

Essential values of discovery system

The National Chung Hsin University, Taiwan
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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

Journal coverage

- 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 中国, 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

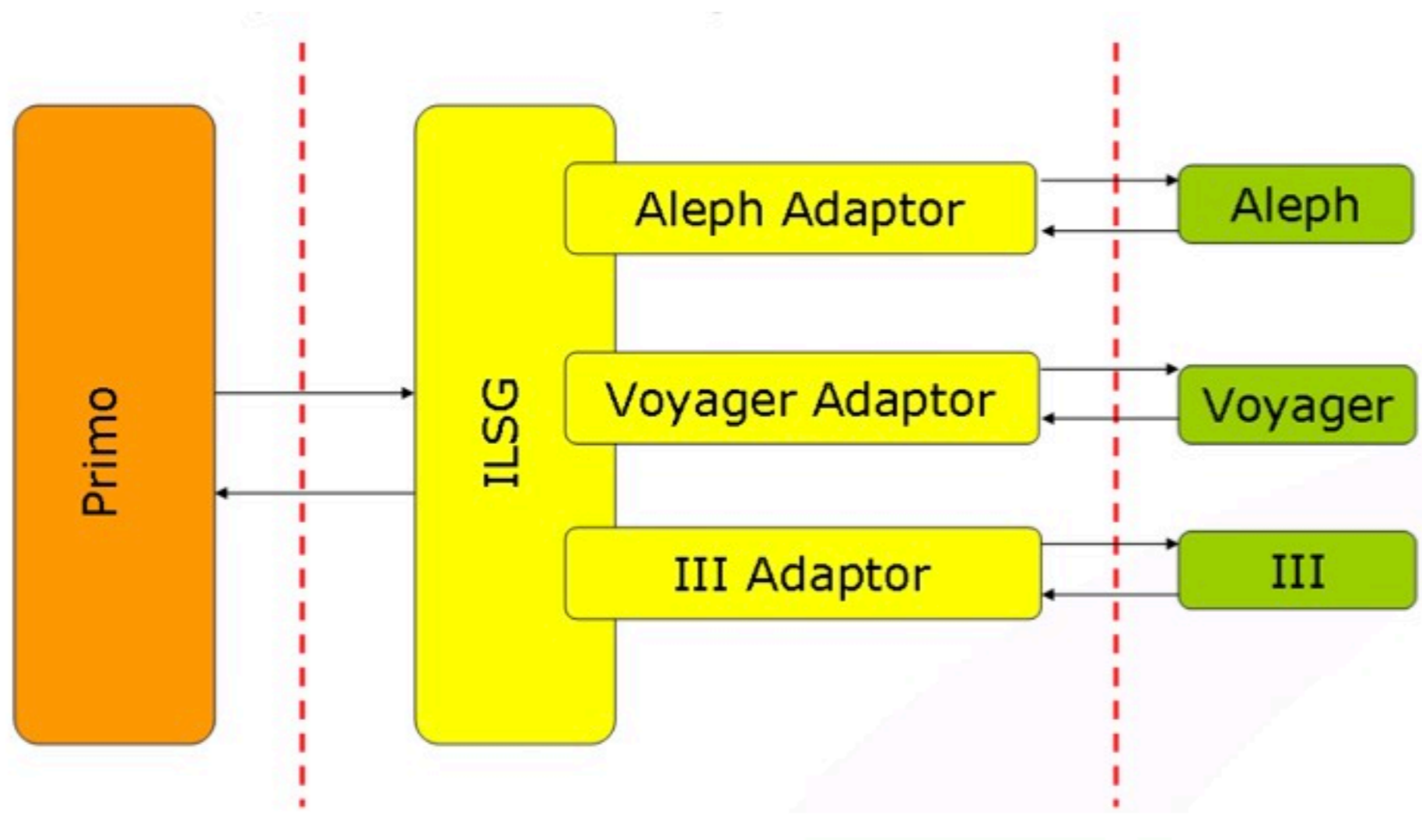
What is OVP?

