

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)



THIS IS THE BEGINNING

- 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- Systems were out of date, clunky and unreliable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

The screenshot displays a software interface for managing course reserves. On the left is a navigation tree with the following items:

- Administration
 - [B] Booking
- Task Manager
 - [J] FileList
 - [A] Batch Log
 - [Q] Batch Queue
 - [D] Print Daemon
 - [C] List Of Courses
 - [R] Course (9999-999 -
 - [L] Course Doc List (1)

The main window is titled "Course Reading" and contains a search area with the following options:

- Sort by...
 - Department
 - Course Number
 - Course Name
 - Instructor
 - Unit
- Enter Starting Point: godfrey

Below the search area is a table with the following columns: Instructor, Department, Course Number, Course Name, Period, Date From, Date To, Unit, and Note. The table contains the following data:


Instructor	Department	Course Number	Course Name	Period	Date From	Date To	Unit	Note
Abrams, Elizabeth	ED PS	5068-090	Meditation & Stress	Annual	05/22/10	06/29/15		✓
Abrams, Elizabeth	ED PS	568-090	Meditation & Stress	Annual	05/22/10	06/29/15		✓
Abrams, Elizabeth	ED PS	6068-090	Meditation & Stress	Annual	05/22/10	06/29/15		✓
Adams, Verl	ARCH	2632-001	Adv Arch Des Work	Spring	08/13/11	05/29/12		
Adams, Verl	ARCH	6015-003	Graduate Studio	NA	08/13/11	12/29/11		
Adams, Winthrop	HIST	3030-001	Byzantine Empire	Spring	12/20/11	05/29/12		

Buttons for "New", "Duplicate", and "Delete" are located to the right of the table. Below the table is a "Course Info" form with the following fields:

- Course Number: 9999-003
- Course Name: Drag Racing
- Department: Engineering
- Instructor: Michaels, Chad (with "All Instructors" checkbox)
- Period: Annual
- From: 01/01/2012 To: 05/31/2012
- Note: (empty)
- Unit: (empty)
- Weekly Hours: (empty) Number of Students: 0

Buttons for "Add" and "Cancel" are located to the right of the form.

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



University Libraries
THE UNIVERSITY OF UTAH

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)

Search for

Look for my query:

[NEW SEARCH](#) [ADVANCED SEARCH](#)

MY LIBRARY ACCOUNT

LOG IN with your uNID for full access to your e-shelf and MY LIBRARY CARD

[Guest e-Shelf](#)

[? Help](#) [My Preferences](#)

RESULTS [RSS](#)

594 Results, sorted by: .

SHOW ONLY: [Online Resources \(537\)](#) [Available \(42\)](#) **Narrow your results by choosing your Course Section Number and/or Course Name*

REFINE MY RESULTS

Narrow my results by limiting the search to:

COURSE SECTION NUMBER:

- > 2040-001 (95)
- > 3125-001 (46)
- > 3329-001 (74)
- > 3753-001 (74)
- > 396-001 (96)

[Show 6 more](#)

COURSE NAME:

- > Anth Arch Anc Egypt/also ANTH 3329 and MID E 3753 (39)
- > Anth Arch Anc Egypt/also ANTH 6329-001 and MID E 3753-001 (39)
- > Anth Arch Anc Egypt/also ANTH 6329/3329-001 (39)
- > Anthropology of Humor and Laughter/ Also ANTH 2040-001 (50)
- > Anthropology of Humor and Laughter/ Also ANTH 396-001 (49)

[Show 6 more](#)

AUTHOR/CREATOR:

- > Bard, K (32)
- > Kramer, S (16)
- > Foster, B (16)
- > Franck, I (15)
- > Apte, M (15)

[Show 15 more](#)

- 1 **Course Syllabus, ANTH 2040-001, Summer 2010** (View details)
Ewa Wasilewska
 Add to e-Shelf **ONLINE ACCESS IS RESTRICTED** ([GetIt!](#))
- 2 **Vocalizing Laughter, Recognizing Humor... A Journey Into the Mysteries of the Brain** (View details)
Ewa Wasilewska
 Add to e-Shelf **ONLINE ACCESS IS RESTRICTED** ([GetIt!](#))
- 3 **Course Syllabus, ANTH 2040-001, Summer 2010** (View details)
Ewa Wasilewska
 Add to e-Shelf **ONLINE ACCESS IS RESTRICTED** ([GetIt!](#))
- 4 **Vocalizing Laughter, Recognizing Humor... A Journey Into the Mysteries of the Brain** (View details)
Ewa Wasilewska
 Add to e-Shelf **ONLINE ACCESS IS RESTRICTED** ([GetIt!](#))
- 5 **Vocalizing Laughter, Recognizing Humor... A Journey Into the Mysteries of the Brain** (View details)
Ewa Wasilewska
 Add to e-Shelf **ONLINE ACCESS IS RESTRICTED** ([GetIt!](#))
- 6 **Course Syllabus, Summer 2010** (View details)
E. Wasilewska



