

Introduction.

In the summer of 2024, the UMD Libraries migrated to Ex Libris’ Alma and Primo VE from Aleph and WorldCat Discovery. After the Primo VE interface went live, we received feedback from users that they could not find items that they could find in WorldCat Discovery. Many of our users rely on the Libraries’ interlibrary loan services to provide access to materials beyond our collections. With the change from WorldCat Discovery to Primo VE, our users lost the ability to easily make ILL requests using the WorldCat records. Primo VE offers an integration with WorldCat that enables users to search the discovery system’s central index, the local bibliographic records, and WorldCat in a single search. However, Ex Libris recommended against using this integration because of performance issues and trouble with the facet options, and problems with facet options not worked have been reported by the community. When efforts to make WorldCat.org easier to access for our users results in continued complaints, we decided to try the integration. This poster discusses the integration and addresses the two major concerns with the integration and why we went ahead and kept the integration.

Why integrate WorldCat?

For many research libraries, a “just in time” collection development model is the new normal where libraries provide access to resources at the point of need. This model contrasts with the traditional “just in case” model where libraries acquire materials in anticipation of a user’s need. Demand Driven and Patron Driven Acquisition programs are one core component of the “just in time” model. Interlibrary loan (ILL) is another core component, another method of providing access to materials at the point of need. However, the user experience for using ILL can be complex and frustrating. When a user is turning to ILL services, they likely have already performed a search that did not return satisfactory results. They then need to perform a search in a second system, such as WorldCat, or go to the library website to access the ILL request form. Integrating WorldCat simplifies the user journey. Users do not need to search a second system or navigate to a request form; it can all be done in a single interface.

Benefits of integrating the WorldCat API

- Provide discovery of materials that might not otherwise be discoverable.
- Simplify the user journey; users do not need to navigate to another system when they cannot find a book.
- Patrons place requests using OCLC records, simplifying processing for ILL staff.

This item would not be discoverable without this integration

Concern #1: WorldCat API does not work with facets

One of the concerns about the integration is that the index is incompatible with the the Primo VE facet options. I did some testing and found that the most used facets work, while only a few facets did not work. Looking at user data and evaluating the tradeoffs, it became clear that implementing the API would be worth it.

Relevant facets

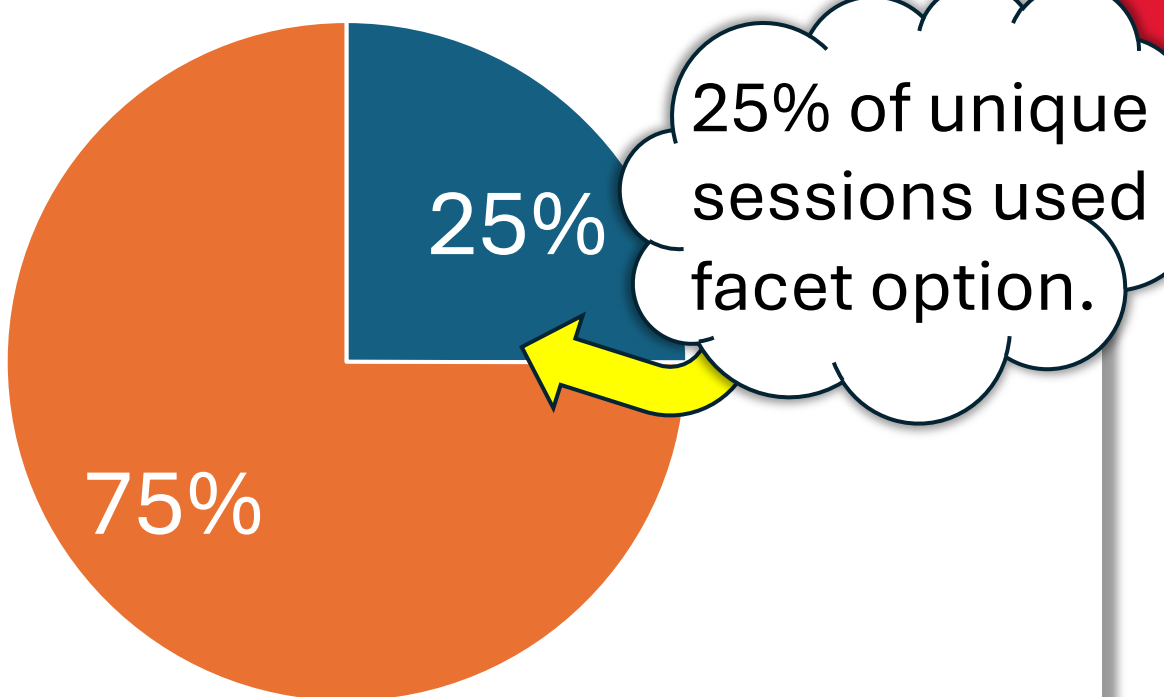
For my testing, I focused on relevant facets, meaning facets a user might expect results from WorldCat based on its use case, surfacing materials not held by the library. This meant, for example, I did not need to check individual location options in the 3 different location facet categories because WorldCat is not being used for material already available. Using usage data, I found that resource type is the most used facet option, so I focused on that set of facets. I also looked at the top level facets, which are a set of specific conditions: open access, peer reviewed, full-text available, and physical items currently available.

