

SWAN Advisory: Discovery and User Experience (DUX)
Thursday, January 24, 2019

Notes

1:30 PM – 3:30 PM

Oak Brook Public Library

1. Welcome, introductions, and designate scribe
2. Review of recent outages and Enterprise issues
 - Tara introduced discussion on the issues experienced on December 26th. Ian provided an overview - towards of last year we encountered system load spikes and found quite a few exploits in the past month on how we can cause the system to come to a halt. Item availability brings up individual calls for every search result. We found items with a large number of holdings could intentionally bring the system to a halt. Null searches should not be done as a home page search default. Making item availability visible only at the item display page resolved the issue.

SWAN IT worked with SirsiDynix to throttle web services data calls. The timing was not ideal and SWAN made the decision to keep the holdings widget disabled until after Azure migration.

The Azure migration brought some additional problems. While extensive testing was done in advance, including a membership-wide request to connect on December 13th, there was one area we could not test in advance. Those were extensive SIP connections at the same time, including eresources. We worked 2 straight days with SD to look at what was happening. SIP connections are memory intense and system monitoring tools available on the new cloud infrastructure allowed engineers to observe these memory demands. SWAN is currently capped at 200 simultaneous SIP connections. The system has been stable; reports are running faster.

VPN tunnels do occasionally renegotiate – now that we are in a virtual environment, tunnels are managed by different VPN firewalls. We now renegotiate every 24 hours immediately after midnight. All firewalls we manage have been reconfigured and we continue to work with all self-maintainers and contractors on the library side to get these new parameters in place. Environment tuning allows immediate allocation of resources. Monitoring tools enable more detailed analysis of systems. Ton of flexibility and gives us a chance to manage resources and boost allocation of resources, as necessary when needed.

During this cloud migration we established more structure communication with members, relying on our new website to track Known issues.

- Enterprise Search Results Holdings display was turned back on around 10 AM, Thursday, January 24. The consensus diagnosis is that the cause of the “day-after-Christmas” problem coincided with the exact day when Public Web Browser (PWB) licenses expired. Heavy traffic

originating from within SWAN member libraries, as seen with Google Analytics further supports this cause.

- Novelist content will be reenabled as soon as the Green Hills migration is complete.
- Discussion: If SIP is an old technology and requires so many memory resources, what can we use instead. SWAN is moving towards OpenAthens authentication for all external connections. SIP sends a lot of data and is not overly secure. SIP2 connections to external services is not secure, not protected, and not encrypted. For example, if using Overdrive with pin encryption it sends the pin in clear text. Goal is to eliminate external SIP2 connections by the end of the year.

3. Review enhancement forum voting

- Lauren demonstrated in Mentor how to participate in the Enhancement Forums. She shared the enhancements submitted by SWAN. SWAN will make the enhancements on the membership's behalf. SWAN might be able to feature the SWAN submitted or SWAN endorsed enhancement requests for voting.
- There are two steps to enhancements. First, the forum allows open voting and then there is Official User Group Voting.
- SWAN members can submit an enhancement request by opening a support ticket. We will submit as an enhancement or review solutions/workarounds that would be useful. Example: bug with last page click bringing down Enterprise. Tara submitted enhancement request to address and also mitigated the problem.

4. BLUECloud Mobile discussion

- Process has just started to configure the Mobile app. One SWAN app, once you sign in, you get your own library's template/access to collections/logos, etc. Need to agree on app name and description that will appear in the app store. Keywords are limited and may not be the way people find the app. Patrons are more likely to find the app from the library's website. SWAN will also make the app availability/access on Enterprise profiles.
- The app description will include a full list of libraries, although description content is not searchable in the app store. While constrained in character count, we will work to include both library name and towns where the name of the library does not convey that information.
- Look for a survey on configuration information for the mobile app, including calendar of events RSS feed URLs. For the initial config, we will link to a library's events page on their website, if we are not able to get an RSS feed. Ebook downloads page, online databases page, contact pages are also prominent links libraries may choose to include in the mobile app configuration.
- Tara has a call with SirsiDynix on January 31st to review the search configuration. We will not have the ability to use the 590 formats. Tara will send BLUEcloud mobile demo app links. Recent upgrades to the app integrated the ability to pay fines directly through the app.
- Timeline – late April go-live. We are the largest group to go live with BC mobile. We will have a demo period in March and will be able to do some customization on the admin side.
- While the initial app configuration will be coordinated and completed between SWAN UX team and SirsiDynix, libraries will have the ability to administer local information and

featured content. SWAN plans to host online training on these administrative features. In addition, live training for the DUX team is planned for the March meeting.

5. Group purchases discussion

- Robin brought the group up to date regarding some vendor contact. These should be considered consortial purchases, rather than Group Purchase. EBSCO came into the office to meet and we discussed targeting subscriptions that are widely used within the SWAN membership and how to identify a core group of resources. Robin has also talked to Gale. Gale is eager to do a demo but we have put that on hold until we have some pricing info. Proquest, Kanopy, Lynda.com have all been approached – so far the most promising vendor is Lynda. Typically vendors split sales people into academic and public. Lynda wrote a contract for OPLIN. OPLIN has licensed for the entire state of Ohio and offers access to the entire state of Ohio. Proquest discussions included of Chicago Tribune and historical Tribune – the benefit of doing a license centrally would be to lower the cost across the consortium individually.
- Robin will conduct a survey about electronic resources. What resources would most benefit your library and your patrons?
- Discussion: Is this an idea on the horizon and when will this be feasible and actionable. When working with vendors, we need to consider how to roll-in/pull-in existing contracts libraries may have individually.
- We need to coordinate with RAILS and the group purchase arrangements they have in place. RAILS has a group purchase and base contract for Career Online High School, so we may be able to work with them directly as a partner to extend their group contracts across the membership.