Books & More **Course Reserves**

Search for

Look for my query:

And Course Section Number is: 6329-001 (remove)
And Course Name is: Anth Arch Anc Egypt/also ANTH 3329 and MID E 3753 (remove)

NEW SEARCH

MY LIBRARY ACCOUNT

LOG IN with your uNID for full access to your e-shelf and MY LIBRARY CARD

[? Help](#)

RESULTS RSS

39 Results, sorted by: . *Number of results has reduced from 595 to 39

SHOW ONLY:

REFINE MY RESULTS

Narrow my results by limiting the search to:

AUTHOR/CREATOR:

- > Bard, K (8)
- > Dunand, F (4)
- > Redford, D (3)
- > Brewer, D (2)
- > Macintyre, B (1)
-

- 1 **Government and the Governed; pp. 79-97, Chapter 05 from Egypt and the Egyptians** (View details)
J. Brewer Douglas
 Add to e-Shelf ONLINE ACCESS IS RESTRICTED (GetIt!)
- 2 **Environmental Background to Pharaonic Civilization. Geography, Environment, Agriculture, and Natural Resources; Chapter 03: The, pp. 45-65 from An Introduction to the Archaeology of Ancient Egypt** (View details)
Kathryn A. Bard
 Add to e-Shelf CHECK HOLDINGS (GetIt!)
- 3 **Egyptian Cities, Temples, and Tombs of the Second Millennium B.C.; pp. 99-119, Chapter 06 from Ancient Cities: The Archaeology of Urban Life in the Ancient near East and Egypt, Greece, and Rome** (View details)
Charles Gates
 Add to e-Shelf ONLINE ACCESS IS RESTRICTED (GetIt!)



Facet Labels Code Table

<input checked="" type="checkbox"/>	default.facets.search-box.facet_local5	Course Section Number	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.search-box.facet_local6	Instructor Name	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.search-box.facet_local7	Course Name	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local9	Collection	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local8	Spatial Coverage	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.search-box.facet_local8	spatial coverage	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local2	Collection Partner	en_US	46	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local7	Course Name	en_US	50	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local5	Course Section Number	en_US	51	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.facets.facet.facet_local6	Instructor Name	en_US	52	<input type="checkbox"/>

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)

The screenshot shows the University Libraries website interface. At the top, there is a dark red header with the University of Utah logo and the text "University Libraries THE UNIVERSITY OF UTAH". Below the header, navigation links for "J. Willard Marriott Library", "S.J. Quinney Law Library", "Spencer S. Eccles Health Sciences Library", and "Help" are visible. The main content area is divided into several sections:

- Search Bar:** A search box containing "history of animation" with a "GO" button. Below it, a search tip reads: "To find Course Reserves search 'Instructor Name' 'Course Number' in the Course Reserves tab. Ex. 'Cutrone 3600'". There are also dropdown menus for "Look for my query:" with options "that contain my query words" and "anywhere in the record".
- MY LIBRARY ACCOUNT:** A yellow box containing a "LOG IN" button with the text "with your uNID for full access to your e-shelf and MY LIBRARY CARD". Below it is a "Guest e-Shelf" button and links for "Help" and "My Preferences".
- Results:** A yellow bar with the text "Results" and an "RSS" icon. Below it, a message says "2 Results, sorted by: relevance". A "Did you mean: history of immigration?" link is also present.
- Item 1:** "The medium is the message (View details)" by Marshall McLuhan 1911-1980. Quentin Fiore. New York : Random House Maxwell, Kent. It includes an "Add to e-Shelf" checkbox and the status "AVAILABLE (GetIt)".
- Item 2:** "The medium is the message (View details)" by Marshall McLuhan 1911-1980. Quentin Fiore. New York : Random House Maxwell, Kent. It includes an "Add to e-Shelf" checkbox and the status "AVAILABLE (GetIt)".
- Additional Information:** A dotted box contains the text "There are 2 versions of this item" with a "More" icon. Below it is an "Add to e-Shelf" checkbox and the text "Additional locations".

BOO!

