

What is Discovery and Delivery?

1. Getting Started: What is Discovery and Delivery?

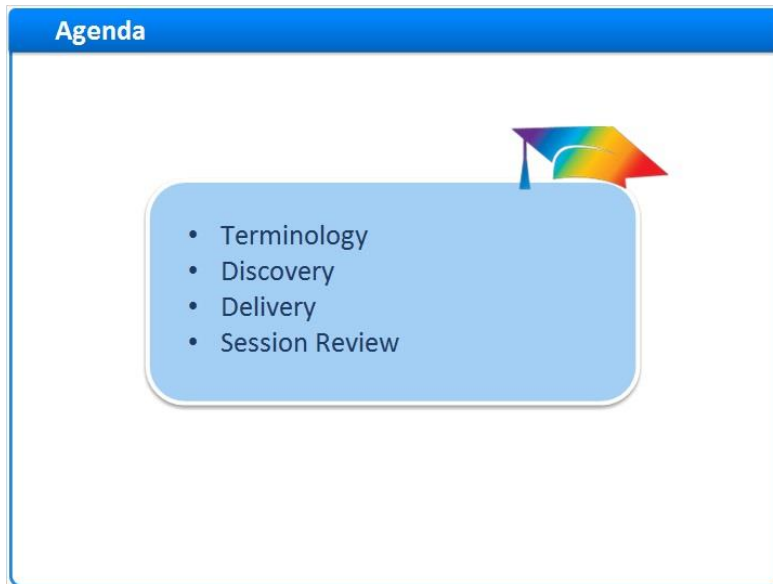
1.1 What is Discovery and Delivery?



Notes:

Hello, and welcome to this session What is Discovery and Delivery?

1.2 Agenda



Agenda

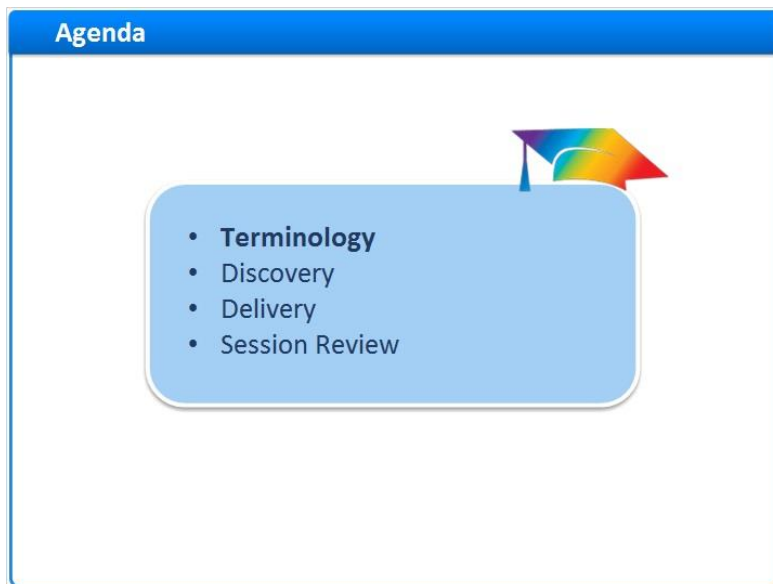
- Terminology
- Discovery
- Delivery
- Session Review

The slide features a blue header with the word 'Agenda' in white. Below the header is a white rounded rectangle containing a blue box with a white border. Inside this box is a list of four items: Terminology, Discovery, Delivery, and Session Review. To the right of the list is a colorful graduation cap icon.

Notes:

In this session, we'll start by introducing some terminology that is useful in understanding discovery and delivery. Then, we will focus on what discovery is, and how discovery works in Primo. Then we will focus on what delivery is, and how it works in Primo. And then we will wrap up the session with a brief review.

1.3 Terminology



Agenda

- **Terminology**
- Discovery
- Delivery
- Session Review

The slide features a blue header with the word 'Agenda' in white. Below the header is a white rounded rectangle containing a blue box with a white border. Inside this box is a list of four items: Terminology, Discovery, Delivery, and Session Review. The word 'Terminology' is bolded. To the right of the list is a colorful graduation cap icon.