- 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



OVP for non-Ex Libris ILS

- NO official adaptor for Ill 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 Ill Sierra

List of all physical items of a book title

Books Articles Books & Articles Extended Search

a brief history of time Entire Collection Advanced Search Browse Search Search HKALL

rss
Add page to e-Shelf

Show only
Full Text Online (181)

Refine My Results

Subject
History, Asia, Australia and Oceania (13)
Engineering (11)
Music (11)
United States (10)
Cosmology (10)
More options


Author
SpringerLink (Online service) (28)
ebrary, Inc (21)
Hawking, S (8)
ScienceDirect (Online service) (7)
Books24x7, Inc (6)
More options

Resource Type
Book (622)
E-Book (86)
DVD (2)
Computer File (1)
More options

Collection
E-Books and E-Theses (181)
Reference Materials (6)
Audio-visual Materials (2)
CUHK Theses (2)
Local TV Programmes (1)
More options


Library
University Library (452)
Chung Chi College Library (58)
Lee Quo Wei Law Library (55)
New Asia College Library (20)

Results 1 - 10 of 785 for Entire Collection Sorted by: Relevance 1 2 3 4 5 → View 6 versions

 **A brief history of time / Stephen Hawking**
S. W. Hawking (Stephen W.)
[Updated tenth anniversary commemorative ed.].. London ; New York : Bantam Press 1998
● Holding: UL Good Reads QB981 .H377 1998b 0

Book [Locations](#) [Details](#) [Reviews & Tags](#) [Findit@CUHK](#) [Send to](#)

Location	Call Number	Status	Request Options
UL Good Reads	QB981 .H377 1998b	ON HOLDSHELF	Sign in to request
UL Good Reads	QB981 .H377 1998b c.2	DUE 29-10-13	Sign in to request

 **The illustrated a brief history of time / Stephen Hawking**
S. W. Hawking (Stephen W.) S. W Hawking (Stephen W.)
Updated and expanded ed.. New York : Bantam Books 1996
● Holding: UL QB981 .H377 1996 0

Book [Locations](#) [Details](#) [Reviews & Tags](#) [Findit@CUHK](#) [Send to](#)

Location	Call Number	Status	Request Options
UL	QB981 .H377 1996	NOT CHCKD OUT	Sign in to request

List of holdings of a journal title

Books Articles Books & Articles Extended Search

journal of management Entire Collection Advanced Search Browse Search Search HKALL

Did you mean: journal of arts management?

rss Add page to e-Shelf

Refine My Results

Subject

- Management (181)
- Industrial management (100)
- Personnel management (74)
- Business (56)
- Management information systems (33)

More options ▾

Author

- Hong Kong Institute of Human Resource Management (26)
- American Management Association (14)
- Institute of Management Sciences (12)
- Financial Training Company (10)
- Association of Chartered Certified Accountants (Great Britain) (7)

More options ▾

Collection

- Periodicals (1,064)
- Reference Materials (43)
- Hong Kong Government Documents (40)

More options ▾

Library

- University Library (955)
- Chung Chi College Library (45)
- Lee Quo Wei Law Library (12)
- Architecture Library (11)
- Li Ping Medical Library (7)

More options ▾


Language

- English (909)
- Chinese (131)
- Japanese (17)
- Korean (2)
- German (2)

More options ▾

Results 1 - 10 of 1,064 for Entire Collection Sorted by: Relevance ▾ 1 2 3 4 5 →

Refined by: resource type: Journal x


 **Journal of management**
Southern Management Association.
Thousand Oaks, Calif. Sage Publications
● Holding: UL Periodical HD28.J5967 0

Locations Details Reviews & Tags Findit@CUHK

UL Periodical HD28.J5967 ● See status

Summary Holdings: UL has v.5, no.1-2 (1979); v.12 (1986)-v.33 (2007);

Location	Call Number	Status	Request Options
▶ UL Periodical	HD28.J5967 v.5, no.1-2, 1979	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28.J5967 v.12, 1986	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28.J5967 v.13, 1987	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28.J5967 v.14, 1988	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28.J5967 v.15, 1989	NOT CHCKD OUT	Sign in to request :

 **International journal of management**
Geelong, Vic. : International Journal of Management 1984-
● Holding: UL Periodical HD28 .I52 0