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
- <record>
- <control>
  <source recordid>000047122</source recordid>
  <source ceid>uuu__courses</source ceid>
  <recordid>uuu__courses000047122</recordid>
  <original sourceid>UUU30</original sourceid>
  <source format>MARC21</source format>
  <source system>Aleph</source system>
</control>
- <display>
  <type>other</type>
  <title>The medium is the message</title>
  <creator>Marshall McLuhan 1911-1980.</creator>
  <contributor>Quentin Fiore</contributor>
  <publisher>New York : Random House</publisher>
  <format>157 p. (chiefly illus.) 29 cm.</format>
- <subject>
  Communication -- History, Technology and civilization
</subject>
<language>eng</language>
<source>uuu__courses</source>
- <avail library>
  $$IUUU$$LMarriott Reserve$$ILVL 2: Marriott Reserve$$2(P90 .J
</avail library>
<lds13>3905-001 0001</lds13>
<lds13>2D Animation Technique</lds13>
<lds14>Maxwell, Kent</lds14>
<lds15>Fall</lds15>
<lds16>FILM</lds16>
<avail institution>$$IUUU$$Savailable</avail institution>
```

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
- <record>
- <control>
  <source recordid>$$V000048652$$Ouuu__courses000048652</source recordid>
  <source recordid>$$V000048776$$Ouuu__courses000048776</source recordid>
  <source recordid>$$V000047122$$Ouuu__courses000047122</source recordid>
  <source recordid>$$V000595605$$Ouuu__aleph000595605</source recordid>
  <source ceid>$$Vuuu__courses$$Ouuu__courses000048652</source ceid>
  <source ceid>$$Vuuu__courses$$Ouuu__courses000048776</source ceid>
  <source ceid>$$Vuuu__courses$$Ouuu__courses000047122</source ceid>
  <source ceid>$$Vuuu__aleph$$Ouuu__aleph000595605</source ceid>
  <recordid>dedupmrg168419</recordid>
  <original sourceid>$$VUUU30$$Ouuu__courses000048652</original sourceid>
  <original sourceid>$$VUUU30$$Ouuu__courses000048776</original sourceid>
  <original sourceid>$$VUUU30$$Ouuu__courses000047122</original sourceid>
  <original sourceid>$$VUUU01$$Ouuu__aleph000595605</original sourceid>
  <source format>$$VMARC21$$Ouuu__courses000048652</source format>
  <source format>$$VMARC21$$Ouuu__courses000048776</source format>
  <source format>$$VMARC21$$Ouuu__courses000047122</source format>
  <source format>$$VMARC21$$Ouuu__aleph000595605</source format>
  <source system>$$VAleph$$Ouuu__courses000048652</source system>
  <source system>$$VAleph$$Ouuu__courses000048776</source system>
  <source system>$$VAleph$$Ouuu__courses000047122</source system>
  <source system>$$VAleph$$Ouuu__aleph000595605</source system>
</control>
- <display>
  <type>other</type>
  <title>The medium is the message</title>
  <creator>Marshall McLuhan 1911-1980.</creator>
  <contributor>Quentin Fiore</contributor>
  <publisher>New York : Random House</publisher>
```

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 data base 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!

Books, Articles & More | Course Reserves

Clement 2212-002

Search

ADVANCED SEARCH



anywhere in the record

Did you mean: clement 7510-001?

Show Only

Full Text Online (29)

Available in the Library (5)

Refine My Results

AUTHOR/CREATOR

Bailey, B (1)
Baptist, E (1)
Bell, T (1)
Berube, A (1)
Breen, T (1)
Show 26 more

Suggested New Searches

BY THIS AUTHOR/CREATOR:

Sone, M
Woodward, C
Foner, E
Chauncey, G
Ware, S
















ON THIS SUBJECT:

Same-sex marriage
African Americans
Gay adoption
United States
Obama, Barack

34 Results for course reserves

sorted by: relevance

1-10 Next

-   **Possessive Investment in Whiteness**
George Lipsitz
Online Access
Other
[View Resource](#) [Details](#) [Reviews & Tags](#) [Additional services](#) 
-   **Go After the Women; from Unequal Sisters**
George Sanchez
Online Access
Other
[View Resource](#) [Details](#) [Reviews & Tags](#) [Additional services](#) 
-   **Cuffy, 'Fancy Maids,' and 'One Eyed Men'**
Edward Baptist
Online Access
Other
[View Resource](#) [Details](#) [Reviews & Tags](#) [Additional services](#) 
-   **Constitutional Right to be Treated Like American Ladies**
Linda Kerber
Online Access
Other
[View Resource](#) [Details](#) [Reviews & Tags](#) [Additional services](#) 
-   **Gender At Work**
Ruth Milkman
Online Access
Other
[View Resource](#) [Details](#) [Reviews & Tags](#) [Additional services](#) 

NEWNOWNEXT

- 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?

Ian Godfrey – Head of Facilities, Collections and ILS Management

ian.godfrey@utah.edu

Tracy Medley - Head of Discovery & Web Development

tracy.medley@utah.edu

