Moving Forward Together
a consortial discovery layer
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a consortial discovery layer
If you are going through hell, keep going.
Winston Churchill
Freeze-Dried Librarian

- Returned to an academic library after working at Ovid Technologies and HighWire Press
- Voyager OPAC essentially unchanged since 1996

- Remember the Internet in 1996?
Electronic Library

Welcome from the University Librarian

News

Library News | Daily Bulletin | Documents | Issues in Academia | and more

Finding Information

- Library Catalogues: University of Waterloo's WATCAT | Wilfrid Laurier | University of Guelph | and more
- Quick Reference: OED | Webster | UWDir | Scholarly Societies Project | OCUL Directory | and more
- Databases & Indexes: Electronic Data Service | UnCover | CUSS | TRACE | Wtmedia | Bookstore | and more
- Resources: By Discipline | Government Information | Etexts | Ejournals | Career Services | and more
- Internet Starting Points: Search Tools | Sites Arranged Geographically | Directories | Guides
- Campus Information Systems: Waterloo's UWinfo | Wilfrid Laurier | University of Guelph | and more

Using the Library

- Orientation: UW Library Workshops | Grad Student Info | Electronic Walking Tours | Displays
- Quick Facts: Library Hours | Borrowing Policies | Facilities | Library Locations
- Services: Interlibrary Loan/Document Delivery | AskLib | Information Services | Guides
- Working together: Dear Library | Library Contacts | Gifts & Donations | Friends | and more

Search UW Electronic Library

Keyword: Search | Clear | Help

Description of UW Electronic Library: selection criteria, design principles, sources of information, server statistics
Queries, Comments and Suggestions are welcome!
Internet Resources Committee | University of Waterloo Library

Internet Archive: Jan 2 1997
UG Library Web Site Map

University of Guelph Catalogue:

- link to UG Library catalogue

Other Library Catalogues:

- access to library catalogues around the world. Includes listing of Ontario universities.
  - Waterloo and Wilfrid Laurier

Subject Resources:

- access to subject-related information and search tools; the major
UG Library Catalogue:  
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Why Primo?

- Look and feel of current interface does not meet the expectation of web savvy users
- Engage with users with new features in an attempt to become relevant in their information seeking universe
- Begin to address our current disjointed library experience
  - Consolidate discovery and delivery of local and remote resources in all formats
Why Primo?

- ILS replacement not our goal. OPAC replacement also not our goal
- Integrate new types of metadata
  - XML ingestion and/or Deep Search for Scholars Portal
- Leverage our existing library expertise and recognize the fact that we are not development organizations
- Integration of systems and interfaces should be easier for the vendor that wrote them than for the library
- Opportunity with our current vendor to overcome the difficulties of their pricing model
Motivated to return to an academic library because our traditional vendors have stopped doing the development work necessary to keep libraries vital in light of what was happening on the commercial internet.
“Enthusiastic Amateurs”
“Enthusiastic Amateurs”

- Staffing situation at Waterloo
  - People in Systems who do our programming =
“Enthusiastic Amateurs”

- Staffing situation at Waterloo
  - People in Systems who do our programming = 2
  - also sysadmins for Windows, RedHat and Debian
  - also database administrators for MSQL and Postgres
“Enthusiastic Amateurs”

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  - People in Systems who do our programming = 2
  - also sysadmins for Windows, RedHat and Debian
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- Large development projects have depended on Co-op students.
Development Organization
Development Organization

- Quality Assurance
- Test Plans
- Regression Testing
- Release Management
- Change Control
- Bug Tracking
- Version Control
- Coding Standards
- Code Review
- Documentation
- Software Project Management
Development Organization

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- Software Project Management
TUG - Challenges

- distinguishing between what is local, TUG, OCUL, CARL, and CRKN
- communications and engaging staff across three institutions
- balancing our campus-wide practises in administration versus our shared library interests
- need for a governance review
TUG - Challenges

- being able to adapt to evolving environment
- setting priorities, strategic directions
- budgets: cuts, staffing, resource fluctuation

- 10 year old problems are pretty difficult to solve, especially when the environment has changed dramatically in that time.
TUG - Benefits

