

Primo : what is it good for?

Re-defining the scope of Primo for Library Discovery at the University of
Sheffield

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Contents

- About the University of Sheffield and its Libraries
- Background to the project
- Laying the foundations: our Discovery principles, user stories & content types
- The scoping project
- Putting them into practice – our move to VE, 2024/25

About the University of Sheffield

- A research-led university in South Yorkshire, UK
- A member of the [Russell Group](#) of 24 research-intensive UK universities
- Part of the [White Rose University Consortium](#), with the Universities of Leeds & York
- 5 academic faculties: Arts & Humanities, Engineering, Health, Science, Social Sciences
- 28 academic departments
- Total students (23-24) – 30,233
- Total staff (23-24) – 8,750 – of which 3,925 academic (teaching & research), 4,825 professional



The University Library

- Mission:
We enable the University to access and use the information universe for the creation, application and communication of knowledge.
- 3 library sites:
 - [Information Commons](#) – open 24/7, our integrated learning environment
 - [Western Bank Library](#) – our research library and home of our Special Collections, Heritage and Archives collections, including the NFCA
 - [Health Sciences Library](#) – collections cover medicine, dentistry, nursing and midwifery
- Collections:
 - 882,000 physical items
 - 1.5 million ebooks
 - 175,000 journals (print and e)
 - Rare books, Archival collections, the National Fairground & Circus Archive
 - “Window on Korea”, East Asian Studies and Architecture collections

Background

Background – starting out with Primo, 2011

- SFX in use since 2008 alongside our Talis Prism discovery interface
- Primo launched as *StarPlus* in 2011 (Talis Alto was still our ILS)
- The Library's answer to Google! A single search tool for everything!
- Activated as many subscribed and free sources as possible in PCI
- Harvested records from White Rose repositories, ContentDM & (later) figshare
- Access to subscribed content was expected to be via Primo
- *StarPlus* got more hits than Library home page!
- Migrated to Alma in 2013 as part of European early adopter cohort
- Added Leganto to our suite of Ex Libris products in 2017

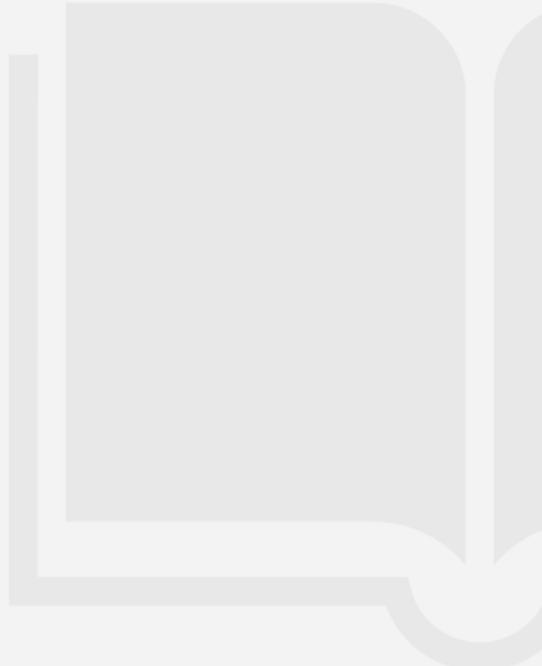
Background – changes over time

- Impact of staffing changes within the Library
 - departure of Discovery Manager (2018), role discontinued
 - no clear ownership of the Library's discovery system/service
- Changing user search habits
 - Increasingly diverse discovery tools and services available to users
- Changes in messaging to Library users
 - Postgraduate researchers & researching academics advised to use specialized databases

StarPlus – what is it good for?...

- Need for a clear set of principles and a scope to guide decisions and future configuration

Laying the foundations



Discovery principles

1. Endeavour to provide, enable or promote self-service tools and services to meet the majority of our users' discovery needs, especially for content recognised in the [content strategy](#).
2. Make reasonable efforts to ensure there is adequate metadata to enable discovery.
3. Consider user needs and behaviours when developing and/or delivering discovery services.
4. Aim to enable users to find the most appropriate discovery services for their needs, recognising that different tools are more appropriate for different purposes.
5. Endeavour to provide users with assistance and the skills to enable them to use those tools effectively.
6. Publish the University's content on platforms that enable discovery, where this is appropriate.
7. Be socially responsible and take no actions that reinforce existing inequalities when describing our material and providing discovery tools and services, acknowledging the historical legacy of our metadata and the difficulties of providing fully transparent search algorithms, but will invest resource in overcoming this.