Locations Details Reviews & Tags Findit@CUHK

UL Periodical HD28 .I52 ● See status

Summary Holdings: UL has v.6 (1989)-v.24 (2007);

Location	Call Number	Status	Request Options
▶ UL Periodical	HD28 .I52 v.6, 1989	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28 .I52 v.7, 1990	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28 .I52 v.8, 1991	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28 .I52 v.9, 1992	NOT CHCKD OUT	Sign in to request :
▶ UL Periodical	HD28 .I52 v.10, 1993	NOT CHCKD OUT	Sign in to request :

Making book hold request

Books | Articles | Books & Articles | Extended Search

a brief history of time | Entire Collection | **Go** | [Advanced Search](#) | [Browse Search](#) | [Search HKALL](#)

rss | Save query | Add page to e-Shelf


Show only
Full Text Online (181)

Refine My Results

Subject
[History, Asia, Australia and Oceania](#) (13)
[Engineering](#) (11)
[Music](#) (11)
[United States](#) (10)
[Cosmology](#) (10)
[More options](#) ▾

Author
[SpringerLink \(Online service\)](#) (28)
[ebrary, Inc](#) (21)
[Hawking, S](#) (8)
[ScienceDirect \(Online service\)](#)

Results 1 - 10 of 785 for Entire Collection | Sorted by: Relevance ▾ | 1 2 3 4 5 → | [View 6 versions](#)

 ☆ **A brief history of time / Stephen Hawking**
S. W. Hawking (Stephen W.)
[Updated tenth anniversary commemorative ed.].. London ; New York : Bantam Press 1998
● **Holding:** UL Good Reads QB981 .H377 1998b

[Book](#) | [Locations](#) | [Details](#) | [Reviews & Tags](#) | [Findit@CUHK](#)

Request Options: **Hold**

Volume:

Location: UL Good Reads
Hold |

[Send to](#) |

May also be available in other locations. [View All locations.](#)

List of current loans

Books Articles Books & Articles Extended Search

journal of management Entire Collection Advanced Search Browse Search Search HKALL

e-Shelf Queries **My Account**

List of Active Loans List of Historic Loans

Renew Selected

#	Title	Barcode	Due Date	Due Hour	Potential Fine	Call Number	Status
1	<input type="checkbox"/> 880-02 Nū ji zhe shou ji / Yishu.	106158989ctyu	DUE 12-09-13			PL2867.Z75 N825 2012	Renewable
2	<input type="checkbox"/> 實在平凡的奇異遭遇 / 亦舒.	319950097619459iedl	DUE 28-09-13			PL2867.Z75 S437 2011 1	Renewable
3	<input type="checkbox"/> 櫻唇 / 亦舒	310003508484239luib	DUE 28-09-13			PL2867.Z75 Y564 2012	Renewable
4	<input type="checkbox"/> 代尋失去時光 / 亦舒.	319950096526809iedl	DUE 28-09-13			PL2867.Z75 D35 2011	Renewable
5	<input type="checkbox"/> Mobile usability / Jakob Nielsen, Raluca Budiu.	004802335	DUE 06-10-13			QA76.59 .N53 2012	Renewable
6	<input type="checkbox"/> 本棚の中のニッポン : 海外の日本図書館と日本研究 = Japanese studies libraries in the world / 江上敏哲.	004795651	DUE 15-10-13			Z688.J3 E33 2012	Renewable
7	<input type="checkbox"/> HTML, CSS, & JavaScript mobile development for dummies / by William Harrel.	004730276	DUE 15-10-13			QA76.59 .H373 2011	Renewable
8	<input type="checkbox"/> Learning iPad programming : a hands-on guide to building iPad apps / Kirby Turner, Tom Harrington ; [foreword by Mark Dalrymple].	004848511	DUE 25-10-13			QA76.8.I863 T87 2013	Renewable
9	<input type="checkbox"/> CSS3 : the missing manual / David Sawyer McFarland.	004822792	DUE 30-10-13			TK5105.888 .M336 2013	Renewable
10	<input type="checkbox"/> Beginning iOS6 development : exploring the iOS SDK / David Mark ... [et al.].	004822799	DUE 30-10-13			QA76.8.I64 M36 2013	Renewable
11	<input type="checkbox"/> Learning jQuery : a hands-on guide to building rich interactive web front ends / Ralph Steyer.	004848500	DUE 01-11-13			QA76.73.J38 S84465 2013	Renewable
12	<input type="checkbox"/> 飢餓遊戲 = The hunger games / 蘇珊·柯林斯著 ; 鄧嘉宛譯.	004540412	DUE 23-11-13			PS3603.O4558 H86412 2009	Renewable

