Redefining the Academic Library

Ex Libris’ next generation solution for library management

26. March 2012
The Bridge of Sighs in Cambridge
St John's College of Cambridge University
The bridge to knowledge

New services to end users

New tasks for the library

New access methods

New collection definition

New partnerships with service providers
Key Criteria for the Next Generation System

• New Services to be created
  ➢ Rising demand on digital and electronic resources

• Old Services to be continued
  ➢ Physical material remains important

• Stretched Budgets and Staff Time
  ➢ Libraries need to prove their value to the organization
Three Steps to the Next Generation System

- CONSOLIDATE
- OPTIMISE
- EXTEND
The idea behind Alma

Unified Resource Framework
Evolution of Library Automation Tools

User Environments

(OPAC) MetaSearch (Viewer)

Print Electronic Digital
ILS ERM DAM

Management Environments
Decoupled & Unified End-User Services

Unified Discovery

Primo

Print  ILS

Link  ERM

Electronic

Digital  DAM

Management Environments
Added Global E-Resource Services

Mega Index articles & e-books

Unified Discovery

Primo

Print
ILS

Electronic
ERM

Digital
DAM

Management Environments

Primo Central

Article Recommender Service

ExLibris
Consolidate the Management Frameworks

Turn format-based **data silos**
Consolidate the Management Frameworks

Turn format-based data silos to service-based unified **workflows**
Unified Resource Framework

Unified Discovery

Primo

Regional/National Catalogs

Alma

Unified Management

Primo Central

Community Zone

ExLibris
The Alma Concepts

Next Generation Library Management Services
The road to the optimised library

Optimisation

Networked library system

Optimised User Experience

Optimised Services & Workflows

Optimised Data Structure

Optimised Infrastructure

Automation

Integrated library system
The road to the optimised library

Optimisation

- Optimised User Experience
- Optimised Services & Workflows
- Optimised Data Structure
- Optimised Infrastructure

Automation

Networked library system

Integrated library system

ExLibris
Optimised Infrastructure: The Core of Cloud Computing

Technical Core

- Multi tenancy
- Highly Elastic performance
- Minimal local effort (browser)
- Central upgrades
- Improved configurability & easier administration
- Improved sharing
- Improved availability & security

Amsterdam, London, Frankfurt, Zürich, Paris, …
The road to the optimised library

- Optimised Infrastructure
- Optimised Data Structure
- Optimised Services & Workflows
- Optimised User Experience

- Automation
- Integrated library system
- Networked library system

• Cloud architecture
• Software-as-a-Service
Optimised Data Structure: Collaborative Metadata Management

A hybrid model to balance global sharing with local needs

Library Inventory
holdings of all types (P & E & D)

Library Catalog
private metadata bibliographic & authority records

Community Zone
global, shared metadata bibliographic & authority records
Optimised Data Structure: Collaborative Metadata Management

Regional/National Catalogs

Inventory

Library Catalog

Community Zone

National Catalogs

Regional Catalog

WorldCat
The road to the optimised library

- Optimised Infrastructure
- Optimised Data Structure
- Optimised Services & Workflows
- Optimised User Experience

Optimised Services & Workflows:
- Community & Library Data
- Automatic content enrichment

Optimised Data Structure:
- Cloud architecture
- Software-as-a-Service

Optimised User Experience:

Automation
Integrated library system

Networked library system
Optimised Services & Workflows:

All End-to-End Workflows in one system

- Cross-resource type selection
- Combined acquisition and activation
- Unified fulfillment – P, E, & D
- User-driven collection development
- Usage-driven evaluation & renewal
- Digitization on demand
Optimised Services & Workflows:
Actionable Analytics and Intelligence
The road to the optimised library

Optimisation

- Optimised User Experience
- Optimised Services & Workflows
- Optimised Data Structure
- Optimised Infrastructure

Networked library system

- Highly automated workflows
- Data analytics & intelligence
- Community & Library Data
- Automatic content enrichment
- Cloud architecture
- Software-as-a-Service

Automation

Integrated library system
Primo with Alma – Smart Fulfillment
Primo with Alma – E-Book Display
Primo with Alma – Print Availability

The Book of Job
David Neiman 1921-1972
Check holdings at Kenny-Cottle Stacks (BS1415.2.N4) and other locations

Get It

Available on Shelf
- Kenny-Cottle Book: Default value for regular Due date (3 Week)
- New England Deposit Library Book: Not For Loan

Available in Closed Stacks
Available at multiple libraries Book: Default value for regular Due date (3 Week)

The Wireless Age: Its Meaning for Learning and Schools (Scarecrow Education Book)
2001
The road to the optimised library

Optimised Infrastructure
- Cloud architecture
- Software-as-a-Service

Optimised Data Structure
- Community & Library Data
- Automatic content enrichment

Optimised Services & Workflows
- Highly automated workflows
- Data analytics & intelligence

