LC 1/12/17

Jim Roberts, Tom W., Lisa H., Deborah, Emily Lynema, Ginny, Emily Daly, Data biz, Guo Jin, Phil Stern, Sean Bissell, Graduate Studies government, Tim, Charles Piot, Ann, Bob, Naomi

1. Introduction and announcements

Thank you and welcome to the semester. Announcements: it’s budget season right now.

1. Tim will announce this session on TRLN (The Triangle Libraries Research Network).

A couple of weeks ago, we had a conversation about demonstration of projects we’re working on around - catalogue search, planning materials, and library materials. We have a new project with TRLN that would address the search issue. The search you experienced today uses a software called Endeca. It was introduced by a project NC State did in 2006. It was such a success that TRLN and other universities wanted to use it and spun off Open Source projects. Project Viewfind that mimics Endeca, and Project Blacklight. Those projects were used for 10 years. Endeca was for a for-profit company. Oracle had different ideas on how to use the product. What we currently use is very small portion of what the platform is now. The interface doesn’t have the same priorities the libraries have, in terms of discovery. We thought it was time to do a review and think about another project.

I’m Emily from NC state, and have been there for 11 and a half years. I have more history than anyone else on this project here. We’re going to talk about the history with TRLN and what’s available to you all, where we’re headed, what the goals are, what we hope is the timeline of the project.

The Triangle Libraries Research Network is a collaboration with the four university research libraries in the area. It started with Duke and UNC, and added NC state and NCCU. The idea is that we could have one research collection serving one user community across four distinct institutions. We wanted to have unlimited research sharing. In order to support the infrastructure, we started working on Search TRLN to give patrons a single place to search across the different libraries without having to go through each own institution. We created a centralized resource to search as our collections grow and change.

The idea was that within a few clicks, you could have access to materials from different university libraries. Over the course of the year, we saw that we were duplicating the same process, and in 2011 we implemented the interface you use today.

You can easily go back and forth between Duke and TRLN’s catalog. If the institutions have the same book, they come up as one record. It’s not perfect, but we are working on it. Why make a change? In 2013 the centralized person we had for this project left and started his own business. Since then, we haven’t had the staff and expertise to support this. The library community has been trying to support new interfaces and make it easier for students and faculty to support collections. We started the Shared Discovery Search Project with the idea of coming up with a new Open Source solution.

We hope to increase collaboration with the higher education community. We will be able to collaborate with universities such as Stanford and Cornell. We hope to be able to pull them into our interface. What do we expect as an outcome?

We‘ll maintain the same infrastructure we have now. The biggest change is we will have a different code base for the catalog interface. The functionality will remain similar. The benefits of using an open source system like Blacklight (user interface) is that there is a large community of developers who are working on this with us. We’ll also be using Solar on the backend. Oracle only provided the backend piece. The front end are things we have developed ourselves from scratch. We are doing this through different levels of collaboration. We’re working with our peer institutions to catalog this experience. The idea is to facilitate discovery across the consortium to optimize our stack resources. We are a shared community, and we’re doing the same thing so we’re trying to be more efficient.

Our different levels of governance are: we have a shared discovery services advisory team. Under that, we have a shared discovery steering committee, chaired by Emily Lynema. Beneath that, we have three teams working to operationalize this project. One working on Data Extract & Ingest Implementation, one technical infrastructure implementation team, one user experience & service implementation team. Those teams are all working independently, but also reporting to the steering committee.

Our three tenants are project management, communication and sustainability. We are responsible for the project success, we are using basecamp to communication across the three teams and to the steering committee. We’re also responsible for bringing that progress to our individual institutions and for communicating about the project.

Sustainability – post roll out, how do we work to sustain and support after the development phase? What is the long term governance model?

The steering committee – we have representation across the libraries: 2 from NCSU, 4 from Duke, 5 from UNC, 2 from TRLN. Shashi Penumarthy is our applications analyst, a new recruit. He’s been fantastic and working very closely with the infrastructure team. He will be a real asset to this team. He is the program officer with TRLN and working with Emily L with project management.

Our project plan is:

-Oct/Nov: completing review of technologies considered for the new shared catalog. Blacklight was selected.

-January/Feb.: working to identify our feature list that will be shared in the new catalog. What have faculty and students identified as far as their needs and wants in the catalog?

-Through June: we are going to be actively developing the catalog.

-Through July: we are going to embark user testing and getting feedback

-In August: there will be a beta catalog.

In the fall, we will be customizing it locally. In December we will go live and Endeca will no longer be in use. Emily D will talk about questions we need from you guys and how we’re going to deploy this at Duke. We’re interested now in hearing from you what you expect from this kind of a tool, what you think exactly must happen. How would you like to be informed and involved moving forward? How do you think other faculty would want to be involved and informed?

Glasses: In my fantasy land, there’s a button on top that reads “request from libraries worldwide” – less time typing in my username and password in library website. Linking up with WorldCat. As researchers, we want to know what else is out there and how accessible it is to go through one search instead of through multiple searches.

Emily: We are certainly looking into that. Worldwide is a bit difficult, but if at any point if you see a book you want that is not in TRLN, you can still request a book that we can get for you through ILL. All of that would happen through the one Request button.

A single interface would be great.

Guo: What about the type of collections – digital databases and ebooks? What about video collections and streaming? At Duke, we have a massive documentary collection. Through this kind of thing, would sharing this kind of access work?

Emily: There are some issues with sharing digital copies, but we’re working on licenses and we hope to open up some of that.

