

Moderated by outgoing Coordinator Meg Bate, the IGeLU 2010 MetaLib Product Update was presented by Gilad Gal, Ex Libris' Senior Product Manager. The update was followed by a short question and answer session and a brief business meeting at which Meg gave her report on the activities of the Product Working Group through 2009-10 and Jeremy Acland agreed to coordinate the PWG until September 2011.

Primo Central Index

We had already had news regarding Primo Central as a MetaLib target and its search via a Primo user interface offered as a service from Matti Shem Tov, Ex Libris President. We had also heard how Primo Central sits within the data services framework of Ex Libris' development strategy alongside the URM and URD² from Oren Beit-Arie, Chief Strategy Officer and Nancy Dushkin, VP for Discovery and Delivery Solutions.

The Primo Central Index is available to Primo customers now. It will become available to MetaLib customers by way of an enabling wizard in MetaLib 4.4 in October this year, with the UI coming on-stream before the end of this year. The cost of Primo Central is included in MetaLib customers' annual maintenance and KB fees.

Yes - Primo Central is free to MetaLib customers!

The core elements of discovery are high quality relevance ranking, wide coverage and a fast response time. Federated search is only a means to an end, with the goal being to have the best electronic discovery and delivery solution.

Primo Central is a centralized index – a mega-index or union index of indexes – designed to offer a search of hundreds of millions of articles, e-books and other materials of academic interest. It is maintained and hosted by Ex Libris using a central instance of Primo, and it is already available to all Primo customers. It will become available to MetaLib customers in the first instance as a MetaLib target in early October, and subsequently as a new Primo Central UI tab in MetaLib before the end of 2010.

As a service and as a composite index, all ranking, de-dup'ing and sorting of results can be done by the service at Ex Libris, and full result sets can then be delivered to MetaLib with onward search results navigation provided by MetaLib or Primo UI facets as appropriate. As a MetaLib target, the recommendation is thus to offer Primo Central as a default quickset consisting only of itself for an order-of-magnitude performance improvement.

So, the breaking news of the conference was that a Primo service for MetaLib customers, expected before the end of this year, will offer direct access to the Primo Central index, through a Primo user interface and using Primo technology, providing seamless, easy access to electronic material. The interface will permit institutional branding and it will be made available to us as part of our MetaLib maintenance and KB fees, although there will be a minor implementation fee. No extra licence or hosting fees will be charged from MetaLib customers for the new Primo service.

For the great majority of institutions, the Primo Central Index will cover the great majority of relevant electronic resources. Most of your users will never need to venture beyond the Primo Central Index, although the new Primo service for MetaLib customers will also allow them to perform federated search using the same Primo user interface. Technically, the search will be performed using the institution's existing MetaLib instance, but of course users need not be

aware of this. The user will see the QuickSets available in MetaLib and can also select specific resources using the 'find database' light-box component available through the Primo user interface. Presenting the results in the same user interface makes it simpler and more inviting to end users and is likely to increase usage.

Already available to Primo customers, Primo Central's availability to MetaLib-only customers in October constitutes a significant *volte-face* on the part of Ex Libris since Helsinki and this and the new Primo Central via Primo UI service is a consequence of much work by Ex Libris and IGeLU. These efforts are very much to be applauded, and I for one will be rushing to implement the new MetaLib Primo Central target and the PC Primo UI service just as soon as I can!

MetaLib 4.4

MetaLib 4.4 is due for general release in October 2010. It will include a Primo Central registration wizard, other Primo Central-related functionality, and general performance improvements.

MetaLib Next Generation

Through the past year, much design work on MetaLib Next Generation has been done in conjunction with the MetaLib Advisory Group. The general requirements of MetaLib NG are that it should support *most* current MetaLib functionality, that it should be useable by Primo and MetaLib-only customers, and that it should provide tools to manage local resources and make them available as a list.

Core current functionality of the gateway is simultaneous search with auto-selection and suggestion of resources to search and normalization, 'blending' and de-duplication of results, supported by Vivisimo-like clustering. Existing adaptors will be supported. Caching and blending of fast/slower responses will give a perception of improved performance. The knowledgebase will keep its basic structure and we should be able to add and share local resources. The management system will allow for resource activation, and will enable you to design quicksets, categories with resource cataloguing and a resource toolkit.

As part of Ex Libris' URD² framework, MetaLib NG will use the Primo infrastructure. Primo already includes metasearch via MetaLib with portal and quickset concepts preserved as views and search scopes; and Find Database also included. Primo Central in this context will offer vastly improved response times, ranking quality and de-duplication speed, with unlimited results sets and an increased search scope – ie all resources in Primo Central. However PC will not be able to offer *all* resources so MetaLib will continue to be required to handle to 'tail' of resources not included in Primo Central, and it will also continue to offer Find Database functionality.

