

## uni systems

## Τεχνολογικές στρατηγικές για ακαδημαϊκές Βιβλιοθήκες σε αβέβαια περιβάλλοντα

Thalia Tsalkitzi, MLA Solutions Division Manager



#### Museums Libraries Historical Archives Solutions



#### Τεχνολογικές Στρατηγικές: Checklist

- ✓ Commitment of partners / Flexibility of the solution
- ✓ Expand strategy
- ✓ Vendor / Solution
- ✓ Local support
- ✓ Technology evolution

#### Commitment or...Library Cooperation Models

#### Shared consortium model

- Shared system by multiple libraries
- Consortia environment for each library
- Strong cooperation with an agreement
  - Catalogue

Single Bibliographic Database – All Consortium members (Global)
Virtual databases (Scoping) – Each Consortium member (Associate Libraries)

#### Circulation

Single Patron Database

Patron partitionning for circulation desk operations

Circulation policies specific to each consortium members

Circulation policies between the consortium members

#### Commitment or...Library Cooperation Models

Acquisitions

Separate Units for each consortium member

Serials

Separate Units for each consortium member

ILL

ILL between the consortium members managed within the circulation module Separate units per site for ILL to non consortium members

Federated search (Research Pro)

Separate Instance for each consortium member

Link Resolver (WebBridge LR)

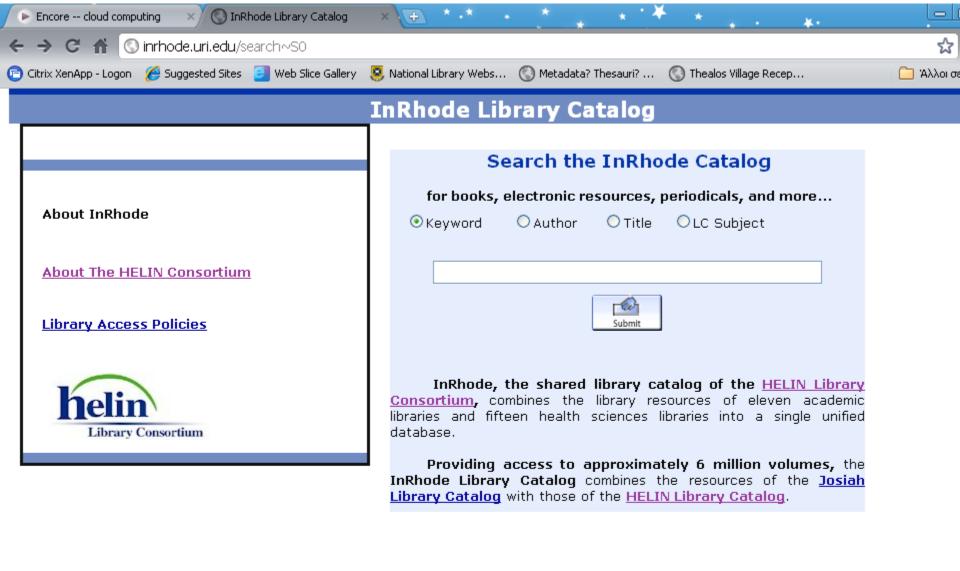
Separate Units for each consortium member

Electronic Resource Management (ERM)

Separate instance for each consortium member

Discovery tool: Encore

Separate facet for each consortium member



WebPAC PRO © Innovative Interfaces, Inc.









一 同









National Library Webs... Metadata? Thesauri? ... Thealos Village Recep...



