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Un exemple de processus d'informatisation: les bibliothèques de Louvain-la-Neuve.

Nyns, Charles-Henri.

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The ongoing story of early implementation of VIRTUA software at the Catholic University of Louvain (Université catholique de Louvain)
Charles-Henri Nyns nyns@bse.ucl.ac.be

Good afternoon Ladies and Gentleman. My name is Ch.H. Nyns. I am Head of the Pure and Applied Sciences Library and Co-ordinator of automated library management at our University.

I have first to apologise for my very bad English which will additionally mar the excellent translation for which I have to thank my colleague David Phillips.

Our University is a (very) early implementor of VIRTUA and I suppose that it will be of some interest to you to know how we got there and how implementation went - or rather goes - on.

5.1 Introduction

To have a good understanding of our situation a little bit of history will be necessary. So As you possibly already know, a separation took place in 1969 between the dutch-speaking and the french-speaking part of the university of Louvain, founded in 1475. The dutch-speaking part remained in the old city of Louvain (Leuven), while the french-speaking part was moved to the new city of Louvain-la-Neuve. The separation affected the entire patrimony of the former single university, including the libraries. The partition of the holdings was done on a purely mathematical basis : the books with even call numbers stayed in old Louvain while the books with odd call numbers went to Louvain-la-Neuve. We have made some efforts to complete our collections since :-).

When Louvain-la-Neuve was planned, it was decided to reorganise the library sector and to go over from one main library to a system of faculty and sectorial libraries. Afterwards some smaller documentation centres, depending on specific research units, were added. The aim was to bring the libraries nearer to the user, but it makes things also a bit complicated.

Lets have a look at the different libraries.

There are two sectorial libraries

- BGSB : Bibliothèque générale et des Sciences humaines : It regroups the libraries of the Faculties of Theology and of the Arts and Humanities (divided into several sections such as art history, history, linguistics etc.) and the Centre général de documentation. The General Documentation Centre assumes some of the functions of the old main library. It's there that you will find most of the old books (with more than 1 million volumes in the closed stacks), the major biographic and bibliographic series and also collections concerning librarianship and information science.
- BSE : The Pure and Applied Sciences Library represents three faculties, the Faculty of Pure Sciences, the Faculty of Applied Sciences and the Faculty of Agronomy. It covers a great variety of fields, from architecture to biochemistry and informatics with important collections of periodicals.

The faculty libraries

- Faculty of Philosophy
- Faculty of Psychology and Education Sciences
- Law Faculty
- Faculty of economic social and political sciences. This library is the holder of the European Union publications
- Faculty of Medicine (this library is located at the campus of L-e-W, near Brussels)

The documentation centres

The more important ones are the Library for Mathematics and Physics, the Library of architecture, the Centre for operations reseies with a system under development.

5.2 Automation and catalogues

Library automation started in the early sixties at Louvain University with a punched cards filing system. This system was later brought over to a digitalized form, still using the card format and limited to the catalogue and badge procedures. This system, slightly enhanced was in use at UCL as late as 88, while the dutch-speaking sister university started in the seventies developing their integrated on-line system in collaboration with Dortmund University, the well known Dobis/Libis system.

In 88, UCL joined the LIBISNet consortium grouping some 20 scientific Belgian institutions, lead by the dutch-speaking Louvain University. This decision essentially aimed at shared cataloguing. Underlying there was also the dream of recreating, at least in this virtual way, the former single library. A project for retrospective cataloguing took in charge those libraries which, in 1989 hadn't yet automated their catalogue.

The decision in favour of the LIBIS consortium had two major snags : we joined the consortium late and did not opt for the integrated system but only for cataloguing and acquisitions and there was no satisfying solution for the major part of our older records in card format which it was impossible to migrate to the LIBIS union catalogue due to their poor quality and non standardised format.

So we decided to double our catalogues using the CDS/ISIS software, distributed by UNESCO. This allowed us to create at least a complete catalogue of each branch library merging the old data with the newly encoded data which we periodically downloaded from the LIBIS catalogue. It allowed us also to give open access to the catalogues, consultation of LIBIS having been costly until recently.

There were also some attempts to develop in CDS/ISIS the missing modules such as circulation or periodicals check-in but, due to a lack of resources, those projects were never to be finalised.

Things were further complicated when our Library of medicine, for which the LIBIS book catalogue was of little interest, decided in 93 to adopt their own library system called CUADRA/STAR.

To sum up : Automation was mainly limited to cataloguing and acquisitions, our data was spread over three systems and a dozen files, and our patrons had to use three different OPACS. In other words, a mess.

5.3 The RFP

In 95 the idea gained ground, that things couldn't go on like this. This feeling was embodied in a plan document which outlines the major strategic elements of our University as concerns library automation until the year 2000. The authorities of the University set up a Committee to manage the change and, a fact not to be overlooked, provided the necessary funds. This Committee designated a working group of librarians and computer people to prepare a proposal. The team, which I had the pleasure to co-ordinate, first considered the possibilities of evolution of the systems in use at UCL but had to reject them, mainly because they were not keeping pace with the rapid evolution of information sciences. The alternative was to find a new integrated and innovative system, responding to our needs, which implied an RFP.

So, based on some user and staff surveys we started to fix the articles and conditions of our RFP. We spent our summer holidays on this. Whoever has already had the pleasure to participate in such an undertaking will know the difficulties involved. Even if you know what you want, if you are asked to formulate it and make it into a coherent whole it's not just writing it down ... you have also to check it against feasibility and, yes, you are not alone, and the rest of the team doesn't necessarily (and fortunately !) share your ideas. This whole process is rather slow but also necessary and rewarding and at the end you have a clear idea of what you want and what you don't want.

Not willing to re-invent the wheel, we took as a model for our RFP the ones of Oxford and Ghent University whose authors kindly allowed us to do so. We adapted and completed them in terms of our own needs. Here some of the major elements (to which one has to add some technical requirements which I will not go into) :

The system has to be a complete and integrated one in a ready to use state but allowing the modifications deemed necessary and must respect the principal international norms and standards. It should be an open system in order to allow interaction with other systems such as student management, finances etc.

The RFP was written with two main goals: defining a high performance tool for library staff on the one hand and on the other hand providing a large scope of services and functions for patrons.

On the patron side one of the fundamental options was abandoning the classic OPAC and replacing it with a Web gateway even for in-library access to information. Not only does the gateway solution have the advantages of using free browser software and platform independence, but also allows access to all the information available via a single interface which is the same for local in-library and remote users (be it for access to catalogues, bibliographic data bases, factual information etc):

For the OPAC, a distinction is made between identified and non-identified users. An identified user will have access to copyright materials (bibliographic data bases, electronic journals etc) according to his level of access. Such users also have at their disposal a number of search tools (some of which are also available to non-identified users) such as hypertext links, parallel searching in different data bases, the possibility of stocking search profiles and running them automatically or at will, the possibility of customizing searches etc. Among

other things, such users should have online access to the following services:

- reserving books for borrowing,
- reserving books at fixed dates,
- ordering reserved books,
- renewal of loans,
- suggestions for purchase,
- request for inter library loans and document delivery,
- patron information (loans, reservations, state of account etc.)
- sending automatically identified messages to library staff,
- sending proposed corrections of bibliographic records;
- printing search results,
- downloading search results in a specified format;
- customized information,
- electronic supply of documents.

Staff should have at their disposal a high performance tool which allow them to move easily from one sub-system to another and to have permanent access to all the information managed by the system.

The different functions covered are:

- acquisitions; with strong interaction with the tools used by publishers and book-shops (EDI)
- cataloguing: with an accent on downloading records rather than home-made records
- management of serials (accessioning, routing, binding)
- circulation (with the possibility of self check-out)
- document supply (including electronic supply), if possible in interaction with existing services (Impala, Ariel)
- identification of patrons and access control
- finances and accountancy

The aim of the RFP was not to draw up a blueprint of the library of the future. We tried nonetheless to take into account the technological evolutions which are emerging, be they multimedia, electronic publications or natural language querying and we thus hoped to be able to prepare our libraries for the challenges which lie ahead by choosing an evolving product whose designers would show that they were people of vision.

We knew that the project as described in our specifications was an ambitious one and that in some requests we were pushing managing information science to its (at this time) last limits. But we were willing to try to make the big leap ahead.

Well, you know how the story ended : our RFP provided us with a short-list of three of which VIRTUA ended up as the winner. The decision was not an easy one, all the more so since there were no financial or non-technical pressures : we really had the choice. VIRTUA ended up with the highest scores in functionality evaluation and was also considered as the technically most promising system by our computer staff. Other decision-making points were the high integration of standards in the system and its multilingual and multiscript abilities.

There was one major drawback : at the time when the decision had to be taken, some 40 % of the system was still in development and our decision, supported by our authorities, was therefor a rather risky one. Hence the question : Two birds in the bush are they worth one in the hand ?

5.4 VTLS : contract and implementation plan

In July 96 a threefold contract was signed between VTLS and UCL : The Main contract (contrat d'entreprise) is based on the answer of VTLS to our RFP which is an integral part of it. It also contains an implementation plan we agreed on after discussion with VTLS. The implementation plan pilots the migration of our data and the phases of installation and staff training.

It concrete terms this meant : - migration of test databases with repeated quality control during autumn of 96 and delivery of the final database on January 17th - phase I installation in January, including OPAC, Cataloguing, Authority Control and the Web-Gateway - phase II installation in March, including Acquisitions and Circulation - phase III installation in October with ILL and the remaining modules Each installation phase was foreseen to come together with on-site training.

5.5 Problems

Let's now come to the problems... I'm speaking here not in public but in front of part of the big VTLS family so I will be frank. As in each family, it's far more rewarding to discuss the problems rather than to try to hide them, if you want to build up a faithful and durable relationship. The problems were on both sides and they concerned the data migration and the VIRTUA software.

5.5.1 Migration

If you remember our initial situation, you understand that data migration was a major, if not the essential issue for us. Software and library systems will change or vanish, what will stay is data,

and its value will increase with its richness and coherence. Migrating to VIRTUA was for us the opportunity not only to merge our different databases but also to enhance them (through authority control, check for duplicates, etc.) and to bring them over to a USMARC format. Impossible or not?

Additional difficulties arose because of our poor know-how of MARC at the moment of mapping - essentially of the holdings format -, a lack of internal coherence in our different databases - some elements of which we realised only when working on the migration and had to be taken in charge ad lib -, and the abundance of diacritics, mapped differently in each system we formerly used.

VTLS only realised this complexity rather late on but they arose fully when we received our first test databases in December. The problems encountered were : general diacritic problems, wrong mapping, no item or holdings records ...

It required several months of constant and diligent work by our System librarian (AL) and our Project manager at VTLS (Bob), including two visits of Bob to Belgium, to get out of this mess.

5.5.2 Software

End 96 we got a little bit concerned about not receiving any pre-release versions of the modules we were supposed to test. When we finally received the first delivery of OPAC and cataloguing module in December to check our sample database, the version was problematic: there was no filtering, no sorting, no printing, the system crashed frequently, connection was lost whenever the system was pushed a bit (e.g. doing three consecutive page-down's), and a difficult database to look at.

Of course we know that in Information Science delays are rather difficult to forecast and seldom respected (need to remember Windows 95 ?). So we agreed to postpone the training to February which would take place with a new version of the software. It was however a somewhat frustrating experience : the software was almost not enhanced, only bibliographic records were available, and these could not be edited nor saved to the database, it was impossible to create workforms, etc., etc. Finally, after two days we had to put an end to the training which dampened the enthusiasm of our staff.

Realising that the development of VIRTUA was in some trouble, we asked VTLS for an explanation. Despite a newly agreed timetable proposed by VTLS we were not seeing any real progress in the development of VIRTUA. At the same time the pressure of our users grew and our authorities became rather nervous. Indeed a new problem appeared : Our first deadlines (January 97) were not real but rather strategic ones. Our initial implementation plan was generous enough to allow postponing for several months. But, trusting in this and of course in our contracts with VTLS, we cancelled our contracts with our former providers, notably the LIBIS consortium, to take effect as of 31st December 97, which meant that we had there a real deadline, having no alternative beyond this date and no budgets to renegotiate for extensions.

At this point (end of April) we urged Dr Chachra to come to Belgium to explain the situation and to renegotiate certain aspects of the contract. After discussions we came to an agreement and, more important perhaps, we finally had the explanation for the slow down of development of VIRTUA due in particular to integration of new third-party software.

5.6 The situation today

What is the situation today ? Much better, thank you :-), otherwise I wouldn't be here speaking to you. Let's have a look at the two problem areas.

Our database has finally been delivered and, I may say it, VTLS has done a very nice job and the result is as good as we could expect, considering the situation at the start. Some finishing touches are still being put on it and a final general clean up will have to be done by our cataloguing staff, but it's usable as it is and for the first time in our history we have a single automated catalogue in an international standard format.

The software that has been delivered beginning of July still showed a lot of problems but since then we get almost daily support and assistance. It appears that part of the problems we had with versions which passed testing in Blacksburg were due to the fact that development and testing was not done on the same platform as the one we use (Sun Solaris). It has to be said also that since July we benefit by a special privilege, Dr Chachra surveying himself the progress of our implementation. Even so there are still some issues to be dealt with

1. Location filtering in CLIENT and GW.
2. Performance in response times for searching
3. Performance in response times for updating the data base.
4. Search by date in CLIENT (OK in GW)
5. Instability when updating data base - erasure of authority records. Impossibility to delete a record.
6. Discrepancies between KW and browse search results.

Additional issues are dealing with Printing, Downloading, Selection and Sorting of search results, but we are nowadays confident that as scheduled in April, we will be able to go back to training in September and go into production for cataloguing and OPAC with the beginning of the new academic year mid September. This first

step being reached, there is no reason not to believe that phase two and three will follow at the dates agreed on and that in Spring 98 everything will be running in a satisfying way.

5.7 Conclusion

The question was : Two birds in the bush are they worth one in the hand ? Or otherwise : was it wise of UCL to chose a system which, at that time, still largely under development ?
The answer falls into two parts : we still believe that VIRTUA will be the most competitive library system of its generation due to a optimal integration of standards, the choice for some of the most promising techniques in information science and a good vision of what the library future will be.

Our decision for VIRTUA was on the other hand a risky one, considering our starting position, namely

- the horizontal organisational structure of our libraries without central technical services
- complex and incoherent data
- poor MARC knowledge
- no experience in managing an integrated system by ourselves, all this adding to the expectable difficult

Two birds in the bush are they worth one in the hand ?

The major problem was to have a final deadline which from a certain moment on didn't allow us any further postponement.

A risky decision therefore but if we come out all right than we will have betted on the right horse.

If you ask me : should we too ? my personal answer is : look at your situation, if you don't have a real deadline (even if VIRTUA is now in a much more advanced state), if you're coming from a stable situation with good know-how, yes, it surely would be a good choice.

If not, well, it's your game.

Thank you for your attention and ... hope to see you in Louvain-la-Neuve in 98.

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