Notes:

Terminology

1.4 Terminology

Terminology	
Term	Definition
Web-scale Discovery	A service that searches across the library's local, open access, and subscription collections, and provides relevance-ranked results with information on how to retrieve full text or obtain the physical copy.
Discovery Layer	The user interface of the Discovery Service; it provides basic and advanced search functions, as well as the ability to refine search results.
Local Index	Indexed metadata in a local database that is searchable via the Discovery Layer. The Local Index can include MARC from your ILS, as well as other metadata harvested from local repositories such as DigiTool, ContentDM, etc.
Central Index	Indexed metadata in a Cloud database that is searchable via the Discovery Layer. The Central Index includes citations from various aggregators and publishers, and is maintained in the Cloud.
Delivery	The method the researcher will use to access the library's physical or electronic resources

Notes:

Web-scale Discovery services are tools that are used to search across the library's local, open access and subscription collections. They provide relevancy ranked results, and they also provide information on how to retrieve full text, or obtain the physical copy. Primo provides Web-scale discovery. The Discovery Layer is really the user interface of this discovery service; it provides basic and advances search functions, as well as the ability to refine search results. Primo includes a customizable Discovery Layer.

The Local Index is indexed metadata within a local database that is searchable using the discovery layer. The Local Index can include MARC from your ILS, as well as other records harvested from local repositories such as DigiTool, ContentDM, or other OAI harvestable databases.

The Central Index is indexed metadata within a Cloud database, which is also searched using the discovery layer. The Central Index includes citations from various aggregators and publishers, and it's maintained in the Cloud, meaning that it's accessed remotely. The Primo Central Index is an example of a Central Index.

And for delivery, this is the method researchers will use to access the library's physical or electronic resources. In Primo, delivery can be an availability statement, showing that the resource is checked in and where it is located, or it can be a way to authenticate and access subscription content online.

Discovery Layer (Slide Layer)

Terminology	
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Local Index (Slide Layer)

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Central Index (Slide Layer)

Terminology	
Term	Definition
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Delivery	The method the researcher will use to access the library's physical or electronic resources

Delivery (Slide Layer)

Terminology	
Term	Definition
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1.5 Discovery

Agenda

- Terminology
- **Discovery**
- Delivery
- Session Review

Notes:

Discovery

1.6 Primo as the Discovery Layer

Primo as the Discovery Layer

The screenshot displays the ExLibris Primo search interface. At the top, there are navigation links for 'PRIMARY SEARCH', 'JOURNAL SEARCH', 'FETCH ITEM', and 'HELP'. A search bar contains the text 'carbon 14'. Below the search bar, a dropdown menu is open, showing options: 'Everything', 'Library Catalog', and 'Primo Central'. The search results are displayed on 'PAGE 1' with '1,595,477 results'. The results list includes:

- 1. REFERENCE ENTRY: carbon 14. (Definition). ISSN: 978-0-618-22947-4. The New Dictionary of Cultural Literacy, 3rd ed., Annual, 2002. Full text available.
- 2. BOOK: Carbon-14. Vernon F. Raaen, Gus A. Rogge, Helen P. Raaen. 1967. C1968. Available at: Main Library Main Location (QC466.S.C1.P22) and other locations.
- 3. ARTICLE / multiple sources exist, see all: Vertical carbon-14 profiles for resolving spatial variability in recharge in arid environments. Wood, Cameron; Cook, Peter G.; Harrington, Glenn A. ISSN: 0022-1694; DOI: 10.1016/j.jhydrol.2014.11.044. Journal of Hydrology, January 2015, Vol.520, pp.134-142 [Peer Reviewed Journal]. Full text available.
- 4. ARTICLE / multiple sources exist, see all: GMP synthesis of carbon-14 labelled substances. Filar, Crist M.; Maniscalco, Mario P.; Thayer, Sandra L. ISSN: 0362-8803; E-ISSN: 1099-1348; DOI: 10.1002/jlcr.3364.

On the right side, there is a 'Tweak my results' panel with the following options:

- Expand my results
- Sort by: Relevance
- Availability: peer review... (1,337,136), Full text Online (1,586,426), Available in the Library (4)
- Resource Type: Articles (1,283,372), Newspaper Ar... (105,694), Books (59,518), Technical Report (15,286), Reference Entries (3,600), Show More
- Subject: Chemistry (92,209), Carbon (46,422)

Notes:

Discovery is about finding the resources you are interested in across a broad variety of sources. To do this, we need a way to enter our search and a way retrieve and view relevant results.

Let us look at Primo as the discovery layer.

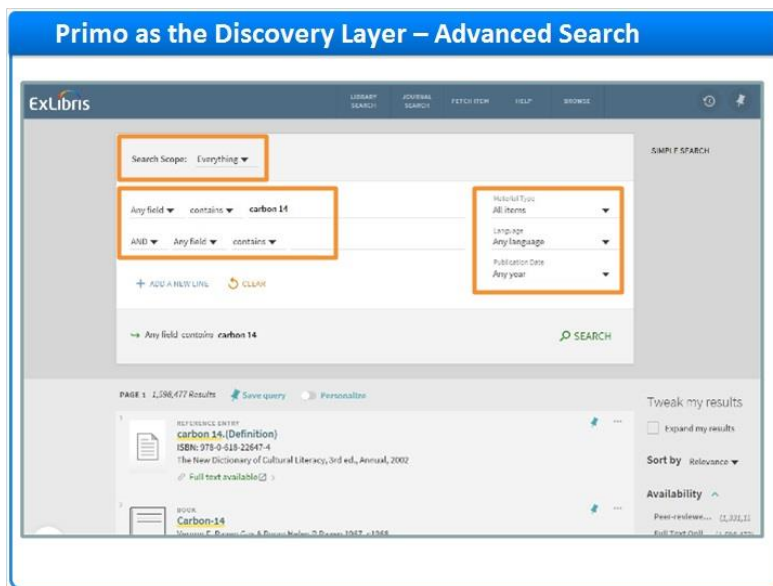
Here is the user interface after conducting a search for carbon 14. Notice the search bar at the top, as well as the filters on the right that allow the user to refine their results.

The search box searches both the local and central indices, retrieving books, journals, and videos from the library as well as articles and other online materials from subscription resources in the central index.

These results are also ranked by relevancy, which means the user will find the first page of results a great place to start their research.

In Primo, the discovery layer is customizable. Ideally we want all of the data sources possible available to search, but we may also want the flexibility to search specific sources or collections. We call these targeted searches 'scopes'. Usually scopes are used to provide a targeted search within a specific data source. In this case, we can see that the scopes in the drop down include the library catalog, Primo Central, and the option to search both at once.

1.7 Primo as the Discovery Layer – Advanced Search



Notes:

There are other ways to discover resources in Primo, including advanced search

In the advanced search, we can select which fields we want to search and where the search term should be in the field. And we can define multiple search terms.

We can also restrict these searches by scope, material type, language, and publication date.

1.8 Summary of Discovery

The screenshot displays a 'Summary of Discovery' window with a blue header. It lists four search results:

- 1** BOOK **Carbon-14**
Vernon F. Raaen Gus A Ropp; Helen P Raaen 1967, c1968
Available at Main Library Main Location (QD466.S.C1 R27) and other locations >
ADD LABELS
- 2** BOOK **Carbon-14 compounds.**
John R. Catch 1961
Available at Main Library Main Location (QD466.S.C1 C32) >
ADD LABELS
- 3** ARTICLE **Factors affecting carbon-14 activity of unsaturated zone CO₂ and implications for groundwater dating**
Wood, Cameron ; Cook, Peter G. ; Hamington, Glenn A. ; Meredith, Karina ; Kipfer, Rolf
ISSN: 0022-1694 ; DOI: 10.1016/j.jhydrol.2014.07.034
Journal of Hydrology, 27 November 2014, Vol.519, pp.485-475[Peer Reviewed Journal]
44 models was based on concentrations for a carbon 14... tracers (chloride, carbon 14 and stable isotopes). Carbon... 1 Introduction Carbon-14 (14 C)¶
Full text available >
ADD LABELS
- 4** ARTICLE **GMP synthesis of carbon 14 labelled substances**
Filer, Crist N. ; Maniscalco, Mario P. ; Thayer, Sandra L.
ISSN: 0302-4802 ; E-ISSN: 1099-1344 ; DOI: 10.1002/jlcr.3304
Journal of Labelled Compounds and Radiopharmaceuticals, 30 May 2016, Vol.59(6), pp.233-237[Peer Reviewed Journal]
Full text available >

Notes:

Discovery ends when the user finds the citation or record for a material that they are interested in.

Here are our results from our initial search - I've selected a few resources that look promising.

1.9 Delivery

The slide is titled 'Agenda' in a blue header. It features a blue rounded rectangle containing a list of topics, with 'Delivery' highlighted in bold. A colorful graduation cap icon is positioned above the list.

- Terminology
- Discovery
- **Delivery**
- Session Review

Notes:

Delivery

1.10 Delivery – Physical Resources

The screenshot displays a list of physical resources under the heading "Delivery – Physical Resources". It contains four records:

- Record 1:** BOOK **Carbon-14** by Veynon, F. Raean Guy & Roon, Helen P. Raean 1967. c1968. Status: Available at Main Library Main Location (QD466.S.C1 R27) and other locations >. Includes an "ADD LABELS" button.
- Record 2:** BOOK **Carbon-14 compounds.** by John R. Catch 1961. Status: Available at Main Library Main Location (QD466.S.C1 C32) >. Includes an "ADD LABELS" button.
- Record 3:** ARTICLE **Factors affecting carbon-14 activity of unsaturated zone CO₂ and implications for groundwater dating** by Wood, Cameron ; Cook, Peter G. ; Harrington, Glenn A. ; Meredith, Karina ; Kipfer, Rolf. ISSN: 0022-1694 ; DOI: 10.1016/j.jhydrol.2014.07.034. Journal of Hydrology, 27 November 2014, Vol.519, pp.465-475[Peer Reviewed Journal]. Includes a "Full text available" link and an "ADD LABELS" button.
- Record 4:** ARTICLE **GMP synthesis of carbon 14 labelled substances** by Filer, Crist N. ; Maniscalco, Mario P. ; Thayer, Sandra L. ISSN: 0302-4803 ; E-ISSN: 1099-1344 ; DOI: 10.1002/jlcr.3364. Journal of Labelled Compounds and Radiopharmaceuticals, 30 May 2016, Vol.59(6), pp.233-237[Peer Reviewed Journal]. Includes a "Full text available" link and an "ADD LABELS" button.

Notes:

Delivery is all about getting access to the resources that have just been discovered.

In Primo, delivery for physical resources consists of an availability statement and the ability to place holds or requests.

Here we can see two library records where both are checked in, or 'Available'.

If I click on the title of the record,, we can see that the item is available in multiple locations in the full record.

I can request this title by clicking here - when I do so, I am prompted to fill in a request form.

full record (Slide Layer)

The screenshot shows the 'Delivery - Physical Resources' page in ExLibris. The main title is 'Carbon-14' by Vernon F. Raaven, Gus A. Ropp, and Helen P. Raaven, published in 1967. The record is available at the Main Library, Main Location (QD466.S.C1 R27) and other locations. The page includes a search bar, navigation tabs (TOP, SEND TO, VIRTUAL BROWSE, TABS), and a list of request types: 'Relists ILL' and 'ProQuest dissertation'. Below this, two physical locations are listed: 'Main Library' (3 copies, 1 available, 0 requests) and 'Rare Books Library' (1 copy, 1 available, 0 requests). A 'Details' section at the bottom lists the title, author, and other metadata.

