Developing Best Practices for Implementing a Web-Scale Discovery System

Kelsey Brett, Discovery Systems Librarian
Richard Guajardo, Head of Resource Discovery Systems
Frederick Young, Systems Analyst

Working With Your Vendor

- Timeline
  - Start Early --it's not too soon to get started
  - Ask for vendor's implementation timeline
- Responsibilities
  - Library responsibility
  - Vendor responsibility
- Migrating your data
  - Vendor experience with your current systems
  - Best practices for migrating data from various sources
- Training
  - Schedule
  - Content

Creating A Timeline

Tip 1:

"Start early --it's not too soon to get started."

What is the vendor's timeline for implementation?

Determine factors important to your library's implementation timeline.

Who Does What?

Tip 2:

"Define vendor & library responsibilities."

RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY
RESPONSIBILITY

What are the vendor's responsibilities?

What are the library's implementation responsibilities?

Data Migration

Tip 3:

"Outline data migration process."

What is the vendor's experience with your library systems?

- **ILS**
- **Discovery system**
- **Digital platform**
- **Finding aids**

Identify best practices for migrating from your current systems?

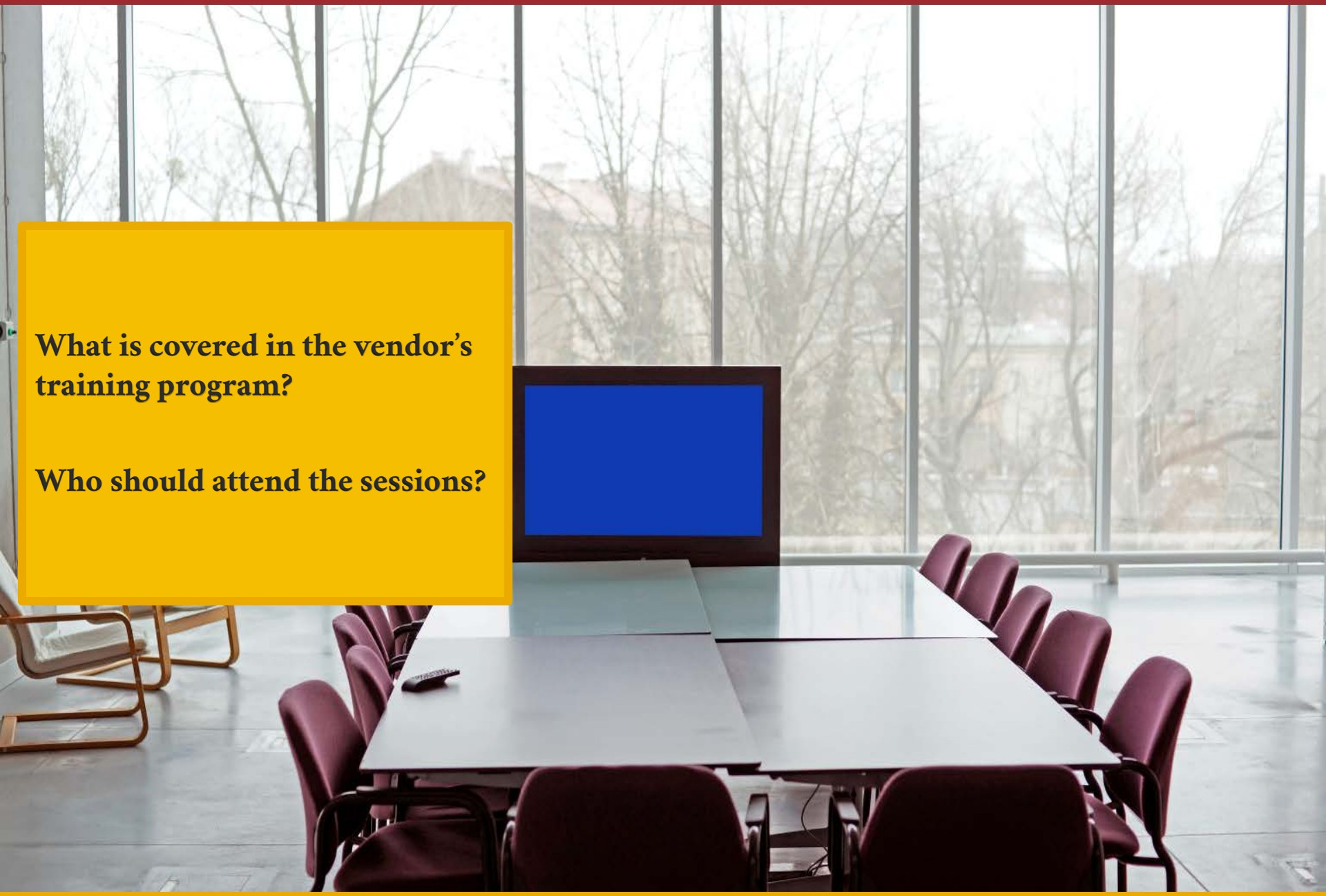