#### **InRhode Library Catalog**



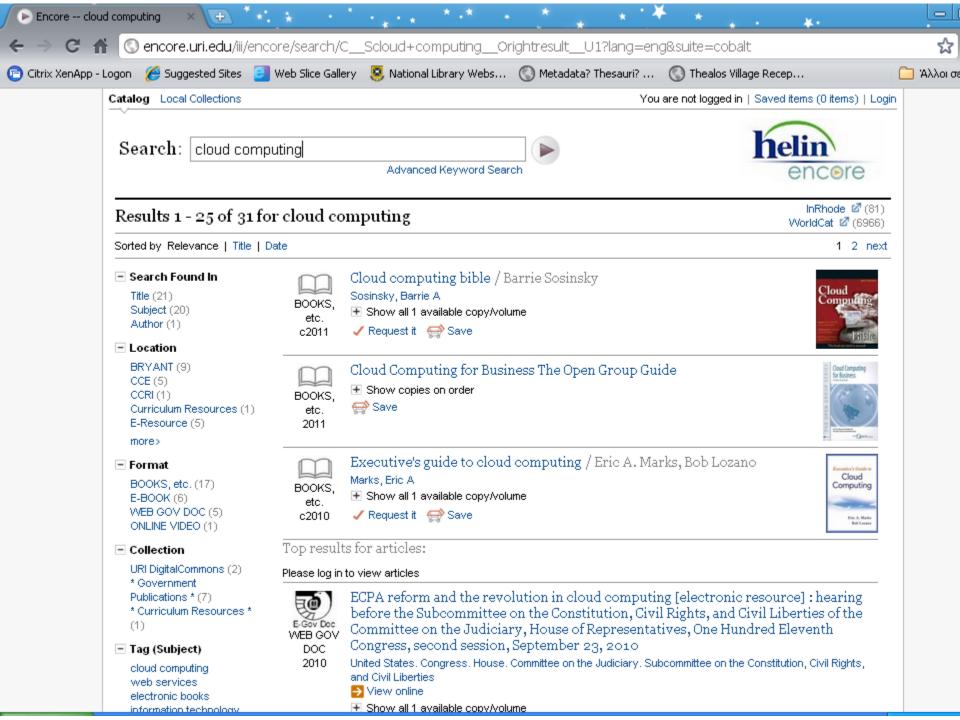
The HELIN Library Consortium is composed of eleven academic libraries and fourteen health sciences libraries. The academic libraries are represented by Brown University, Bryant University, the Community College of Rhode Island, the Dominican House of Studies, Johnson & Wales University, Providence College, Rhode Island College, Roger Williams University, Salve Regina University, University of Rhode Island, and Wheaton College.

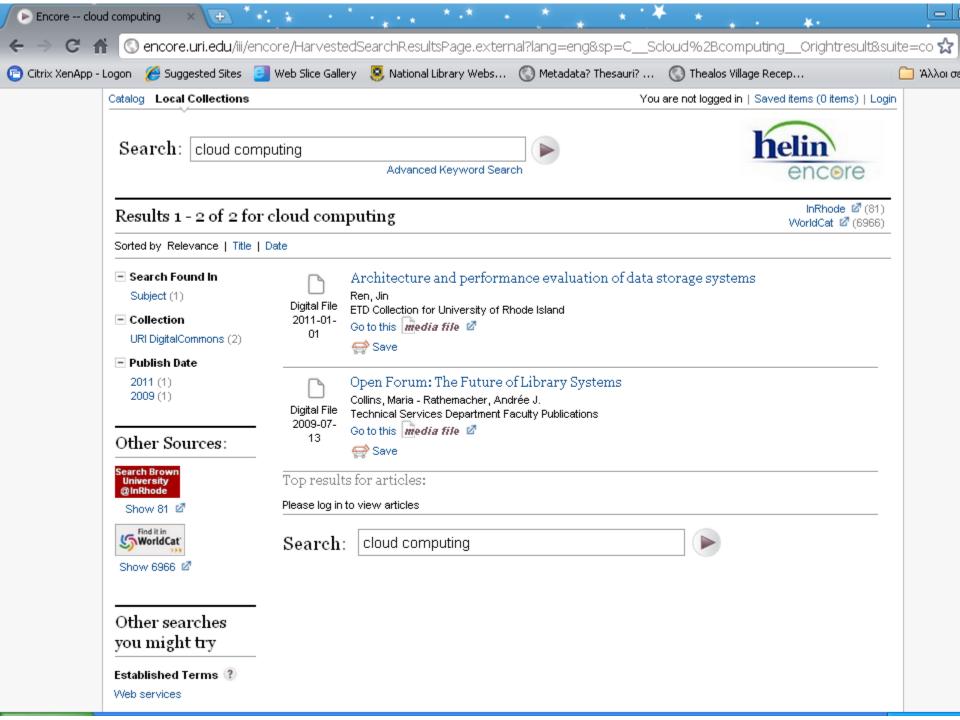
The health sciences libraries, members of the Association of Rhode Island Health Sciences Libraries (ARIHSL), are represented by Butler Hospital, Eleanor Slater Hospital, Kent Hospital, Landmark Medical Center, Miriam Hospital, Memorial Hospital of Rhode Island, the Naval Ambulatory Health Center, Newport Hospital, Rhode Island Hospital, Roger Williams Medical Center, South County Hospital, St. Joseph Health Services of Rhode Island, Women's & Infants Hospital, and the VA Medical Center.

