



Smart LibrariesTM

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Smarter Libraries through Technology:

The OCLC Non-Event

By Marshall Breeding

The topic sparking the most buzz in library tech circles at ALA's Annual Conference was the unfortunate turn of events surrounding OCLC leadership. OCLC had named Jack Blount as its new President and Chief Executive Officer on June 8, 2012 and then rescinded the appointment with a subsequent and surprising announcement. A letter from Larry Alford, chair of the OCLC Board of Trustees, to the organization's membership dated June 20, 2012, gave the first public statement of this dramatic change of course. Jay Jordan will continue at the helm. The expected duration of Jordan's extended tenure as President and CEO of

OCLC was not immediately announced as the organization defines a new executive selection process.

The appointment of Blount and its rescission 12 days later followed an extensive and thoroughly vetted search process involving the executive search firm Heidrick & Struggles, an Executive Search Committee, as well as the Board of Trustees, which was responsible for the final decision. A Community Advisory Group provided additional input. This year-long process was initiated following OCLC's announcement on June 29, 2011 that Jay Jordan planned to retire on June 20, 2012, giving the organization ample time to plan a transition. The selection and appointment of a new CEO for the world's largest library organization represented an incredible investment of time and resources among a very broad group of stakeholders. That process will now be reprised, inevitably with extreme caution and vigilance.

While speculation abounds regarding the circumstances of these decisions, no information has been officially released nor is any reliable informal or background information available. It is not even known which party withdrew. As can be expected with the conclusion of an employment relationship at this level, all parties have apparently executed contracts that include non-disclosure terms.

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It is not likely that additional information will be forthcoming.

That some kind of show-stopping issue arose following the public announcement despite careful vetting was truly unfortunate and will have an impact on the next round of the executive search. While it might be understood that difficult choices were made and that prompt action was taken before rather than after the new President-elect was handed the reins, it would have been infinitely better if all the multiple layers of scrutiny had managed to avoid this public reversal, even if it meant a delay in leadership transition. That said, I do believe that the selection process was carried out with the utmost care and that there is no reason to cast dispersions. The many individuals who were involved in the process have likely gone through an enormously stressful period as the arrangement unraveled.

Yet it also isn't quite right to say that this reversal is without significance. Had the appointment not been withdrawn, a major theme of the 2012 Annual ALA Conference for OCLC would have surrounded this transition of leadership. Major announcements are often tied to this largest of library conferences to gain maximum exposure in the library community. Going into the conference with leadership news story reverberating, OCLC representatives naturally downplayed its significance and instead gave great emphasis to its positive accomplishments, especially those surrounding its efforts in implementing linked data.

In the perspective of the long history of OCLC, this event is but a bump in the road, but one that cannot easily be erased from the memory of the community. We can anticipate that a new President and CEO will be appointed within a reasonable period, that Jay Jordan will actually get to enjoy his retirement, and that the mantle of leadership will then pass to another well-qualified individual.

As a global organization with several layers of governance, the trajectory of OCLC is influenced, but not unilat-

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erally set by its President and CEO. Each of the presidents has made a personal impact on the shape of the organization and its activities. Jack Blount would have brought his experience and perspective as a technologist and entrepreneur. In an editorial essay that I prepared for *Smart Libraries Newsletter* following the announcement, which appropriately was preempted for publication, I mentioned some of my thoughts on Blount's background relative to the challenges at hand. Those points are now moot, and I will wait with great interest as OCLC works its way through the eventual appointment of its next CEO.

It's natural to expect that for now OCLC will continue with the strategic directions that have been put in place under Jay Jordan as he extends his tenure of leadership. It has been a course of expansion, including ever increasing global involvement and participation along with a widening of the scope of its services, especially into the area of library management systems with the launch of WorldShare Management Services as a major strategic initiative. New leadership will come to the organization in due course. In the meantime, OCLC continues to make ambitious progress on a slate of new initiatives, including building out new products based on the WorldShare Platform and WorldCat.org; making forays into the realm of linked data; and continuing and strengthening its many longstanding products and services built around the basis of library cooperation.

Bibliotheca Enters E-Book Arena

Bibliotheca, the globally consolidated company built around RFID technologies, has expanded its business interests to include a new set of products based on e-books. The company has not yet provided detailed information regarding the components of its planned product and service offerings related to the management and lending of e-books, though it has outlined its general strategy.

