



Curtin University



CAUL International Travelling Fellowship: Next Generation Library Management Systems and electronic resource acquisitions

CURTIN UNIVERSITY LIBRARY

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11th February, 2013

Overview

- Current Library Management Systems
- Next Generation Library Management Systems
- Site Visits
- Lessons for Australian University Libraries
- Conclusion
- Questions





Current Library Management Systems

- ILMs (e.g. Ex Libris ALEPH; Ex Libris Voyager; Innovative Interfaces Inc. Millennium)
- OpenURL Link Resolvers (e.g. Ex Libris SFX; Serials Solutions® 360 Link)
- Federated search engines (e.g. Ex Libris MetaLib)
- Electronic resource management systems (ERMs) (e.g. Ex Libris Verde; Serials Solutions® 360 Resource Manager)
- MARC record services (e.g. Ex Libris MARCIt!; Serials Solutions® 360 MARC Updates) and
- Usage statistics products (e.g. Ex Libris UStat, SwetsWise Selection Support; Serials Solutions® 360 Counter)



Current Library Management Systems

- Different systems store data about the same product at different levels, e.g.:
 - Orders and bibliographic data in ILMS at package level
 - Holdings in Link Resolver at title level
 - Licence arrangements, administrative data (e.g. usernames and passwords) in ERM at interface level
 - Counter reports in a Usage statistics product at title level
 - Other data in numerous Excel spreadsheet
- Poorly integrated
- Inadequate for managing electronic resources



Current Library Management Systems

- “Librarians have struggled for nearly a decade with how best to handle electronic resources, as the information economy has shifted inexorably toward electronic materials. In the interim, experimentation and product development has confirmed that electronic resource management (ERM) is nothing short of chaotic.” (Collins & Grogg, 2011)

Collins, Maria and Jill E. Grogg. 2011. “Building a Better ERMS”. *Library Journal* Mar 1, 2011.
http://www.libraryjournal.com/lj/newslettersnewsletterbucketljxpress/889092-441/building_a_better_erms.html.csp



Next Generation Library Management Systems

- During 2010 and 2011 I was a member of the Curtin University Library LMS Working Group
 - Better understanding of the current environment
 - Determine what we should be looking for in the future
 - Literature reviews, vendor presentations, webinars
 - Learnt more about the new unified/next generation library management systems that were being developed
 - potential for these new systems to reduce the amount of time we spend working with discrete systems (e.g. separate ILMS, link resolvers, and ERMs) and therefore streamline our electronic resource acquisitions processes and workflows



Next Generation Library Management Systems

- Applied for the CAUL International Travelling Fellowship in 2011
 - visit technical services staff from some of the early adopters of the different Next Generation Library Management Systems in the US to discuss their experiences of how these innovative systems handle the management of electronic resources.
 - Aim - to identify benefits of Next Generation Library Management Systems in streamlining electronic resource work processes.
 - Outcome - establish how Curtin and other Australian University Libraries can learn from the experiences of these early adopters of Next Generation Library Management Systems to streamline electronic resource acquisitions processes and workflows.





Next Generation Library Management Systems

- Built from the ground up
- Focus on improved backend processes
- More flexible
- Interoperable with other systems
- Support emerging standards
- **Integrate the management and fulfilment of electronic and print resources within the one system**





Next Generation Library Management Systems

- Alma by Ex Libris
- Intota by Serials Solutions
- OLE (Open Library Environment) by the Quali Foundation
- Sierra by Innovative Interfaces Inc.
- WorldShare Management Services by OCLC

Wilson, Kristen. 2012. "Introducing the Next Generation of Library Management Systems." *Serials Review*, 38 (2):110-123 doi: <http://dx.doi.org/10.1016/j.serrev.2012.04.003>



Site Visits

- University of Pennsylvania Library – Kuali OLE founding partner.
- Princeton University Library – Ex Libris Alma developmental partner.
- University of Tennessee at Chattanooga Library – OCLC WorldShare Management Services (WMS) early adopter.