HELIN serves a population of over 70,000 students, faculty, and staff at campus locations throughout Rhode Island, Colorado, Florida, Washington, D.C., South Carolina, and Virginia. With the inclusion of Brown into HELIN in May 2002, library patrons have access to approximately 6 million items, including books, periodicals, electronic resources, videos, and audio materials, in a shared library catalog, InRhode. Borrowing library resources is reciprocal among member libraries and is facilitated through online catalog requests. The requested material is delivered using a delivery system maintained through the Rhode Island Office of Library and Information Services.

The HELIN Executive Director, Robert H. Aspri, oversees all HELIN operations, including formulating the budget, and negotiating and overseeing contracts with software, hardware, and electronic resources vendors. HELIN also employs a Systems Librarian, Ruth E. Souto, and a Knowledge Management Librarian, Martha Rice Sanders, who assist the Executive Director in the daily activities of the Consortium.

A Board of Directors, consisting of the library directors from each of the ten full member libraries and the HELIN Executive Director, governs the HELIN Library Consortium. The Board of Directors also includes four elected representatives, who, along with the Executive Director, and the Past President of the Board comprise the HELIN Executive Board. The President of the HELIN Executive Board is Helena <u> Padriquae, Daan Univarcity Librariae at Johnson 9, Walas Univarcity, Vica Procident is Patar Daakla, Daan</u>





#### Shared consortium model

# SCOPING

Record Processing
Assignment of scope settings
to each individual record
according to scope rules

Search Retrieval:
Filtering of search results
based on choice from
scope menu

# Scoping = Separate Institution / Library/ Location / Collection / etc

- Scope Rule(s) applied during processing
  - Record can belong to more than one scope
  - Keyword indexing adds scope setting to index
  - Scope setting(s) by record number added to independent file for non-keyword indexes
  - Allows some scopes to be <u>suppressed</u> from view
  - WebOPAC –Scope specific <u>personalization</u>

#### Commitment or...Library Cooperation Models

- Distributed resource sharing model INN Reach
  - Autonomy of members
  - Agreement on general cataloguing policies
  - Agreement on lending/borrowing policies between the members
- Combined Shared/Distributed models