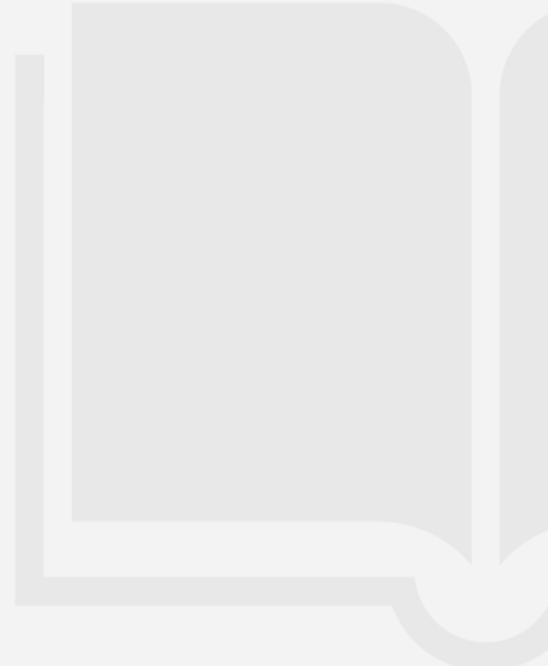
User stories

1. A student on a taught UoS course (UG or PGT) seeking recommended resources for their modules
2. A student on a taught UoS course (UG or PGT) undertaking independent research to write an essay, dissertation or project
3. A UoS teacher (staff or PGR) preparing a reading list for students on their course, looking for references to support a lecture presentation or preparing teaching materials
4. A UoS researcher (staff or PGR) looking for resources for their research project or keeping updated on new developments
5. A researcher from another university (or a private researcher) looking for resources for their research project or keeping updated on new developments
6. A member of the public doing their own research
7. Staff at another library trying to locate a specific resource to fulfil a resource sharing request

Content types

- Books
- Journals
- Journal articles & conference papers
- E-offprints/Digitised extracts
- Archives
- Datasets, research software & code
- Grey literature
- Preprints
- Newspaper articles
- Theses
- Audio-visual material
- OERs
- Content databases
- Music scores
- Patents
- Standards
- Maps

The scoping project



The scoping project – Phase 1

Identify which services support discovery of different content types to establish how Primo relates to other discovery services:

- List discovery services, including third-party services
- Map service coverage and strengths to identified content types, to identify coverage overlaps and gaps between services
- Note any content types for which Primo is the only available discovery service, and content types for which Primo is one of multiple options

The scoping project – Phase 1

Key findings & conclusions:

- Primo fulfils a unique role for discovery of and *access to* the Library's collections esp. books, maps & scores
- Some content types cannot be fully indexed in Primo
 - newspaper articles, standards, patents
- Some content types cannot be displayed in a meaningful way in Primo
 - archives (hierarchical) records, research datasets
- Some content types are “noise” and should be eliminated or given less prominence
- Duplication of records causes confusion and makes it harder to identify relevant results

The scoping project – Phase 1

Practical recommendations for Primo configuration:

- Prioritise the discovery of content types in the Library’s collections that are not indexed elsewhere
- Remove content types that cannot be fully indexed or displayed to make sense
- Reduce “noise” and duplication as much as possible to improve discovery experience
- Provide signposting to alternative, more appropriate discovery services for content types that cannot be discovered in Primo

The scoping project – Phase 2

Identifying which services support discovery for each user story

Considering the characteristics of each user story and matching against the characteristics of the discovery services