Optimised User Experience
- Unified smart fulfillment
- On-demand fulfillment

Integration of library system

Automation

Optimisation

Networked library system

ExLibris
Alma Integration and Extension

Online connectivity to external services
Alma Interfaces on Every Level

- User Experience
  - Primo Interfaces
- Services & Workflows
  - Process Level WebServices
  - WorkFlows
- Data Structure
  - Data Level WebServices
- Infrastructure
  - Monitoring
  - Security
Integrate Into Your Environment

Extend Alma by integrating it with existing and upcoming environments

- Self Check
- SIP2
- Virtual Learning Environment
- Users
- Suppliers
- Metadata Providers
- Material Vendors
- Resource Usage
- Parent Institution
- Student Information System (SIS)
- LDAP
- Finance & ERP
- SSO
- Identity Mngt
- Partners
- Union Catalogs
- Resource Sharing
- Scholarly Community
- University Press
- Open Access Repositories
- Research Management

ExLibris
Extend Using the Open Platform
Ex Libris Alma in 7 Bullet Points...

- Unified management of all resource types
- Consolidated workflows & data

- Cloud service
- Collaborations (libraries, users)
- Analytics-driven

- Open, Service Oriented, Extensible
- Enables libraries to offer new services
The Status

Next Generation Development Style
## Alma Development Partners

### Princeton University
- **Background**: ~7M items
  - Voyager, Meridian, SFX, Primo
- **Key Areas of Collaboration**: Workflow streamlining
  - Especially cataloging
  - Systems integration

### Purdue University
- **Background**: ~6.5M items
  - Voyager, SFX, Primo
- **Key Areas of Collaboration**: Digital content
  - Descriptive Metadata
  - E-Research workflows

### Boston College
- **Background**: ~7M items
  - Aleph, Verde, DigiTool, SFX, Primo
- **Key Areas of Collaboration**: Course reading workflows
  - Analysis tools
  - Digital collection mgmt

### Katholieke Universiteit Leuven
- **Background**: ~4M items (31 institutions):
  - Aleph, Verde, DigiTool, SFX, Primo
- **Key Areas of Collaboration**: Inter-institutional relationship management
  - Consortial services
# Alma - Agile Release Cycle

<table>
<thead>
<tr>
<th>Frequent, small updates</th>
<th>Periodical Releases</th>
<th>Lower TCO</th>
</tr>
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<tbody>
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<td>• Bug fixes, minor enhancements</td>
<td>• 3 times a year (spring, summer, winter)</td>
<td>• No server or client upgrades</td>
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<td>• Automatic for every customer</td>
<td>• New features</td>
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<td>• User requests &amp; needs addressed in weeks / months (not years)</td>
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## Alma Early Adopters

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<thead>
<tr>
<th>Region</th>
<th>Early Adopter Programme Kick-Off</th>
<th>Partners, Consortium</th>
<th>Number of Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Australia &amp; NZ</strong></td>
<td>Early Adopter Programme Kick-Off in October 2010</td>
<td>8 Partners, incl. a Consortium</td>
<td>8</td>
</tr>
<tr>
<td><strong>North America</strong></td>
<td>Early Adopter Programme Kick-Off in October 2011</td>
<td>11 Partner</td>
<td>11</td>
</tr>
<tr>
<td><strong>Europe</strong></td>
<td>Early Adopter Program Kick-Off in July 2011</td>
<td>9 Partners – among them</td>
<td>9</td>
</tr>
</tbody>
</table>

- University of York
- Lancaster University
- University of East London
- Plymouth University
- Free University of Bolzano

- **60 institutions in total**
- have already signed Alma-Contracts
### Alma Early Adopters D-A-CH

<table>
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<tr>
<th>Germany</th>
<th>Integration with German union catalog structure</th>
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<tr>
<td></td>
<td>GND, ZDB,...</td>
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<th>Austria</th>
<th>Integration with ACC</th>
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Costs and Service models

Software-as-a-Service
Software-as-a-Service

- Ex Libris offers a variety of services, which is
  - software already installed on hardware
  - ready to use via Web (Service Level Agreements)
  - All new version upgrades included

→ yearly subscription fee

- Each service requires certain implementation
  - Data migration from legacy systems
  - Training
  - Initial configuration

→ up-front cost
Ex Libris Services
Ex Libris Services

Primo Central
Primo

Alma

Community Zone
bX
Ex Libris Services – Price Modell

- Services and related subscriptions vary by product
- In general, subscriptions are based on number of users, either end-users or staff-users
- Another criteria is collection size, represented by metadata records and digital objects
- We offer consortia models for all products
- For a more detailed discussion we will need to talk individually

- Please contact:
  - Ullrich.Juengling@ExLibrisGroup.com
Alma has open arms

The bronze statue of 'Alma Mater' by Daniel Chester French.

The artist said he wanted to make a figure that should be gracious in the impression, with an attitude of welcome to the youths who should choose Columbia as their College.'

1903
Columbia University,
New York
Thank you!

Dr. Axel Kaschte, Strategy Director Europe
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www.exlibrisgroup.com