipes"
- USMARC to Primo (Unicorn)
- Dublin Core to Primo (TVNews Archive db)
  - Each pipe involves:
    - Extracting existing metadata from source into standard output format (MARCXML or Dublin Core)
    - Harvesting the metadata into Primo's publishing platform using normalization (mapping) rules and enrichment algorithms.
- Review and Comment on OBE User Interface
- Beta test

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## VU's Approach

- Aggressive time frame
- Staff development opportunity
- Need to develop "buy-in," especially from the "constructively skeptical"
- Maximize use of our particular strengths
- → Distributed approach

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## Project Plan

- Nine LARGE tasks (developed teams for most of these):
  - Extract/Harvesting
  - Normalization (mapping)
  - Enhancement metadata source(s)
  - Availability/Delivery (“GetIt!”)
  - Metalib implementation (“remote” resource federated search)
  - Authentication/Authorization (federated identity, reduced sign-on, if possible)
  - User Interface review and comment
  - Staff and public beta/acceptance tests
  - Legal and Licensing issues

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## Project Teams

- Overall Project management (Jody Combs)
- Unicorn Pipe (Dale Poulter)
- Beta Testing Coordination (Julie Loder)
- TVNews (Dublin Core) Pipe (Marshall Breeding)
- Normalization (Mary Charles Lasater)
- Authentication (Bill Hook)
- Delivery “Getit” (Jason Battles)

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## Normalization (mapping plan)

- Reviewed and advised on Deduplication algorithm
- Reviewed and advised on FRBR algorithm
- Planned mapping of MARCXML to Primo record structure (PNX)
- Planned mapping of Generic Dublic Core to PNX
- Reviewed and advised on mapping for “GetIt!” functionality, faceted searching, etc.

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## Enhancement Metadata Source Options

- We are currently using metadata from Marcive (TOC)
- Reviewed other options
  - Syndetics
  - Amazon
  - Other?
- Roberta Winjum appointed to review options, advantages/disadvantages, make recommendations
- Decision to use Amazon through initial implementation period

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## Availability/Delivery ("GetIt!")

- Reviewed current 'delivery' services from Unicorn and Library-developed web forms
- Reviewed SFX delivery options
- Developed mapping plan for delivery functions
- Created custom page for holdings display and actions for users linking from Primo, depending on where services will be provided (Unicorn, web forms, linking)
- Decided the level of availability information that needs to be provided in Primo

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## Metalib Implementation

- VU had not implemented Metalib prior to this project
- It is required for searching "remote" resources
- John Haar led the project team to develop default "quick set(s)" for use in Primo
- Upgraded to Metalib 4.0

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## Authentication & Authorization

- Research options available
- Jody Combs worked with VU ITS and MIS to determine options and potential time frames for Reduced Sign-On (SSO) service
  - available by beta-test
  - Current options under consideration are:
    - Secure LDAP—current using
    - Centralized Authentication Server (CAS) perhaps by late fall
    - Shibboleth federated identity from VU ITS sometime later(?)

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## User Interface Review and Comment

- Usability testing is the responsibility of University of Minnesota development partner
- We were given access to early drafts in September
- We have been asked to provide feedback as the UI developed
- A wide variety of library staff have participated
- Project team formed to collate comments on UI and from staff beta-test activities

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## Staff Testing

- Two teams:
  - Usability/Acceptance and Comparison testing
- Library staff and Digital Library Advisory Board asked to review, test, communicate observations and recommendations

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## Public Review and Comment

- Started in August
- We provide access information through a wide variety of channels (Heard Public Web, library home pages, Library Test Pilot site, faculty news feed, VU print publications, etc.)
- Use Library Test Pilot site and Tell Us service to gather feedback

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## Our Environment

- SirsiDynix Unicorn v.3.1 PC5b
  - Highly customized web OPAC
- Metalib
  - Not implemented before Primo
  - Initially implemented at 3.13
  - Upgraded to 4.0 for Primo functionality
- SFX v.3
  - Limited customizations

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## Getting the data

- Not as easy as it sounds ☺
- Differences between ALEPH and Unicorn formatting
- Extract time requirements

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## Unicorn Availability

- Actually increased flexibility
  - Added a library
- Allow direct linking to resource
- Deduped records
  - Link to each resource records
- Multi-volume sets and serials

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## How current is the information?

- Deleted records are removed daily
- Edited bibliographic records updated daily
- Availability .....
- Availability is updated hourly but...
  - Indexed daily
- TV News data updated daily

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## Search scopes

- Local resources
  - Unicorn data
  - TV News data
  - All local resources
- Metalib resources
  - Each quickset is a scope

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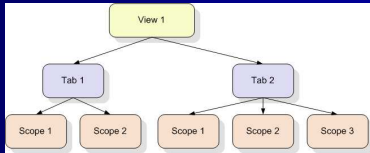
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## Views and Scopes



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## Search Scope with multiple repositories

- Challenges
  - Unicorn data
    - Includes circulation data
    - Library locations
    - Library names
  - TV News data
    - Contains metadata
    - Links to resource

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## Administration (TCO)

- All daily tasks can be done via web environment
- Staging server allows easy experimentation
- Will be able to copy configuration via web environment between servers in the future

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## Future Plans

- Blackboard integration
- Additional local collections
- 3<sup>rd</sup> node search

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## Demo

- Administrative UI ([staging](#))
- Live search ([Alphasearch](#))

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