Training

Tip 4:

"Create a plan for implementation training."

What is the vendor's schedule for training?

Is online training available?



What is covered in the vendor's training program?

Who should attend the sessions?

Getting Internal "Buy-In"

- Involve stakeholders in the evaluation & implementation process
  - Public Services
  - Technical Services
  - Web Services
- Focus on benefits to users
- Elicit feedback at various stages
- Be active about responding to users concerns
- Provide updates to library administration
- Involve stakeholders in ongoing development of platform

Creating Buy-in

Tip 1:

"Involve stakeholders in the evaluation process"

Discovery Systems Working Group: Membership

UH – Main Campus

Head of Resource Discovery Systems –Chair

Electronic Resources Coordinator

Web Services Coordinator

Head of Metadata and Bibliographic Services

Head of Digital Services

Resource Discovery Systems Fellow

Digital and Web Projects Fellow

History & Political Science Librarian

Systems Analyst 3

UH – Downtown

Assistant Director for Technical Services

Electronic Resources Librarian

Web Services Librarian

UH – Clear Lake

Associate Director for Library Digital Services

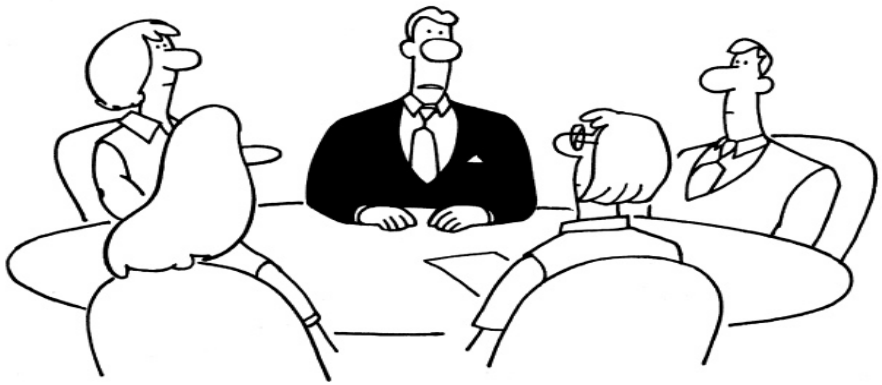
Associate Director for Technical Services