	A	C	D	E	F	G	H	I	J	K
1	System	Library Controlled	Library maintains contract	Scope of coverage	Content source		Ease of authenticated access to full text	Descriptive overview	USP	Useful for
2	Jisc Archives Hub	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Advanced	No authentication needed	a way to quickly find archives held in the UK	Collections from diverse archives across the UK, free to search	
3	Browzine	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Library holdings	Academic/trusted	Basic Discipline-spe...	Muse SSO	Quick access to the Library's ejournal tables of contents with authentication to view full text of articles. Searching at journal title level by title, ISSN or subject hierarchy browsing. Not designed as a search tool, more a way to browse journal collections by subject area	Hierarchical subject structure allows refined discovery of relevant journals. Authentication via Muse SSO gives quick access to full text.	Finding relevant journal discipline Keeping up to date with selected journals
4	University of Sheffield Library Digital Collections (ContentDM)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Library holdings	Academic/trusted	Basic Advanced	No authentication needed	Discovery service for SCHA's digital objects (photographs, digitised materials and finding aids). Hosted by OCLC.	Complete curated collection of SCHA digital assets with full metadata.	
5	CORE	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic	No authentication needed	Searchable database of OA journal papers (or author accepted manuscripts in OA repositories).	Basic search functionality, filters and limited export options (i.e. no export to RIS/Endnote option), make it limited use for literature searching. As content is also discoverable and accessible via Google Scholar, LibKey Nomad, Unpaywall etc or other search tools, usage among our user groups likely low	Librarians (e.g. SCT, ILI)
6	DART	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Discipline-spe...	No authentication needed	Searchable database of OA theses	Collected metadata for OA theses from European universities' repositories. Ideally this would be indexed in CDI for searching. Includes WREO records.	
7	Data repositories	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Discipline-spe...	No authentication needed	Institutional or discipline-based collections of datasets and other outputs from research projects. Links to researchers (ORCIDs?) and DOIs of related publications. Essential for providing context and reproducibility of research but more likely to be linked to rather than searched directly.	A place to deposit research outputs and provide links from related researchers and research publications.	
8	Database A-Z (LibGuides)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Curated content	Academic/trusted	Basic Discipline-spe...	Muse SSO	List of databases, search tools and specialist resources (either things we subscribe to or open access resources that are used in teaching or research). Can search for a known database, browse alphabetically or filter by subject area	Quick way to find and access the Library's subscribed and selected databases and filter by discipline. Some crossover with Library subject guides	Students, researchers, & wishing to explore alternative specialist resources beyond what is available in the Library. Students may be more likely to use this than the Library's own guides for this purpose
9	Discover our Archives (ArchivesSpace)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Library holdings	Academic/trusted	Basic Advanced	No authentication needed	Hierarchical catalogue of the University Library's Archival & Special Collections (under development)	The only service offering in-depth hierarchical discovery of UoS Library Archival collections	
10	EThOS	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Advanced	No authentication needed	Currently unavailable following ransomware attack. Database providing full text access to digitised UK PhD theses.	Useful for free full text access to UK theses (those that have been digitised). Recent theses are likely to be available via OA repositories, and significant overlap with ProQuest Dissertations & Theses (although that is a subscription resource). WREO content + other institutional thesis repositories.	PhD students wishing to find their theses in their subject area, looking for grey literature alternatives in cases of non-loanable theses
11	Google Scholar	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Advanced	Link to StarPlus Relies on LibKey Nomad to link...	Largest, and free to search, database of journal articles and other research publications. Search options fairly basic compared to other databases but retrieval and relevance very good. Can be set up to display FindIt links, or used with LibKey Nomad to provide access to subscription and OA material. Almost certainly the primary discovery option for most users looking for journal articles. Content isn't edited or curated, may surface preprints, often unclear which version of a paper you're looking at or how access is provided	Easy and quick way to find journal papers on any topic. Can be set up to surface subscribed content as well as OA material. Doesn't require complex boolean search strategies. Not so good for people undertaking systematic literature reviews.	Students, researchers & for journal papers
12	Jisc Library Hub Discover	<input type="checkbox"/>	<input type="checkbox"/>	Global holdings	Academic/trusted	Basic Advanced	Link to StarPlus	Combined catalogue of UK HE, National and special library holdings with links to locations/access (via institution's authentication where appropriate). Useful as a back-up if StarPlus is unavailable, and for identifying holding libraries for titles not held locally (ILLs?)	One-stop search across collections held at multiple HE, National & Special libraries in UK. Useful for locating titles not held at own institution and for ILLs.	
13	Kaltura	<input type="checkbox"/>	<input type="checkbox"/>	Curated content	Academic/trusted	Basic	Muse SSO	Platform for videos and digital media created and uploaded by University of Sheffield staff	Useful for hosting videos (e.g. library Research Skills & Critical Thinking videos) with students and researchers at the university. Students unlikely to use it to search for library content (more likely to access via Library subject guides or Study Skills @ Sheffield)	Library staff wishing to use it (LLATS, FET, SCT)
14	I enonto	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Curated content	Academic/trusted	Basic Discipline-spe...	Muse SSO	Reading list platform: teaching staff can set up reading lists to share library resources, web resources and embed links with students on specific modules	Module reading list resources curated by academics and librarians. Academics and librarians can use it to search StarPlus for content but probably isn't used for discovery (more likely to already know what items you want to put on the list and use the search feature simply to find the stimulus record for that item)	Students on a specific module or group, library staff

