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## The New Summit: Building the Foundation for Enhanced User Services

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# The New Summit:

## Building the Foundation for Enhanced User Services

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On December 1, 2008, the Orbis Cascade Alliance unveiled a new Summit search system (Orbis Cascade Alliance 2008). The creation of this new, much more robust, Summit catalog was motivated by several factors. Most importantly, the Alliance Council, in a 2006 strategic planning effort, identified next-generation discovery systems as a priority initiative for the Alliance (Orbis Cascade Alliance 2009). The most pressing need identified by the Council was to improve the patron interface to meet the expectations of our current users, whose expectations are shaped by services such as Amazon, Facebook, and Flickr.

In March 2008, the Alliance Council met and decided to commit to a product still in development, OCLC's WorldCat Navigator. The WorldCat Navigator solution consists of three components: a customized view of WorldCat.org, which supports discovery; the Navigator Request Engine (NRE) software, which is an extension of OCLC's VDX interlibrary loan software, to support returnable borrowing; and the Circulation Gateway program, which enables standardized communication between NRE and library circulation systems (OCLC, 2009). In the envisioned development partnership, OCLC and the Alliance would work together to create an integrated search/request/delivery solution based upon these software tools.

The essential features of a next-generation discovery system are embodied in the new Summit catalog ([summit.worldcat.org](http://summit.worldcat.org)) and are:

- Retrieval of article records from Summit; indexes include ArticleFirst, British Library Serials, PubMed/MEDLINE, and ERIC.

- Display of post-search filters, or facets, on results screens; these facets include: author, format, publication date, language, and topic.
- Improved relevancy ranking of search results.
- Book jackets displayed in many records.
- Support for user-created lists, tags, and book reviews.
- Ability to customize and extend the catalog through a published Application Programming Interface (API), which provides the information that developers need to customize results and record displays.

One additional element was needed, however, to make this migration a successful one: maintaining the requesting and borrowing capabilities to which Summit users were accustomed. These capabilities include the ability for users to search and seamlessly request items from Summit institutions; to review the status of requests; and to renew and cancel requests. The previous Summit catalog and borrowing system relied upon the Innovative Interfaces (III) INNReach consortial borrowing software and the III Millennium software, which is used by each Alliance library as its local catalog. Because of the tight integration that III achieved with Millennium and INNReach and the high requesting volume of the existing Summit service, the challenge proved to be formidable.

When the Council approved the change to WorldCat Navigator, it also created an implementation team to spearhead



the migration. The Implementation Team managed the WorldCat Navigator implementation; which included supporting the shutdown of the III INNReach system; coordinating software development tasks performed within the Alliance; and supporting communication with and training for Alliance members (Orbis Cascade Alliance 2009). To a great degree, the Implementation Team's work, and the migration as a whole, has been transparent. A search of the term "summit migration" in Google will retrieve detailed information about the migration from the Alliance's Web site, including information on the Implementation Team's work (Orbis Cascade Alliance 2008). In short, the Alliance and its members are taking a leadership role among consortia in the development partnership with OCLC and in the implementation of WorldCat Navigator. Making information on the migration public, when possible, will enable other consortia and institutions to benefit from this work.

It was clear from the start that the migration would be challenging. The deadline required that the migration to Navigator would have to be accomplished in a very tight timeframe and would require an "all hands on deck"



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approach by the Implementation Team, by staff at the Alliance and at member institutions, and by OCLC staff who were assigned to the implementation. Also, the tight timeline meant that the INNReach shutdown process would have to begin in early November, only seven months after the Council's decision to commit to the WorldCat Navigator migration.

Beyond the timeline issue, there were technological ones. During the fall 2007 Northwest Innovative Users Group meeting, Kyle Banerjee presented at a plenary session on next-generation discovery systems (Banerjee 2007). One of the points that Kyle emphasized was the lack of maturity of the then-available discovery solutions, with all of them employing techniques such as screen scraping, use of JavaScript code hacks, and the use of software packages designed for other purposes (such as content management systems). As a result, in order to deploy a much more robust discovery system that would better meet the needs of Summit users, the Alliance and its members had to embrace some relatively immature technologies. Much of the early work for OCLC and staff members working throughout the Alliance went to ensuring the best possible request experience and service for users, given the technical challenges of this migration.

Additionally, it was clear at the March Council meeting that the Alliance would be assuming some local software development responsibilities as a development partner with OCLC. This was quite a change from the previous software support model with III's INNReach, for which the




vendor performed essentially all development work, and improvements in the software were requested and implemented through a lengthy enhancement process. For example, programming had to be performed to support pass-through searching from Millennium systems throughout the Alliance to the new Summit catalog. The programmers went beyond replicating the Millennium-INNReach functionality and implemented pass-through searching that retains advanced search limits, such as date ranges and media types, when passing a search from a Millennium catalog to the new Summit catalog. Developing the OpenURL resolver was particularly critical, because it enables the system to process requests for articles. The resolver is configured so that institutions can set up one or more entries as needed in order to support multiple fulfillment options, e.g., for each campus of a single Alliance institution. These local development efforts are being supported by an Alliance technology group; the programmers responsible for coding specific applications for the new Summit are listed on the technology group's Web page (Orbis Cascade Alliance 2009).

Because the new summit runs on the WorldCat.org platform, only OCLC records are searchable. Therefore the Alliance and OCLC launched an immediate initiative to update the accuracy and completeness of member library holdings in WorldCat. OCLC supported the updating of holdings through reclamation and batch updating projects, which enabled records to be added in WorldCat for holdings not previously represented in the system. Because of the rapid implementation timeline, OCLC worked with the Alliance and member libraries to perform these updates as a high priority (Orbis Cascade Alliance 2009), with coordination provided by the Alliance.



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While the migration work is still in progress as of this writing, January 2009, a number of important milestones have been achieved. The core functions of discovery and returnable requesting and borrowing are in place. All of the discovery features listed at the beginning of the article are now available to Summit users, including the ability to extend the discovery system using a published API (OCLC 2009). Most importantly, by employing WorldCat Navigator, the Alliance has built a foundation that will support the ongoing improvement of user services. The Navigator Request Engine software can support the delivery of articles as well as returnables (books, etc.). The NRE can also support requests for materials held by libraries outside the Alliance, either through WorldCat Resource Sharing, or by transferring request information from NRE to ILLiad, another OCLC resource sharing product.

While OCLC is still developing support for article requesting in NRE, the Alliance has implemented a software solution that has the potential for truly integrating the discovery and delivery processes. Summit users will have the ability to search a growing and diverse set of collections as a single unified collection, and to obtain materials through a unified request system. It's a challenging and ambitious goal, but with the implementation of the new Summit system, the Alliance and its member institutions have taken a big step toward meeting it. 



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