Electronic Resources Librarian

UH – Law

Associate Director

Head of Cataloging & Serials



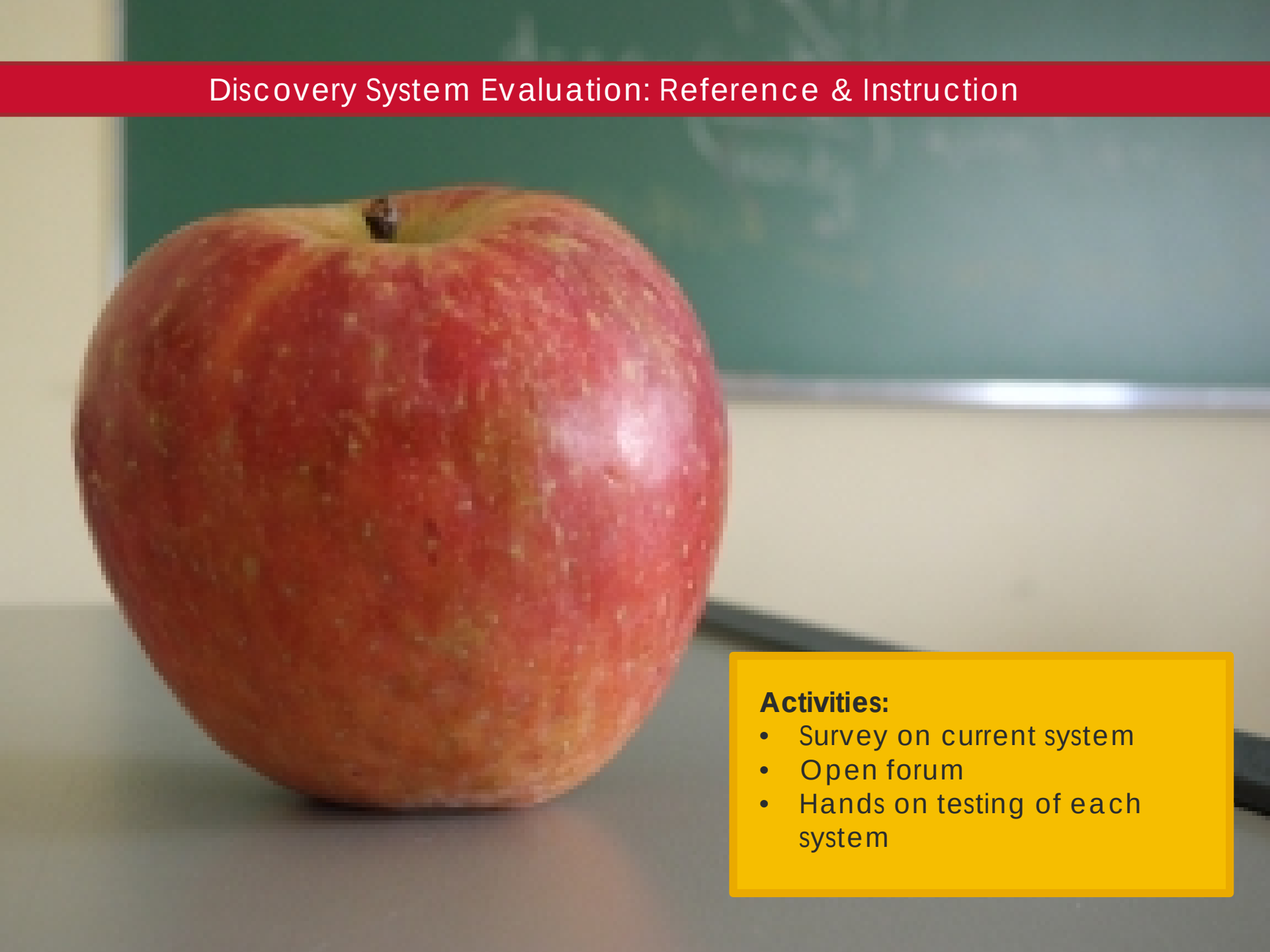
"Whew! That was close!
We almost decided something!"

