



Primo

Michael Cotta-Schønberg

► **To cite this version:**

Michael Cotta-Schønberg. Primo. The 5th Scholarly Communication Seminar: “Find it, Get it, Use it, Store it”, Nov 2010, Lisboa, Portugal. 2010. <hprints-00531590v2>

HAL Id: hprints-00531590

<https://hal-hprints.archives-ouvertes.fr/hprints-00531590v2>

Submitted on 12 Nov 2010

HAL is a multi-disciplinary open access archive for the deposit and dissemination of scientific research documents, whether they are published or not. The documents may come from teaching and research institutions in France or abroad, or from public or private research centers.

L'archive ouverte pluridisciplinaire **HAL**, est destinée au dépôt et à la diffusion de documents scientifiques de niveau recherche, publiés ou non, émanant des établissements d'enseignement et de recherche français ou étrangers, des laboratoires publics ou privés.

November 16th, 2010

Primo

Presentation at the The 5th Scholarly Communication
Seminar: “Find it, Get it, Use it, Store it”, 7-9 November
2010, Lisboa, PORTUGAL

By

Michael v. Cotta-Schönberg

Deputy Director General (The Royal Library)

University Librarian (University of Copenhagen)

Contents:

1. A short presentation of Primo
 - a. Ex Libris Group and its product portfolio
 - b. Primo
 - c. Primo 3
 - d. Primo Central
 - e. URM
2. Primo in the development of the Royal Library Copenhagen (with the Copenhagen University Library)
3. The next step: Primo Central, Summon or ...?

The text of this presentation is available in the HAL-system:

<http://hprints.org/hprints-00531590/en/>

Dear colleagues,

1. Short presentation of Primo

First some facts:

a. Ex Libris Group and its product portfolio

Primo is a product of the Israeli-based, but today international firm, Ex Libris Group, which was founded over 25 years ago. This firm is an important provider of library automation solutions offering a comprehensive product suite for electronic, digital and print materials. Its major competitors are firms like Serials Solutions. Since 2006, Ex Libris Group is owned by Francisco Partners, a private equity firm which focuses exclusively on investments in technology or technology-based services companies. This probably means that Ex Libris has to be quite good at earning money for its owner, but on the other hand the arrangement gives Ex Libris access to extensive financial resources — which it will need to fulfill its ambitious product development strategies. In 2009 its total revenue was actually 84 mio dollars. It has 11 offices around the world, 12 distributors and 4.700 customers. Among the customers are all 10 top universities in the world and 36 of the 50 top European universities, at least according to one of the more prestigious university ranking lists. So, there is no doubt that Ex Libris is a very important player in the international market for library automation systems.

Apart from the discovery and delivery system, Primo, the product portfolio of Ex Libris comprises the two library systems, **Aleph and Voyager**, as well as **SFX, Metalib, Verde, Digitool, Rosetta**, and **bX Recommender**.

b. Primo

Primo was launched in 2007, and the total number of institutions around the world that have chosen Primo now amounts to 738.

It is a user interface providing a one-stop solution for discovery and delivery of local and remote resources, such as books, journal articles, and digital objects.

I shall not describe the Primo system further but move on to its latest avatar, Primo 3.

c. Primo 3

Primo 3 was released in May 2010 and has until now been installed in more than 100 libraries.

It integrates OPAC functionality with the redesigned and streamlined Primo user interface and thus greatly improves the get-it functionality of the system, since users no longer have to pass from a separate discovery tool into a separate delivery tool to get access to the library's literature.

Among the interesting new features of this version are:

- Recommendations: The integration of two recommender systems enables Primo to display the most relevant recommendations generated on the basis of researchers' usage of scholarly materials
- Mobile platform: The out-of-the box CSS-based iPhone interface, which can be easily customized by library staff, provides an additional library-branded access point to collections.

d. Primo Central

In sharp competition with Serials Solutions and its Summons, Ex Libris has now launched its Primo Central service.

Primo Central is a mega-aggregate index to scholarly materials. It is hosted by Ex Libris via a cloud computing infrastructure (whatever that is!), and already is claimed to cover hundreds of millions of electronic resources. The index is generated by harvesting metadata from primary and secondary publishers and aggregators and from open access-repositories.

e. URM

The latest development in terms of Ex Libris-based services is the URM-system, of which a first version has now been released to partners, and which has quite recently been taken by seven Australian libraries and library consortia.

Ex Libris describes the system in this way:

“URM integrates back-office processes across all library materials, regardless of type, format, and acquisition method—enabling your library to streamline current processes and to maximize staff efficiency. URM reduces effort and lowers costs associated with metadata management while providing new services for enrichment and enhancement of materials and community engagement with the collections and with each other.”

To my mind, the most interesting and the most revolutionary part of the URM concept is the centralization of data and processes which make it possible for individual libraries not to duplicate work and processes done by other libraries. Instead they are performed centrally and at a much lower cost in terms of staff resources. This applies not only to print resources, but also – and not the least – to digital resources.

The URM will work with a centralized metadata management system (MMS). This system is a joint, international and centralized system maintained by Ex Libris Group, and it contains the basic description of all resources (of all its library customers) in

the joint system combined with an inventory of any local information, including institutional holdings.

Dear colleagues, the great players in the game now seem to be moving towards the formula for a distributed world library.

2. Primo in the development of the Royal Library Copenhagen (with the Copenhagen University Library)

Obviously, the catalogue of the Royal Library and later the OPAC, were always considered a necessary tool for managing print collections and gaining access to them. By 2005/2006 it became a major strategic issue for us – as for libraries in general - to provide a comprehensive discovery tool to our total collections, print and digital. Moreover, our discovery tool would have to incorporate relevant developments in information technology and fit into the rapidly evolving communication and information world of our users.

It is no surprise that the major international, commercial providers of automated library systems have responded to these same needs and pressures. One of the first movers in this area was Ex Libris, which had already since 1999 been the supplier of our library system, Rex, based on Aleph.

In the course of 2006-2007 we took the next step in the development of our discovery system and moved from the Aleph OPAC to Primo. Actually we became one of the partner libraries in the development of the new system, which was opened to public use in March 2008.

Deciding to go for Primo came quite naturally, as we were already satisfied with the services of Ex Libris, and Primo appeared to be a natural development of our Aleph system.

By then other systems were being developed. In particular the second largest research library in Denmark, the State Library in Aarhus, had started to develop its own system, Summa, and later entered into a cooperative arrangement with Proquest.

The Royal Library, on the other hand, has for a number of years pursued a policy of avoiding self-development of systems and preferring shelf-ready systems from solid, international suppliers.

With Primo we obtained the following advantages:

- * integrated searching of our print resources (located in a great number of individual libraries and collections)
- * integrated searching of digital periodicals on article level of a significant proportion of our digital periodicals
- * a smarter and better user interface
- * simplification of maintenance of the system

Overall, Primo has functioned well and it did represent a significant advance in terms of our discovery system. However, it has increasingly been felt as a problem that Primo was “only” a discovery system and that users had to move to a separate delivery system, the old Aleph OPAC, in order to get access to what they had discovered.

Moreover, it is a problem that searching of print resources is not integrated with searching of digital resources.

Finally, we have the problem that our e-content system, DADS, which provides content to our Primo facility for searching digital resources, covers our own portfolio of digital resources inadequately. Ideally, all digital resources should be covered, but that goal may be impossible. Firms which compete with Ex Libris as a producer of discovery and delivery systems and which themselves produce and sell content through their own system, may not be willing to make this content available through Primo.

The first of these problems, i.e. the disconnection between the discovery system and the delivery system, has basically been solved with the implementation of Primo 3, which was opened to our users in the middle of October this year.

But we do need to solve the other problems mentioned, i.e. integrated searching of print and digital resources and much better coverage of our digital resources in the search system. Moreover, we need a much smarter and simpler and cheaper system for managing electronic resources, and we also need a system which integrates getting material from our own collections with getting materials from external systems.

So, where do we go from here?

3. The next step: Primo Central, Summon or ...?

As you are probably aware there are at present at least four major players offering systems which fulfill our requirements as described above.

One is Ex Libris Group with Primo Central. Another is Serials Solutions with Summon. I have the impression that Serials Solutions was a first mover in this area, but Ex Libris Group has now woken up and is working hard to catch up.

A third system is Ebsco's Discovery, which was taken recently by Liverpool's university library, but we are having problems with their proprietary policies, which seem to us to represent a competitive disadvantage.

A fourth system is OCLC's World Cat. It offers a tri-level, international, regional and local solution, which is quite interesting in view of the fact that no single library can today fulfill all its users' needs and has to depend on regional and international networks to fulfill its role properly. This system is now beginning to be taken up by

European libraries. WorldCat is rapidly developing its facility for integrated searching of print and digital resources with linkage to full text.

And there are certainly other systems out there, now, and the field is burgeoning with new players and ideas.

What shall non-specialist library directors think?

Personally, I prefer to go for a safe solution offered by a major, international, commercial player. It must of course be smart and very user-friendly, and it must feel comfortable to users attuned to present day information and web-technologies, and it must have a mobile user interface. It must also be competitive in terms of pricing!

I consider integrated searching of print and digital to be an essential feature of a 2010-discovery tool, and a major competitive advantage will be the proportion of our digital resources which may be searched on article and chapter level and made available through the system.

Finally, it must provide an Electronic Resources Management System which makes it possible for the library to reduce its local management of electronic resources to a minimum.

Our course has not yet been decided, but I feel that Primo and Summon are two good candidates in the short run. WorldCat may become very attractive in some years, but I would prefer that some other, large European libraries have tried it out successfully before we consider it seriously. In this area I do not want to be in the adventurous avant-garde, but rather just behind!

In the broader picture I see three problems which keep nagging my mind.

The first one is: to what degree is it still relevant for individual researchers and students to use catalogues which only cover the print collections of one library, when they have very easy access to all print collections of – in this case – Danish libraries?

The second one is: researchers and at least graduate students seem to be very familiar with the abstracting and indexing services of their own subject disciplines,

like Psych Info in psychology, PubMed in medicine, Historical Abstracts in history and others. Will they really search for digital articles through the library catalogue, or should we rather use our efforts to make them available through relevant subject systems?

The third one is: if our user can find all articles and books through Google etc., why should libraries maintain their own, individual systems?

Whatever the future will bring in the long run there is no doubt that for the present research libraries must still provide discovery tools specific to their own print and digital collections.

And certainly Primo, Summon and similar discovery, delivery and management systems have a key role to play in the next phase of library development. What they will eventually offer remains to be seen, but I have the feeling that a radically new library concept may be developing in front of our eyes: the distributed world library with centralized management of metadata, inventories and acquisition workflows, combined with local service functions and print collections.

How far it will go and how soon, we cannot see now: a veritable battle is going on out there, but when the dust settles I think that we may really have a system which will be much better, though very different ...

Thank you!