Testing facets

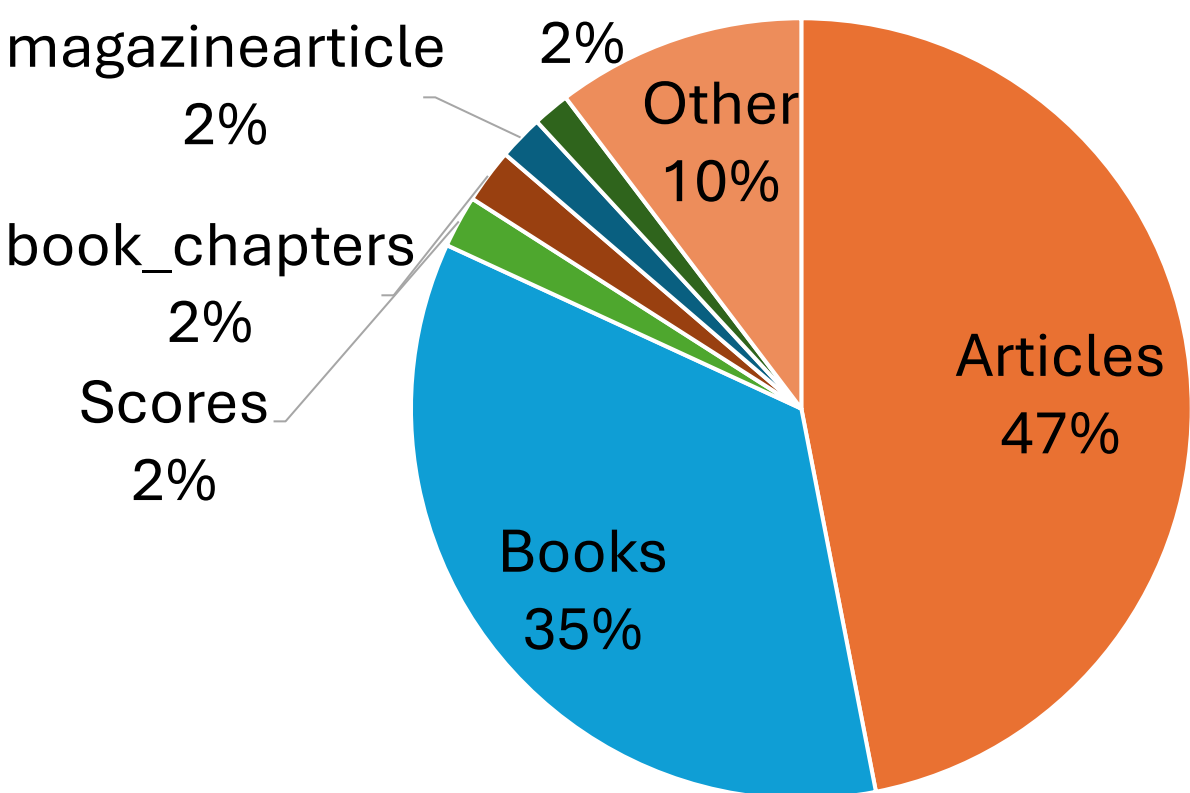
For testing the resource type facets, I created a table of each option and recorded whether a user would expect results from WorldCat under that condition or not. There are cases when I would not expect WorldCat to have relevant (ex. Articles). Then I recorded if the facet worked. Most resource type facets worked; the one notable exception is dissertations which did not work when a user would reasonably expect to work. In addition to finding that most relevant facets worked, usage data indicates that the vast majority of resource type facet usage features the books and/or articles which both work as expected.

Comparing Facet Use, September 2024

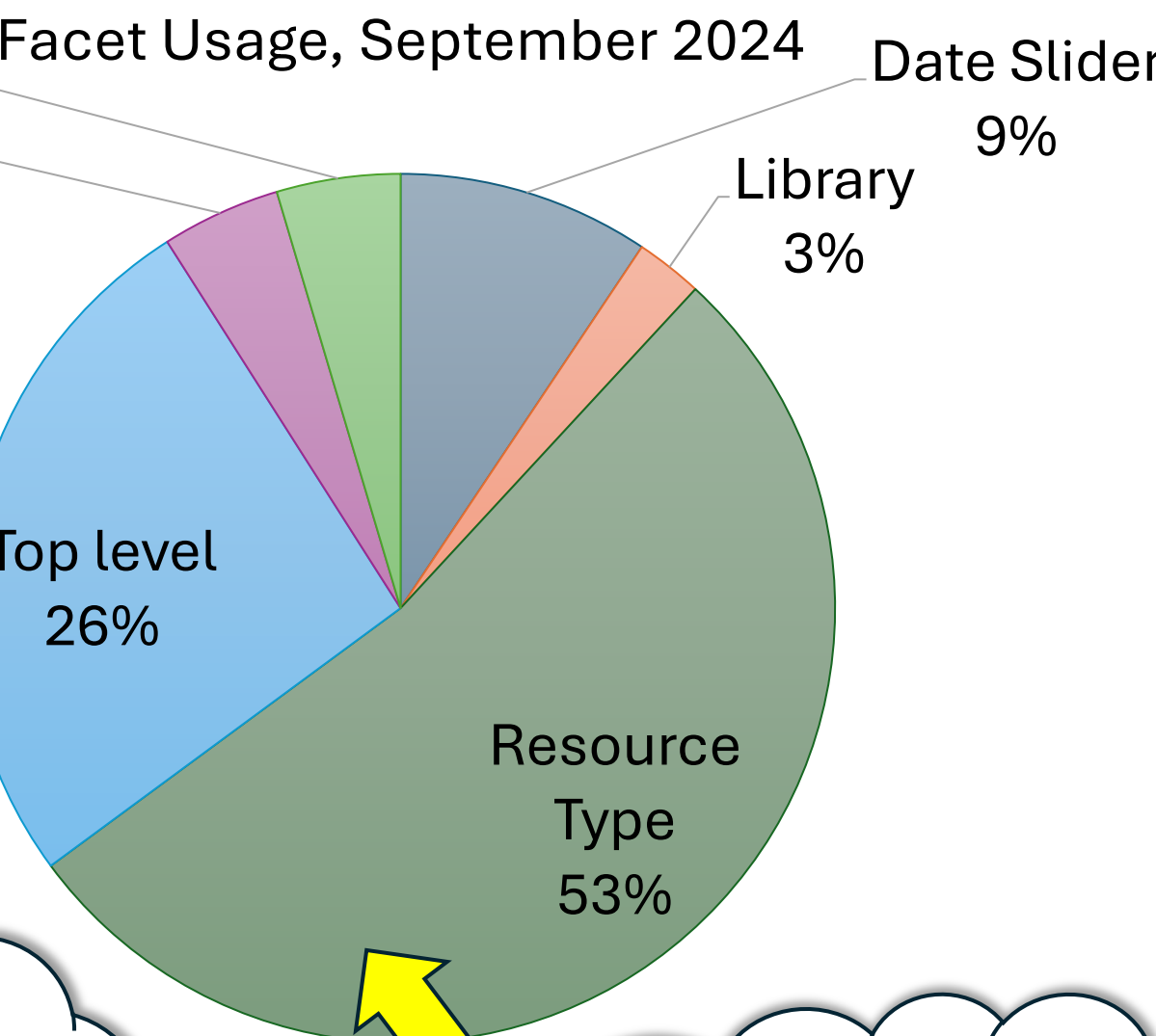
Sessions with filters Sessions Without Facets



Breakdown of Resource Type Facet Usage, September 2024



80% of resource type facet usage included books and/or articles options



Resource type is the most used facet category

Concern #2: Overall performance

Another concern is that the system might perform much slower using the index. Using Primo VE’s built in performance monitor, I compared the performance of the system when using the API against its performance without it.

Testing performance

During the initial implementation period, I compared the performance of Primo VE with and without the WorldCat index to monitor the performance. I ran one search using each option at 12pm, 12:30pm, and 1pm during the month of September. For the test, I used two separate private browser windows for each option. I would use the same keyword search for each test, and I rotated the order of which version I searched first. I used the built-in performance monitor to collect my data.

Append “&show_performance=true” at the end of the Primo URL to view the performance monitor

Client monitor

- total search time: 1870
- search api response time: 1716
- results render time: 154

Results

The median search times were close. For the search with the WorldCat API, the median search time was 3.49 seconds, while it was 3.28 seconds without the API. There is a measurable difference in performance, but a fraction of a second is not noticeable nor is it reason enough to not use the integration.

Conclusion

Using the Primo VE WorldCat API integration within a search of catalog records and the central index deserves some reconsideration because, for many libraries, its upside may outweigh its downsides as in our case. There are occurrences where facet options may not work as expected, but as my data demonstrates, the facets work in most cases. Moreover, the effect on the performance of the interface is negligible. The interface when using the blended search slot appears to be The WorldCat API might not be right for all libraries, but it might be right for yours.

The tradeoff

Even though there were instances when the integration did not work as expected, those rare instances did not outweigh the value of the integration.

Note

Since this poster was proposed, OCLC has sunset version 1 of their WorldCat Search API and replaced it with version 2. Ex Libris has implemented a new integration for the API, but as of writing, the integration does not support blending. Ex Libris is aware and looking at the problem.