6. Article Search configuration demo

- Robin has been reviewing Article search configuration settings and working to make these consistent and follow best practice. Article Search works as a federated search of database resources via api integrated within Enterprise. It can be considered the “research” function of Enterprise. The data configured in EBSCO/Article Search came from early configuration by EBSCO and some library submitted Patron Database Questionnaires. Robin is reviewing all these configurations and will not make changes if your library is actively choosing the configuration options in use. However, findings show most libraries have not and do not wish to manage the resources and configurations.
- Given the nature of the resources surfaced and that this is a federated search, Robin has established the following requirements when configuring Article Search:
 - database is full-text
 - research starter is free and included
 - if search term matches exactly to a journal title it will list that journal
 - narrowed to full text and library-only; search within full-text fields
 - Title of journal = Source
 - Abstract – limits search terms within abstract
 - Patron access is via Find Full Text button which opens up in the EBSCO host database so that the full citation is available, from this page patrons can access

the full article. [Note: some databases are 99% full-text, but there are cases where abstract is only available. In these mixed full-text/abstract databases, the database is defined as full-text and therefore Find Full Text can occasionally surface only abstracts]

- Authentication is via OpenAthens and does not require repeated authentication for each resource.
- Article Search can connect other databases, they do not need to be EBSCO.
- Discussion: Students at Downers Grove love Article Search and find it very useful. Initially finding the “Article Search” tab is difficult in Enterprise, but once they find it, it is easy to locate in the future. Messenger has found that when using the OPACs they are locked down a little too much and links may not open. It would be helpful to share how to configure PWB to allow these links, as well as a list of database hosts to include for exception linking.

7. Discovery platform R&D discussion

- SWAN UX team has been in touch with Bibliocommons and the Nashville Public Library’s use of Pika. These talks, demonstrations, and research are prompted by SWAN’s strategic planning process and DUX feedback in a need to assess Enterprise and alternative catalog options. These talks are investigative only at this stage. Enterprise is included in our SirsiDynix services contract so any alternate catalogs have cost implications that must be considered in the evaluation. Over the next year or so we are looking at alternatives to the Discovery layer. We are also anxiously awaiting Enterprise improvements.
- Bibliocommons – we have eRC with Enterprise, SWAN sets up the api connector to Enterprise without loading MARC records. Bibliocommons does not have all the vendors that we are currently using. Overdrive, hoopla (excluding music), Cloud Library are currently available as external connectors. Axis 360 is not.
- Pika is an open source catalog, developed by the Marmot Consortium in Colorado. It is an extension of VuFind. They took VuFind and developed their own discovery tool that is far removed from the main VuFind branch. Every library that is using Pika contracts with Marmot consortium but Marmot is not accepting any new discovery partners in 2019 due to going through strategic planning.
- Regardless of platform, including continued use of Enterprise, high on our priority list is the ability to group records. Search relevancy is also critical. Both Bibliocommons and Pika look at number of holds, how recently searched to weight relevancy, resulting in a more current relevancy results. We will also look at a couple of academic discovery platforms in the evaluation.
- We are developing a feature list looking at systems. Will bring this to DUX after review by SWAN management team. We will look at doing a weighted matrix [e.g. make sure we can place holds on eRC titles within the discovery platform] Robin calls this process the “The art of quantitative analysis”

8. Progress on usability test recommendations

- Tara demonstrated the combined physical and electronic facet. Usability test indicated this as a source of confusion for patrons and a high priority to address.

- Lauren is developing new format icons to reinforce downloaded vs physical formats. These icons will clearly show a download symbol for all resources requiring download and they will be format descriptive as well (e.g. book and downloadable book will have some book icon, but downloadable will also include symbol for download) The icon set will be sent to DUX for preview.
- Timeline for roll-out will be shared with DUX and the membership prior to release.
- DUX members would also like SWAN staff to continue reviewing messaging around hold placement actions. SWAN will compile a list of messaging for review. Would like to consider changing the “success” message received when placing a hold with something more meaningful related to the process of how holds are processed so that patrons have an idea of what “success” means.

9. Next meeting February 28th

Attendees:

- Nick Ayala (Itasca)
- Jessie Affelder (Messenger)
- Molly Bitters (Eisenhower)
- Susan DeRonne (Glen Ellyn)
- Graham Dostal (Tinley Park)
- Doug Ferrini (Tinley Park)
- Laura Hays (Carol Stream)
- Greg Hunt (Frankfort)
- Michelle Kurczak (Messenger)
- Joy Matteson (Downers Grove)
- Angela Romano (Oak Lawn)
- Jane Shelton (St. Charles)
- Sarah Slack (St. Charles)
- Scott Brandwein (SWAN)
- Robin Hofstetter (SWAN)
- Lauren Levaggi (SWAN)
- Michael Szarmach (SWAN)
- Ian Nosek (SWAN)
- Dawne Tortorella (SWAN)
- Tara Wood (SWAN)