MetaLib Advisory Group

The MetaLib Advisory Group (MAG) is a group of customer representatives put forward by IGeLU and ELUNA MetaLib PWGs and agreed with Ex Libris. The objectives have been to help set priorities, understand customer workflows and end-user needs, help solve design problems and come up with new ideas. There have been three meetings so far, to determine requirements of MetaLib NG, the integration of Primo Central in metasearch, and the front-end.

Next steps are to continue the work of the MAG in refining MetaLib NG requirements, to examine the broader picture of federated search usage in particular in light of the take-up of Primo Central by customers, and to continue the analysis process.

During Gilad's presentation a short talk was given by Lukas Koster, a member of the MAG, underlining some of the requirements of MetaLib NG. For searching Lukas pointed out that the

current quicksets and categories is confusing and suggested that quicksets could be dropped to be replaced by a single flexible non-hierarchical and “multi-relational” mechanism for administering categories. Normalisation of author names and subjects is needed, as is a multilingual subject search.

Results processing – merge, deduplication and ranking – needs improvement and results presented to users as soon as there’s something to show, to give users an impression of high performance. A configurable ranking algorithm is required; and limits regarding numbers of simultaneously searchable databases (default 8) should be removed and fetched results per database (30) should be improved. Reports also need improvement.

Questions and Answers session

The MetaLib product update was followed by a short Q&A session at which Gilad Gal answered a number of questions submitted in advance by MetaLib customers.

1. Selling MetaLib

- Materials to help ‘sell’ MetaLib within your institutions are available from the Ex Libris website
- Activation of the Primo Central Index and the new Primo service for MetaLib customers (using Primo technology and user interface) should revitalise MetaLib

2. View Resources changed: unreliable

If you experience problems with viewing resources, please place support incidents in the Pivotal CRM

3. Perl classes

In general, support for existing Perl connectors will continue. If we find during the design and development that there are more efficient ways of working we may choose to support different technologies in the future. The goal is to get to the best electronic material discovery and delivery solution and we will use the technology we find most efficient to get to this goal.

4. Search interfaces

Design and development work on search interfaces for MetaLib NG is yet to be finalized: more feedback is required to determine how effective such interfaces will be

5. Four most important functionality requirements to Ex Libris and four most important functionality requirements to customers

- Ex Libris don’t have a list: our goal is to best answer the customers’ requirements
- Core discovery requirements by customers include ranking quality, search performance, wide search scope, categories, and filtering results

6. Primo Central Index and MetaLib NG

The PCI and MNG are complementary: Primo Central is a new MetaLib component covering the great majority of relevant electronic resources with MetaLib providing the remaining CKB coverage plus local resources. Any development we do in the future for electronic discovery should be evaluated in light of customers’ and end users’ adoption and feedback about the new Primo service for MetaLib customers.

7. MetaLib NG and Primo Central: integration in Primo

- MetaLib NG will include *most* current MetaLib functionality
- The Primo Central Index user interface *is* Primo
- PCI Searches will carry forward into MetaLib, notwithstanding login

8. MAG: influencing the development of MetaLib NG

The MetaLib Advisory Group can influence Ex Libris thinking on MetaLib NG but the final decisions are Ex Libris' own. See above for a summary of the MAG and its current work with Ex Libris.

9. List of PCI resources

A list of Primo Central Index resources will be provided in the next couple of months and will be downloadable from the Documentation Centre?]. It will be updated on a regular basis.

10. NERS: priorities in CKB

Ex Libris will receive 6 recommendations to add resources to the CKB from NERS every 2 months. 4 of these will be global requests, 2 regional. Necessarily, business factors will be taken into account when deciding whether to include these requests into the CKB.

11. Scoping searches in PC

- It will be possible to toggle the default search view between MetaLib and the Primo Central Index search scopes.
- For the future, there is the potential for exploiting user metadata to refine default search scopes in line with characteristics about users

Summary

Ex Libris are committed to providing the best discovery and delivery solution in response to feedback from its customers.

Business meeting

The MetaLib product update meeting ended with a short business session at which outgoing PWG coordinator Meg Bate thanked her committee for 2009-10, gave a brief overview of the PWG's activities over the last year, and introduced your PWG members for 2010-11. These are:

- Jeremy Acland - Queen Mary, University of London (2007-) Co-ordinator
- Jussi Brunberg- National Library of Finland (2009 -)
- Stefan Lohrum - KOBV Berlin – Germany (2008 -)
- Meg Bate – AARLIN Melbourne – Australia (2007- Jan 2011)

Very many thanks are owed to Meg for her many achievements during 2 years of coordinating the MetaLib PWG.

Lukas Koster, University of Amsterdam, will continue as MetaLib's liaison with the IGeLU Steering Committee.

And that's it - next stop Haifa!

Jeremy Acland
for IGeLU MetaLib PWG
Sunday, 31 October 2010