



#### Implementing Verde

Dr Richard Cross, Nottingham Trent University, UK IGeLU, Brno, September 2007

### Describing...

- Verde implementation: NTU's timetable to date
- Implementing Verde: advantages in NTU's favour
- Implementing Verde: challenges NTU has faced
- Issues in Verde 2.0 as an application
- Verde phase one 'go live' July 2007
- Verde phase two implementation plans

### Verde implementation timetable to date

- First UK (second global) site to take Verde 2.0 May 2006
- Ex Libris Verde training June 2006
- Extended 'trouble-shooting' and development June-December
- Devolved responsibility for SP and KB updates January 2007
- Resynchronised SFX-Verde KBs April 2007
- Interoperability progress Verde-SFX; Verde-ALEPH May 2007
- Phase one 'go live' July 2007

### Implementing Verde: local advantages

- Non-consortia environment
- Library Management System ALEPH (single Admin Lib [ADM])
- Link Resolver SFX (single live instance; no complex institutes)
- ALEPH not previously used for electronic ordering no need to migrate ERM data ALEPH > Verde
- LLR's fourth Ex Libris product implementation
- Strong and effective working relationships with UK Ex Libris office

# Implementing Verde: local challenges

- Local ERM data held in variety of local bespoke systems and applications – fragmented, complex (and incomplete) data set
- Technical implementation managed by same small team responsible for ALEPH, ARC, MetaLib, SFX and Digitool – issues of workload and competing demands
- Need to cope with a fragmented stop-start implementation process
  difficult to sustain momentum while awaiting bug resolutions
- Electronic resource librarians have not yet had the opportunity to exploit the application one year on from their initial training
- Difficult to sustain credibility of application as delays extended not used to spending a year implementing an Ex Libris product; similar problems would not be tolerated in a public-facing service

#### Issues in Verde 2.0 as an application

- Existence of a frustratingly large number of instabilities and flaws in v.2.0 of the application
- Challenge of securing effective and dependable Verde-ALEPH and Verde-SFX interoperability
- Lack of comprehensive documentation inconsistent quality
- Need to focus disproportionate effort on 'getting the basics to work'
- Hold-ups in being able to implement and explore the higher-end, added-value functionality of the application
- Delays on the part of Ex Libris to acknowledge the breadth of problems affecting Verde – and the reality of a great deal of common customer experience

### Ex Libris and issues surrounding Verde 2.0

- Implicit acknowledgement of Verde 2.0 'issues' by Ex Libris –
  withholding customer management of Verde SP and KBs [Summer 2006]
- LLR acknowledged as amongst leading UK implementers, even though not in production (NTU as Ex Libris Verde reference site)
   [Autumn 2006]
- Customer dialogue begins to reveal shared experience of frustration, bug-battling and delay [Spring 2007]
- Ex Libris System Seminar customer representatives meet senior product and company managers [May 2007]
- Ex Libris to announce Verde plan of action; NTU invited to work as one of four 'implementation partner' sites [July 2007]

# NTU: phase one 'go live' - July 2007

- Verde and SFX Knowledge Bases fully re-synchronised
- Localised Verde KB reflects NTU's subscription profile
  - Local Work record / e-Product records created for Standalones absent from GKB
  - Standalones, e-Packages and e-Constituents activated as appropriate
- Verde-SFX interoperability secured and operational
  - SFX activations / de-activations managed through Verde (with caveats)
  - Two-way 'look-up' connectivity attained and tested (Verde>SFX / SFX>Verde)
- Verde-ALEPH interoperability secured
  - Two-way 'look-up' connectivity confirmed (Verde>ALEPH / ALEPH>Verde)
- Initial work to enrich e-product records (with Admin, Usage, Access, Trial and other data)

### NTU: 'phase two' implementation plans

- Work with LLR colleagues to embed Verde operationally
- Work with Ex Libris as Verde implementation partner
- Confirm (and customise) full interoperability with ALEPH
- Populate Verde with ERM data (*Licensing, Usage, Admin*)
- Develop reporting functionality (*Renewal, Trial*)
- Explore 'Workflow' functionality ('lifecycle' management)
- Cascade training and set-up logins for LLR colleagues and teams

Commitment is undimmed!

No desire to scale-back expectation – want to see Verde as successful ERM at the heart of Ex Libris product suite