The scoping project – Phase 2

Key findings & conclusions:

- Primo is distinct from other discovery services:
 - Controlled and configured by the Library
 - Content selected and curated by the Library
 - Linked to authentication, enabling access to owned and subscribed print and electronic collections
- Primo is not the most suitable discovery service for all the user stories:
 - Searching skills of novice vs. experienced researchers
 - Working practices of researchers – discovery of relevant content via social networks and discipline-specific databases offering better advanced search
 - External users don't have pre-existing knowledge of UoS collections
 - University affiliation gives access
- Library cultural and research collection metadata needs to be discoverable beyond the Library's discovery services

The scoping project – Phase 2

Practical recommendations for library discovery:

- Review means of access to electronic material to ensure affiliated users can access content wherever they discover it (continue to promote LibKey Nomad and consider Nomad++)
- Continue to send records to external services (e.g. ArchivesHub, Jisc Library Hub Discover, OCLC WorldCat) to aid discovery for users who will not start their search in Primo

The scoping project – Phase 3

- Combine the findings of phase 1 and phase 2 into a grid to highlight the use cases (combination of user story and content type) where Primo is the best fit discovery service.
- From this we deduce the scope and purpose of Primo within the context of the Library's list of discovery services
- This gives us the basis for making decisions regarding the content and configuration in StarPlus (Primo)

**DEATH BY
SPREADSHEET**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	User services	Effprint/Digitised extracts	Books	Journal articles & conference papers	Newspaper articles	Archives	Datasets, research software & code	Grey literature	Preprints	Journal	Theses	Audio-visual material & non-textual digital resources	OERs	Music scores	Patents	Standards	Maps (physical and digital)	Content databases
2	Services that index this content	Leganto	Leganto Primo Primo (CDI) Subscribed databases Google Scholar Search engines External union catalogues [Jisc Library Hub Discover, WorldCat etc.]	Leganto Primo (CDI) Subscribed databases Pre-print servers Research publication repositories (CORE, WRRO etc.) Article/paper-sharing (Discover our Archives, ContentID, Archives Hub, etc.) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar GenAI tools for discovery Social media networks (incl. ResearchGate) Search engines	Leganto Primo (CDI) Subscribed databases Social media networks (incl. ResearchGate) Search engines Archives catalogues (Discover our Archives, ContentID, Archives Hub, etc.)	Leganto Primo (CDI) Social media networks (incl. ResearchGate) Search engines Archives catalogues (Discover our Archives, ContentID, Archives Hub, etc.)	Leganto Primo (CDI) Pre-print servers Research publication repositories (CORE, WRRO etc.) Search engines, software and code repositories (ORDA, discipline-specific etc) Dimensions	Leganto Primo (CDI) Pre-print servers Research publication repositories (CORE, WRRO etc.) Search engines, software and code repositories (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Leganto Walk-in kiosk Primo (CDI) Subscribed databases (WRRO, DART, EThOS) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Leganto Primo (CDI) Primo (CDI) Subscribed databases (WRRO, DART, EThOS) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Leganto Primo (CDI) Primo (CDI) Subscribed databases (WRRO, DART, EThOS) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Leganto Primo (CDI) Primo (CDI) Subscribed databases (WRRO, DART, EThOS) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Leganto Primo (CDI) Primo (CDI) Subscribed databases (WRRO, DART, EThOS) Article/paper-sharing databases (SciHub, Mendeley etc.) Google Scholar Social media networks (incl. ResearchGate) Search engines Dimensions	Subscribed databases	Subscribed databases	Subscribed databases	Subscribed databases	Database A-Z (LibGuides) Library Subject Guides Primo Search engines
3	1 A student on a UoS taught course (UG or PGT), seeking recommended resources for their modules	Leganto	Leganto Primo	Leganto Primo (CDI) Subscribed databases Primo (CDI) Search engines	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto	Leganto Primo	
4	2 A student on a UoS taught course (UG or PGT), undertaking independent research to write an essay, dissertation or project	Primo Primo (CDI) Search engines External union catalogues	Primo (CDI) Google Scholar Subscribed databases	Subscribed databases Search engines	Search engines	Archives catalogues	Search engines Research data, software and code repositories	Primo (CDI) Research publication repositories Google Scholar Search engines	Primo (CDI) Pre-print servers Research publication repositories Google Scholar Search engines	Primo Browne Subscribed databases External union catalogues	Primo (CDI) Primo (CDI) Subscribed databases Search engines Archives catalogues	Primo (CDI) Primo (CDI) Subscribed databases Search engines Thesis databases	Primo (CDI) Primo (CDI) Subscribed databases Search engines External union catalogues	Primo (CDI) Primo (CDI) Subscribed databases Search engines	Subscribed databases	Subscribed databases	Primo Subscribed databases Primo Search engines	Library Subject Guides Database A-Z (LibGuides) Primo
5	3 A UoS teacher (staff or PGR) preparing a reading list for students on their course, or looking for references to support a lecture presentation (or preparing teaching materials?)	Primo Primo (CDI) Subscribed databases Search engines External union catalogues	Primo (CDI) Google Scholar Subscribed databases	Subscribed databases Social media networks Search engines External union catalogues	Archives catalogues	Social media networks Search engines Research data, software and code repositories	Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Pre-print servers Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Primo Browne External union catalogues	Primo (CDI) Primo (CDI) Subscribed databases Search engines Thesis databases	Primo Primo (CDI) Primo (CDI) Subscribed databases Search engines External union catalogues	Primo (CDI) Primo (CDI) OER repositories Search engines External union catalogues	Primo (CDI) Primo (CDI) Subscribed databases Search engines External union catalogues	Subscribed databases	Subscribed databases	Primo Subscribed databases Primo Library Subject Guides Search engines	Database A-Z (LibGuides) Primo Library Subject Guides Search engines	
6	4 A UoS researcher (staff or PGR) looking for resources for their research, either for a specific project or keeping updated on new developments	Primo Primo (CDI) Search engines Subscribed databases External union catalogues	Subscribed databases Google Scholar Primo (CDI) Social media networks Pre-print servers Research publication repositories Search engines GenAI tools for discovery	Subscribed databases Social media networks Search engines	Archives catalogues	Dimensions Research data, software and code repositories Social media networks Search engines	Dimensions? Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Pre-print servers Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Browne Dimensions Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Thesis databases Primo (CDI) Subscribed databases Google Scholar Social media networks Search engines	Search engines Primo (CDI) Subscribed databases Google Scholar Social media networks Search engines	Search engines Primo (CDI) Primo (CDI) Social media networks OER repositories External union catalogues	Search engines Primo (CDI) Primo (CDI) Social media networks OER repositories External union catalogues	Primo Subscribed databases Primo Subscribed databases Search engines External union catalogues	Subscribed databases	Subscribed databases	Primo Subscribed databases Primo Search engines External union catalogues	Database A-Z (LibGuides) Primo Search engines
7	5 A researcher from another university (or a private researcher) looking for resources for their research project, either for a specific project or keeping updated on new developments	External union catalogues Search engines	Google Scholar Article/paper-sharing databases Research publication repositories Social media networks GenAI tools for discovery Search engines	Search engines Social media networks Archives catalogues	Archives catalogues	Social media networks Search engines Social media networks	Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Pre-print servers Research publication repositories Article/paper-sharing databases Google Scholar Social media networks Search engines	Search engines External union catalogues	Google Scholar Social media networks Search engines Thesis databases External union catalogues	Search engines Archives catalogues	OER repositories Social media networks Search engines External union catalogues	Google Scholar Social media networks Search engines External union catalogues	Google Scholar Social media networks Search engines External union catalogues	Google Scholar Social media networks Search engines External union catalogues	Search engines External union catalogues	Search engines External union catalogues	
8	6 A member of the public doing their own research such as family or local history (or supporting their own lifelong-learning)	Search engines External union catalogues	Search engines Google Scholar	Search engines Archives catalogues	Search engines Archives catalogues	Search engines Research data, software and code repositories	Search engines Walk-in kiosk	External union catalogues	Search engines External union catalogues	Search engines Archives catalogues	Search engines OER repositories External union catalogues	Search engines Archives catalogues	Search engines OER repositories External union catalogues	Search engines External union catalogues	Search engines External union catalogues	Search engines External union catalogues	Search engines External union catalogues	