1.11 Delivery – Online Resources

The screenshot shows the 'Delivery - Online Resources' page in ExLibris. It displays a list of search results for 'Carbon-14'. The first result is a book titled 'Carbon-14' by Vernon F. Raaven, Gus A. Ropp, and Helen P. Raaven, published in 1967. The second result is a book titled 'Carbon-14 compounds' by John R. Catch, published in 1951. The third result is an article titled 'Factors affecting carbon-14 activity of unsaturated zone CO2 and implications for groundwater dating' by Wood, Cameron; Cook, Peter C.; Harrington, Glenn A.; Meredith, Karina; Kipfer, Rolf, published in the Journal of Hydrology in 2014. The fourth result is an article titled 'GMP synthesis of carbon-14 labelled substances' by Filer, Crist N.; Maniscalco, Mario P.; Thayer, Sandra L., published in the Journal of Labelled Compounds and Radiopharmaceuticals in 2016. Each result includes a 'Full text available' link, which is highlighted with an orange box in the original image.

Notes:

Online resources can be from your local index, as well as the Primo Central index. Here we can see several records where full text is available. By clicking on the full text link, I can access the full text of this resource. Access to online resources involves linking to the full text content online, If it's subscription content, there will also be a prompt to log into a proxy if the user is not on campus.

1.12 Summary of Delivery

The screenshot displays a 'Summary of Delivery' window with a blue header. It contains four items, each with a small icon, a title, author information, and availability details. The first two items are books, and the last two are journal articles. Each item has an 'ADD LABELS' button and a 'Full text available' link.


- 1** BOOK **Carbon-14**
Vernon F. Raean Gus A Ropp; Helen P Raean 1967, c1968
Available at Main Library Main Location (QD466.S.C1 R27) and other locations >
ADD LABELS
- 2** BOOK **Carbon-14 compounds.**
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- 4** ARTICLE
GMP synthesis of carbon 14 labelled substances
Filer, Crist N. ; Maniscalco, Mario P. ; Thayer, Sandra L.
ISSN: 0302-4802 ; E-ISSN: 1099-1344 ; DOI: 10.1002/jlcr.3304
Journal of Labelled Compounds and Radiopharmaceuticals, 30 May 2016, Vol.59(6), pp.233-237[Peer Reviewed Journal]
Full text available >

Notes:

Delivery ends when the user has the information they need to access the resource, whether it be a physical book on a shelf or a full text article online.

1.13 Session Review

Agenda



- Terminology
- Discovery
- Delivery
- **Session Review**

Notes:

Session Review

1.14 Session Review

Session Review

In this session we covered:

- Terminology useful in understanding how Primo works
- How discovery and delivery work in Primo

Next Steps:

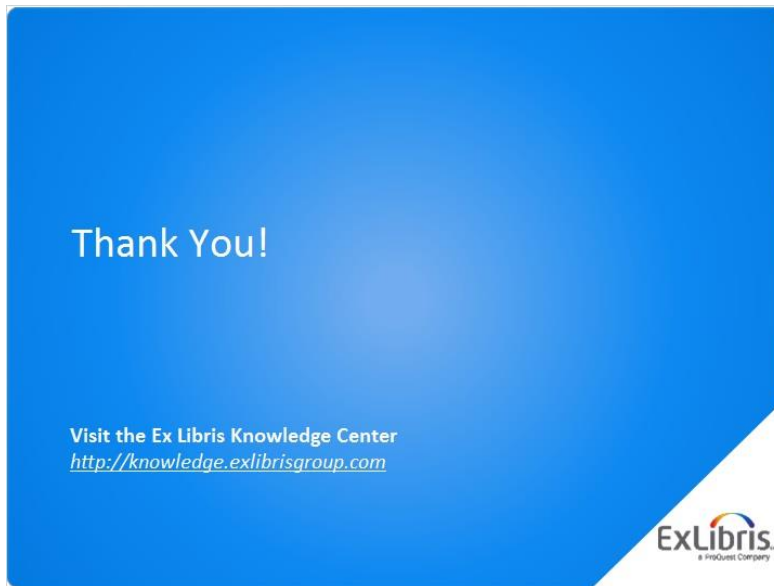
- Continue to the next training session.

