Ex Libris Integrated and Consortia Solutions

Heal-Link Workshop
September 2007

www.exlibrisgroup.com
Agenda

- Ex Libris – who and where we are
- New trends and challenges
- Primo and our integrated solutions
- Consortia models and solutions
- A look into the future
Where we are

Ex Libris is the world leader in providing library automation solutions to academic, research, consortium and national libraries
One strong team

Following merge with Endeavor

- Clear leader in the academic library market
- Staff increased by 25%
- Customer base increased by 1,300 customers
- Added 1 new main product to our portfolio--Voyager
Worldwide customer distribution

North America

Central & South America

Africa

Europe

Asia

Australia & New Zealand

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Who uses Ex Libris products?

44 of the top 50 North American universities
31 of the top 50 European universities
9 out of 10 the top universities for citations worldwide

Source: The Times (UK) 2006 World University Rankings

94 of 123 ARL (American Research Library) members
32 national libraries

75 of the top 100 universities worldwide
82 of the top 100 North and Latin American Universities

Source: Institute of Higher Education Shanghai Jiao Tong University Academic Ranking of World Universities 2006
Selected customers

Academic

- Harvard University
- Leiden University, Netherlands
- MIT
- Freie Universität Berlin
- Charles University
- Beijing Jiaotong University
- King’s College London
- Royal Melbourne Institute of Technology

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Selected customers

Consortia

The California State University

THE STATE UNIVERSITY OF NEW YORK

SUNY

OCUL
Ontario Council of University Libraries

Darlin
Australian Academic & Research Library Network

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Selected customers

In the Region

library
INTERCOLLEGE
CEDEFOP
TECHNOLOGICAL EDUCATION INSTITUTE (T.E.I.) OF ATHENS

THE AMERICAN SCHOOL OF CLASSICAL STUDIES AT ATHENS

Ex Libris Integrated and Consortia Solutions
Complete library solution

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The Role of the Library

- Facing competition in what used to be a well-defined, exclusive domain
- Striving to be a vital source of resources and services in its communities
- Putting more focus on bringing content & services to the users and *not* just about bringing the users to content and services
- The main challenge: *How to remain relevant to its users?*
Our Strategy #1: The End-user

Provide a system and services that will enable libraries to expose content and services to users where & when they need it and in the way they expect it.
The end-users – the way they expect it...

- Users’ expectations are driven from their overall Internet experience:
  - “One stop shop”
  - Simple but powerful
  - Access quality resources
  - Discovery is a means; Access/Delivery is the goal
    - Instant gratification
  - Collaborative tools

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The Challenge

... current end-user services (OPAC, resource discovery, etc.) are tightly tied to back-end applications (e.g., ILS, Digital repositories) and often represent the need of back-end management (governed by librarians) rather than the end-users needs
The Solution

- **Decouple** the user experience layer from the library’s back-office functions, separating data creation and maintenance from its discovery.

- The goal: provide users with a single solution for the discovery and delivery of all local and remote assets: books, journals, articles, images, and other digital content.

Metasearching

Front end

Primo Index

Back office

Library catalog
Digital repository
Knowledge bases of electronic resources
Course mgmt. systems
Institution Web sites

Library controlled
Institution controlled
External

Databases
e-Journals
Subject Gateways
Web repositories

Subject Gateways
Web repositories
Primo Consortia

- One installation can support multiple institutions.
- The end user can view data related to his institution only, to all institutions (consortium), a specific group of institutions or collections across institutions.
- Different Views – each has a different look and feel and different defaults for the pre-search filters (including scopes = set of records on which the search is conducted)
Primo Consortia Model
Primo Consortia Related Features

- De-Duplication – identifying identical records and combining them into one - including all holdings.
- FRBR – identifying similar records and combining them into a group of related records.
- Collection facet – to reflect the organizational structure of the consortium
- Context sensitive display for users – different institutions or the consortium level (e.g. availability status)
### Union Catalog versus Central Catalog

<table>
<thead>
<tr>
<th>Upload of bibliographic records from local systems</th>
<th>Central cataloguing – download into local systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate bibliographic records are virtually de-duplicated</td>
<td>Shared bibliographic records</td>
</tr>
<tr>
<td>Local systems are independent in terms of cataloguing rules</td>
<td>Binding rules for central cataloguing</td>
</tr>
<tr>
<td>No “feedback” from union catalog</td>
<td>Local systems receive corrections of locally owned records</td>
</tr>
<tr>
<td>Separate authorities</td>
<td>Shared authorities</td>
</tr>
</tbody>
</table>

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Central Catalog Implementations

- Consortium of the Austrian Ministry for Education and Cultural Affairs: 16 local libraries - 650,000 titles
- ACC - 57 members of the Austrian Library Network – sharing a central catalog from which each library extracts its own records
- HBZ – Hochschulbibliothekszentrum des Landes Nordrhein-Westfalen – one of the largest catalogs in Europe - members run a range of different library systems
Model A: Single BIB with Multi-ADM Libraries

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Single BIB with Multi-ADM Libraries

- Shared installation/server
- All institutions share a single BIB record
- ADM library per institution or group of institutions
Model B: Central Catalog – ALEPH Cluster

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Central Catalog – ALEPH Cluster (cont)

