2013

True Single Search: The good, the bad, and the ugly

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TRUE SINGLE SEARCH: THE GOOD, THE BAD, AND THE UGLY

Margaret Turman Kidd
Virginia Commonwealth University
James Branch Cabell Library
- 5,500 linear feet of manuscript & archives materials
- 50,000+ volumes
- Collection area: 20th/21st century Richmond and Central Virginia, focus on underdocumented communities, book arts, comic arts

Tompkins-McCaw Library
- 2,576 linear feet of manuscript & archives materials
- 5,955 artifacts
- 11,000+ books & journals
- 10,000+ photographs:
- Collection area: materials related to the history of health care in Virginia
ABOUT PRIMO

- Billed as “one-stop solution for the discovery and delivery of local and remote sources”

- VCU began using in November 2011; used in conjunction with Alma, our ILS

- Searches hundred of millions of items simultaneously including:
  - VCU Libraries books and media
  - Research databases like ERIC and MEDLINE
  - E-Journal collections like JSTOR and Science Direct
  - VCU Libraries Digital Collections
  - Legal, governmental, and archival materials

- Replaced the traditional OPAC
FEATURES OF PRIMO

- Single search box (like Google’s omnibox)

- Uses Primo ScholarRank algorithm to boost relevant results to the top
  - Primo gives a higher ranking to electronic/online resources
  - Institution can customize to give higher ranking to local holdings

- Faceted searching (like Amazon)
  - Users can focus a search by selecting or excluding facets
  - Facets are customizable

- Advanced search option

- E-shelf for saving records; able to export citation

- Post reviews and add tags
WHAT does PRIMO LOOK LIKE?

Same product with a different look.
### PRIMO: VCU vs UTK

<table>
<thead>
<tr>
<th>VCU Facets</th>
<th>UTK Facets</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Subject</td>
<td>- Topic</td>
</tr>
<tr>
<td>- Material Type</td>
<td>- Resource Type</td>
</tr>
<tr>
<td>- Collection</td>
<td>- Collection</td>
</tr>
<tr>
<td>- Author/Creator</td>
<td>- Creator</td>
</tr>
<tr>
<td>- Publication Date</td>
<td>- Creation Date</td>
</tr>
<tr>
<td>- Language</td>
<td>- Language</td>
</tr>
<tr>
<td>- Call Number</td>
<td>- Classification LLC</td>
</tr>
<tr>
<td>- Journal Title</td>
<td></td>
</tr>
<tr>
<td>- Library</td>
<td></td>
</tr>
<tr>
<td>- Genre</td>
<td></td>
</tr>
</tbody>
</table>

- Share some similar facets, but named differently (Subject vs. Topic)

- Similarly named facets with different function
  - VCU - Collection refers to licensed content
  - UTK - Collection refers to the library/department where the item is held
THE POINT:

Primo is...

- Ready to use “out of the box”
- Customizable
- Flexible
- A great discovery tool, meaning it is very useful when you don’t really know what you are searching for
So right now you are thinking…

WHO CARES ABOUT THIS LIBRARY STUFF...

TELL ME ABOUT FINDING ARCHIVAL MATERIALS!
PERSONALIZED RESULTS

If you want us to find materials that better match your needs, please give us a few details about yourself. These details will enable us to display items that are more relevant to you at the top of the results list.
Preferences
Degree: Graduate       Discipline: Nursing
SEARCH RESULTS WITHOUT PREFERENCES

11,474 Results for Everything
Sort by: Rel

- **Context and contingency in the history of post World War II nursing scholarship in the United States**
  - Fairman, Julie
  - Full text available

- **Papers of James L. and Dorothy Knowles Thomson, 1831-1985**
  - James L. Thomson Dorothy Knowles Thomson 1981
  - Check Find or Request for options

- **Public health nursing: an autonomous career for World War II nurse veterans**
  - Barum, Nancy C
  - Full text available

- **Papers of Evelyn (Crany) Bacon, 1936-1997**
  - Evelyn Crany Bacon 1936-1997
  - Available at Tompkins-McCaw Library Special Collections and Archives - Manuscripts (2011/Jan)

- **Jensen's History and trends of professional nursing**
  - Deborah MacLung Jensen 1965
  - Available at Tompkins-McCaw Library General Collection (RT31 . J54 1965 )
NOW FOR SOME OF THE BAD AND UGLY…

Image credit: [http://chirobeans.wordpress.com/2012/06/16/what-makes-a-good-or-bad-chiropractor/](http://chirobeans.wordpress.com/2012/06/16/what-makes-a-good-or-bad-chiropractor/)
WHAT IS WRONG WITH THIS PICTURE?
EVEN WORSE:

Evelyn Crary Bacon 1916-1997
1936
Unavailable

Find or Request | Details | Reviews & Tags
--- | --- | ---

Request Options: ILLiad (Interlibrary Loan / Document Delivery) | Don't see what you need? Request Anyway |

Location: Tompkins-McCaw Library - Special Collections and Archives - Manuscripts 2011/Jan/1
Availability: (0 copies, 0 available)
No items exist. Please refer to the request options above
The Current Fix:

Evelyn Crary Bacon 1916-1997 1936
Check Find or Request for options

Find or Request | Details | Reviews & Tags
--- | --- | ---
Sign in to request this item

Request Options:

Location: Tompkins-McCaw Library  Special Collections and Archives - Manuscripts  2011/Jan/1
Availability: (0 copies, 0 available)
Please refer to location or request options above
In order to display like this an item record is needed. Currently manuscript collections do not have an item record.
Imagine conducting a search and wanting to narrow the Material Type facet to archives or manuscript.
Manuscripts and archives are choices because of the subject headings in the bibliographic record.
Link to finding aid found under “details.” Sends the user to Virginia Heritage where our finding aids are stored.
PREFERENCE FOR LOCATION OF FINDING AID LINK

- Preferable to place the link under “view online.”

- Potential drawback: may mislead user into thinking the entire collection is online.

- Would have to coordinate with Systems Librarian to determine what is involved with this change.
What do SC&A Patrons Say?

Short survey conducted in JBC SC&A; 9 responses

- 66% agreed it was easy to find archives materials using the Primo search
- 78% agreed or strongly agreed it was clear they needed to go to SC&A to view the material
- 67% agreed or strongly agreed that they easily found the link to the finding aid in the record
For more information on Primo

http://www.library.vcu.edu/

http://www.lib.utk.edu/

www.exlibrisgroup.com/category/PrimoOverview
THANKS TO...

- Jodi Koste, VCU University Archivist
- Libby McDaniels, VCU Special Collections Catalog Librarian
- Erin White, VCU Web Systems Librarian

Thanks to these three for answering questions and providing feedback while I worked on this presentation.
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(804) 828-9898 main dept.
http://www.library.vcu.edu/mlc/speccoll/
True Single Search: The Good, the Bad, and the Ugly

Presented at MARAC, Erie, PA, Spring 2013

Session description

Since the advent of Google, the trend in search engines has been to try to provide as many types of information as possible from a single location. Libraries are no exception, with discovery tools such as Primo and Summon becoming more and more popular. In this session, we will explore the ways in which archival repositories have integrated their information alongside books, journal articles, and everything else found in libraries.

Slide 1 Title

- Introduce self
- Discussing Primo: will be describing what it is, how it looks/works, some of the issues we have had and how we have or will resolve them

Slide 2 SC&A

- Briefly describe SC&A at VCU
- JBC Collection: As part of the VCU Libraries system, James Branch Cabell Library’s Special Collections and Archives preserves and provides access to materials documenting the history of twentieth and twenty-first century Richmond and Central Virginia, with a strong focus on traditionally underdocumented communities. The collections encompass a wide range of materials, including the personal papers and oral histories of social activists, writers, and artists as well as the records of civic associations, local non-profit organizations, and activist groups. Nationally prominent collections of comic arts and artists’ books also are housed in Special Collections and Archives.
- TML Collections focuses on the history of health care in Virginia and includes numerous medical artifacts, photographs, manuscript and archives materials spanning the 19th to 21st centuries, and a rare book collection with volumes published between 1538 and the present.

Slide 3 About Primo

- Ex Libris, provider of library automation solutions; products for discovery, management, and distribution
- Local and remote: means that it will search not just your physical holdings, but also databases.
- From the Primo page: “Through a single search box, users can now search across the full breadth of content from the library’s collection, exploring the library’s locally-managed collections, along with the global and regional resources from the Primo Central index. Primo
presents the results in a single, relevant-ranked list from which users can access items of interest.”
- OPAC: replaces the traditional OPAC by integrating it into the functionality of the search interface.

Slide 4 Features of Primo
- ScholarRank: Uses ranking algorithm to place best matches on first page; can customize with info about discipline and degree at log-in to personalize results.
- Facets: the library can choose which ones to use
- Returns results in a single ranked list that can be narrowed by the use of facets

Slide 5 What does Primo Look Like?
- Shows Primo as used at VCU and as it appears at UTK. Both institutions implemented Primo at about the same time.

