

Chapter 33

Implementing Primo for the Michiana Academic Library Consortium (MALC)

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ABSTRACT

The University of Notre Dame and the Michiana Academic Library Consortium (MALC) have implemented Ex Libris'™ Primo^{®2} as its next generation discovery system. The consortium initially implemented the system in public beta and transitioned Primo[®] to the default discovery system for the Libraries in the Spring of 2011. This chapter discusses the rationale for acquiring Primo[®], the implementation and customization, user response, and long term hopes for the system. It also touches on the early evaluation and implementation steps for the Primo Centralized Index.

INTRODUCTION

The University of Notre Dame and the Michiana Academic Library Consortium (MALC) selected Ex Libris'™ Primo[®] as its next generation discovery system in the fall of 2008. The consortium chose Primo[®] from a slate of over 10 systems because of its modularity, extensibility, and customizability. Primo[®] is robust, both in its ability

to make adjustments to the interface through its default wizards, but also in its system architecture which facilitates customization for organizations that would like to create a beyond out-of-the-box experience. Primo[®] is also a full-featured discovery system with its native configuration. The libraries initially implemented Primo[®] in public beta, branded as CatalogPlus, and made it available in parallel with the classic Online Public Access Catalog (OPAC) – Ex Libris'™ Aleph Integrated Library System.

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Primo® was released as the default search for library collections in January 2011, after two years of public beta. The libraries also kept the classic OPAC available as an alternative, and plan to keep it available indefinitely. Early feedback has helped guide the development of locally programmed customizations that have significantly enhanced the Primo® interface, especially in the areas of locations for physical materials and extended services. This chapter discusses how Primo® is designed to work, implementation and customization choices for the system, early response from users, work with their feedback, and how the University of Notre Dame hopes to extend the system in the future. While this chapter discusses Primo® in the context of the consortium, the perspective represented is that of the system managers at the University of Notre Dame Hesburgh Libraries, hitherto referred to as Hesburgh Libraries.

BACKGROUND

The University of Notre Dame is a member of a the Michiana Academic Library Consortium (MALC), a small local consortium comprising the University of Notre Dame, Saint Mary's College, Bethel College and Holy Cross College. This consortium was originally formed in 1990 to support the Northwestern Online Total Integrated System (NOTIS) as a shared library resource. Notre Dame had already implemented NOTIS in 1986 and provided hosting and technical support services for the consortium.

MALC libraries migrated from NOTIS to Aleph 500 in 1998/99. The Kresge Law Library at Notre Dame was not part of this migration; they had previously switched to Innovative Interfaces Incorporated's Integrated Library System (III). From 1992-1996 the law library used NOTIS for cataloging, and INNOVAC (Innovative Interfaces) for acquisitions and serials. In 1996, they migrated to III's INNOPAC for all modules and upgraded to Millennium in 2001.

DECIDING, ACQUIRING, AND IMPLEMENTING EX LIBRIS' PRIMO

Assessing What Was Needed in a Next Generation Discovery System

In 2008, the libraries formed a Resource Discovery Assessment Working Group to assess options for a new discovery system in the wake of the emerging "next generation" OPAC landscape. The group included 10 members, from various areas in the libraries.

The group hoped to address a number of issues as it considered options for Resource Discovery Systems. One was the desire to provide a Union Catalog search for the consortium. Even though the libraries were on a shared system, each MALC member had a separate catalog database and it was not easy to cross-search them. There was a Union Catalog option available for the Aleph system, but the consortium had not implemented it. The law library's records were not in the Aleph system at all. A union search would be a convenience to users, rather than conducting multiple searches to find out what they had easy access to use. It is worth noting that MALC patrons have cross borrowing privileges and a shared catalog would address the directors' goal toward inter-institutional resource sharing and promotion of the consortium.

Another major issue was the changing nature of library collections. The biggest change at the time was the introduction of electronic resources. At the time of the assessment, the libraries were already subscribing to the majority of their journals in electronic format and anticipated increasing collections of electronic books in the future. In the vast majority of cases, there were separate records in the Integrated Library System (ILS) for the print and electronic copies. While this had advantages for managing the collection, it was confusing for users.

There were also library collections that were not in the catalogs at all. For example, the Architecture Library at Notre Dame has a collection of

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