

The Impact on Public Services During and After Implementing a New Catalog

Three speakers discussed the impact on public services staff and library patrons of implementing new catalogs and lessons learned during the transition.

1. Erika Wade Smith described the switch from VuFind 0.6 to New VuFind at Illinois College.

- Single Sign-On integration available with New VuFind streamlined the use of I-Share for the undergraduate student population.
- The small staff size made direct communication and productive meetings easier. Staff tested the interface and provided feedback.
- Full implementation was scheduled for the summer, but the team underestimated the amount of time required, especially on the part of IT staff.
- One important lesson learned: Student workers, who are often the “first line of defense” in the library, needed more training.
- It is important to encourage buy-in. Word of mouth from “power users” like faculty was key during the testing and implementation periods.
- To promote New VuFind, staff sent a campus-wide email with screenshots and instruction videos and worked with CARLI staff to write clear instructions on the New VuFind page.
- The transition caused minimal disruption to regular library services, and users can now use their campus logins instead of a separate I-Share password.

2. Niamh McGuigan detailed the 2015 migration to Alma-Primo at Loyola University Chicago.

- Staff created many Primo training opportunities for students, including one-on-one and group sessions and online tutorials. Users showed little interest in formal training; in retrospect, FAQ or troubleshooting documents may have been more effective.
- Alma-Primo is updated frequently; search results are always changing.
- Public services staff often needed a deeper understanding of catalog records to interpret search results. Tip: Taking screenshots of search results is great for later troubleshooting.
- Primo search methods are very complex: Boolean does not work as expected, full text results are inconsistent, and there are link resolver problems.
- Primo has impacted library instruction. Librarians find themselves explaining the difference between a discovery tool and an OPAC, putting more emphasis on selecting and evaluating sources and less on keyword searching methods, and spending lots of class time on finding full text.
- The migration has made staff more comfortable with project management techniques and created lasting cross-departmental and cross-institutional working groups.
- Public services staff have taken more ownership over the catalog.

3. Geoff Morse discussed the long migration (2013-2015) at Northwestern University from Voyager to Alma.

- Catalog users at Northwestern are at many different levels, from novice undergraduates to faculty “power users”; many were accustomed to old interface NUCat.
- Developed implementation structure in April-August 2013 and made three task forces: Acquisitions/E-resources, Resource Management and Metadata, and Fulfillment/Circulation. Staff hierarchy was ignored in favor of functional experts.
- Teams mapped out current workflows and what to alter. They were able to overhaul loan periods, trim down the number of locations, and reduce the number of patron types.
- In 2014, the new Primo interface NUsearch was announced.
- A communications task force was formed to publicize the transition. The team communicated about the catalog multiple times in many different ways to reach the maximum number of users. Task force members met with different library departments.
- In May 2015, staff worked with the Marketing and Communications Department to mount a series of LibGuides “Tip Sheets” comparing NUCat and NUsearch.
- Feedback on the new interface: title search is easier, searching author in basic search is more difficult, handling of misspellings in searches is better, there are issues with FRBR and deduplication, and Primo Central records can take a week to show up.
- Instruction and reference staff teach the use of facets and post-search limiting more often now.
- Because of the complexity of Primo’s search algorithms, it is sometimes difficult to explain search results rankings or to know what exactly is being searched.
- It is important to give stakeholders and users a chance to be frustrated and to involve staff from all areas.

Submitted by Jessica Grzegorski