#### Distributed Resource Sharing Model - INN-Reach

#### Types of Libraries in Systems:

Some all Academic
Some all Public Libraries
Some both Academic and Public

Types of ILS: Millennium and Non-Mill

From 2 to 300+ participating libraries

Requests: from 1,500 to 90,000

per month/system

Requests in 2010: 4,300,000+

Very high Fulfillment Rate



#### **INN-Reach - Key points**

#### Easy to Find

Union catalog of all holdings

Real time updating – no staff action needed

Pass search from Catalog to INN-Reach right to record

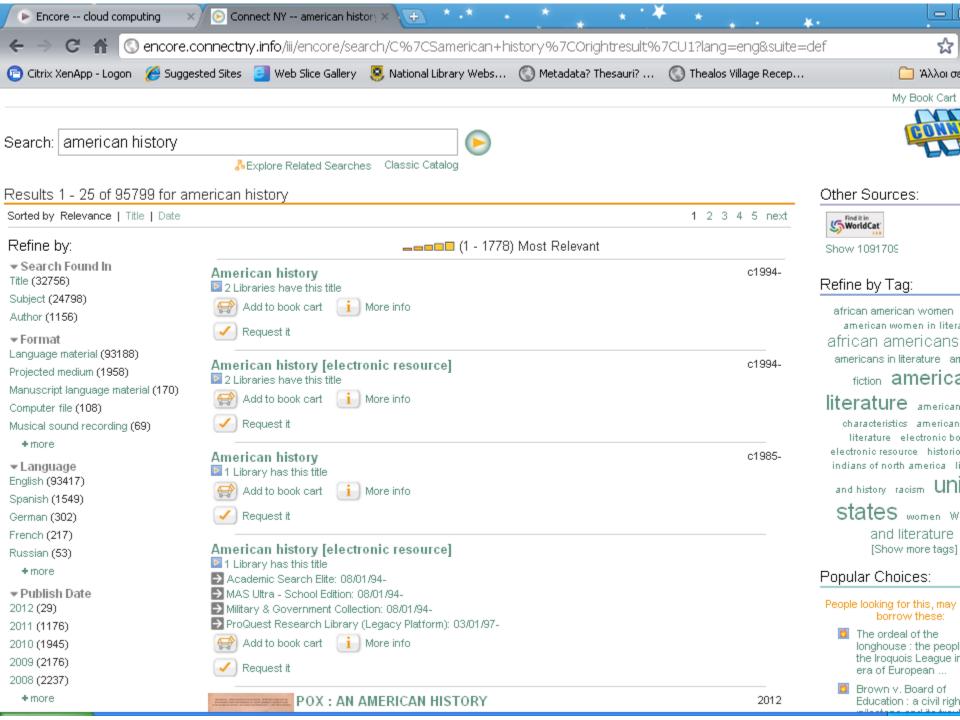
#### Easy to Request

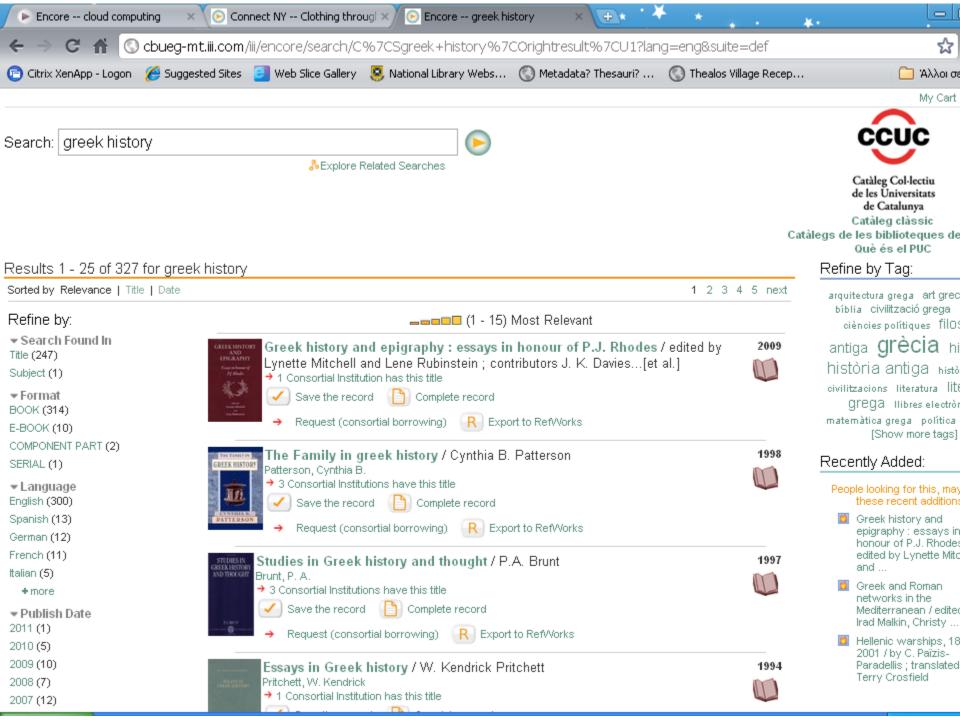
Validates against own patron records in ILS
Selects pickup location
System does the work

