PRIMO REALNESS
IMPLEMENTING COURSE RESERVES AT THE UNIVERSITY OF UTAH LIBRARIES
UNIVERSITY OF UTAH LIBRARIES

J. Willard Marriott Library
Eccles Health Sciences Library
Quinney Law Library
McKay Music Library

- 22,030 Full-time Undergraduate students
- 5,606 Graduate students
- 1,354 Teaching Faculty
- 3,375,576 volumes (Aleph)
- 224,229 digital collection items (CONTENTdm)
- 213,890 items (SFX)
Historically there were two systems for Course Reserves
  - Horizon --> physical
  - Docutek --> online

Systems were so heavily customized outside of system framework that we were no longer able to perform system upgrades or apply hot fixes

Systems were out of date, clunky and unreliable
  - Support no longer offered by vendor
  - Unified search was not possible

Priorities for implementing Primo
  ✓ “Use the system” and customize according to system framework and parameters
  ✓ Sustainability
  ✓ Stability
  ✓ Unified Search
WELCOME TO THE JUNGLE

Course Reserves are delivered using Aleph and Primo

- 1900 Courses annually
- 26,685 course readings
AUTHENTICATION AND LDAP SYNCING

• Ex Libris recommended loading patrons directly into Aleph using the Z107 (e-reserves course registration table)
• Utah wanted to use CAS to authenticate users in Primo and LDAP to sync course readings with registered courses
• Current product configurations did not support LDAP syncing with course readings
• This was not a sustainable solution due to the number and frequency of registration changes.
• Authentication through CAS was utilized in Primo using a Restricted Delivery Scope, but never connected students directly to their specific course readings
ALEPH PUBLISHING PROBLEMS REQUIRED EX LIBRIS DEVELOPMENT

- University workflow created course reading lists were prepared for each course at the beginning of the semester.
- Once a bib was linked to a course – subsequent changes to the bib were not published to Primo.
  - UE_21 does not update the z00p record for connector if physical bib record is changed. As a result publish-06 output USM30 connector with old data.
- Cross-listed courses requiring changes to a bib had to be individually updated to work around this flaw. Resaving a connector record UPDATED the z00p status, which allowed publish-06 to output the updated fields.
- Our Aleph implementation liaison acknowledged this as a bug and an enhancement request was submitted to Development.
- Fixed in V20-rpc#3221 – Labeled as a defect report.
REALNESS DEFINED
REALITY: THE STATE OF BEING ACTUAL OR REAL
WORK! IN PRIMO 2

- Data Source created (UUU_COURSE)
- Scope created (uuu_course_reserves)
- Normalization Rules created (uuu_course_reserves) Templates- added backlink and link to holdings (also added in norm rules)
  - Added local search
  - Course Name
  - Course Instructor
  - Added local display
  - Course Code—Course Name— Instructor
  - Pre-filter facets (Course code, course name, Instructor)
MIGHTY REAL

- Primo 2: Cross-listed courses not dedupping
- If a reading was cross-listed 6 times it showed up as 6 different items in Primo
- Searches retrieved repeated course readings, which overwhelmed results
  - If a cross-listed course had 49 readings, a search for that course could return 294 results or more
- The absence of author and title sorting prevented students from getting directly to particular readings. (Many courses have more than 100 readings)
  - Courses are all processed on the same date, therefore date-sorting was useless.
- Because Primo 2 did not dedup cross-listed courses or offer author/title sorting, unique facets were created in order to limit results to a particular course number.
  - Course Section Number
  - Course Name
  - Instructor
  - Author/Creator (kept in place)
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<th>Language</th>
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## Course Reserves Normalization rules: facets

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<th>Ind2</th>
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<td>Add single PNX field</td>
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HAPPY HALLOWEEN

• Contributing to the problem of overwhelming result sets – The delete & reload pipe for course reserves failed to delete items, creating “ghost records”
• This further muddied result sets and led students to dead end screens because those records no longer existed in the source system (Aleph)
BOO!
SASHAY AWAY

- Many records from the uuu-courses Data Source (Aleph) that had been "deleted" were stuck in an incorrect status in the database and were still displaying in the FE
- Primo Support had to manually correct these records in the database with SQL prior to our migration to Primo 3
- Patron expectations continued to influence and evolve our delivery of Course Reserves
- We quickly understood that many of our course reserve delivery issues would be “fixed” in Primo 3
PRIMO 3 – BAM!
• Restricted Delivery scope never worked properly with Ebsco resources and had to be removed. (Restricted delivery is now determined by IP address)

• Off-campus Access key was implemented to streamline Access and prompt authentication.

• Shielding of inactive courses
  ✓ Course shielding normalization rules were in place, but were disturbed with the application of Primo SP 3.1.0
  ✓ We plan to rewrite this rules and test again this summer

• Web service to push course readings to students through the Campus Information System
QUESTIONS?
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