Discovery System Evaluation: Technical Requirements & System Functionality

Activities:

- Vendor technical demos
- Vendor questionnaire
- DSWG rating of each question
- DSWG ranking of each vendor

Discovery System Evaluation: Reference & Instruction



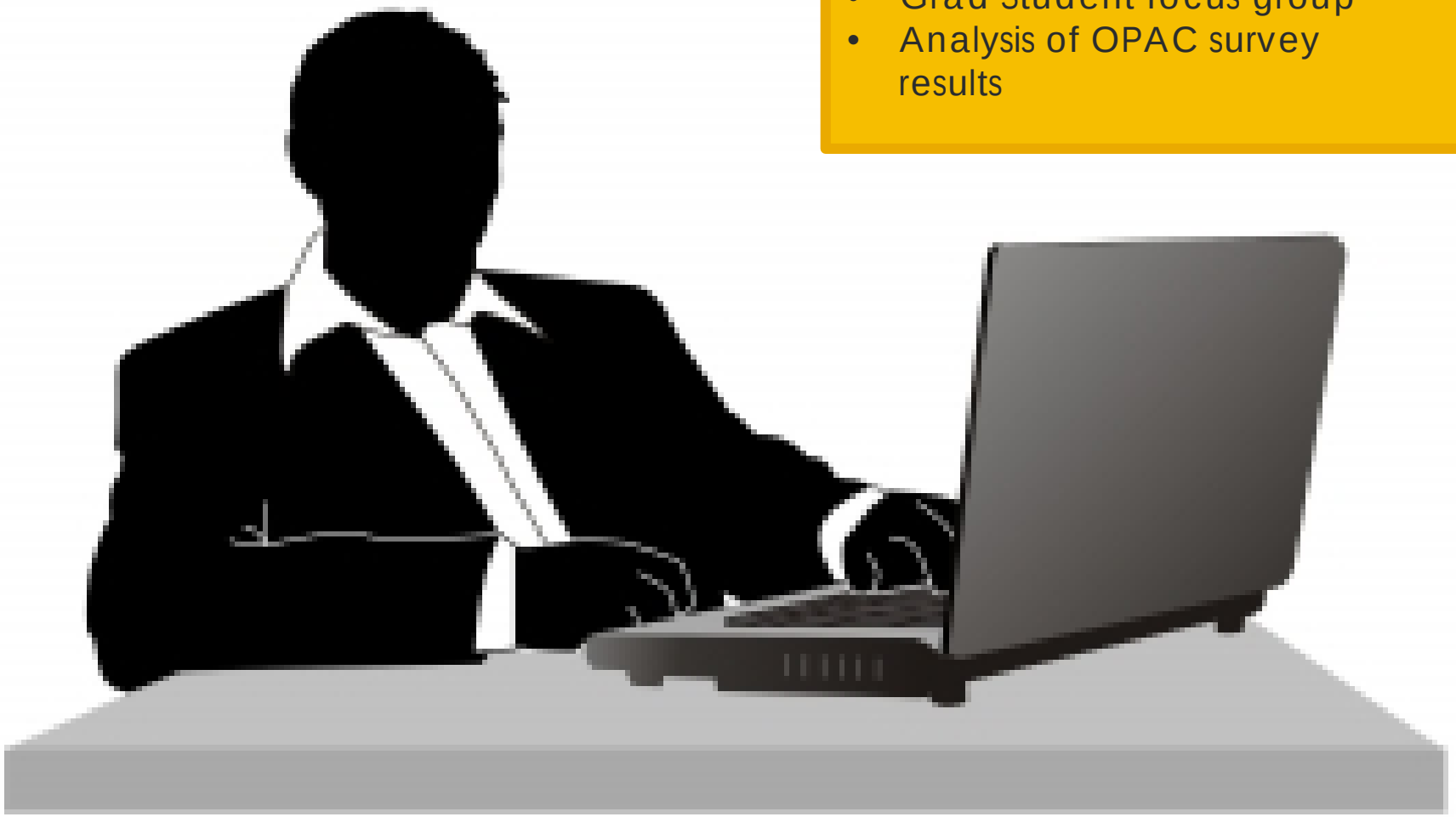
Activities:

- Survey on current system
- Open forum
- Hands on testing of each system

Discovery System Evaluation: User Experience

Activities:

- Literature Review
- Grad Student focus group
- Analysis of OPAC survey results



Creating Buy-in

Tip 2:

"Focus on benefits to the user"

Creating Buy-in

Tip 3:

"Involve Stakeholders in the Implementation Process"

Primo Implementation Team

- Head of Resource Discovery Systems
- Liaison Services
- Metadata & Digitization Services
- Web Services
- Access Services

Creating Buy-in

Tip 4:
"Elicit Feedback at various stages"

Creating Buy-in

Tip 4:
"Be active about responding to users' concerns"

Creating Buy-in

Tip 5:

"Provide updates often"

Creating Buy-in

Tip 6:

"Involve stakeholders in ongoing development of the system"

Discovery Advisory Group

- Resource Discovery Systems
- Liaison Services
- Access Services
- Special Collections
- Metadata & Digitization Services

Discovery Usability Group

- Resource Discovery Systems
- Liaison Services

Tips for the Technical

Tips for the Technical

Tip 1:

"You're a stakeholder, get involved early"

Tips for the Technical

- Attend the vendor demonstrations
- Ask the technical questions
- Be attentive to other stakeholder questions

Tips for the Technical

Tip 2:

"Get involved!"

Get Involved!

- Join the listserv(s)
- Usergroup membership
- Attend the conferences

Tips for the Technical

Tip 3:

"Find out where the answers are."

Training & Documentation

- Sign up for the Listserv(s)
- Look out for Webinars/Online Sessions
- Access to Documentation & Tutorials
- Attend the UserGroup Conference

Tips for the Technical

Tip 4:

"Play, play, play in the sandbox"

Play in the Sandbox

- Get access before training
- It doesn't have to be your data

Tips for the Technical

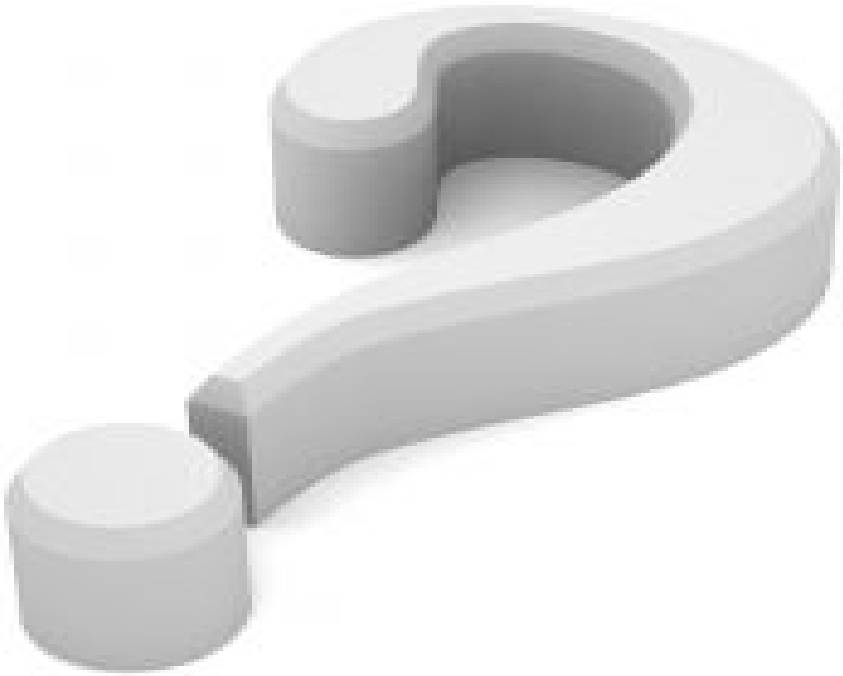
Tip 5:

"Enjoy the honeymoon"

Honeymoon

Take full advantage of vendor resources during implementation!

Final Tip

Celebrate your accomplishment!!!

Questions?