UVA Library Discovery Layer Recommendation

Virgo 4 Team, August 2018

We recommend Blacklight 7 for comprehensive discovery of UVA Library holdings via a sustainable technology stack.

Virgo 3, built on Blacklight/Rails 3, is outdated and unable to progress further. For the Library's discovery layer, a modern architecture is needed to better interface with our users.

Virgo 4 Requirements emphasize a discovery interface to the Library's collections that:

- is easy to use for novices
- is robust enough for expert users
- is mobile-friendly
- is accessible to all users
- allows users to personalize the interface
- makes all library materials discoverable
- facilitates both intentional and serendipitous discovery
- facilitates seamless access to materials when possible
- facilitates user requests to other systems when necessary
- enables the retirement of Virgo Classic by incorporating necessary features

Our current stack solution, Blacklight, was developed in 2007 as an alternative to vendor-based search and discovery systems which were inadequate for the needs of research institutions. It was important to re-test that assessment in 2018. Following a comprehensive examination of features, improvements, and revisions requested by stakeholders over the past four years, we selected 58 representative requirements to compare across nine solution stacks used by peer institutions. Two of nine solution stacks merited local test instances and comprehensive review.

- We recommend Blacklight 7 for comprehensive discovery of UVA Library holdings via a sustainable technology stack.
- Sirsi Enterprise is an alternative worth pursuing if the UVA Library departs from the strategy of local implementation of open source solutions.

Comprehensive Stack Reviews

Blacklight: UVA (Blacklight 6 test instance), Stanford (Blacklight 6), Penn State (Blacklight 7)

- Summary: Blacklight 6 and 7 are the next generations of UVA's current comprehensive discovery solution. Local UVA test instance of Blacklight 6 dove into modern features. Blacklight Summit community peer experiences led us to recommend Blacklight 7.
- Pros: dedicated advanced search, works with EBSCO, open source development community, library account integration, Fedora/Samvera integration, Virtual Shelf Browse, works with Sirsi staff-facing integrated library system
- Cons: open source, requires dedicated customization and maintenance resources

Sirsi Enterprise: UVA (4.5 local test instance), Mississippi State

- Summary: UVA partnered with Sirsi Dynix to configure a local test instance to dive into indexing local, special, and digital collections.
- Pros: dedicated advanced search, works with EBSCO, reader advisory engine, integrated with Sirsi staff-facing integrated library system
- Cons: requires annual service subscription and dedicated customization to include digital collections, custom browse (LC call number, headings) and mobile web in next release

Roadmap

	Blacklight 7 (recommended)	Sirsi Enterprise 4.5
Phase 1 (Complete)	• Assemble team • Prioritize requirements from stakeholder input • Community engagement	
Phase 2 (In Process)	• Proposal to SLT • Feature Prioritization • Community engagement: Town Hall Virgo 4 Update, September 17	
Phase 3 (Upon SLT approval)	• Development sprints begin (early & often demos) • Continuous user testing • Roadmap refactoring	• Contract negotiation/signing • Recruit Discovery Engineer skilled in Javascript, jQuery, CSS, HTML, web services, XML and/or MARC21, LDAP and Shibboleth • Development/customization sprints begin • User testing • Feature refinement
Phase 4	• User documentation • Virgo 3 phaseout • Outreach about retiring services, promotion of new • retirement of Virgo Classic	
Phase 5	• Evaluation and adjustment • Full transition to production service	

Additional Stack Reviews

Primo: Princeton, Brandeis

- Summary: Article-centric vendor solution, requires digital collections (including video) to be discovered via separate search applications
- Pros: Browse by LC call number, search inside collections, Aeon login, fast access to journal searching tools
- Cons: Relevance is only default search option, discovery in non-subscription targets requires a separate search instance, no Virtual Shelf Browse, no video search

Summon: Dartmouth

- Summary: Article-centric vendor solution, requires all non-article collections (including books) to be discovered via separate search applications in tabs from library home page
- Pros: 11 bibliographic citation styles available, journal searches with exact titles
- Cons: Relevance is only default search option, need to facet to Full Text Online to find e-holdings, browse title not available, separate searches required for books, articles, and A/V respectively, novel displays via APIs not evidenced

WorldCat: Maryland

- Summary: Article-centric solution, requires digital collections to be discovered via separate search applications
- Pros: Enhanced ability to work with metadata, User Folder saves for citations and email, beta API

- Cons: No series display, options for displaying digital/local/special collections not apparent, no link to Advanced Search from header

VuFind: Villanova

- Summary: Built on an aged technology stack but has mature features to emulate
- Pros: Open source, mature solution, high level of integration with user account functions, "Did you mean" search suggestions, logged-in users can comment on or add tags to individual items
- Cons: Aged technology stack (PHP), very small development community, does not point at digital collection items in their catalog, no Virtual Shelf Browse equivalent

Other stacks considered but unavailable for review:

- FOLIO is very promising but cannot be reviewed at this time as there is no working instance except for a protoype at Cornell. SirsiDynix promises to offers the option to migrate to FOLIO in future when available, should UVA opt to continue with their ILS
- Triangle Research Libraries Network (TRLN) has a multi-year project in process to build a consortial discovery system using Blacklight which may provide some best practices

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