Primo V.2 and V.3 experience at Yonsei University

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Presentation Overview

Yonsei University Library, one of the most prestigious libraries in Korea, has promoted a development project for the next generation academic information system to provide users more innovative scholarly information services in support of the world’s leading research institution.

The Ex Libris product has been adopted for our next generation academic information system. The Ex Libris product including Aleph, Metalib, Verde, SFX, DigiTool, and Primo was implemented.

We want to share our experience from findings of our Primo V.2, Central, and Primo V.3 projects.
I. INTRODUCTION

• **Yonsei University**
  - Founded in 1885, 37,967 Students, 19 Graduate Schools, and 20 Colleges

• **Yonsei University Library**
  - Started with 230 books in 1915
  - Currently has about 2,000,000 books, 16,000 serials, and 65,000 e-journals
  - Consists of 2 campus libraries and 5 branch libraries
  - Has the experience of developing and operating Maestro and XMDL, the integrated digital library
  - Started the next generation system by implementing Ex Libris full package in 2008.

*Library on Incheon International Campus will be opened in 2011*
II. ENVIRONMENTAL CHANGE OF LIBRARY & INTRODUCTION OF PRIMO

External Environmental change of Library
• Enormous information
• Google Preferred environment
• Open Platform & Web 2.0 Trend

Internal Environmental change of Library
• Weakened leadership of providing academic information*
• Emergence of multiple source, multiple format
• Need for sharing data with other institution/library
• Need for considering UX (User Experience) in library system

Change of Library Role and Responsibility
• User oriented service
• Enlargement of leadership of academic information provision
• Provision of Specialized academic information to researchers

Why Primo?
• To correspond the environmental change of library
• To enable libraries to
  ① Enlarge Solid leadership of academic information
  ② Provide Leverage effect of research activity
  ③ Provide User-oriented service

System Stability

Increased research efficiency

Flexible Data Manipulation

Primo as academic information platform

III. EXPECTED EFFECT AND IMPLEMENTATION STRATEGY

How To Implement

Yonsei University Library Website

RFID

U-Lounge

Primo

Facility System

• Need to satisfy various IT demand by implementing and integrating New library websites, RFID system, U-lounge*, and library facility system

• Our strategy is to pursue Primo as academic information platform and new library websites for supporting RFID/U-lounge/Facility System in parallel

What We Expect

Increased research efficiency

Flexible Data Manipulation

Primo as academic information platform

Implementation Strategy

1. Academic Information Platform

2. Localization

3. Interoperability

4. UI Customization

*U-lounge is the cultural space in Yonsei university library with ubiquitous technology
IV. OVERVIEW OF PRIMO PROJECT

<table>
<thead>
<tr>
<th>Task</th>
<th>~2009.8</th>
<th>~2009.10</th>
<th>~2010.5</th>
<th>~2010.6</th>
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<tbody>
<tr>
<td>• Primo2 installation &amp; Configuration</td>
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<tr>
<td>• Linking new lib. web. with Primo 2</td>
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<td>• Primo3 beta installation &amp; Test</td>
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<td>• Primo3 installation and Configuration</td>
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**Primo2**
- Production: BE and FE separated topology
- Staging: All in one

**Primo3**
- STP with Primo Central
- Opac Via Primo enabled

**Stage 1**
- Linking old lib web with Primo2

**Stage 2**
- Linking new lib web (7 sites) with Primo2

**Stage 3**
- Decided to early adopt Primo2 and Primo 3 beta installation and test

**Stage 4**
- Primo3 installation and Configuration
- Migration of Primo2 to Primo 3 STP
Overview of designing and implementing Primo with New library websites
• New library websites are developed in parallel with Primo as the total library discovery solution
• We concern
  • Substantially integrated both new library websites and Primo
  • Optimized Primo for Korean environment

How we approach the solution for fulfilling our strategy

1. Academic Info. Platform
   • Designing View Structure
   • Enabling SSO for multi library websites environment

2. UI Redesign of Primo3
   • UI consistency for all sites
   • Optimized Search UI: how many tabs are proper?
   • Optimized OVP

3. Localization
   • Korean Search
   • Expect to support DDC Enrichment

4. Interoperability
   • Interacting with Refworks
   • Interacting with iGoogle
   • New Arrival materials by using Open API
V. DESIGNING AND IMPLEMENTING PRIMO WITH NEW LIB WEB
-1. ACADEMIC INFORMATION PLATFORM

What we expect from Platform strategy

Benefit

Competitive advantage

Competitive disadvantage

Price

Demand of Library Search

Primo:
Academic Information Platform

Seoul Campus

Wonju Campus

Center for Korean Classics

Law Library

Music Library

Multimedia Center

Business Library

Cooperating other institutions or libraries

Linking Lib web with Primo
• SSO is prerequisite for our AIP implementation
• Modifying PDS for AIP implementation due to limitation of PDS-
Especially for Log-out process
★ Work Around!
V. DESIGNING AND IMPLEMENTING PRIMO WITH NEW LIB WEB
-1. ACADEMIC INFORMATION PLATFORM

Designing View Structure for Yonsei university library

Hierarchical structure of Basic Primo Structure

Institution → View → Tab

Hierarchical structure of Yonsei University Library

Conceptual View

Yonsei → Individual View

Shared View → Physical View

- Seoul
  - Library Search (Aleph+Digtool+SFX+Metalib)
  - Library Search+Primo Central

- Wonju
  - Library Search (Aleph+Digtool+SFX+Metalib)
  - Library Search+Primo Central

- Course Reserve & Etc
  - Course Reserve Materials
  - Smart phone
  - Other services

- Branch Libraries
  - Law Library Search
  - Business Library Search
  - Music Library Search
  - Multimedia Center Search
  - Center for Korean Classics Search
To maximize the leverage effect of Primo, UI is re-designed as Simple and Intuitional

• Two Tabs structure!

**V. DESIGNING AND IMPLEMENTING PRIMO WITH NEW LIB WEB**

-2. UI RE-DESIGN

4 Search Tabs
3 Search Boxes
6 Search Options

4 Search Tabs
1 Search Box
4 Search Options

2 Search Tabs
1 Search box
1 Search Option
V. DESIGNING AND IMPLEMENTING PRIMO WITH NEW LIB WEB
- 2. UI RE-DESIGN

Optimized OVP
• OVP: Powerful function in Primo 3, but not optimized for Yonsei environment

• Our OVP Optimization
  • Field Optimization: Location, Item Category, Item Status, Pickup Location, Effective Date, Memo
  • Request Process Optimization
    ① Action buttons in Request tab: Hold, Acquisition, ILL buttons \( \rightarrow \) only Hold need to be activated (Work Around!)
    • Pages is not valid Acq page of Yonsei when ACQ is clicked
    • ILL through OVP is not valid in Yonsei environment
    ② Not allow users to access Request Tab (Work Around!)
    ③ Allow users to do Hold request only when material is not available
    ④ Place Blocked Request Tabs to the right end

★ Work Around! : How to block button or request tab is simply using \(<a>\) at the code of buttons and tabs
What is localized & What needs to be localized

**Search**
- Precision of search needs to be improved
- Ongoing NR optimization

**FRBR**
- FRBR only displays one of grouped books, so user can’t identify the rest of books in group
- Especially, problematic when each volumes of the book have their own records

**DDC Enrichment**
- Supporting DDC enrichment is required as well as supporting LC enrichment

**Start With Search**
- Ongoing enhancement with Ex libris
V. DESIGNING AND IMPLEMENTING PRIMO WITH NEW LIB WEB
-4. INTEROPERABILITY WITH INTERNAL/EXTERNAL SYSTEM

• Internal Systems
  • Supported by Data manipulation of Primo (Pipe & NR functionality)
  • Aleph, Digitool with DRM, Metalib, SFX, etc.

• External systems/institutions
  • Google, Refworks, etc.

Interact with Internal System for Multi Source, Multi Format-MARC21, KORMARC, OAI, XML, DC…

Interact with External System and Institution

Internal interoperability
- Pipe functionality
- Collection with DRM,

External interoperability
- Refworks
- Google
- Open API
VI. ANALYSIS ON EXPECTED EFFECT OF PRIMO INTRODUCTION

• Change of Usage Statistics after Primo Implementation
  – Analysis conducted with four folds, such as Search stat., Web access stat., Defect stat., and Search Time stat.

