

Case Study:

Oxford University Library Services (www.ouls.ox.ac.uk)

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Oxford University
Library Services

Oxford University Library Services: How to Deliver Portal Functionality in a Box

"In terms of functionality, Matrix was ideal for us. It's incredibly well documented and simple to use. It's enabled us to develop a low-maintenance publishing factory that's easy to roll out and easy for a small technical team to support. In quick time we've managed to build an implementation and training practice around the CMS that gives people exactly what they need, and allows them to get a site published within days." Ruth Bird, Bodleian Law Librarian

The Organization – Oxford University Library Services (OULS)

Oxford University needs no introduction. It's one of the world's most prestigious academic institutions. Its network of over 40 libraries provides the world's deepest resource of academic information, holding over 9 million volumes – including the famous Bodleian Library, one of the world's oldest and largest libraries, which itself contains over 6 million items on 176 km of shelving, with seating for 2500 readers.

Oxford University Library Services was established in 2000, and its Systems and E-Research Service (SERS) was established in August 2001 to provide integrated support and systems for a wide range of IT-related services and activities across the university's library network, providing the libraries with network services such as email, file-store, web-space, office systems, training and support for new applications.

The Challenge – Portal Control!

"What we really needed was control. We wanted to simplify the process of publishing and maintaining each portal within the network."

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Part of OULS' mission is to oversee the development of a uniform, central library web site, and to support each library's public-facing site. Each of the 40 libraries within the network is responsible for publishing and maintaining a 'portal' style site that provides users with access to key resources such as public online catalogues, key contacts, and secure member access to more in-depth search facilities.

As the need for libraries to publish more information via the web grew, this provided a major management headache: whilst SERS' responsibility was to support each library's web presence, there was no central policy for the production of sites. As such, different sites were published using different tools and different formats, which meant that the overall network had no coherence in terms of technical infrastructure and branding, and that user experiences would differ from site to site as various methods were applied by different libraries and their staff.

As Ruth Bird, Bodleian Law Librarian, and member of the Senior Management Group of OULS with responsibility for the OULS web site, explains: "With libraries working independently to produce their portals, a number of problems were arising. Most notably, the look and feel of each site was different, and this lack of consistency was leading to inefficiencies from a user perspective. Essentially, we were making it harder than it needed to be for users to access their resources.

"From a technical standpoint, support issues were also growing, and, as the people responsible for helping the library network, this was unsustainable for SERS. My web site planning team has only one dedicated IT support person, and his ability to cover all the bases was compromised. There were simply not enough hours in the day and skills within the team to manage such a disparate group of sites! What we really needed was control. We wanted to simplify the process of publishing and maintaining each portal within the network. We wanted to manage the entire network of sites within one central system, and to provide each of the libraries with a standard 'portal in a box' that was easy to publish and easy for my team to support."

The Solution – the MySource Matrix Open Source Content Management System

"The framework ensures our technology base is standardised and easy to support, and that important end user issues like branding and design are kept totally coherent"

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In late 2004, Oxford University recruited Squiz to implement a web site publishing system, based on its market leading, open source Content Management System (CMS), MySource Matrix.

Squiz had already created similar systems for other leading public sector organizations such as the Royal College of Nursing and the University of Greenwich, as well as for leading commercial brands such as Future Publishing and Tyco.

MySource Matrix proved to be the ideal solution for OULS. It delivers a set of standard modules and design templates that enable organisations to create a simple, managed framework for publishing multiple sites under one brand and within a single installation of the CMS. In practise this meant that Ruth and her team were able to create a standard portal publishing policy that could be cascaded across the entire library network, giving individual libraries an 'out of the box' package that was easy to replicate and implement, and, more importantly, easy for the SERS team to support.

"In terms of functionality, Matrix was ideal for us," says Bird. "It's incredibly well documented and simple to use. It's enabled us to develop a low-maintenance publishing factory that's easy to roll out and easy for a small technical team to support. In quick time we've managed to build an implementation and training practice around the CMS that gives people exactly what they need, and allows them to get a site published within days.

"At the same time, this framework ensures our technology base is standardised and easy to support, and that important end user issues like branding and design are kept totally coherent. Each library site publisher now knows exactly what to do, how to do it, and who to come to should they need help. And, should they move jobs within the network, they now have a standard system to work upon, which means their training and start up costs are lowered."

The Squiz Approach – Ownership and Cost Control

"With Matrix, we've basically built the new book on portal publishing, and it's good to know that we own it and can develop it in whichever way we need."

Aside from being easy to implement, MySource Matrix also proved to be the most cost-effective site publishing solution for Oxford's library network. Because the CMS is open source, it's free to use and own, meaning that OULS

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& SERS have been able to control its development and support spend in a far more effective way than would be possible with alternative commercial systems.

This helps OULS on two important fronts. Firstly, with Matrix they can focus their development budget where it matters, rather than having to spend on 'per seat' licensing fees for each new site that's published within the network. Overall, this has slashed the cost of producing a new site, since the only development cost is that of the OULS internal support team. Secondly, the use of open source software means that 100% of the resulting system is owned by OULS, including the valuable intellectual property that's been built whilst creating it - such as documentation, processes and the resulting web site code itself.

Says Bird: "In terms of control and ownership, the use of open source software was important to the overall direction of the project. Once the system was built, it was easy to build a properly documented policy behind it and set ourselves up as a centre of competence that would be respected by the library network. With Squiz's support, we've been able to devise a complete start up programme for non-technical library staff that includes custom documentation and training. This provides them with everything they need to get up and running and generating web pages. With Matrix, we've basically built the new book on portal publishing, and it's good to know that we own it and can develop it in whichever way we need."

The Results – Better Online Resources, More Centralised Control

"Ultimately, Squiz and MySource Matrix have given us back control of our online resources in a way that benefits everybody – the central IT team, web managers, users, and, just as importantly, my budget manager!"

To date, 12 new library sites have migrated to the Matrix system, and in the near term, Bird's plan is to add another six. All of this work to date has been managed and supported by Ruth Bird and only one dedicated IT support person, with additional help from a technical expert for the hardware side of the system.

"So far, the feedback from both site managers and end users has been terrific. The overall production process is really 'light touch,' and that works for everyone. Our aim is to increase the number of sites under the new system quickly,

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and I'm looking to add another IT support person to my team to help manage this growth. Ultimately, the way the system scales should be simple. Now that our processes and policies are in place, it will take only a small number of support people at the centre to facilitate a large number of satellite library web sites.

"We're on track to reach our targets and the great news is that our costs are low. And in an academic environment this point is critical. It's very satisfying to see the network of sites grow this way. Ultimately, Squiz and MySource Matrix have given us back control of our online resources in a way that benefits everybody – the central IT team, web managers, users, and, just as importantly, my budget manager!"

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