- One central catalog containing a single record for each title, supplemented by local catalogs
- Enables multiple servers (per institution)
- Each institution controls its own BIB and ADM data
- Bibliographic and AUT records are cataloged centrally (ALEPH CAT client)
- Holdings and items are entered locally
- Interface: ALEPH Cluster replication
  - Replication of BIB records: central -> local
  - Replication of HOL records and items: local -> central
  - Local systems use central AUT data
  - Web-OPAC: Jump into the local OPAC
- ALEPH Cluster: connection ALEPH <-> ALEPH
Central Catalog – ALEPH Cluster (cont)

Workflow

- BIB records are always created centrally first, then copied manually (CTRL+N) to the local BIB.
- BIB records are centrally available -> copy (CTRL+N) to the local BIB.
- Every BIB or AUT update is automatically replicated to the local systems.
- HOL and item records are only created locally, and updated with automatic replication to the central system.
Model C: Central Catalog – Non-ALEPH Participants

Central System

External data

Copy Cataloging

HOL

BIB

Updates

Online Interface

M essages

Z39.50

Local Systems

HOL

BIB

AUT

Messages

Z39.50

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Central Catalog – Non-ALEPH participants (cont)

- Each institution controls its own BIB and ADM data
- Holdings and items are entered locally
- Bibliographic and AUT records are entered locally
- Interfaces:
  - Online Interface for Cataloguing/ALEPH CAT
  - Messages concerning data changes can be fetched by local systems
  - Updated records can be transferred to local systems via Z39.50
Central Catalog – Non-ALEPH participants (cont)

Workflow

- BIB and AUT records are always created centrally first, but can be processed by local client.
- Holdings can either be created centrally before or after local update (local client).
- Every BIB or AUT (and if needed HOL) update generates a message.
- Local systems pull messages and get full records through Z39.50.
Model D: Separate Catalogs and a Union Catalog

**Diagram:**

- **Union Catalog**
  - **BIB Library**
    - **BIB Record**
    - **ADM Record**
      - **ADM library**
  - **BIB Library**
    - **BIB Record**
    - **ADM Record**
      - **ADM library**
  - **BIB Library**
    - **BIB Record**
    - **ADM Record**
      - **ADM library**

**Ex Libris Integrated and Consortia Solutions**
Separate Catalogs and a Union Catalog (cont)

- Enables multiple servers (per institution)
- Each institution controls its BIB and ADM data
- Virtually de-duplicated Union Catalog for OPAC (desirable)
- Upload of bibliographic records and HOL information
- Circulation status may be obtained from local systems Real time access to circulation status via Z39.50 or ALEPH API
- ALEPH and NON-ALEPH local systems
California Digital Library – Union Catalog Model

- Over 23 million titles
- Contains records from 2 ALEPH 500 systems and various other ILS systems at 10 campuses
- Bibliographic data is routinely extracted from all these systems and loaded into CDL on an ongoing basis
<table>
<thead>
<tr>
<th>Library</th>
<th>Call Number</th>
<th>Availability</th>
<th>Notes</th>
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<tbody>
<tr>
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Σύλλεκτα των Θουκυδίδη (Thucidides, 5th century B.C.)

Σύλλεκτα των Θουκυδίδου και Ηροδότου ιστοριών, προς χρήση του εν Αιγίνη Κεντρικού Σχολείου.

Εκδοση

260
Αποτελεί Εκ της Εθνικής Τυπογραφίας διευθυνμένης υπό Γ. Αποστολίδου Κοσμίτου,
1832.

Περιγραφή

300
1φ. +120 σ., ;
22 εκ.

Σημασίες

510
ΓΜ 2232.
533
Το βιβλίο διατίθεται και σε ψηφιακή μορφή
Ρέθυμνο
Πανεπιστήμιο Κρήτης Βιβλιοθήκη (Πρόγραμμα "Κοινωνία της Πληροφορίας")

ΠΛ-ΨΠ

700
Ηροδότος,
484-410 π.Χ.

ΚΩΔ-ΧΡΗ

999
μουζουρά

Μετατροπή

Α01
149248
140279
RET
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<th>Συγγραφέας</th>
<th>Τίτλος</th>
<th>Έτος</th>
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<tr>
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<td>Καζαντζάκη, Νικόλ,</td>
<td>Ταξιδεύοντας: Αίγυπτος, Σινά, Αγίοι Τόποι, Κύπρος</td>
<td>1959</td>
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<td>Καζαντζάκη, Νικόλ,</td>
<td>Alexander the Great: a novel / Nikos Kazantzakis ; translated by Theodora Vasilis ; illustrated b</td>
<td>1982</td>
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<td>1961</td>
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<td>Buda : tragedia en 3 actos / Niko Kazantzakis</td>
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</tr>
</tbody>
</table>
Open Modular Scalable Solutions:

- Individual products
- Interoperability
  - Internal – Product suite
  - External – Open architecture
- Comprehensive solution
- Consortia support

Ex Libris Integrated and Consortia Solutions
When planning the next generation system...

- Primo is the first step: decoupling the front-end from back-office systems
  - Libraries do not need to wait for a total solution; they can offer better service to end-users today
  - Libraries can add or replace back-office systems without changing the user experience
The next step—back office

- Moving from multiple product-based solutions to a uniform resource management system
- Supporting task-based workflows
- Enabling a higher level of data analysis to support decision making
- Facilitating collaboration and resource sharing as well as differentiation
- Decreasing total cost of ownership (TCO)
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