LIBRARIES AUSTRALIA SEARCH REDEVELOPMENT: UPDATE

Purpose
To advise Libraries Australia Advisory Committee (LAAC) members on progress with the redevelopment of Libraries Australia Search.

Background
Replacing Libraries Australia Search is one of the National Library’s two highest strategic IT priorities (the other is replacement of the Library’s Digital Library Infrastructure) for the period 2012-2014. The current Libraries Australia Search has reached the end of its useful life, and is no longer capable of supporting the volume of work required by the member community. While various modifications to the existing Search have been made over the last twelve months, complete replacement of the Search asset is the only viable option to support future member requirements.

The Business Review conducted between October 2011 and April 2012 clarified the need to redevelop the service for use in the next five years, and provided detailed information – gained from both Libraries Australia users and their managers – on the ways in which members use and interact with the full service suite.

Project plan and progress
The project is divided into four Stages.

Stage 1 commenced in May 2012 and concluded 10 September. The major deliverables for Stage 1 were: the prioritised list of requirements (Must, Should, Could, Won’t); performance requirements; proposed technical architecture; and the Stage 2 plan.

This Stage included extensive research specific to Libraries Australia Search, and building on the research undertaken during the Business Review. The research methodology included:

- Site visits by business analyst Joanna Meakins and interface designer Kenji Walters. The visits deployed a user-centred design technique where target users of a new or existing system are observed completing their typical tasks in their actual place of work, with some scope for additional questions on the users’ opinions and usage of the system. The site visits allowed the project team to understand the context of how Libraries Australia Search fits with the user’s regular tasks as well as identifying opportunities to improve the usefulness and usability of the new system. Site visits were conducted at the National Library of Australia, one state library, two universities, one large public library, one large special library, and one vendor (James Bennett);
• Interviews asking NLA staff to identify any problems with the existing system;
• A survey placed on the Libraries Australia website titled "Have your say";
• Identification of outstanding issues listed in:
  o the Libraries Australia Help Desk enquiries system (Reftracker)
  o the Libraries Australia project and issue tracking software (JIRA)
  o the Libraries Australia Search Training Manual
  o Libraries Australia User Group meeting minutes
  o any library procedure manuals that were obtained; and
• Discussion with Libraries Australia trainers.

These activities resulted in a report on research findings, a report on issues to be considered during redevelopment (grouped by function), a set of ‘based on real life’ user profiles to assist with interface development, and supported development and prioritisation of the requirements. In addition a set of issues were identified that fall outside the scope of the redevelopment project. The Help Desk team is working on a number of these issues.

Stage 2 is currently underway and is due for completion by the end of 2012. The major deliverables for this Stage are: the new Search database, the Z39.50 interface; the Loader (which operates between CBS and Search); the development and two test environments; and wireframes for high level User Interface requirements.

Wireframes represent the bare bones or the skeleton of the user interface which focuses on the information presented to the user and how they interact with this information. They may be as simple as a sketch on a piece of paper. Prototyping with wireframes allows the team to rapidly explore a number of different solutions and refine these through usability evaluation sessions with actual users. This will help to ensure that we get the basics right before getting too far down the track. As the project progresses we are likely to move to an online prototype to use in further evaluations and to gather wider feedback. We have adopted a user centred design approach for Libraries Australia search which means that we engage with users early and often throughout project. We will arrange usability evaluation sessions of each prototype to ensure that critical usability issues are addressed long before the final Libraries Australia search is released.

The major deliverable for Stage 3 will be an alpha version of the user interface, containing some of the required functionality. We would then like to invite users to put this through its paces and provide us with comments and suggestions. Member libraries will also be asked to test the Z39.50 interface during Stage 3.

During Stage 4 the remaining functionality of the user interface will be added, modifications will be made to associated systems (Libraries Australia Administration, products and Record Export Service), the online help developed, the User Manual updated, the Libraries Australia website updated, documentation completed, the training environment set up, and the new service deployed into production and released to users.
Issues
An issue that was resolved during Stage 1 was whether the new Search service would be delivered from the Trove database. This option had been considered as a possibility, but was not pursued. Libraries Australia users expressed a strong preference that their working database be organised around individual bibliographic record, not grouped into FRBR clusters, and the Trove database is FRBRised. This conclusion does not obviate the need for a wider ranging architecture review, but does mean that review is not so urgently required.

The Committee may also note that the Business Review highlighted the increasing prevalence of electronic resources (including eBooks), and a marked increase in outsourcing of cataloguing activity. This raised questions of whether the new Libraries Australia Search would need significant changes to accommodate these changes. Both issues were addressed during site visits and associated research. In relation to eResources and eBooks, no ‘special’ Search requirements were identified (although it is possible that some match and merge changes may be required).

In relation to outsourced cataloguing activity, our site visit to James Bennett and correspondence with CAVAL (the major providers) confirmed that both rely heavily on the CBS cataloguing client, and make minimal use of Search. This means that no special Search requirements were identified that would improve third party cataloguing and holdings update efficiency. However, the project will separately address changes to other aspects of Libraries Australia that would make third party activity more transparent, both to purchasers of these services and to the Libraries Australia team.

Recommendation(s)
The Libraries Australia Advisory Committee to note the report.

Contact: Marie-Louise Ayres
mayres@nla.gov.au
02 6262 1202

10 October 2012