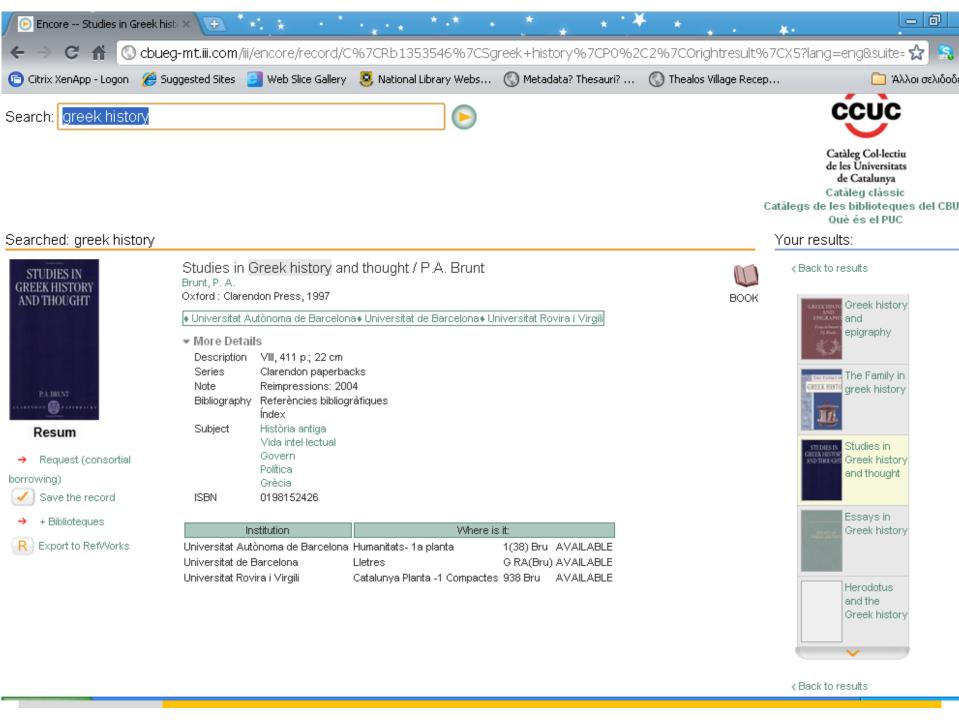
- determines availability and load balancing
- Creates temporary records for circulation

#### **Easy Staff Processing**

Owning Library: print slips, cko, put in transit Borrowing Library: receive, patron alerts, holdshelf, cko to patron Patron returns material: system cleans up temporary records







#### Τεχνολογικές Στρατηγικές: Checklist

- ✓ Commitment of affiliates/partners
- Expand strategy
- ✓ Vendor / Solution
- ✓ Local support
- ✓ Technology evolution

#### Expand Strategy with Millennium & Encore

#### ✓ Shared Model Package

Associate Library License
Staff concurrent licenses
Serials Separate Unit
Acquisitions Separate Unit
ERM Separate Unit
Profiling/Data Migration / Training services



#### ✓ Distributed Resource Sharing Model Package

Separate Millennium Instance License
Staff concurrent licenses
INN-Reach associate license
Implementation services



#### Τεχνολογικές Στρατηγικές: Checklist

- ✓ Commitment of affiliates/partners
- ✓ Expand strategy
- Vendor / Solution
- ✓ Local support
- ✓ Technology evolution

#### **Uni.systems**

- ✓ Οικονομική ευρωστία: Ετήσιος τζίρος 90ME+ με κερδοφορία Μηδενικός δανεισμός - Βραβείο 2011 ICAP Strongest Greek Company
- ✓ **Ιδιοκτησιακό καθεστώς:** Κανένας εξωτερικός επενδυτής ή άλλα εταιρικά σχήματα Ελληνική Εταιρία
- ▼ Σταθερό Senior Management: Συνέπεια στην Εταιρική Κουλτούρα και Φιλοσοφία

#### **Innovative Interfaces**

- ✓ Οικονομική ευρωστία: Ετήσιος τζίρος US\$75M+ με κερδοφορία
- ✓ Ιδιοκτησιακό καθεστώς: Κανένας εξωτερικός επενδυτής ή άλλα εταιρικά σχήματα
- ✓ Σταθερό Senior Management: Συνέπεια στην Εταιρική Κουλτούρα και Φιλοσοφία

#### Vendor

- Οικονομική ευρωστία και ανεξαρτησία στο management
- Πρώτος στην κατάταξη λειτουργικότητας συστήματος
- 4ης Γενιάς λογισμικό Σταθερότητα στις νέες εκδόσεις
- Υποδομή υποστήριξης help desk support bug fixing
- Υποδομή για localization (μετάφραση στα ελληνικά)
- Ενδιαφέρον για την αγορά εκτός Αμερικής
- Πιστούς πελάτες
- Εγκαταστάσεις σε μεγάλα ιδρύματα Εμπειρία

#### Solution

- Οριμο προϊόν
- Ολοκλήρωση και κάλυψη όλων των υποσυστημάτων
- Ανοικτή αρχιτεκτονική
- Συνέπεια στην εξέλιξη νέων εκδόσεων
- Συμβατότητα με νέες τεχνολογίες υποδομών
- Ολοκλήρωση με τρίτα συστήματα
- Ισχυρή κοινότητα χρηστών
- Ευελιξία στην υλοποίηση
- Project management & project implementation team

