Project Charter

A. General Information

Project Title: Discovery System Implementation
Brief Description: Implementation of a full library discovery system using Blacklight, per the Discovery Strategy Recommendation approved by SLT in September 2013.
Prepared By: Sam Popowich, Discovery Systems Librarian
Date: December 16, 2013
Version: Final

B. Project Objective

The Library's 2012-2016 Strategic Plan contains two discovery-related strategic initiatives:

> 1.1.3.7 Develop and implement discovery tools that work across formats, support a variety of research needs and styles, and bring all of our collections together.
>
> 2.3.3.5 Exploit emergent mobile technologies to connect users to library discovery tools, collections, and services.
>
> (From *Forging the Future, Preserving the Past: A Strategic Plan for the Great Research Library, 2012-2016)* [http://www.library.ualberta.ca/aboutus/mission/Library_Strategic-Plan-2012-2016.pdf])

In order to accomplish these initiatives, the Library has decided to implement a full-scale discovery strategy based on the open-source Blacklight project. This implementation would allow us to provide access across all our collections and data sources while maintaining control over indexing and the user experience. At the end of the project, we expect to deploy a discovery system for use by the entire Library community. This will increase the findability of our resources and the experience of our users (students, faculty, and researchers). This will also solve the problem we currently have of collections which are not currently discoverable, as well as long-standing problems with the user-experience in engaging with library resources.

The Business Case for this project is contained in the Discovery Strategy Recommendation of September 2013 (https://docs.google.com/a/ualberta.ca/document/d/1G8TzQjU4lBPnS30wJ-n7vt0mgrPXWLMumRD_6dC_RXE/edit?usp=sharing)

C. Assumptions

1. The core software will be Project Blacklight.
2. We will continue to use Ebsco Discovery Service for article content.
3. We will integrate all identified metadata collections and maintain their rich metadata, as applicable.
4. We will employ Agile Software Development and DevOps principles in the software development phase of the project, centred around automated provisioning and deployment.
5. The Web Architecture Team will act as the project customer, and will be responsible for overall communication with the rest of the library.
6. We will incorporate user assessment and feedback as early as possible.
7. We will rely on analytics and metrics to provide additional understanding of the project's success.

D. Project Scope

1. The following metadata collections will be indexed:
    - Symphony
    - Ebsco Discovery Service
    - SFX Records
    - Peel
    - Steele
    - ERA
    - Curricula
    - Business Database
    - William H. Wonders Map Database
    - Web Archives
    - CIHM
    - Web Content
    - Microguides
    - PolarInfo Database
    - Internet Archive collections
    - Databases (subject tagging)
    - LibGuides (subject tagging)

2. The following user-interface components will be implemented:
    - A single search box
    - A “bento box” style interface
    - The ability to by-pass single search to target a particular collection
    - Faceted result browsing
    - An e-journals list
    - A database list
    - The ability to place holds, access accounts and find reserves using web services
    - The ability to send call numbers/records via email and text
    - The ability to export records to a citation management system

3. The following software components will be developed:
    - A faceted index using Solr
    - A mobile-ready Ruby-on-Rails web application using responsive design
    - A CMS for the remaining web-pages
    - Dynamic e-journal and database lists
    - Web-Services-driven holds and My Account modules
    - Modules to update records for growing metadata collections (e.g Business)
    - Analytics using JQuery and Google Analytics
    - Book jackets drawn from Google Books
    - Email and SMS modules
    - Export to citation management module
    - Patron-Driven Acquisition Module
4. In-depth user assessment, feedback, and integration of results.

The following items are *not in scope* for this project:

1. NEOS-specific functionality
2. Deprecation of the Symphony/iLink catalogue for power users
3. An API for library data
4. “Inside-out” discoverability
5. Batch “flat” export of records
6. LibGuides
7. A new-books list

E. Project Milestones

** Dates in this table are estimates **only**.

Milestone	**Deliverable**	**Start Date**	**End Date**
Evaluate config/deploy options	Recommendation	1/2/2014	2/3/2014
Determine Hardware Requirements	Hardware Spec Document	1/11/2013	31/1/2014
Purchase or Provision Hardware	Installed Hardware	1/2/2014	1/3/2014
Spec and Set up Virtual Machines	Deployment Manifests, Working Virtual Environments	2/3/2014	15/3/2014
Initial design work		1/3/2014	1/4/2014
Data and Metadata Determination and Recommendation	Metadata Spec Document	1/2/2014	15/3/2014
Software Deployment and Dev Workflow Determination	Working toolchain, deployment	1/3/2014	1/4/2014
Metadata work		1/4/2014	1/7/2014 (3 months)
Software Development/ Testing/QA	Initial Software Release (v. 0.1)	1/4/2014	1/7/2014 (3 months)
User Assessment/ Feedback Cycle 1	User Assessment Report 1	2/7/2014	15/8/2014 (6 weeks)
Implementation/Testing/QA	Software Release (v.0.5)	16/8/2014	30/8/2014 (2 weeks)
Customer Features Approval	WAT Signoff		31/8/2014 (1 day)
Soft Launch			1/9/2014 (1 day)
User Assessment/ Feedback Cycle 2	User Assessment Report 2	1/9/2014	15/9/2014 (2 weeks)
Implementation/Testing/QA	Software Release (v. 0.9)	16/9/2014	28/9/2014 (2 weeks)