University of Pennsylvania Library

- Michael Winkler (Director, Information Technology & Digital Development)
- 27th August, 2012
- Association of Research Libraries (ARL) Tier 1 Research Library
- 6.01 million books (print)*
- Acquisitions budget 16 million



Van Pelt-Dietrich Library

* University of Pennsylvania. 2012. Penn Facts. Accessed November 14, 2012, <http://www.upenn.edu/about/facts.php>

University of Pennsylvania Library

- OLE release 0.6 – model data
 - Release 0.8 scheduled for October 2012 – local data
 - Release 1.0 scheduled for Spring 2013 – will include workflows
- Likely to implement OLE with release 1.5 in June 2014
- Will look at their workflows about a year before implementation
- By being a founding partner the University of Pennsylvania Library are shaping the development of the product
- Kuali OLE is developing Global Open Knowledgebase (GOKb) in partnership with JISC



University of Pennsylvania Library

- GOKb will be more than just a knowledge base; it will be a management platform for licensed electronic resources
- OLE will replace – Voyager, Verde and MARCIt!, but not SFX (at this stage)
- Expect OLE will result in a reduction in the number of staff in technical services (e.g. as 60% of the workflow for print and electronic journals will be the same)
- Staff to work on other things



Princeton University Library

- Janet Lute (Integrated Library System Coordinator)
- 28th August, 2012
- Association of Research Libraries (ARL) Tier 1 Research Library
- 7 million books*
- 2010-11 Acquisitions budget > 24 million*



Firestone Library

* Princeton University. 2012. Princeton Profile. Accessed November 14, 2012, <http://www.princeton.edu/pub/profile/scholarship/academic-resources/>

Princeton University Library

- Alma partner release 5
- Delayed Alma implementation until June 2013
 - Move of Technical Services division off campus
 - Waiting for some additional functionality
 - Primo did not offer browse searching
- Working with Ex Libris Princeton University Library are rethinking their workflows – conscious of not building them around exceptions
- Role set up will take some time



Princeton University Library

- Pre-migration data-clean up (e.g. adding SFX IDs to Meridian (for packages) and identifying match points)
- Electronic Resource data migration from Meridian problematic
- Alma will replace – Voyager, Meridian, SFX and MARCIt!
- Expect Alma to streamline acquisitions and resource activation
- Staff to work in different areas



University of Tennessee at Chattanooga Library

- Jason Griffey (Head of
- Library Information
Technology)
- 30th August, 2012
- 457,779 volumes*



Lupton Library

* Breeding, Marshall. 2012. Lupton Library. *Library Technology Guides: lib-web-cats*. Accessed September 11, 2012, <http://www.librarytechnology.org/lwc-displaylibrary.pl?RC=2368>

University of Tennessee at Chattanooga Library

- Implemented OCLC WorldShare Management Services (WMS) with WorldCat Local on 6th August, 2012
- No local catalogue
- Building their own call number search
- Pre-migration data-clean up (e.g. matching of their catalogue records with OCLC records)
- Three attempts to successfully load all of their data
- Libraries dramatically underestimate the time and complexity involved in new systems (Andrea Schurr)
- When migrating to a new system, build in more time than you need (Colleen Harris)

University of Tennessee at Chattanooga Library

- Importance of staff training – ‘getting over the grumpy hump’ (Colleen Harris)
- Some things were not working correctly (e.g. display of multi-volume works)
- Some things were still being investigated (e.g. WMS budgeting functionality)
- Some functionality had not yet been developed (e.g. serials still catalogued in Connexion)
- Some things had not yet been looked at (e.g. the recently released license module)
- WMS has replaced Virtua (ILS) and will replace Gold Rush (once the data has been migrated)
- Spending less time on cataloguing and acquisitions
- Staff are now doing different tasks (e.g. ILL instead of copy cataloguing)



Lessons for Australian University Libraries

- Wanted to show the impacts of these systems on acquisitions workflows and staffing levels
 - The libraries were not very advanced with their electronic resource acquisitions workflows
- Lessons for Australian University Libraries:
 - Allow for a period of disruption as it will be some time before these systems include all of the planned functionality



Lessons for Australian University Libraries

- Allow sufficient time for the migration and implementation process:
 - Time for pre-migration data-clean up
 - Time for the identification of match points when migrating data from different systems (data silos)
 - Time to configure the system (e.g. roles, rules, privileges, and workflows)
 - Time for testing and training of staff



Lessons for Australian University Libraries

- Manage staff anxiety and uncertainty
- Consider the implications of improved efficiencies as a result of streamlined workflows and the automation of some tasks on future staffing levels (workforce planning)
- All likely to have a unique migration experience
- Share our experiences with the implementation of these new systems with each other



Conclusion

- CAUL International Travelling Fellowship to investigate the impacts of Next Generation Library Management Systems on electronic resource acquisitions processes and workflows
 - University of Pennsylvania Library – Kuali OLE
 - Princeton University Library – Ex Libris Alma
 - University of Tennessee at Chattanooga Library – OCLC WorldShare Management Services (WMS)
- Lessons for Australian University Libraries
- May be a few years before libraries experience the anticipated impacts of these systems on the streamlining of electronic resource acquisitions





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