Primo Provides One-Stop Discovery and Delivery for Shanghai Jiao Tong University

Library staff at Shanghai jiao Tong University (SJTU) began their exploration of new options for a library management system in 2008. It had rapidly become clear to both users and staff members that the existing integrated library system (ILS) was insufficiently robust to handle the library’s extensive collections. In addition, the search technology it offered delivered an inconsistent and patchwork service to users—often demanding complex search routes for more specialized resources, and requiring detailed knowledge of databases in order to find the most appropriate items. The library’s existing ILS could not be integrated with the university’s other systems, such as remote electronic collections or the university’s web site.

In setting out their requirements for a new discovery platform, SJTU gave priority to establishing a one-stop, streamlined access point. The single interface had to provide access to all library resources and services, including print and digital items, and linking to full-text articles in online journals. The solution needed to provide intuitive interface for staff and end users, that could be integrated with different information resources, assimilated into SJTU’s existing technical environment (such as course management systems and institutional portals), and developed over time to adapt to the university’s evolving needs.

Open architecture and the availability of application programming interfaces (APIs) were important to SJTU, in view of their emphasis on flexibility and extensibility. Finally, as one of the premier research institutions in China, it was essential for the solution to have powerful Chinese capabilities in terms of the user interface, administrative functions and search technologies.

A global search for an international solution

As part of an exhaustive process to identify the best discovery platform for the library, SJTU carried out a thorough competitive evaluation of discovery systems including AquaBrowswer, Encore, WorldCat local, and open-source options such as Blacklight and VUFind, and produced a detailed product comparison report.
CASE STUDY

Solution
The system’s core strengths, including faceted navigation, relevance-ranked list of results, integration with other systems, open architecture, and Web 2.0 features, led SJTU to select the Primo® discovery and delivery solution from Ex Libris. It provides a unified search interface for print and digital resources, and enables librarians to provide a higher quality service to users.

Results
OUReXplore, powered by Primo, together with a whole suite of Ex Libris solutions, provides SJTU librarians with a set of comprehensive tools to manage and expose the library’s rich collections. Primo is the library’s only entry point to the library’s resources for faculty and students, offering accurate searching combined with Google-style simplicity.

Library managers found that Primo’s rich functionality and multilingual capabilities were best suited for the institution and its diverse research community. As Qiaoying Zheng, associate library director at SJTU explained: “Our strategy of delivering an integrated search and access solution made Primo, together with Aleph, MetaLib and SFX, the best choice for a one-stop platform for resource discovery.”

A simple interface with a dramatic impact
Having gone live with Primo in summer 2009, SJTU has seen striking results on the library’s research performance. Researchers have enjoyed using the solution’s intuitive user-interface, and find features such as faceted navigation, relevance ranked search results, and the integration of enriching information such as book covers, tables of contents, and reviews, to be very valuable. For library staff, the solution is refreshingly open and flexible, and has fitted seamlessly into the library’s other systems. “Librarians find that Primo enables them to provide a better quality service to students and faculty,” noted Ms Zheng.

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“How easy and faster,” explains Yi Sun, information technology librarian at SJTU. “Search results are more relevant than our previous systems because Primo can be customized to reflect the weighting we want to give to our different collections.” To measure its acceptance by users, SJTU carried out a study of undergraduate students taking science and engineering courses, and found that 90% rated Primo easy to use.

The solution has dramatically reduced search times. As Mr Sun describes, “if it takes 15 seconds to search a single Chinese database, that can add up to several minutes of searching across databases without necessarily being able to access the full text of an item. With Primo, we can search and receive results of almost all the library’s databases in less than 25 seconds, and reach the full text directly from the results page.”

While search times have decreased, the volume of searches has significantly grown. For example, searches in a typical Chinese database increased by 88% from April 2008 to April 2009. By the end of the period, over half of the total searches were carried out via Primo. By early 2010, Primo had replaced all native interfaces as the single entry-point for all the library’s resources.
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“Our work with Ex Libris went way beyond simple implementation and developed into a fully-fledged partnership,” explains Ms Zheng. SJTU and the Beijing office of Ex Libris worked intensively on a number of customizations and special features for Primo, which are now proving highly successful in the library. “The project team and Ex Libris collaborated on integrating Primo with the library’s home page; customizing the Primo search box and search scope; expanding the subject heading source from subject fields to title fields; and implementing the FRBRRed display of the library’s Chinese book collection,” adds Mr Sun. In addition, one of the library’s outstanding achievements was to integrate a mash-up of external information including tables of contents, book covers, and Wikipedia data.

“Throughout the customized implementation of Primo, Ex Libris China was consistently helpful and supportive – in particular in dealing with the complex Chinese language customizations,” noted Mr Sun.

Well received on all sides

After running Primo, branded OURExplore (Online Universal Resources Explore) for a year, SJTU commissioned feedback from staff members and end-users. Among the overwhelmingly positive feedback was the following student comment: “OURExplore is a perfect SJTU Scholar resource discovery platform that integrates diverse resources. It is easy to use.” Librarians responded that Primo offers a set of comprehensive tools for continuously expanding and updating the resources available to users. “The highlight for librarians is Primo’s Google-style simplicity,” summarized Mr Sun.

Primo and the other Ex Libris solutions run by SJTU underpin the university’s long term vision for resource discovery. Ms Zheng emphasized that the library is an established member of the international research community, with global horizons for its users’ information needs. SJTU found that Primo strengthens its strategy of “enabling users to find and obtain the print and digital, local and remote, owned and accessed resources, and, at the same time, supporting the most international standards and protocols, with open vision and structure,” explains Ms Zheng.
A lasting partnership

Building on a relationship with Ex Libris that began with the library’s implementation of Aleph in 2008, SJTU’s implementation of Primo, MetaLib and SFX has led to the formation of a deep and long-term partnership with the company. As part of their symbiotic relationship, SJTU has contributed many pioneering ideas and developments for Primo, which have been adopted for the library and which are available for the benefit of the international Primo community.

Ex Libris and the Beijing office are known for their commitment to collaborating with customers to realize innovative ideas and solutions. “At all times,” commented Ms Zheng, “we found the Ex Libris team to be committed to an open-platform strategy, the development of local customizations, and round the clock support and services.”

“We value our position as the first Primo customer in China, and appreciate the investment in our success by Ex Libris, concluded Ms Zheng. “Our adoption of Primo has proved to be an overwhelming success for both our research community and library staff. We are looking forward to many years of fruitful collaboration with the Ex Libris team in China and the international customer community.”

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