Bibliotheca has become established as one of the leading companies involved in RFID-based products and services for libraries, with a broad international presence. Shai Robkin, President of Bibliotheca's North American business, reported that the company sees a real opportunity in the library e-book arena, which is seeing strong growth and can be well integrated into the company's existing products and services. While the

company anticipates long term interest in its products related to handling a library's physical materials through RFID and other technologies, e-books present an additional line that can complement its existing products, markets, and areas of expertise.

Building on the Douglas County Libraries E-Book Program

Bibliotheca will model its e-book offerings on Douglas County Public Library in Colorado, which has garnered national attention with its e-book lending program. One of the key principles embraced by Douglas County is a business model based on the ownership of e-book titles rather than licenses that govern access. The program aims to lower the cost of e-books by negotiating discounts as libraries cooperate to amplify their purchasing power. Bibliotheca aims to further develop this model and create products and services that can be distributed to libraries internationally.

The Douglas County Library has created its own infrastructure for the storage, management, and lending of e-books, based on the Adobe Content Server. Working with around 12 different publishers, it has created a collection of more than 7,000 e-book titles that it owns and which can be accessed and charged out through its VuFind-based online catalog. The emphasis on building its local collection of e-books has leaned toward independent authors and publishers, especially those writing about topics of local interest, rather than the major publishers that so far do not support library ownership and lending of e-books.

Jamie LaRue, director of the Douglas County Libraries, has been an advocate of library e-book ownership and has established this library district as a pioneer in this arena. The library has established partnerships in support of its e-book program, including an agreement with the Colorado Independent Publishers Association (<http://www.cipacatalog.com/>) to offer lending and links for purchase of e-book titles. In addition to its own locally-managed e-book collection, the Douglas County Libraries also subscribes to commercial services, including OverDrive and the 3M Cloud Library as well as other services for online music and video. Although working in partnership with Bibliotheca, the library anticipates that any new offerings created would be implemented to complement and not necessarily replace its existing e-book infrastructure.

Two employees of the Douglas County Libraries have joined Bibliotheca. Monique Sendze, formerly associate director for information technology, will lead Bibliotheca's new e-book division. Jordana Vincent, formerly collection development librarian, has been named the company's content and publisher relations manager. Vincent will help Bibliotheca build its collection of

The technical capabilities that Bibliotheca has in place for connecting its self-service equipment to integrated library systems would also provide the basis of integrating e-book lending into library catalogs.

e-book titles following some of the principles used in the Douglas County model.

Bibliotheca will extend its existing presence in libraries related to self-service to support access to e-books. The self-check kiosks would also serve as service points within a library for patrons to be able to discover, check-out, and download e-books. The technical capabilities that Bibliotheca has in place for connecting its self-service equipment to integrated library systems would also provide the basis of integrating e-book lending into library catalogs.

The e-book products will initially be centered in Bibliotheca's North American operations, with later deployment in the other international regions it serves.

Consolidating the Bibliotheca brand

Bibliotheca has also become the global brand for the company that was formed out of Bibliotheca RFID Systems, ITG, Intellident, and more recently Trion AG. Each of these separate companies stood as major suppliers of RFID technologies to libraries in their respective geographic regions and were each acquired in June 2011 by One Equity Partners (see "Global Consolidation: three firms join to form Global RFID synergies" Smart Libraries Newsletter, July 2011). The brands of the antecedent companies have been phased out gradually since the initial business consolidation, with a concerted rebranding announced in March 2011. The Intellident brand, however, will continue to be used for selected products in the UK sold outside of the library arena to industrial and retail markets. In North America, the company operated for a period as Bibliotheca ITG, reflecting the consolidation of Bibliotheca RFID Systems with Integrated Technology Group, a division of Vernon Library Supplies. Shai Robkin serves as one of the managing directors of the consolidated company and leads its North American operations. Following the rebranding, access to all the company's library-related products and services are available through bibliotheca.com.