Notes:

In this session we learned terminology that is useful in understanding how Primo works, and how discovery and delivery work in Primo.

Please continue on to the next training session in this series.

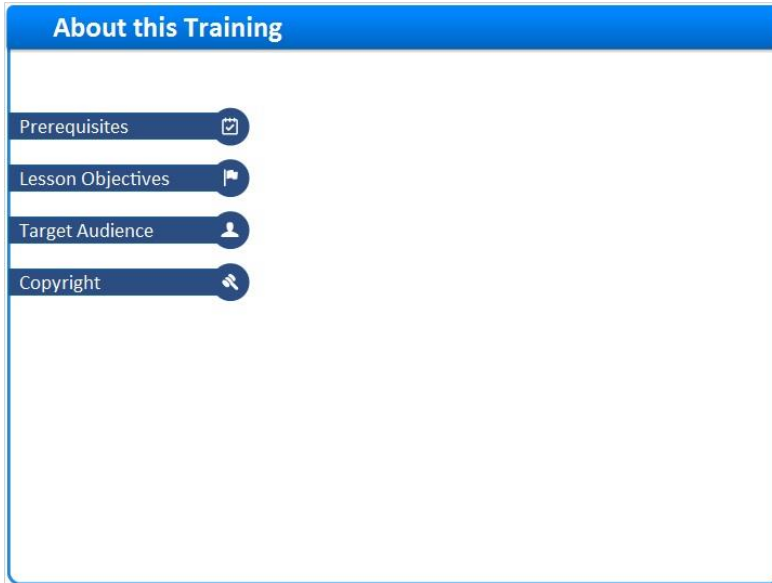
1.15 Thank You!



Notes:

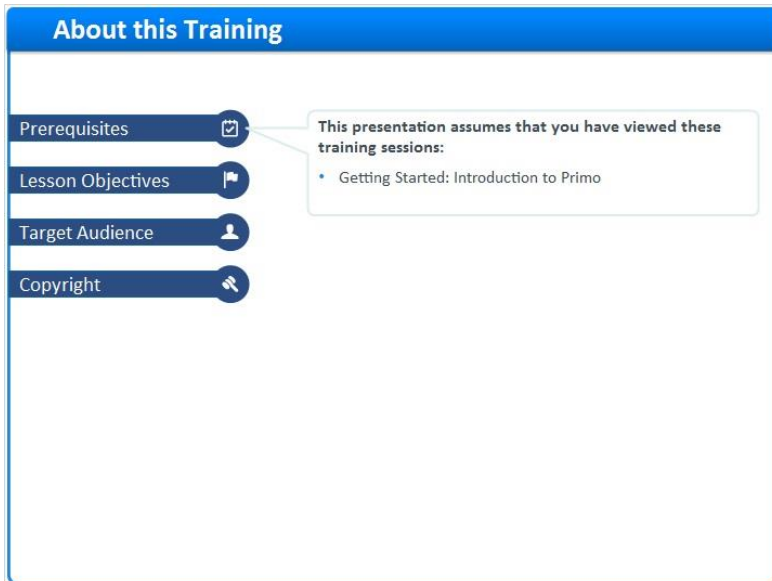
Thank you for joining this session!

1.16 About this Training







Notes:

1 (Slide Layer)



2 (Slide Layer)

About this Training





- Prerequisites 
- Lesson Objectives 
- Target Audience 
- Copyright 

By the end of this training session, you will know:

- What the terms web-scale discovery, discovery layer, and delivery mean
- How discovery works in Primo
- How delivery works in Primo

3 (Slide Layer)

About this Training

- Prerequisites 
- Lesson Objectives 
- Target Audience 
- Copyright 

Target Audience:

- Staff involved in using and maintaining Primo

4 (Slide Layer)

About this Training

- Prerequisites
- Lesson Objectives
- Target Audience
- Copyright

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