Slide 6 VCU Primo Search Results ANIMATED
- This is what the search results looks like for Pride and Prejudice
- A1 See the facets to the left to further refine the results
- A2 Upper right show login, link to account and eshelf
- A3 Closer look at a single result; tabs appear for find/request, details (bib record), reviews and tags and also links to additional information

Slide 7 UTK Primo Search Results ANIMATED
- Same search as VCU, appears very similar
- A1 See the facets to the left to further refine the results
- A2 Upper right show login, link to account and eshelf
- A3 Closer look at a single result; tabs appear for find/request, details (bib record), reviews and tags and also links to additional information
- Very similar, but there are differences

Slide 8 Primo: VCU vs UTK
What is the point of this comparison? As you can see they share similar facets; however,
- VCU had more facets to choose from
- The same facets have different name
- Some facets are used differently, for example UTK uses the “collection” facet to designate the library or the UTK collection an item is in; VCU has a “library” facet to designate which library/department and uses “collections” to designate the various databases packages we subscribe to that are searched via Primo
Slide 9 The Point:

- The point is that Primo is customizable and allows for flexibility; it also great for discovery when you don’t really know what you want.

Slide 10 So right now you are thinking

- Transition slide...what about finding archival materials

Slide 11 Personalized Results

- This is the customizable results I mentioned earlier
- To use sign in, under personal settings can edit
- Degree choices: Researcher, Graduate, Undergraduate, and Library Staff; this will tweak the results and send potentially more relevant results to the top
- Can select more than one discipline
- Let’s say I chose “graduate” and “nursing” and I am looking for information on World War II and nursing

Slide 12 Search Results When Logged in With Preferences ANIMATED

- Searched for world war ii nursing
- A1 Notice the top two results are for manuscript collections; by clicking on details you find that all of the terms appear, however only the Bacon papers concern nursing in WWII

Slide 13 Search Results without Preferences ANIMATED

- If you do the same search without preferences or as a guest user the results are reordered in relevance
- A1 This example is not very dramatic, but it shows how the results change
- This could make a difference though if the user is the type to only look at the first page of results; a less precise search could bump these to the second page

Slide 14 Now For Some of the Bad and Ugly...

- Transition slide...some of the problems I have found since we began using Primo and changed to Alma for our ILS

Slide 15 What is Wrong with this Picture? ANIMATED

- Do you see it?
• **A1** It says unavailable!

**Slide 16 Even Worse ANIMATED**

• Expanding the “find or request” tab causes even more confusion
• **A1** No items exist? I processed this myself of course it exists!

**Slide 17 The Current Fix**

• Spoke to systems librarian and the “unavailable” and “does not exist” have been changed to “Check Find or Request for options” and “refer to location above”
• Not ideal, but an improvement

**Slide 18 What it Should Look Like**

• Available at: TML SCA...
• Notice in the expanded F/R that it now looks like a book record does when expanded
• What was the problem? Manuscript collections do not have an item record
• So to fix this issue we need to work with Cataloging to go back and add item records, it may be that we add an item record for each box or just make an item records that lists boxes 1-5, etc.
• Benefits: record displays in a more accurate fashion; barcode created that can be added to boxes which could help with inventory and use statistics

**Slide 19 Another Issue**

• In the facets if you want to narrow the material type to archives or manuscripts you have to choose “other”
• The average user will not think to choose “other”
• Will need to work with Systems Librarians and Catalogers to fix this

**Slide 20 Another Alternative**

• Using the “genre” facet a search can be narrowed to find manuscripts and archives materials if the bib record contains subject headings that use these terms
• Drawback: Would the user know this with being told or exploring? Genre facet is near the bottom of the list and it is easily overlooked

**Slide 21 Link to Finding Aids**

• Link is currently located under details; is small and not noticeable unless the details tab is expanded

**Slide 22 Preference for Location of Finding Aid Link**
• Might be better to have under “view online” but could mislead user into thinking the entire collection is online, not just the finding aid

Slide 23 What do SC&A Patrons Say

Unfortunately I did not receive many survey responses, but here is the breakdown based on the few I did get.

These responses indicate that users are having some success finding our materials, but how many have been stymied by the confusing or misleading information that has been displaying?

The takeaway is that Primo is great for discovery, but it needs some work. Unique materials such as manuscripts and archives present a challenge as they do not fit neatly into the catalog, (archivists have long had to shoehorn their collection records into catalogs that are designed for book holdings, not complex holdings like manuscript collections) especially one that assigns a higher relevance value to electronic formats. We need to make it easier for our users to search specifically for manuscript and archives materials. It will take some trial and error to make sure that these materials are findable and displaying correctly. For us it is important to work with our systems librarians and catalogers to find solutions to these issues, which is precisely what we are doing.

Slide 24 More Information on Primo

Slide 25 Thank you to...

Slide 26 Contact info