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DRAFT GALILEO Upgrade Project: Phase II MetaLib Pilot Project, Stage I

Project Sponsor:

Merryll Penson, Executive Director, Library Services, OIIT,
Board of Regents, USG

Institutional Sponsors:

University of Georgia: Bill Clayton

Emory: Selden Deemer

Georgia Institute of Technology: Tyler Walters

Georgia State University: Bill Walsh

Medical College of Georgia: Karen Tschanz

Project Team Leads:

Hardware: Phil Fitzpatrick

Technical: Ross Singer

Resources: Elizabeth Winter

Interface: Selden Deemer

Project Manager: Lauren
Fancher

IT Manager: Tim Peacock

Project Coordinator: Andrea
Wilson

Project Team Members: Gail Anderson, Jeff Carrico, Tom Cutshall, Selden Deemer, Phil Fitzpatrick, Doug Goans, Katie Gohn, Justin Otto, Ross Singer, Ginger Smith, Mike Thomas, Bill Walsh, Elizabeth Winter, UGA Representatives TBD

Consultant: Brad Baxter

Technical Exploration Subteam: Ross Singer (Lead), Doug Goans, Mike Thomas, Ginger Smith

Resource Exploration Subteam: Elizabeth Winter (Lead), Gail Anderson, Katie Gohn, Bill Walsh

User Interface Exploration Team: Selden Deemer (Lead), Tom Cutshall, Doug Goans

Ex Libris Implementation Staff:

Maida Rubin: Ex Libris Manager of Implementation Services for eproducts (SFX, Verde, MetaLib, Digitool)

Susan Kane: MetaLib implementation librarian, training, project management from install to production

DRAFT Scope Document



Project Dependencies:

- The overall GALILEO Upgrade Scope Document provides the background and goals for the three-year Upgrade plan and for each phase:
<http://www.usg.edu/galileo/about/planning/projects/upgrade/project/UpgradeScope081105.doc>
- The GALILEO Upgrade Phase II Scope Document provides the background and goals for the second year of the Upgrade:
<http://www.usg.edu/galileo/about/planning/projects/upgrade/project/PhaseIIScopeDrft91906.pdf>
- Deployment requires multiple, inter-related sub-projects with individual scope documents (i.e., this is the scope of the MetaLib Pilot Project, Stage I).
- The MetaLib Pilot project, Stage I is dependent on the release of MetaLib Version 4.0, released on February 2, 2007, and the Ex Libris installation and implementation schedule.
- Additional project dependencies may surface as a result of inter-related sub-projects and institutional projects and timelines.

Goals & Objective:

The objective of the Metalib Pilot Project, Stage I is to complete the base installation of the MetaLib software and provide orientation to key institutional and GALILEO staff sufficient to determine strategies and goals for a Stage II implementation.

Goals for the MetaLib Pilot Project, Stage I include:

1. Install the MetaLib software and set up user accounts
2. Provide training to key institutional and GALILEO staff
3. Complete the base configurations necessary to support further implementation of institutional and GALILEO shared-resources
4. Answer key questions identified by the Project Team, including a comparison of the X-Server API and the default interface functionality
5. Identify strategies and goals for Stage II implementation

Background/Narrative:

The GALILEO Upgrade proposal sought multiple pieces of software in order to provide core functionalities for all GALILEO users, among them SFX linking and federated search. The following considerations were involved in finalizing the proposal:

- Four of the five research institutions -- UGA, Emory, Georgia Tech, and Georgia State (GETS) -- already had SFX linking.
- The federated search product review identified strengths and weaknesses in all available options.

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- Interviews with existing customers and Ex Libris suggested that the MetaLib product was not fully mature for the identified purposes, but had the potential to better integrate with the SFX infrastructure, also offered by Ex Libris. In addition, the MetaLib product offered more flexibility and interoperability for institutional deployment and integration within the campus infrastructure.
- WebFeat, a vendor-hosted product, offered a fast start-up and the opportunity to learn more about federated search without locally deploying a major system.
- Each product had very different pricing models. WebFeat offered an annual subscription model based on numbers of translators. Ex Libris offered a one-time licensing and annual maintenance model based on FTE and system units (institutes). In addition, Ex Libris offered bundled pricing with significant discount incentives that leveraged the existing GETS SFX licensing, the expansion of SFX licensing for all of GALILEO, including the fifth research institution, Medical College of Georgia, and the addition of MetaLib for the GALILEO academic institutions and the five research institutions (known collectively as GETSM).

The GALILEO Steering Committee and participating consortia (USG/RACL, AMPALS, GPALS, DTAE, DOE, and GPLS) made the decision to purchase both federated search products, along with SFX and EZproxy for support of linking authentication for the non-GETS libraries. The MetaLib and SFX licensing fees would be factored over a three-year period, during which time different aspects of the project would be phased in. Phase I (year one, FY06) would focus on implementation of WebFeat and SFX for all GALILEO institutions; Phase II (year two, FY07) would focus on expanding customization and localization, including a pilot of the MetaLib system; Phase III (year three, FY08) would focus on further customization and maintenance.