#### **Innovative Services**

- Υπηρεσίες παραμετροποίησης
- Συμβουλευτικές υπηρεσίες και εκπαίδευση διαχειριστών
- Εγκατάσταση
- Μετάπτωση Δεδομένων
- Τεχνική υποστήριξη
- Ελεγχος σφαλμάτων και διορθώσεις
- Διατήρηση της «υγείας» του συστήματος

#### Local Support - Uni.systems

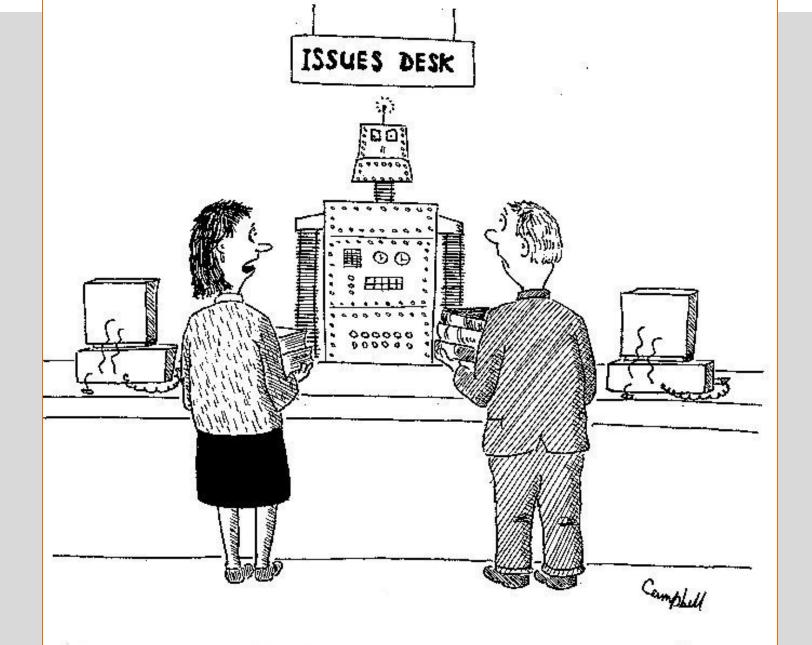
- Υπηρεσίες Διαχείρισης Έργου
- Κατανόηση και γνώση του περιβάλλοντος
- On site υποστήριξη στα ελληνικά
- On site εκπαίδευση στα ελληνικά
- Help Desk για υποστήριξη στα ελληνικά
- Μετάφραση νέων εκδόσεων
- Ελεγχος νέων εκδόσεων
- Βαθιά γνώση σε ολοκλήρωση με τρίτα λογισμικά & υποδομές

#### Προστιθέμενη αξία στην τεχνολογική σας στρατηγική

- Μοντέλο συνεργιών και όχι αντιπροσώπου
- III/Uni.systems στρατηγική «do what we do best»
- Παροχή υπηρεσίων από ιδιαίτερα εξειδικευμένα στελέχη και των δύο εταιριών
- Απευθείας επικοινωνία μεταξύ της Βιβλιοθήκης και της Innovative
- Απευθείας επικοινωνία μεταξύ της Βιβλιοθήκης και της Uni.systems
- Απευθείας επικοινωνία και συνεργασία μεταξύ όλων των μελών των ομάδων
   Uni.systems / Innovative (εμπορικό, τεχνικό, υποστηρικτικό, εκπαιδευτικό)
- Η Innovative παρέχει απευθείας υπηρεσίες εξυπηρέτησης πελατών με τον ίδιο τρόπο σε όλες τις χώρες, ΚΑΝΕΝΑΣ πελάτης δεύτερης κατηγορίας
- Η Innovative διατηρεί μόνο μία έκδοση του λογισμικού, όχι τοπικές εκδόσεις, προκειμένου όλοι οι πελάτες να αναβαθμίζονται τακτικά και ταυτόχρονα.