List of historic loans

Books Articles Books & Articles Extended Search

journal of management Entire Collection Go Advanced Search Browse Search Search HKALL

e-Shelf Queries My Account

Loans (33)
Requests (2)
Fine & Fees (1)
Personal Settings

List of Active Loans **List of Historic Loans**

#	Title	Author	Due Hour	Potential Fine	Location
1	Learning UNIX for Mac OS X Panther	Taylor, Dave, 1962-	17-10-2012		Copy 2
2	Learning UNIX for Mac OS X Panther	Taylor, Dave, 1962-	17-10-2012		Copy 2
3	Learning UNIX for Mac OS X Panther	Taylor, Dave, 1962-	17-10-2012		Copy 2
4	JavaScript : the complete reference	Powell, Thomas A., 1968-	22-10-2012		Copy 1
5	jQuery in action	Bibeault, Bear.	22-10-2012		Copy 1
6	jQuery in action	Bibeault, Bear.	22-10-2012		Copy 1
7	Beginning iOS 5 games development : using the iOS 5 SDK for iPad, iPhone, and iPod Touch	Jordan, Lucas.	22-10-2012		Copy 1
8	jQuery in action	Bibeault, Bear.	22-10-2012		Copy 1
9	HTML, CSS, & JavaScript mobile development for dummies	Harrel, William.	22-10-2012		Copy 1
10	JavaScript : the complete reference	Powell, Thomas A., 1968-	22-10-2012		Copy 1
11	图书馆 : 不落幕的智慧盛宴 = The library : an illustrated history	斯图亚特·A. P. 默里(Stuart A. P. Murray)著 ; 胡炜译.	22-10-2012		Copy 1
12	Professional mobile application development		22-10-2012		Copy 1
13	Professional mobile application development		22-10-2012		Copy 1

List of hold request

Books Articles Books & Articles Extended Search

journal of management Entire Collection Advanced Search Browse Search Search HKALL

e-Shelf Queries **My Account**

Loans (33)
Requests (2)
Fine & Fees (!)
Personal Settings

List of Requests

#	Type	Title	Author	Status	Pickup Location	Location	Actions
01	Hold	A brief history of time / Stephen Hawking.		Ready. Must pick up by 04-09-13	University Library		Cancel
02	Hold	Stephen Hawking's A brief history of time : a reader's companion / edited by Stephen Hawking ; prepared by Gene Stone.		DUE 10-09-13	University Library		Cancel

List of fines

Books Articles Books & Articles Extended Search

journal of management Entire Collection Advanced Search Browse Search Search HKALL

e-Shelf Queries **My Account**

Loans (33)
Requests (2)
Fine & Fees (1)
Personal Settings

List of Fines:

#	Title	Date Due	Date Returned	Type	Amount	Transferred
01	HTML, CSS, & JavaScript mobile development for dummies / by William Harrel.	Tue 19 Feb 2013		Debit	\$1.00	No
02	陌生人的糖果 / 亦舒.	Sat 03 Aug 2013	Mon 05 Aug 2013	Debit	\$2.00	No
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


EL Commons - Wiki

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You are here: [EL Commons](#) > [Wiki](#) > [Primo](#) > [iii2primo](#)

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- Documentation
- Enhancement Ideas
- FAQ
- General
- How to
- iii2primo**
- Trouble Shooting
- User Interface

[Labels:](#) None 

iii2primo

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Tags:
Last Updated: Apr 07, 2009 16:39

Description
This distribution includes a number 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

- [Author\(s\) homepage](#)
- [Download](#)
- [Installation instructions](#)

EL Commons - CodeShare

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- [PrimoCentral Real Time Availability Update for Primo v3.0](#)
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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