The scoping project – Phase 3

Key findings & conclusions:

- Primo is a critical discovery tool for our taught students beginning independent research (beyond reading lists)
- It is essential for our academics creating reading lists and teaching materials
- For these users, a core set of content types must be discoverable
- “Known item” searches should just work!

The scoping project – Phase 3

Practical recommendations for the scope of Primo:

- Optimise discovery of core content types
 - Books (print and electronic)
 - Journal articles and conference papers
 - Journals
 - Theses
 - A/V material
 - OERs
 - Music scores
 - Maps
- Prioritise the needs of key user stories:
 - students on a taught course, undertaking independent research to write an essay, dissertation or project
 - teachers preparing a reading list for students on their course
- Additionally, for researchers seeking certain content types (books, music scores and maps) Primo will be the only discovery service available

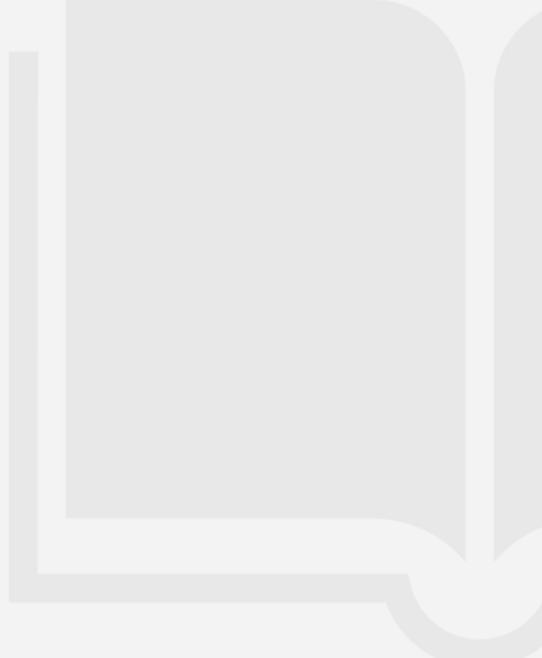
The scoping project – wider recommendations

- Review means of access to electronic content, especially when that content has not been found via Primo
- Review how users are guided to the most appropriate discovery service for their needs

(added later):

- Boost discovery of Open Access materials in Primo

Putting it into practice: our move to Primo VE



Implementing Primo VE

- Having a defined scope determined which sources were included (and which were not)
- Simplified remit eliminated the need to harvest records from external sources, made implementation easier
- Use of CDI searching for repository records in attempt to reduce duplication (not yet tested)
- Noise of “book reviews” in search results – unfortunately VE functionality clash has prevented us from achieving this yet



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eResources



Database A-Z

A complete list of our subscribed databases searchable by subject.



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Find ejournals by title, subject or ISSN.



eResources service status

Updates on scheduled maintenance, at risk periods and current issues.

Help and information



Your Library Essentials

Guide to using Library services.



StarPlus FAQs

Tips on using StarPlus



Searching for information

Guidance on effective searching.

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