During the licensing process for MetaLib, consultation with the Ex Libris staff suggested that each of the GETSM institutions would need individual MetaLib environments, referred to as "institutions" rather than as "instances". Factors involved included limitations within the MetaLib system that require one-to-one relationships to both an SFX server and authentication methods, as well as scalability issues with large numbers of resources, entitlements, and credentials. The contract with Ex Libris provides for a MetaLib installation on a single server, including a test and production institution for each of: GALILEO, GALILEO Academic, Georgia State, Georgia Tech, Emory, UGA, and MCG. Other software components include an instance of MetaIndex and the X-Server interoperability module. A mirrored server may also be maintained; however, the ability of the software to provide load-balanced redundancy is unproven. Installation and implementation support, including initial training, are also provided. Cost factors for support of machines, systems, and ongoing maintenance are accounted for in the overall Upgrade Proposal pricing.

Preliminary planning and preparation activities for the MetaLib Pilot Project has taken place over the past year in a variety of ways that have influenced the timeline and scope of the project.

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- An initial meeting of the MetaLib Pilot institutions was held on April 12, 2006 in order to discover critical issues and pre-planning activities. A major interest of the group centered on investigating the MetaLib X-Server API functionality as an alternative to use of the reportedly-cumbersome-to-customize default interface.
- A number of key staff from the institutions and GALILEO attended the Ex Libris' Users' Group Meeting (ELUNA) in June 2006, where they learned that plans for the 2007 MetaLib Version 4.0 release included a rewrite of the XServer API to use web services, among other significant differences between Version 3 and Version 4, suggesting that installation and implementation should wait for the availability of Version 4.0.
- In August 2006, Key team members were identified in consultation with the institutions, including team leads for machine (Phil Fitzpatrick), technical (Ross Singer), interface (Selden Deemer), and resources (Elizabeth Winter) subteams.
- In October and December of 2006, the team leads met to identify approaches for the pilot and have initial consultation with Ex Libris MetaLib implementation staff. In December, the Ex Libris schedule for release of Version 4.0 was uncertain, creating scheduling challenges for new installations. They require a approximately 6-8 weeks of time for installation, pre-implementation activities, and training/implementations.
- Ex Libris formally released MetaLib 4.0 on February 8, 2007.
- The MetaLib Pilot Team met with Roy Tennant from California Digital Library on March 2 following the Code4Lib Conference to learn about his experience with MetaLib and the X-Server API.
- GALILEO has coordinated with the Ex Libris implementation staff to identify a schedule for installation and implementation.

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Proposed Schedule (in progress)

- Monday, April 9, 1:00 to 4:00: MetaLib Pilot Team Meeting, including interested managerial stakeholders and institutional sponsors, Georgia Tech, Wilby Room
- April – July, to be scheduled: Weekly conference call with MetaLib Pilot Team
- April – early May, to be scheduled: Resource subteam preparation of resource worksheet for pre-training implementation by MetaLib staff
- Thursday, April 12: Server Certification Deadline (required in order to hold installation and training dates)
- * April 26: Installation
- * Thursday, April 26, 3:30 – 4:30: MetaLib Pilot Team project kickoff call with MetaLib implementation librarian Susan Kane
- * May 1-11, to be scheduled for two hours online, approximately two weeks before training: Introduction to MetaLib Web Orientation Session, MetaLib Pilot Team
- * Monday and Tuesday, May 21-22, 8 – 5: MetaLib Pilot Team Training, Georgia Tech, Homer Rice Computer Training Lab
- June - July, to be scheduled: XServer Web Session and MetaIndex Web Training Session, MetaLib Pilot Team

* These dates can only be changed if the group decides to change the timeline for the project; due to Eluna and ALA, the likely next possible training times would be in July.

Deliverables

1. Server with installed software and necessary user accounts
2. Pilot team members with training in MetaLib software management and capabilities
3. Configured institutional and consortial institute relationships
4. Configured examples of institutional and consortially-shared resources
5. Comparison of MetaLib X-Server API and default interface functionality
6. Strategies and goals for Stage II identified

Boundaries

- 1) Participation in the MetaLib Pilot Project: Stage I is not required; institutions may choose to wait for Stage II.
- 2) MetaLib on-site training classes are limited to 12 participants. Each participating site may send up to two staff people. Additional training will be arranged in Stage II as needed.
- 3) The pilot team will need to finalize the best approach for Stage I. Related questions include identification of which institutional and GALILEO institutes will be used for exploration activities, which pilot activities are Stage I or Stage II (e.g, usability, courseware integration, marketing and presentation of resources), which activities are centralized and which are institutional, and the purview of the subteams for Stage I.
- 4) Additional boundaries may surface.

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Communications

- MetaLib Pilot Listserv
- MetaLib Pilot Web Discussion Forum
- GALILEO Upgrade Project Site