- **benefits to our users**
  - TUGdoc services
  - Annex
  - TRELLIS
  - opportunity to pilot/create new services
  - staffing efficiencies and skill/knowledge sharing

- sharing of management expertise
- Stats & Reports Group (user surveys/studies)
- financial benefits (cost sharing program)
- cooperation and collaboration
- history of success
“a new search and discovery interface”

- it has been clear for quite some time now, that there is a need for a concerted effort to investigate and introduce a new “search and discovery interface” for access to resources both within the catalogue (i.e. TRELLIS) and the many other electronic information resources available to our user communities.
Process

- Agree that we should start by **decoupling the front end problem (OPAC)** from the back end and begin our explorations by seeking solutions for our users now and our processing needs later.

- Discuss the business models with ILS systems both now and into the future. Recognize that we have invested money for ILS solutions, but **the consolidation of the options and the age of their underlying architecture argue for frank discussion of directions for OCUL Libraries and include the possibility of OCUL ILS initiatives for various modules in the future.**
Options

- Bibliocommons
- Endeca
- Evergreen
- Ex Libris Primo
- Georgia Tech’s Communicat
- Scholars Portal, leveraging Mark Logic
- University of Rochester eXtensible Catalog (XC) Project
- University of Virginia’s Blacklight Project
- others...
- Aquabrowser
- Other enterprise search services (ESS) companies like Endeca
there is no one right answer

- A primary lesson of TUG
- One size does not fit all
## Considering Primo in June 2007

<table>
<thead>
<tr>
<th>Feature</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features</td>
<td>+</td>
</tr>
<tr>
<td>User Expectations</td>
<td>+</td>
</tr>
<tr>
<td>Time to market</td>
<td>+</td>
</tr>
<tr>
<td>Integration</td>
<td>+?</td>
</tr>
<tr>
<td>Maintainability</td>
<td>+?</td>
</tr>
<tr>
<td>Scalability</td>
<td>+?</td>
</tr>
<tr>
<td>Ability to migrate</td>
<td>?</td>
</tr>
<tr>
<td>Cost</td>
<td>-</td>
</tr>
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</table>
Course set
<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Venue</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 14th</td>
<td>9am-12pm</td>
<td>2nd Floor, Robarts Library</td>
<td>ExLibris</td>
</tr>
<tr>
<td>August 15th</td>
<td>9am-12pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Proquest</td>
</tr>
<tr>
<td>August 17th</td>
<td>9am-12pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Siderean</td>
</tr>
<tr>
<td>August 20th</td>
<td>1pm-4pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Endeca</td>
</tr>
<tr>
<td>August 21th</td>
<td>9am-12pm</td>
<td>Rm. 4049, Robarts Library</td>
<td>SIRSIDynix</td>
</tr>
<tr>
<td>August 21th</td>
<td>1pm-4pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Bowker</td>
</tr>
<tr>
<td>August 23th</td>
<td>9am-12pm</td>
<td>Virtual</td>
<td>Integration New Media</td>
</tr>
<tr>
<td>August 23th</td>
<td>1pm-4pm</td>
<td>Rm. 4049, Robarts Library</td>
<td>Coveo</td>
</tr>
<tr>
<td>August 27th</td>
<td>9am-12pm</td>
<td>Canceled - Vendor Withdrew</td>
<td>IBM</td>
</tr>
<tr>
<td>August 27th</td>
<td>1pm-4pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Mark Logic</td>
</tr>
<tr>
<td>September 6th</td>
<td>11am-1pm</td>
<td>2nd Floor, Robarts Library</td>
<td>Autonomy</td>
</tr>
</tbody>
</table>
“…OPAC replacement also not our goal”
“...OPAC replacement also not our goal”

...but it is a major milestone
Project Timeline

- June - December 2007
  - Created a TUG Initiatives Blog
  - Held a series of TUG days describing the plans
  - Received access to Primo documentation
  - Completed a prerequisite Voyager upgrade
Project Timeline
Project Timeline

- January – May 2008
  - Primo Implementation Team established (8)
  - Received training from Ex Libris
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  - Primo Mascot chosen
Project Timeline
Project Timeline