Veronica: Searching text in books - is that something coming up? Search results from inside of a book? These are things that have been raised.

Emily: Stanford is working on a visualization software called Uno that may help with that, but you can learn more about that. We’re looking at those and we could offer a facet that could make it possible to search for that.

?: Why does TRLN go through ILL? Is the goal a more seamless interface where everything can be done? Is that a direction we’re heading in – one collection, one interface?

Emily: There are some kinks in the system. The goal is that you would be able to borrow much more seamlessly. The problem we have is that every institution has borrowing privileges at different lengths. There is a policy breakdown of Duke may be more liberal, Harvard may say you can have that for half of semester. What we’re hoping is that when we have your new interface up you won’t have to go through ILL. It will go directly to the owning institutions and you’ll be able to renew them using the same Duke interface. NC Central is part of the TRLN but they’re not represented. They have made a decision and have a vended interface. They’ve decided to use their own instead of getting on board with us. They’re not part of the collaboration but they are still able to search across TRLN and borrow. Their materials will still be part of the collection. They chose a contract where they give up some control of personalization of their search and the company they use controls the way the search looks and runs.

How do you like to be informed? Updates through Library council.

1. Support for….

I wanted to discuss with you how the Duke University Libraries should support non-traditional and digital scholarly publishing.

The kinds of requests we’re seeing are from faculty around the country, discussions on campus where the library has been involved. We’ve received requests from assistance from Duke faculty. We’ve received requests from Francophone Digital Humanities Initiative. They wanted some sort of hosting on the Duke Libraries site on our domain, so that it was on a scholarly site instead of a .com. That raises some issues not just about hosting, but also how scholarship is on the web.

[Project Vox](https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=0ahUKEwj38-7K7r_RAhUq_IMKHa2nA8EQFggaMAA&url=http%3A%2F%2Fprojectvox.library.duke.edu%2F&usg=AFQjCNGDQO9KHHiXMyH-LmwIsdDjXxGsWA&sig2=Snqk_jLWlW-dvEmiGnoPrg): A number of librarians are involved with that on the project team, assisting in a number of ways with things like identification of courses, copyright management, especially with images on the side.

A recent request from Ed Balleisen: He has an upcoming book on fraud and wanted to create a companion website: *Suckers and Swindlers: A Digital Companion to FRAUD: AN AMERICAN HISTORY FROM BRANUM TO MADOFF (Princeton University Press, 2017)*. He’s raising questions about support needed to create the site to work with his publication coming in the spring. It brings up the concept of multi-model publications.

In a broader sense, the Library Publishing Coalition was founded in 2014. There are 60 plus institutions that belong, including Dartmouth, Emory, Northwestern, Wake Forest, U of Michigan and U of Washington. One example is through the U of Michigan. They’ve created Michigan Publishing Services. They offer web design, and other publishing-related services to help produce particular publications.

Here on campus at Duke, starting mid-2015, representatives of DU press, DUL, FHI, OIT, TTS and VP for Interdisciplinary studies met to discuss who could work together and work on scholarly publishing on the web. TTS joined in the discussions, Ed Balleisen joined in after the discussions began. The discussions moved very quickly to the provost on getting support for these services. We really needed to step back and examine what the needs are and come up with statements from faculty and students who need this service. We asked if they could appoint a faculty committee that could work with us. We weren’t sure the provost was aware of the need or if there was a case made for that previously. We want to identify what is missing from the Duke environment to enable faculty to work on this space. Meanwhile, what steps should DUL take to enhance the publishing services it provides?

We need to identify what services can and cannot be provided with existing resources (e.g. contract review, copyright advice, web design, web hosting, digitization, digital preservation).

Another step is we need to present and promote these series as a coherent suite of series available to the campus.

We definitely want to continue to develop partnerships with other campus units that provide similar or complementary services. We don’t want to compete or duplicate services unnecessarily. There are things that TTS provides that we will not be able to. IT will be much better if it is a collaborative service throughout the Duke community.

With that in mind, I would like to get your reactions and thoughts. What else is going on in this space? The support for digital and scholarly works on campus. What are your needs? Thoughts on services DUL should or might provide.

There’s so much desire for younger scholars to find ways to come up with better ways to do this, and Duke should be in the cutting edge of this and focus on how to do this. It requires a much more thorough response than ‘let’s set up a committee’. It’s a much bigger problem. It seems like we’re pretty far from a reasonable answer to this question.

An issue with digital publishing is the quality. If the library is going to provide some sort of technological support, I feel that it would be wonderful to have digital companions to books and things like that, but we need to go further. One of the spaces is how to move it from self-publishing to something that gets that respected validation and meet that cultural space at the University.

That’s one thing that Duke Press has expressed some interest in. They’re not eager to take on web publishing. The Libraries hosts a cultural anthropology journal and it’s going really well. It’s managed by the Libraries and paid for by subscribers.

One approach is for the Library to look at things like Ed’s website that are a bit different and outside of the mainstream. Part of the question is ‘where do these things live?’ They need a home that’s more flexible than TTS and Duke Press, but that’s part of the question we’re asking.

Tim’s biggest concern is digital storage. A digital website can expire in a year because the technologies are no longer supportive. An interactive interface may need more upkeep. There are certain platforms that exist, like at Lehigh. It’s not an insurmountable endeavor. It will require thought.

Why would the Library want to do this? Because we manage information, and we’re interested in open access.

Thank you for your feedback.

Meeting adjourned at 1:22 pm.