#### Τεχνολογικές Στρατηγικές: Checklist

- ✓ Commitment of affiliates/partners
- ✓ Expand strategy
- ✓ Vendor / Solution
- ✓ Local support
- Technology evolution



"Personally I think they went a step too far in making the library electronic"

#### **Technology evolution**

Cloud Social web

Web services SSO

RFID

Virtualization

**Campus Smart Cards** 

Mobile Apps

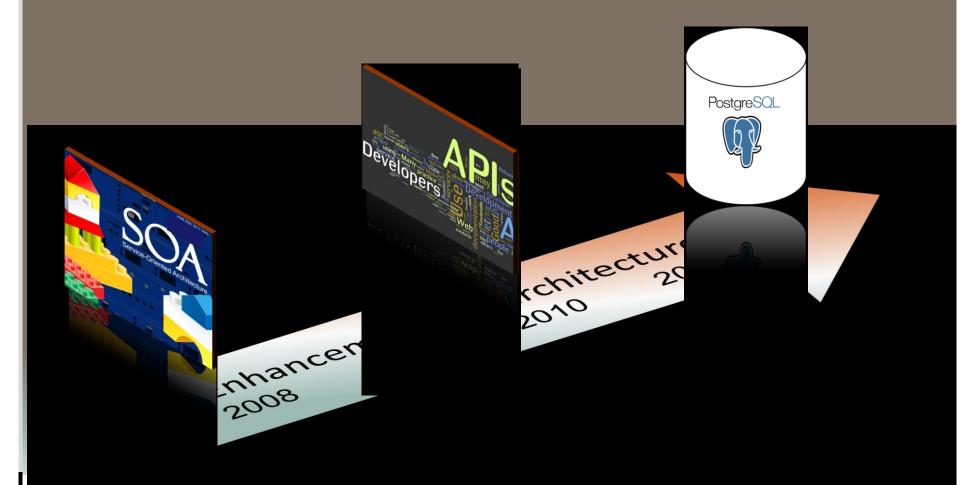
**eContent** 

SaaS

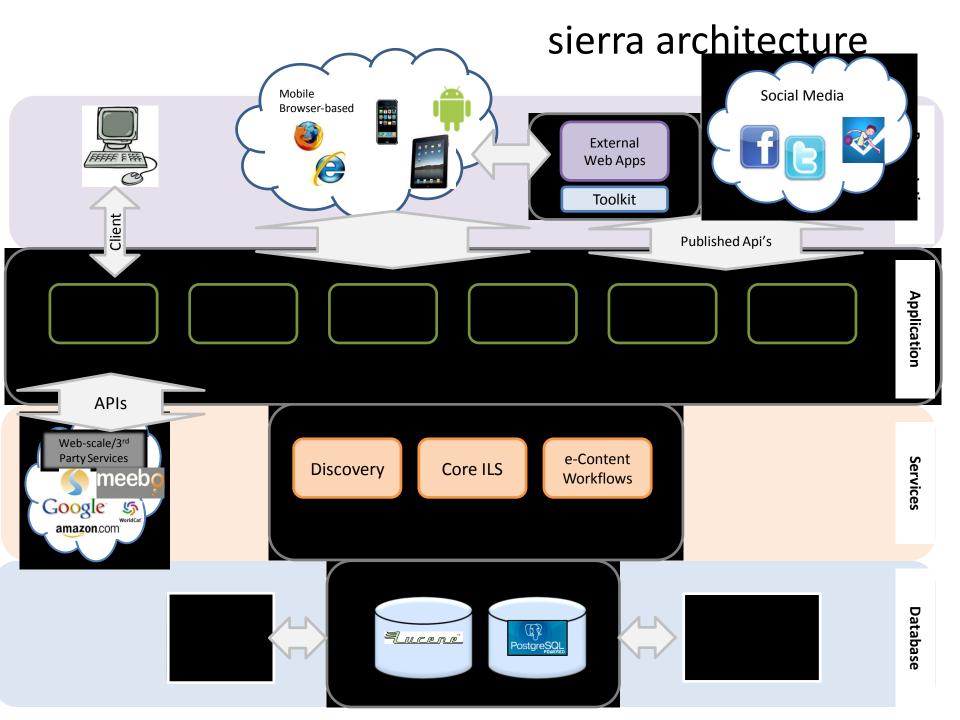
Feeds

SIS

#### **A**RCHITECTURE EVOLUTION







#### Προτεραιότητες της Βιβλιοθήκης vs Τεχνολογικής εξέλιξης

- Business Plan (New Services introduction ?)
- ROI
- Core Business Functionality
- Human Resources
- ICT Management
- Current infrastructure
- Co-operations / Alliances
- Budget
- Patrons trends
- National trends in libraries
- International trends in libraries



### uni.systems

#### Σας ευχαριστούμε

TsalkitziT@unisystems.gr