MetaLib Product Update and Q&A

IGeLU Helsinki 2009

Preamble

Most of this session comprised presentations first from Carmit Marcus, who gave an overview of new functionality introduced to date in MetaLib 4 up to release 4.3; and Gilad Gal, who described current Ex Libris thinking for Next Generation MetaSearch.

Overall MetaLib objectives are to reduce total cost of ownership (TCO) by:

- simplifying maintenance by introducing previously Unix-based functions into an expanded and reworked back-office, including the introduction of increased granularity for access control and wizards to streamline workflows, eg for quicksets management
- providing an expanded toolkit and integrating it into the back-office, eg a deep-link generator, additional X-server functionality, the ability to change look-and-feel through back-office management of stylesheets

Meanwhile the knowledgebase continues to grow, with 427 resources added between August 2008 and August 2009, of which 90% had been provided with Z39.50 or XML connectors and 30% were 'regional'. Full-text and peer-review (a full-text button with a tick in it) indicators were now supported, and there were also new options for saving records to EndNote and in RIS format.

The ongoing development of MetaLib is now part of Ex Libris' overall URD^2/URM strategy (Unified Research , Discovery and Delivery). The aim is to include key MetaLib functionality built using Primo technology, including a next generation UI (with database selection in a lightbox over ongoing searches), providing a framework for easier support and greater flexibility for popular enhancement requests, and resulting in improved search performance and a lower TCO. MNG functionality will be phased into Primo 3 and 4 which will provide the upgrade path for MetaLib customers, with Primo 3.1 (q3, 2010) for existing Primo customers and Primo 4 for non-Primo customers. There will be no licensing implications for existing MetaLib customers.

Onward MNG development will be continued with the PWG, including discussions, use case scenarios and a customer survey. The PWG will be asked to help define scope: identify functionality to preserve, to implement differently, not in use or required, and new functionality. A customer advisory group (CAG), comprising a range of different experienced customers by geography and type who will not need to have Unix ability, will advise on development in an iterative process.

Q&A section

The session then moved into a Q&A section in which Carmit and Gilad answered questions that might not have been covered by their presentations. The feeling of the PWG is that all your submitted questions were answered, either directly or implicitly, except one on eBooks and possibly one on eJournals that were not addressed at all.

The MetaLib Q&A questions submitted to Ex Libris were not answered in the form in which they were submitted, but were answered either implicitly as part of Carmit's and Gilad's presentations or in a composite manner presented after the presentations. Detailed functionality for example will be addressed as part of the design of the MNG in discussion with the CAG but the submitted questions themselves provide important input.

Here follows a list of the questions submitted, together as far as we can ascertain with Ex Libris' answers. Further questions and points raised during the Q&A are included at the end.

Question 1:

- In Madrid at IGeLU 2008 Ex Libris announced the "next generation MetaSearch tool" as successor to MetaLib. It would consist of a completely re-designed MetaSearch backend and Primo as frontend. Until now we have only heard of the Primo frontend developments (since recently there is only one product manager for Primo and MetaLib).
- But what are the plans for the new backend? And will the current MetaLib customer base be involved in the re-design?

Frontend and backend will be redesigned. Customers are to be involved in the process. MetaLib 4 back office enhancements were summarised up to and including MetaLib 4.3. Subsequently MetaLib NG (MNG) front/back end will form the metasearch component of Primo to URD^2/URM conformance respectively.

Question 2: Will the new Primo MetaSearch continue to have information buttons for each resource with descriptions, links to guides and tips?

Answered later implicitly. This is a specific detail.

Question 3: Will My shelf still exist in new Primo MetaSearch and will it be more user friendly. For example are wording and options for export of citations cryptic and complicated.

Answered: e-Shelf will continue to be available in MNG.

Question 4: Will e-books be presented in subject categories in an existing classification system (like Dewey), and with search on title or free text?

Not answered: e-books were not mentioned in the session at all; and it is still unclear what plans are for e-books

Question 5: Will lists of databases, journals hits be scrollable and continue more items than now? 100 items should be shown in one list. The user should also be able to select the number of items in a list (preferences)

We were shown the lightbox idea in a wireframe whereby the object would be to do a search and then refine it by adjusting the databases being searched by a variety of ways – title, category, A/Z list &c – and then repeating the search by pressing the button. It wasn't clear whether one would have to do an initial search or select the resources first.

The 100-item lists is a specific that perhaps ExL haven't yet decided (go to end). MetaLib can be configured currently to allow up to 99 resources to be simultaneously searched (with a performance implication note).

Question 6: Will the new Primo MetaSearch allow Users to select resources before searching, for example from a database list within a subject category?

See #5 for lightbox observation. Certainly resources will be selectable by subject category as before but ExL seemed unclear on whether resources should be selected first or whether a search should be done – or whether the user would be given the option to either. It was clear that users would be able to refine results by adjusting searches on the hoof, although the search button to repeat the search on the new selection.

Question 7:

- Will the new Primo MetaSearch continue to display categories and subcategories for easily finding all databases within a single subject?
- b) will it be possible to transfer this list to a Metasearch screen?
- As now, you have to select category and subcategory again.

Again, the lightbox idea suggests that the answer to the first bullet is 'yes', while also making the 2nd bullet redundant.

Question 8: <u>The future of MetaLib – MetaLib today and the next version.</u>

a. The next version of MetaLib is supposed to have the same User Interface as Primo. What functionality of the recent MetaLib /V will be accommodated in the new version, and what new end-user-features are planned for the new MetaLib-version?