—Marshall Breeding

3M Cloud Library Forges Ahead

3M, Bibliotheca's largest competitor in the self-service and RFID sector, entered the e-book arena in May of 2011 with the announcement of its 3M Cloud Library. This e-book service includes several components: an increasingly large collection of e-book titles hosted in its cloud-based infrastructure; 3M Discovery Terminals that allow patrons to discover, browse, and check out e-books from kiosks within the library; and 3M eReaders that can be loaned to patrons who may not already have their own devices. 3M also provides support for their library e-book lending service to multiple mobile platforms, including Apple iOS devices (iPad, iPhone), those using the Android operating system, the Nook from Barnes and Noble, as well as Macs and PCs.

It has been just over a year since 3M's initial announcement, and it has made significant progress in attracting libraries to its e-book products. The State Library of Kansas was one early adopter and development partner. Libraries making recent announcements to adopt the 3M Cloud Library include the Pasadena Public Library and the Glendale Public Library, both in California. These libraries join a handful of others across the United States making early implementations of the 3M Cloud Library.

3M has also made progress in expanding the number of titles available through its platform. The company reports that its agree-

ments with publishers now represent a total of around 200,000 titles. In addition to existing arrangements made in 2011 that brought in around 100,000 titles, agreements have been formed recently with Smashwords, including works from 40,000 independent authors (<http://www.smashwords.com/>); INscribe Digital (<http://www.inscribedigital.com/>), an e-book publishing service; Rowman & Littlefield Publishing Group, an academic and general interest publisher with over 1,500 titles; and the National Book Network (<http://www.nbnbooks.com/>).

3M is also part of a pilot project involving Penguin Group (USA), a Big Six publisher that recently discontinued its e-book loan services. In a pilot project, Penguin is working with the New York Public Library and the Brooklyn Public Library to make its titles available through the 3M Cloud Library. Restrictions apply, including delaying the lending of titles until six months after publication and limiting the time that the titles can remain in the library's collection to one year, after which they need to be repurchased. Despite these restrictions, this pilot project makes available to patrons a large number of high-interest titles and re-engages a major publisher.

—Marshall Breeding

EBSCO Releases EBSCO Discovery Service API

EBSCO Publishing has improved the extensibility and interoperability of its EBSCO Discovery Service (EDS) through the release of a new Application Programming Interface, or API, compatible with current technology practices and with popular discovery interfaces such as VuFind. This move brings EDS, which already competed well on the power of its search technology and the breadth of its index, into an even stronger position relative to other discovery services, such as Summon and Primo Central, which have previously released APIs.

The genre of discovery services allows libraries to present their users with the ability to search all components of its collections, expanding the traditional scope of the online catalog to also include articles represented in its subscriptions to electronic resources and to other collection components. Each of the major products in this sphere, Summon from Serials Solutions, Primo Central from Ex Libris, WorldCat Local from

OCLC, and EBSCO Discovery Service from EBSCO Publishing offers a service that delivers this expanded search capability through a Web-based interface. In addition to using discovery services as-is through the provider's user interfaces, libraries increasingly want to combine capabilities among other applications and interfaces. Some libraries may, for example, have a search environment already in place and want to preserve its user interface while extending its scope to article-level resources. Or they may want to add the capability to search library resources from other related resources, such as the campus learning management system.

In order to gain access to the search capabilities of a discovery service from outside the provider's interface, a set of APIs, need to be enabled, documented, and made available to libraries or other third parties. APIs allow programmers to write scripts or applications that take advantage of the capabilities

of a product. APIs enable system-to-system communications for such purposes as exchanging data and expressing functionality. For discovery services, an API might enable an open source discovery interface, such as Blacklight or VuFind, to take advantage of the extensive index and search and retrieval capabilities of a discovery service.

EBSCO Publishing released the EDS API to provide access to the product's extensive content resources and the underlying functionality. Some of the elements available through the API include access to the metadata within the EDS environment, delivery of result set data including relevancy rankings, access to facets represented in search results, presentation of book jacket images, and full-text linking capabilities, including those based on OpenURL and EBSCO's proprietary SmartLinks technology.

Through a technique EBSCO calls Platform Blending, libraries that also subscribe to EBSCOhost content products can tap into subject indexing and metadata that can be integrated into broader search operations. Platform Blending unifies results from subject indexes in EBSCOhost with the EDS Base Index. Platform Blending can also be accomplished in search results delivered through the EDS API.