- January – May 2008 (cont’d)
  - Team began weekly meetings to strategize
  - Began weekly conference calls with Ex Libris
  - Installed Primo on servers
Project Timeline

- January – May 2008 (cont’d)
- Team began weekly meetings to strategize
- Began weekly conference calls with Ex Libris
- Installed Primo on servers
- Mascot met partner and sired fraternal twins
Project Timeline
Project Timeline

- June 2008
  - First data load (200,000) on staging server
  - asked for feedback on PIT communications, tried to gauge TUG interest, learn how best to communicate
Project Timeline

- June 2008
  - First data load (200,000) on staging server
  - Asked for feedback on PIT communications, tried to gauge TUG interest, learned how best to communicate
  - Primo’s extended family and pets grew
Project Timeline

- July 2008
- Offered TUG staff a look with Primo Alpha
to get some initial feedback
to help keep staff informed and engaged
Project Timeline

- August 2008
  - Reviewed Primo Alpha feedback
  - migrated from v1 to v2
  - Loaded 3.7m records on Production server
  - Set August 26 for Primo Beta
  - Discovered data extract and data update issues

  August 26 ➔ September 3 ➔ September 10...
Project Timeline

- September 2008
  - with Ex Libris, decided to delay Primo Beta launch until a re-examined list of criteria were met
  - Re-evaluated basic requirements/must haves with two things in mind
    - Basic Primo functionality (seen at other sites)
    - understanding the importance of first impressions
  - Develop criteria and rigorous testing procedures
  - Ex Libris delivered fixes
Project Timeline

- October 2008
- Major fixes were (are) put into place to address the data and authentication issues
- v2.1 is just out, will now install
- Currently in a period of extreme testing
- Announce Primo Beta
Project Timeline

- October 2008: Major fixes were put into place to address the data and authentication issues.
- v2.1 is just out, will now install.
- Currently in a period of extreme testing.
- Announced Primo Beta 2.
Project Timelines

- November 2008 and beyond…
  - Solicit and review feedback
  - Focus on 2.1 enhancements
    - live tags and reviews, Real Time Availability
    - eShelf folder management, CSS customization
Project Timelines

- Integrate with current catalogue (TRELLIS)
- Define different views for TUG campuses and libraries
- Revisiting cataloging policies: ejournals & ebooks
- Communicating Primo: “what does Primo mean to me?”
- Handling project fatigue
What is Primo

- What we have come to expect in a search and discovery layer
  - Single search box
  - FRBR and dedupe
  - Facets (available, online)
  - Did you mean…
  - Cover art
  - Tags & reviews
  - Google/Amazon links
  - RSS (searches and folders)
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- 50+ worldwide
- Boston College
- Bridgeport University
- Emory University
- Iowa State University
- New York University
- Royal Library of Denmark
- University of Iowa
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Deep Search

Search for

* United

results for Articles

1,421,000 results, sorted by: relevance
Deep Search

- Royal Library of Denmark
  - Querying DADS repository of 65M articles
- Excellent performance & ranking quality
- No need to duplicate the index

- Scholars Portal
Deep Search

[Image of a search interface with the text "Search for: united" and "results for Articles: 1,421,000 results, sorted by: relevance"]
New Opportunities

- Focus on access and delivery as the goals
- Becoming relevant: integrating Primo into our user experiences
- Engaging with our users
- Usability tests (with other web presences)
- Calibrating and leveraging: did you mean, FRBR, deduping, tags, reviews
- Another tool in arsenal to reduce steps between discovery and delivery
New Opportunities

- Accessibility for Ontarians with Disabilities Act
- Regain control of our interfaces
  - DeepSearch
  - MBooks
- OAI feeds
- OurOntario
- Working within the EL Commons
New Opportunities

- Accessibility for Ontarians with Disabilities Act
- Regain control of our interfaces
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Moving Forward Together

- TUG Initiatives projects will provide the basis for an updated governance model for the consortium
- Initial steps with Basecamp for improved PM processes
- Improved Communication - Adobe Connect, Skype
- Test plans being written
- We have begun to explore regression testing options
- Cataloguing and Metadata Librarian working with XML and asked for my *Mastering Regular Expressions* book
Greg Sennema, Wilfrid Laurier University

Allan Bell, University of Waterloo