Core [MetaLib] functionality will be included in MNG, with detailed design currently under way. Prioritization will be determined in consultation with a customer advisory group (CAG). While 'core' was not defined, examples of 'new' include: 'Did you mean', tags, ratings, reviews, recommendations.

b. We assume that the new version of MetaLib will preserve most of the admin-functionality (/M) implemented in MetaLib today. Are there any new features planned in the new version or any differences in admin between the recent and the new version?

Answer is: yes

c. Our consortium is also using MetaLib to administer and present resources which are not part of MetaLib CKB. We are using listing and browsing functionality in MetaLib to present both searchable and link-to resources as well as their links to native interface. How will this functionality be transferred to the new MetaLib?

Detailed functionality and prioritization thereof will be addressed in conjunction with the CAG.

d. Further development/future of MetaLib beyond the next version in relation to URM development?

MNG front-end will be part of the URD^2 and will support multiple search technologies and back office functions will form part of URM, [in line with] ExL's strategy [to] de-couple URD^2 from URM.

Question 9: Journals in MetaLib.

a. Integrating SFX-A-Z lists in MetaLib is not satisfactory today. Is it possible in the future version to provide deep linking to journal categories in MetaLib? Deep linking to journal categories is today only possible through SFX.

b. It should be possible to group My Journals into self defined "categories/groups" and save them in My Space in MetaLib. Any possibilities for including this feature?

Question 10: Search in MetaLib

- Clustering today appears only on merged lists. Is it possible to make changes so that clustering also appears on result lists from search in single source?

Answer: this will be addressed. See also 8 above

Question 11: Will the new Primo MetaSearch continue to have information buttons for each resource with descriptions, links to guides and tips?

Answer is: yes

Question 12: Will the new Primo MetaSearch continue to offer links to the native interface?

Answer is: yes

Question 13:

- As the new Primo MetaSearch will not be available by end of 2010 and because of this time lag for the new product, would it be possible for Ex Libris to consider one more round of MetaLib enhancements. There are still a number of minor enhancements (Listed in the MetaLib enhancement voting list) that could be included in such update.

Answered in the sense that ExL have made it clear that MetaLib 4 is the last major MetaLib release, and 4.3 the last minor release of any consequence, before MNG. However ExL will continue to release patch cumulations (cf 4.3.2), and the CAG will be consulted on the design of MNG

Question 14:

- Will Ex Libris still continue to support the X-Servers? I am asking this because of the increasing popularity of Dave Walker's Xerxes

Answered: "Yes". Ex Libris will add new rather than change existing functionality

Additional

Question 15:

- Will the new PMS support multilingual versions (other than English)?

Answer: The question is acknowledged but the answer is not known at this stage, but [ExL] realize this is important

Other notes

Other points that came up during the Q&A session and not covered above were:

- Provision for MetaLib backup will be made as part of Primo MetaSearch back office functions
- It's not known yet whether external programs written in perl will continue to be supported in MNG. There may be performance implications but the intention is to support external perl scripts if possible
- It will be possible to extend searches to all databases in a given subject by way of the categories search in the Primo database selection lightbox
- There will be full lists of databases
- It will be possible to upgrade from Primo 1 to Primo 4 without having to upgrade to Primo 3.1 first

Postamble

The non-availability of Primo Central, and PM/MNG functionality until Primo 4, to non-Primo MetaLib customers was controversial and by the time of a full Ex Libris Q&A on the last day of the conference, Ex Libris had promised to rethink their current stance on both these issues. However no commitments were made and we await future developments.

However the underlying principles behind the migration of MetaLib into an URD^2/URM framework that enhances the user experience seem good. It makes marketing sense on Ex Libris' part to concentrate development on a product core which can support their full range of products since such a service would be easier to support, thereby resulting in greater efficiency for us customers.

Nonetheless a strategy that includes non-availability of Primo Central to non-Primo MetaLib customers, and effective non-appearance of new MetaLib functionality for non-Primo customers until 2011, is unfortunate. It is to be hoped that Ex Libris will be persuaded to provide smooth MetaLib development as well as Primo Central in particular to those libraries who are already committed to a non-Primo enterprise search solution, or who want to review the marketplace. In this way Ex Libris can retain the loyalty of *all* its existing MetaLib customers.

IGeLU MetaLib Product Working Group
Monday, December 07, 2009

Stop Press!

1. Ex Libris' slides of the presentation are now available via the Documentation Centre, at (http://docs.exlibrisgroup.com/docportal/ -> Cross Product tree search -> Seminars &c -> Helsinki -> MetaLib Product Update).

2. Primo Central to be made available to all MetaLib Customers, included in the MetaLib KnowledgeBase annual fee (Nancy Dushkin, email, 19 November 2009).

   Primo Central, to be released in beta at the tail-end of 2009, will initially cover more than 150,000,000 journal articles and e-books. By the time of its release to all MetaLib customers as a MetaLib "super-search" target in mid-2010, Ex Libris anticipate the participation of all key publishers, at least a three-fold increase in the number of items, and the inclusion of additional types of scholarly materials.

   This change of heart on Ex Libris' part is at least in part due to the work carried out by the MetaLib Product Working Group, the IGeLU Standing Committee, and the IGeLU and ELUNA organizations as a whole on your behalf.

3. The Product Working Group, with ELUNA and Ex Libris, are currently short-listing candidates for the Customer Advisory Group who will work closely with Ex Libris on the design and functionality of MetaLib Next-Gen. Watch this space!