WAT Features Approval / Smoke Test	WAT Signoff		30/9/2014 (1 day)
Launch	Software Release (v. 1.0)		1/11/2014 (1 day)
Make default search			1/1/2015
Project Closeout	Final Report, Maintenance and Change Management Plans		15/1/2015

F. Impact Statement

The impact of this project is significant. Not only will ITS be required to support and maintain the existing servers and software, but ITS developers will have to make a commitment to periodically refresh the system, adding and removing features as necessary. Public services will be on the front line as returning users are faced with a new and significantly different website and search interface. Training will certainly be required for staff, and possible for students and faculty as well. The commitment to Blacklight and Solr as our primary library search also has an impact on metadata and bibliographic services: how are the metadata needs of the new system supported? what is the role of the Symphony catalogue? Finally, by decoupling library search from the Symphony catalogue, there will be an impact on how we think about and provide service other NEOS libraries.

The impact of the project not succeeding is huge. We are currently behind other ARL libraries in not having a unified discovery strategy and system in place. Since early 2013, when we cancelled WorldCat Local and the Primo implementation, we have been left with only a partly successful discovery strategy for all our collections, despite its prominence in the library's strategic plan. The Chief Librarian and SLT have strongly endorsed this project. Consequences for the project's failure will be felt primarily by public services units, but all units will be affected. The importance of this project requires a strong commitment from all units, especially ITS, to support the project through commitment of IT and human resources.

G. Roles and Responsibilities

Role	Name	Title
Project Sponsor	Sandra Shores	AUL for BITS
Project Manager/DevOps Team member	Sam Popowich	Discovery Systems Librarian
DevOps Team member	Natasha Nunn	Web Applications Developer
DevOps Team member	Neil MacGregor	Web Programmer
Subject Expert (Web)	Kenton Good	Web Development Librarian
Subject Expert (Metadata)	Sharon Farnel	Metadata & Catalogue Librarian
Subject Expert (Public Services)	Sarah Polkinghorne	Public Services Librarian
Subject Expert (Digital Collections)	Peggy Sue Ewanyshyn	Digitization Librarian
Subject Expert (Digitization)	Peter Binkley	Digital Initiatives Projects Librarian
Subject Expert (Solr)	Tricia Jenkins	Applications Analyst

H. Project Risks

Risk	Description	Mitigation Strategy
Too much in scope	Have we included too much in the project scope for the time we have? If so, do we abandon features or do we go over schedule?	Project Charter approval, and Change Management Plan
Unspecified or insufficient time	Can I count on a specific number of hours per week from the Dev team? Can this be formalized (particular days/times per week). If not,	Apply DevOps tools, techniques, and strategies to more flexibly share the workload across all members of the Dev team, allowing

	a risk is that other project will take immediate priority.	developers to take on some system administration roles (e.g. server configuration) and vice-versa.
Not following Agile/DevOps best practices/tools.	Are we use of version control, virtualization, automation? Have we selected the appropriate toolchain for this project (version control, virtualization, automated deployment engines?)	Failure to follow this best practices can cause inefficiencies and proliferating failure-points, causing the project to fall behind schedule.
Over-schedule	What if we can't get it done by December 2014.	Project Charter approval, and Change Management plan
Scope Creep	Many library projects suffer from scope creep, which change the project requirements and affect delivery date.	Change Management Plan, and formal Change Management Process and Board (WAT)
Lack of clear direction	Some library projects lack clear direction or authority.	Specify Sandra Shores as Project Sponsor and WAT (with its new mandate) as Project Customer, responsible for overall direction and authority).
Not answering users' needs		Rigorous assessment and implementation of feedback.
Staff unwillingness to use the new system		Frequent, detailed, and timely communication; staff training.

I. Success Measurements

- Post-launch survey (Winter Term of 2014) to gauge user's satisfaction with the new system. Hope to get an approval rating of 80%-90%.
- Use Google and JQuery Analytics to determine user's success rate.
- Compare e-book and article usage statistic for EDS with other institutions.
- Compare ILL, Circulation, and Reference statistics for two periods, one in 2014, and one in 2015.

J. Signatures

Customer: _____ (WAT Co-chair) | Date:
Customer: _____ (WAT Co-chair) | Date:
Project Sponsor: _____ | Date:
Project Manager: _____| Date: