



Smart LibrariesTM

Formerly Library Systems NewsletterTM

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Smarter Libraries Through Technology: Wrapping up Another Year, Looking to the Next

By Marshall Breeding

As another year concludes, it is time for a quick review of what has transpired and what readers can expect in the next year. *Smart Libraries Newsletter* aims to provide current information and perspective on the library technology industry. Libraries make significant investments in technology products and services that shape the daily work life of almost all personnel and are essential vehicles in delivering the library's services to its community. I'm

delighted to have the opportunity to produce this monthly newsletter to chronicle the critical technologies upon which libraries rely.

Facts Plus Perspective

No other publication focuses exclusively on the library technology industry. *Smart Libraries Newsletter* provides in-depth coverage on any major event, supplemented by the historical background of the entities involved. I occasionally provide editorial comments, which should be easily from the objective details. At least some degree of the value of the newsletter derives from its editorial standard seen in the selection of events to cover, consistently garnering and vetting details with the individuals directly involved, and with the inclusion of relevant details and historical developments from a variety of other sources.

Smart Libraries Newsletter places utmost value in ensuring that its articles are factually correct. Standard practice includes allowing the individuals and organizations involved to review any article written about them in time to provide any corrections or clarifications. While the subjects may not always agree with editorial comments given, they have the opportunity to identify any factual errors.

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IN THIS ISSUE

Wrapping up Another Year, Looking to the Next
PAGE 1

EBSCO Releases Full Text Finder
PAGE 2

New Developments in the Quali Commercial Entity
PAGE 5

National Public Library System in Denmark Reaches Milestone
PAGE 6

OCLC Makes Board Appointments
PAGE 6

Library Technology News
PAGE 7

Target Audience

As I develop the newsletter, the target audience I address would include library staff who are involved in selection, implementation, and use of major technology products or those responsible for defining strategies related to technology. But *Smart Libraries Newsletter* isn't only for the consumers of library technology—it also aims to inform those on the production side. Individuals associated with a vendor will naturally pay close attention to how we cover their own products and those of their competitors or partners.

Scope and Coverage

The scope of the newsletter isn't strictly defined, but it generally aims to cover the strategic technology products and the organizations that produce and support them. It usually does not cover trends in consumer technologies and devices, though those trends may at times come into play in the realm of library-specific products. The ever rising adoption of mobile technologies, for example, hasn't been covered discretely, but comes up repeatedly in the discussion of patron-facing library products and services. It's essential to be in tune with the broader trends in consumer and business, though our focus is centered on library technologies.

Key product genres that receive consistent attention are tools that libraries use to describe and manage their collections, including library services platforms, integrated library systems, digital asset management systems, electronic resource management and linking utilities, or repository platforms. I'm also on the lookout for other products or technologies with potential significant impact for libraries. The development of the SirsiDynix BLUEcloud Suite, providing a new multi-tenant platform to extend the capabilities of the company's Symphony and Horizon products, initially discussed in March 2013, saw further coverage in August 2014 with the BLUEcloud Campus initiative.

Some articles deal with new products that have been announced, but may not yet have seen the tests of production use. In these cases I attempt to reflect the design and intent of these new products, since readers may benefit from knowing about them for future consideration. As these products eventually see completion and adoption, I also aim to produce follow-up stories that discuss how well they live up to expectations.

Kuali OLE stands as an example. *Smart Libraries Newsletter* has covered its progression from its conceptual design (October 2008 issue), through its software development phase (June

2010, March 2013), and more recently as it has been placed into production in its first two libraries, featured in the October 2014 issue. Yet the Kuali OLE story isn't complete. The version implemented thus far focuses on print resource management. In 2015 readers can expect to read about how well new versions that also manage electronic resources fare as well as its adoption by additional libraries that have been part of the development partnership.

Likewise, ProQuest Intota remains in the unproven category, with development well underway, but not yet in production in libraries. The initial announcement of Intota Assessment, a precursor product, was covered in the March 2013 issue, with its general release featured in January 2014. Intota Foundation Release, focusing on managing electronic resources, was discussed in our August 2014 issue. Next up, 2015 will be a critical year for ProQuest Intota with the planned release of the full product with comprehensive resource management capabilities.

Even more important than the products used by library personnel are those oriented to patrons. Discovery services have

been one of the most interesting product genres in the past few years. In this age of index-based discovery services that aim to provide near comprehensive access to library collection items across all formats, we keep a close watch on products including EBSCO Discovery Service, Primo, WorldCat Discovery Service, and Summon. In March 2014 we covered the launch of OCLC's WorldCat Discovery

Service, making a transition from its FirstSearch service and WorldCat Local. Summon 2.0, whose initial launch was covered in March 2013, has seen deployment through 2014. New capabilities related to EBSCO Discovery Service were reported, including the new Curriculum Builder (August 2014) and the new Full Text Finder, featured in this issue. ProQuest Flow, the successor to the popular RefWorks citation management product, was covered in Feb 2014.

Smart Libraries Newsletter also takes great interest in the changes and trends in the business side of the industry. Any major transitions, such as strategic acquisitions or investments, mergers among any of the players, or major internal restructuring, have great potential to impact the libraries engaged with these organizations and thus warrant detailed attention.

The library technology industry saw some significant events in 2014, generally continuing the trend of consolidation among companies as well as through internal organizational changes. One of the most dramatic series of events involved the by Innovative Interfaces' acquisition of Polaris, a company with almost

The library technology industry saw some significant events in 2014, generally continuing the trend of consolidation.

unstoppable momentum in the US public library arena. The May 2014 issue provided extensive coverage. The subsequent acquisition of internationally-oriented VTLS was covered in the following July issue. Though less dramatic, our January issue covered the expansion of Innovative into the Arab Gulf Region through a business partnership with Naseej. ProQuest made some major changes in its business, covered in March 2014, that saw Serials Solutions dropped as a separate brand and business, with its activities fully integrated into the company. Another interesting business story relates to the launch of Kualico as a new commercial company that is expected to play a dominant role in the open source Kualico projects, discussed in October 2014. Though so far we've seen no direct impact on the Kualico OLE project, I will monitor with considerable interest any possible involvement of Kualico in the months or years to come.

It's not possible, naturally, to predict what changes might be in store for the library technology industry in 2015. Every year sees a steady pattern of some changes, so it would be remarkable if the business scene remained entirely quiet. I believe that it is likely that some companies will change ownership in the next year, with a smaller possibility of transitions resulting in further consolidation. As always, it will be interesting to see what happens. It is also important to keep in mind the remarkable stability of the library technology industry. No companies have gone bankrupt in recent memory. Most of the mergers that have happened resulted in manageable product transitions that did not impose dramatic disruption. Even in the merger with the reputation for the most disruption, that of SirsiDynix, both legacy products, Symphony and Horizon, remain alive and well after nine years.

I also recognize the importance of the people in major leadership roles in the industry. While I can't cover every appointment, changes in the top positions warrant mention. This year has been relatively uneventful. Our November 2014 issue noted the appointment of Eric Hines as the new President

of Ex Libris North America. This month we note new appointments to the OCLC Board of Trustees.

Most of my treatment of organizations in the industry is triggered by some major event. Those that keep a steady, albeit positive course might go unrecognized. In order to recognize those with less dramatic histories, *Smart Libraries Newsletter* occasionally features selected companies and products. Our September 2014 issue, for example, profiled Biblionix, a company that has developed Apollo as an entirely Web-based automation system for small public libraries. Several articles related to the Koha open source ILS appeared in the April 2014 issue.

The churn of libraries selecting and renewing system selections every year fuels the industry. I naturally cannot cover these routine transactions. Some, however, reflect a major trend or have such a large impact that they merit attention. Two in this category include the strategy in Denmark to deploy a single nationwide system for the public and school libraries, which we noted in our January 2014 issue was awarded to Dantek. The selection of Sierra from Innovative Interfaces for the public libraries throughout Ireland was the main topic of the November 2014 issue. While the opportunities for other truly national systems may be few and far between, I anticipate that there will be an increasing number of large-scale automation projects where large numbers of libraries band together for a shared system to enable efficiency and cooperation. Such winner-take-all projects have the potential to reshape the relative positions of the companies and products, favoring those able to master massively scaled deployments.

There should be no shortage of interesting products and events to chronicle in year ahead. It would also be beneficial for readers to become more involved. In addition to the usual coverage of new developments in the industry, I would welcome any questions or suggested topic. I look forward to another year covering the library technology industry through *Smart Libraries Newsletter*.

EBSCO Releases Full Text Finder

Patrons need a variety of tools to find materials from within library collections. The genre of discovery services aims to retrieve resources in response to queries that a patron enters. Typical search queries involve subjects, authors, concepts, or other terms that might help discover what items exist and are available. The genre of index-based discovery services that addresses this approach to finding library resources has been extensively covered in *Smart Libraries Newsletter*.

Finding Tools for Journal Titles

Library patrons and personnel also require the ability to find materials based on a citation or other representation of a known item. The patron may have a specific journal title of key interest or may have a citation in hand with the need to find the associated document. Many researchers have a handful of titles that they closely follow. They may want to browse the articles

recently published or delve into back issues. Discovery proceeds much differently when the starting point is a journal title compared to concepts, subject terms, or authors.

The ability to navigate to specific journals within a library's collection has been fulfilled through alphabetical lists that the library maintains on its website. In the early days of e-journals, libraries built alphabetical lists manually on web-pages or built other local finding aids. As e-journals proliferated, each library maintaining its inventory of e-journal titles manually and independently proved inefficient, if not untenable. A variety of commercial products emerged that were based on a comprehensive knowledge base of journal titles issued across all major publishers. These products offered alphabetical e-journal listings of a given library based on their active subscriptions. Some of the early producers of these products included Serials Solutions, EBSCO, and TDNet. These knowledge bases were also leveraged to produce OpenURL link resolvers.

Journal titles usually are also cataloged within the library's integrated library system, with holdings records that describe the coverage of dates and issues available. But since the ILS does not handle article-level records, it is not able to provide any next steps in the research process, such as finding a specific article. Representation of journals in the ILS was better suited for the time when they were held in print form, and patrons needed to know where to find the current issues and bound volumes.

The A-to-Z listing of e-journals has become one of the well-established tools for providing access to specific articles via a library's Web presence. Yet the use of these tools can be cumbersome, especially for libraries that have extensive numbers of e-journal titles, because users may have to work their way through many pages of results in order to find the title of interest.

EBSCO Launches Full Text Finder

EBSCO has developed a new tool, called Full Text Finder, to efficiently provide access to journal titles using an interface designed to be more efficient and easily understood than alphabetical lists. Full Text Finder accesses publication titles through a search box with responsive auto-complete and a new landing page organized by disciplines. This new product provides a greatly simplified interface that aims to make it faster and easier to find an item in the library's collection when working from a citation. Full Text Finder operates through a knowledge base of publication records. This capability complements the discovery process, where patrons seek information resources on given topics or concepts. It also provides an efficient tool to assist staff when their work involves locating journal titles within the library's subscriptions. Full Text Finder is based on

EBSCO asserts that finding titles through the interface of Full Text Finder takes only a fraction of the time that would be needed when using an A-to-Z listing tool.

the knowledge base of publishers' titles maintained by EBSCO, with the ability for libraries to add any titles that they may own not already included.

The launch of Full Text Finder also fits within the context of EBSCO's platform consolidation. When EBSCO Publishing and EBSCO Information Services operated as separate business units, they each delivered their services through their respective technology platforms, EBSCONET and EBSCOhost. As the company has come together organizationally, it has also worked toward unifying its patron-facing services on EBSCOhost, with EBSCONET focusing on staff-oriented functions such as managing subscriptions. (See the July 2013 issue of *Smart Libraries Newsletter* for more details on this consolidation.) Rather than simply re-deploying the LinkSource and EBSCO A-to-Z on the new platform, EBSCO took the opportunity to completely redesign the way that these services are provided.

Publications Search Landing Page

The design of Full Text Finder was based on EBSCO's usability studies that revealed that users prefer this style of interface rather than the traditional A-to-Z listings. For libraries acclimated to the alphabetical lists, the new approach may take some adjustment. EBSCO asserts that finding titles through the interface of Full Text Finder takes only a fraction of the time that would be needed when using an A-to-Z listing tool. EBSCO reported that for library staff that search for 20 titles per day, its user testing of the two systems (A-to-Z using the alphabetical browse feature vs. Full Text Finder leveraging the search auto-complete feature) results in savings of an average of 45 minutes per day.

When invoking the search tool in the Full Text Finder landing page, titles will appear as drop-down options in the manner that has become a standard convention in most Web-based search environments. The titles that appear will be based on those included in the knowledge base, sorted by frequency of use (calculated daily) and limited to those to which the library subscribes. The matching is not strictly alphabetical, including titles that begin with and that contain the text typed by the user.

The product also includes the ability to target queries to articles that appear within a single journal title or selected

groups, provided the library subscribes and that it is searchable within EBSCO Discovery Service. This capability can be convenient for those interested in exploring the content within a specific publication, without all the results that would come from other publications that would also match the search terms.

The landing page of Full Text Finder, which would be labeled as a publications search on the library's website, presents a series of subject discipline facets, with the count of associated titles within the library's collection. Clicking on any of these terms will present additional facets that can be used to further narrow the discipline and will change the scope of the search box presented to the selected discipline.

Once the desired publication title is located, users can easily access the full text of the associated articles using the same technologies integrated into EBSCO Discovery Service. This includes both SmartLinks that directly present a PDF icon or other download link when the article is available through EBSCO Discovery Service or through an OpenURL link resolver. As with EDS, Full Text Finder works with link resolvers other than the one provide by EBSCO.

Integrated Into EBSCO Discovery Service

In addition to being a tool accessed separately to search for publications, Full Text Finder comes integrated into EBSCO Discovery Service (EDS). When a patron types a query into the search box of EDS, its autocomplete will drop down the usual popular terms, but will also provide a second tier of responses labeled "Publications," which will include titles from the knowledge base that match the query term, drawing on the same matching algorithm as used in the search box of the Full Text Finder landing page.

Full Text Finder will also be invoked when there is an exact match with a publication title entered into EDS.

Configuration and Administration

Authorized library personnel configure Full Text Finder via the *EBSCOadmin* console, which is also used to manage all EBSCO-host platform services to which a library subscribes. Through this console, libraries can adjust the branding of the pages presented through Full Text Finder to match their own logos and presentation schemes. This console also allows the library's administrator to enter custom publications and perform other configuration tasks. Full Text Finder also includes the ability to produce statistics on the use of publications, to download lists of publications, or to upload titles to be included.

Holdings and link management is accomplished through a separate and related tab within the *EBSCOadmin* interface called Holdings Management.

Full Text Finder also exposes an API for integration into other services or interfaces.

Replacing Legacy Tools

Full Text Finder represents the next generation product for EBSCO's A-to-Z service and LinkSource knowledge base and link resolver. It is currently integrated into EBSCO Discovery Service and can also be acquired as a stand-alone product.

Libraries that have previously implemented EBSCO's A-to-Z and LinkSource products will have a migration path for the transition. The migration schedule will be deployed in phases and will be coordinated with libraries subscribing to the legacy products to minimize disruption.

One of the trends in recent years has been to consolidate the number of tools and interfaces that libraries put forward for their users. The development of Full Text Finder fits within this trend. Rather than offering a separate interface as a finding aid for locating e-journal titles, this product extends the capability of the discovery interface and subsumes this functionality.

New Developments in the Kualii Commercial Entity

In the October 2014 issue of *Smart Libraries Newsletter* we reported on the transition of the Kualii projects to a more commercial model. Since the publication of that story, there has been some additional activity worth noting. The new commercial entity now has a name, KualiiCo, and it can be found on the Web at kualii.co. The company will be based in Salt Lake City, Utah. According to recent information on its website, the company employs around 25.

As noted, the company will be led by Joel Dehlin as CEO, who will also hold a seat on its Board of Directors. The Kualii Foundation will also appoint a member to the board. Administrators from educational institutions will also be appointed and will serve without compensation and will serve only with explicit approval by their campus administration to avoid conflicts of interest. Non-educational administrators on the board will be compensated through equity in the company. The Kualii

Foundation is named as an investor in the company, contributing \$2 million from its cash reserves.

The company has already made a strategic acquisition. In October, Kualico acquired the business component of rSmart involved in providing software-as-a-service for Kualo implementations. The former CEO of rSmart, Chris Coppola, joined Kualico as its Chief Operating Officer and is responsible for sales, marketing, operations, and product development. Prior to its acquisition, rSmart offered hosting services primarily for Kualo Financial System and Kualo Coeus research management module. Those organizations relying on rSmart's hosting will shift to support by Kualico under similar arrangement.

Previously, rSmart was involved in other business activities related to Kualo projects. Those consulting services were acquired by Navigator Management Partners, a consulting firm offering a variety of services in educational, government, retail, health, and other business sectors.

These developments reflect rapid movement in the establishment of the new commercial company for the broader set of Kualo products. No specific activity has been reported related to Kualo OLE, which continues as before under the management and control of its own boards, separate from those of other projects.

National Public Library System in Denmark Reaches Milestone

KOMBIT, the national agency in Denmark responsible for major projects in the public sector, reported progress on the development of a new automation system for the nationwide deployment for the public and school libraries in Denmark. Dantek, now a subsidiary of Systematic, has made an initial release

of the software available for a pilot project in the Horsens Municipal Libraries. This release concentrates primarily on functionality related to the discovery and circulation of library materials. Following the pilot project, the software will be deployed across the country over the next two years.

OCLC Makes Board Appointments

OCLC has made new appointments to its Board of Trustees, the primary body that provides strategic oversight. Joining the OCLC Board are **Kathleen Keane**, director of John Hopkins University Press; **Brady J. Deaton**, former chancellor of the University of Missouri; **Ellen Tise**, Senior Director of Library and Information Services at Stellenbosch University in South Africa; and **John F. Szabo**, the City Librarian of Los Angeles Public Library.

Since 1977 OCLC has provided compensation to the members of its Board of Trustees, many of which are in administrative positions in OCLC member libraries. The company provides a statement that explains the practice of board compensation and specifies the amounts that board members receive in return for their appointment and activities (http://oclc.org/about/finance/compensation_q_and_a.en.html). OCLC, as required, reports the amounts paid to each board member in its annually filed IRS Form I-990, which is open to public inspection. For the latest year available, fiscal 2012, OCLC paid \$659,677 to its board members.

Finishing their terms on the OCLC Board are **Ed Barry**, former President of Oxford University Press (12 Years, total compensation from 2003–2012: \$349,496); **Tony Ferguson**, former University Librarian of the University of Hong Kong Libraries (6 years, compensation through 2012: \$124,817); **Bernadette Gray-Little**, Chancellor of the University of Kansas (5 years, \$76,155); and **Sandy Yee**, Dean of University Libraries and School of Library and Information services at Wayne State University. Yee was formerly the Chair of the Board of Trustees (2008–2014, compensation through 2012: \$165,387).

No conflict of interest is implied by providing the specific compensation figures reported in OCLC's tax filings, but it is information worth noting. OCLC benefits greatly from the input and oversight of its Board of Trustees. Its organizational structure in the library technology industry is unique and provides an interesting set of comparisons with the other organizations based on for-profit business models.

Library Technology News

News items are compiled from press releases on Marshall Breeding's "Library Technology Guides" website. For the latest vendor announcements, visit <http://librarytechnology.org/news>

My Intota streamlines library management workflows

SEATTLE, November 12, 2014—Day-to-day library collection management activities for academic librarians using ProQuest Intota (<http://bit.ly/1osyOJv>) now benefit from a new workflow feature called My Intota (<http://bit.ly/1qtVWmD>). My Intota provides an "Activities" and "Databases" workspace that includes tasks, deadlines and associated action steps—with multiple filtering capabilities and access to more detail relevant to the specific task—all within an easy-to-navigate single interface.

Get more details on how workflow is simplified in this quick view of My Intota (<http://bit.ly/1osAiDJ>).

Access to data in the activity details is managed based on how the library establishes permissions, giving more control of sensitive data and delivering a better user experience.

- The Activities workspace centralizes all collection management notifications with filtering capabilities based on Notification Type, Resource and Due Date.
- The Databases workspace gathers all subscribed databases into a single list and provides quick access to the relevant workflow activities for a specific database.

Plum Analytics adds data visualization feature

Ipswich, MA—November 06, 2014. Plum Analytics, an EBSCO company, introduced a new data visualization feature. The new analytics feature gives anyone who interacts and uses research insights into the trends and stories behind the citation, usage, social media and other data PlumX collects from dozens of online sources.

PlumX is an impact dashboard that provides information on how research output is being utilized, interacted with, and talked about around the world. It delivers a picture of research and answers questions about research impact by gathering metrics from the places people interact with research artifacts such as articles, clinical trials, blog posts, grants, books, theses/dissertations, webpages and more. These metrics are then categorized into Usage, Captures, Mentions, Social Media and Citations.

The new Analytics tool builds upon the existing features, allowing users to see trends and logical comparisons of groups, artifact types, metric categories and more. The interactive charts will be helpful for those who fund, perform, support or publish research to help understand more about the interaction with their research. This will help answer questions about potential collaborators, promotion efforts, new researchers' work and more.

Questions or suggestions
for topics in future issues?



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