EBSCO states that the EDS API was created to follow the standards and conventions widely implemented in library-oriented development projects. The APIs are delivered as Web services, both as REST (REpresentational State Transfer) transmitted over existing Web protocols and SOAP (Simple Object Access Protocol), a more complex messaging format. Service responses can be delivered through XML or JSON. The API has been developed with consideration for popular library interface environments, such as VuFind, and content management systems, such as Drupal. A sample VuFind



deployment demonstration is available. The key goal of the API involves delivering search results through third party interfaces as they would be through the native EBSCO Discovery Service, with the ability to make needed customizations or feature extensions.

Technical personnel, such as programmers or integrators, need detailed documentation of an API in order to take advantage of its capabilities. EBSCO provides complete documentation developers will need to create custom interfaces or to integrate with third-party applications. It makes available the XML Schema Definition employed by the EDS API, sample XSL transformation, sample code snippets, as well as the demonstration application for integration with VuFind.

EBSCO publishing offers resources that describe the capabilities of its APIs, provides access to technical documentation, including a Wiki available to EDS subscribers. See: <http://www.ebscohost.com/discovery/api>

Below are examples of libraries taking early advantage of the new EDS API.

- Universitätsbibliothek Freiburg in Germany (<http://www.ub.uni-freiburg.de>) blends EDS results into local catalog results through an interface based on IPS (Information Portal Suite). IBS was originally created by IHS Technologies GmbH and has been adopted by HBZ as the basis of its DigiBib library portal.
- Indiana University uses the EDS API to integrate search results into its OneSearch@IU discovery environment. Indiana University is also developing a new search interface based on Blacklight.
- EBSCO makes available its own implementation of a demonstration site that uses the VuFind discovery interface that illustrates parallel results out of a local library ILS and from EDS.

EBSCO has offered tools for its EBSCOhost platform through its EBSCO

Integration Toolkit for expressing results from EBSCOhost databases through environments such as Microsoft SharePoint, IBM Web Sphere, and the Google Search Appliance. The APIs for EBSCO Discovery Service provide a more sophisticated and modern approach to interoperability.

EBSCO Publishing announced a partnership with Innovative Interfaces in August 2011 to develop integration between Innovative's Encore discovery platform and EBSCO Discovery Service that will be based on the EDS API.

Summon from Serials Solutions has offered APIs and the ability to work with other interfaces from its original launch in March 2009. Some of the implementations using the Summon API include that of Villanova University that uses the VuFind interface to provide parallel results from Summon and the library's local Voyager-based ILS; the University of Michigan, The University of London Royal Holloway Library.

Ex Libris also offers APIs for its Primo and Primo Central discovery products. The University of Leipzig, for example, has created an environment that uses VuFind with the Primo Central from Ex Libris.

The competition among the major discovery services continues to be intense, with Summon, EBSCO Discovery Service, Primo Central, and WorldCat Local each being marketed aggressively. The availability of APIs to facilitate integration has become an important consideration. Not having an API could exclude a discovery service from some procurement opportunities. The release of an advanced API for EBSCO Discovery Service significantly strengthens the product's appeal for libraries with more complex environments that require integration among different content and discovery services.

—Marshall Breeding

Breeding Knowledge Base and Link Resolver Report Published by National Library of Sweden

The LIBRIS division of the National Library of Sweden commissioned Marshall Breeding to write a report on e-resource knowledge bases and OpenURL link resolvers. Breeding gathered data from each of the major providers. He also surveyed libraries on their impressions of current and previous link resolvers, their assessment of the completeness and quality of the associated knowledge base.

The free download is at:
http://www.kb.se/dokument/Knowledgebase_linkresolver_study.pdf

—Patrick Hogan

Library Technology News in Brief

Excerpted from press releases posted on Marshall Breeding's Library Technology Guides (<http://www.librarytechnology.org/>).

3M Donates Standard Interchange Protocol (SIP) to National Standards Organization (NISO)

St. Paul, MN. – June 7, 2012 – 3M Library Systems and NISO have joined together in an effort to drive future innovation of the Standard Interchange Protocol (SIP) as an American National Standard. Originally this was developed

by 3M to provide a common communication language that would drive adoption of self-service systems for libraries. SIP has become the defacto standard for the communication between self-service devices and Integrated Library Systems (ILS) globally. Each update has addressed the evolving needs of libraries, simplifying and supporting automated materials handling systems, PC management systems and fine and fee payment solutions.