***Measuring search time of Primo(2010) and Old system(2008) with selected keywords
****Comparing the number of reports about searching materials and website usage from ‘Ask a librarian’ from 2008 to 2009
VI. ANALYSIS ON EXPECTED EFFECT OF PRIMO INTRODUCTION

**Academic Information Platform**
- Primo satisfies the demand of library search in university
  - Successfully supports 2 campus libraries and 5 branch libraries
- Primo affects the increased use of library search based on the empirical analysis
  - Strengthen the leadership of academic information of university library

**UI Customization**
- To maximize the leverage effect of researchers, usability of library search needs to be enhanced
- Re-design UI as simple and intuitive
  - Two tab structure
  - Customized OVP
  - UI consistency
- However, separated information, such as availability and location, need to be displayed at one sight

**Localization**
- Korean Search is comparatively excellent in Primo even though it has some limitations
- However, the powerful functionalities of primo, such as FRBR, DDC enrichment, and Did you mean, need to be further localized
- Start with Search is on the ongoing improvement

**Interoperability**
- Data manipulation using Pipe & NR can enable Primo import multi-source & multi format data, such as OAI, DC, MARC, etc.
- Yonsei implements Digitool collection with DRM in Primo
- Also have Primo interact with iGoogle, Refworks, and Open API for user-oriented services
VI. ANALYSIS ON EXPECTED EFFECT OF PRIMO INTRODUCTION

<table>
<thead>
<tr>
<th>Strength and Weakness</th>
<th>Strength</th>
<th>Weakness</th>
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<tbody>
<tr>
<td>Strength</td>
<td>• Stable and Prompt Library Search</td>
<td>• Stable and Prompt Library Search</td>
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<tr>
<td></td>
<td>• Integrated Search using Primo Central</td>
<td>• Limit of Search and functionalities</td>
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<tr>
<td></td>
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<td>• Lack of User-Convenient add-on (Web IME)</td>
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<td></td>
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<td>• Way of displaying availability and location</td>
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<tr>
<td></td>
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<td>• Data manipulation using NR</td>
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<tr>
<td></td>
<td></td>
<td>• Enhanced Stability</td>
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<td>• User analytics - View based Stat. - More items on user stat.</td>
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<tr>
<td></td>
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<td>• Stability of System</td>
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<tr>
<td></td>
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<td>• Integrated Search environment</td>
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<td>• Strong functionalities for treating data</td>
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<td></td>
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<td>• Limitations of functionalities in Korean environment</td>
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<td></td>
<td></td>
<td>• Lack of User-Convenient add-on and display</td>
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<tr>
<td></td>
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<td>• View based user analytics</td>
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Perspective

User

System
VII. IMPROVEMENT REQUEST

• Improvements requests tree based on Our experience

<table>
<thead>
<tr>
<th>Category</th>
<th>What needs to be improved</th>
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<tbody>
<tr>
<td>Academic Info. Platform</td>
<td>Expect to support View based Stat. support</td>
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<td>Expect to enhance PDS for identifying which view users are from when Sign-in and Out</td>
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<tr>
<td>Localization</td>
<td>Need to improve FRBR for Korean environment</td>
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<td></td>
<td>Expect to support DDC Enrichment</td>
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<td></td>
<td>Need to improve Enhanced Search Precision for Korean environment</td>
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<tr>
<td></td>
<td>Need to improve Did you mean improvement for Korean environment</td>
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<tr>
<td>UI to UX</td>
<td>Need to less click, more display separated information at one sight-Availability and location</td>
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<td>Need to enlarge View based UI Customization area and items</td>
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<td>Ex Libris Support</td>
<td>Expect to have more swift communication &amp; coordination with Ex libris</td>
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<td></td>
<td>Need to better manage CRM issues</td>
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<td>Expect to install the region-based development team of Ex libris</td>
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<tr>
<td>Our Experience</td>
<td>Conclusion</td>
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| • Implementation of Primo2, Primo3, and Primo Central  
• Primo’s interaction with seven new library websites  
• Comparatively good performance and stability  
• But, many issues, bugs, and lists to be improved | Identifying Positive effect of Primo in terms of  
• Primo acted as academic information Platform  
• Strong data processing and manipulating functionalities  
Confirming Primo’s Contribution of  
• Supporting the research activity  
• Increasing research efficiency of users | But, in terms of localization, Primo lacks the consideration of regional characteristics and Korean environment  
Furthermore, the process of support from Ex libris needs to be enhanced  
• Expect to install Region based development Team  
• Expect more swift Communication & Coordination |
Q&A

Yonsei University Library (http://library.yonsei.ac.kr)

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