“The maturity of the SIP protocol and its implementation track record should allow it to move quickly through the NISO standardization

process,” stated Todd Carpenter, NISO Managing Director. “We anticipate that version 3.0, as it currently stands or with very minor revisions, will be adopted as a standard following a brief period of review within a NISO Working Group.”

Anyone interested in participating in the working group to review SIP 3.0 and prepare it for balloting as a NISO standard should contact NISO at nisohq@niso.org. More information about the project, including the project proposal, can be found on the NISO website in the SIP Workroom: www.niso.org/workrooms/sip.

Yippy, Inc. and MuseGlobal to Merge

San Francisco, CA – June 11, 2012 – Yippy, Inc. (OTCQX: YIPI) (www.yippy.com) (“Yippy” or the “Company”), a unified search company known for its clustering technology, reported that the Company entered into an agreement to merge with MuseGlobal, a leading provider of content integration and data virtualization services.

Yippy.com (formally www.clusty.com) is an award-winning deep research engine developed out of Carnegie Mellon University. The programs were acquired by Yippy in May 2010 from Vivisimo, Inc., an industry leading Enterprise Search company that was recently acquired (May 2012) by International Business Machines (IBM). In conjunction with the purchase of the search engine software, Yippy acquired from Vivisimo/IBM a transferable, unlimited lifetime perpetual license for the software known as Velocity for web-based search applications. Velocity is the most advanced enterprise software solution with patented clustering methods that are the keys to the future of enterprise and consumer search. IBM currently holds a 10% stake in Yippy, Inc.

“Big Data is a major problem for search engines. If you can’t cluster search results and dynamically rank and normalize unlimited information sources whether it is a consumer search engine such as Bing or Google, or an enterprise model like HP/Autonomy, in my opinion you’re out of the game of search in 3-5 years. The future is Data Virtualization or Data as a Service in the cloud,” stated Rich Granville, CEO, Yippy Inc.

Ingram's Vital Source implements EPUB3 to Bookshelf platform

New York, NY – June 4, 2012 – Vital Source Technologies, Inc., an Ingram Content Group company, announced that it has implemented support for the EPUB 3 standard in its flagship Bookshelf platform, becoming the first e-textbook solution provider to deliver support for the latest version of the open industry standard.

The new EPUB 3 version, based on HTML5, supports rich media, interactivity, global languages, and enhanced accessibility features..

"Textbooks in higher-education are moving beyond the static dimension of the printed page and the book-under-glass e-books people are accustomed to," said Kent Freeman, Chief Operating Officer, Vital Source Technologies, Inc.

Vital Source can accept and deliver EPUB 2 and EPUB 3 content to institutional partners around the world through its Bookshelf platform. The VitalSource platform supports EPUB across all six clients including browser, Mac, Windows, iOS, Android and Kindle Fire.

OverDrive to Provide Streaming Audiobooks to Libraries and Schools

Cleveland – June 13, 2012 – OverDrive announced today that it will update its popular audiobook download services to include new options for readers to instantly “See Book—Hear Book.” Scheduled for launch later this year, streaming audiobooks will be available on a wide range of Internet-connected devices, including smartphones, tablets and computers. This instant-access technology will eliminate long downloads before listening to popular audiobooks from libraries and schools throughout the OverDrive network. The “Listen Now” option will complement the download options already in use with the millions of installed OverDrive Media Console apps on Windows, Mac, iPhone, iPad, Android, Windows Phone, and BlackBerry®.

OverDrive will incorporate the streaming option into the free OverDrive Media Console apps, enabling readers to access complete audiobooks or to immediately sample excerpts without first downloading the title. This new feature will complement the current download options, which allow readers to transfer titles to a variety of iPod and MP3 audio devices or burn to CD. Streaming audiobooks will add value to every library’s audiobook collection while still enforcing copyright and supporting permitted lending models. Access to each streaming audiobook will expire at the end of the borrowing period.

Development Partners Now Testing Intota

Seattle, WA – June 12, 2012 – Serials Solutions, a ProQuest business, announced today the first functionality of Intota, a new web-scale management solution, is available to its library development partners.

In this first iteration, the six development partners are testing interoperability with vendors, as part of the critical supply chain for materials in a library management workflow, as well as the new Serials Solutions knowledgebase (in development), a single integrated database that supports global print and electronic resources.



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