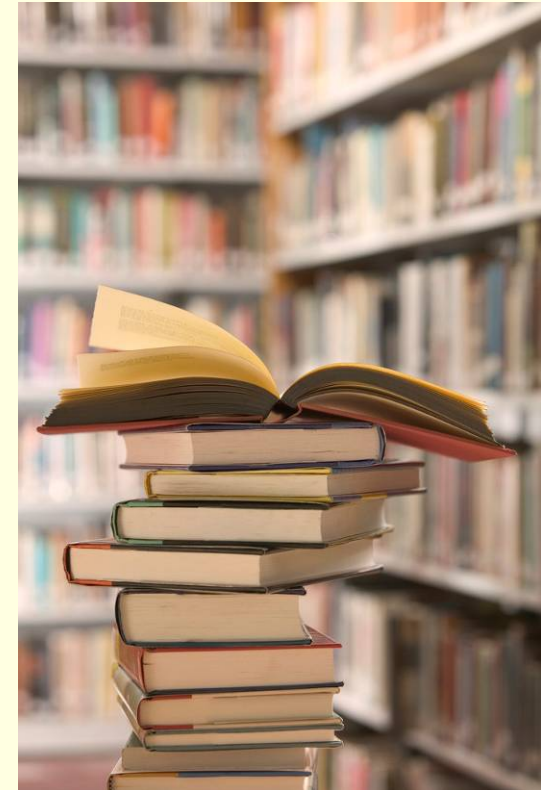


Managing the Virtual Library

Jane Burke
Vice President, ProQuest CSA
General Manager, Serials Solutions

Old Model of Library Use is Gone

- Old model resulted from \$\$\$ of the '60's
- Built BIG print collections
- Users had to come to the collections



Nature of collections has changed

- 50+ % spent on e-resources is not unusual
 - Underutilized
- Collections are much more volatile
 - e-journals
 - Open Access journals
 - e-book collections
 - e-music
 - Institutional repository
 - Online reference resources
 - Datasets

It's all about the Users

- The Web has changed how we deliver and consume information
 - The shift from physical to digital delivery of information has created new requirements and opportunities for delivering effective library experiences
- The Web has profoundly transformed the nature of library collections
 - The majority of new acquisitions are Web-based
 - Collections have increased dramatically and content is available anytime, anywhere
 - Web search engines compete with libraries

The Elephant in the Room



Users are forcing a paradigm shift

- 87% of respondents believe that the paradigm has shifted from library management to user-centric
 - They cite the “Googlization” of information access as a primary reason
- Where researchers still use the library—it is often remotely
 - This negates the research librarian’s traditional value-added role in users’ research processes

Today's Library exists within a new world of users

- We need to be where the end users are !
- We can't believe that they will tolerate learning multiple systems
 - Courseware & Google are the lingua franca
- We must accept short term risk to avoid long term "disintermediation"

- Embrace Web 2.0 !!

危机

Frankly, we need to ...

- Align our priorities with reality
- Align our behaviors with reality
- Stop doing lots of stuff that isn't appreciated
- Hurry Up !!

What are librarians *really* worried about?

Recent research project:

- Keeping up with all of your duties
 - Too much to do and not enough time, people or budget
- Making the transition to a user-friendly library
 - This was a recurring answer to many of our questions

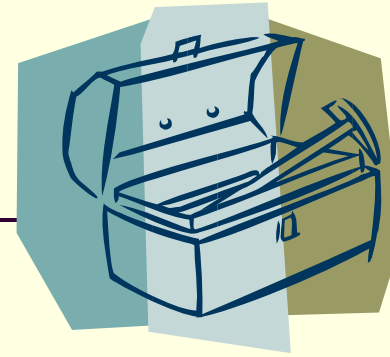
We can do anything ...

We can't do everything

Aligning behaviors means deliberately putting energy and thought into digital services:

- Re-integrate technical services
- Look hard at all print processing activities
 - Give it up!
 - "Starve books"
- Stop doing bibliographic instruction – it doesn't work
- Don't accept the "Long Tail" as an excuse
 - There aren't enough staff resources

Tools



- What do we have now
 - Improvements to expect
- What's coming shortly?

Discovery

- Users can't use it if they can't find it
- Federated search is NOT "in its infancy"
 - Google for premium content
- Connector technologies – publishers "get" it now – XML gateway standard (NISO MGX)
- Results processing advances
 - Relevancy
 - Visualization
 - Results Clustering

Current Relevance in Federated Search

- Simple term count / scoring system (sample rules)
 - Term in title – 3 points
 - Term in abstract – 2 points
 - Frequency of term in citation – 1 point for each
 - Rank in the Native Database – variable multiple
 - Recency of Article – variable multiple
- Ultimately, this is a simple mathematical analysis
- It cannot consider context of the information need

Visualization

grokker ESM

✓ Yahoo! ✓ Wikipedia Amazon Books

magellan **GROK** Advanced Search

Outline View **Map View** 134 total results

ZOOM BACK TOP Expand View Expand Detail

Working List
0 items in your list
[View your list](#)

Email Map...
 Export Map...

Search within the map:
by keyword
 Exclude

by date
all most recent

by source
<All sources>

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Magellan probe
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...The Magellan probe, a NASA unmanned space mission to Venus....
http://en.wikipedia.org/wiki/Magellan_probe - Sunday, October 08, 2006
Source: Wikipedia

Ann Arbor, Michigan Commercial and Residential Real Estate, McKinley
[Add to Working List](#) | [Post to del.icio.us](#) | [Bookmark](#) | [Email](#)
Commercial and residential real estate realtors in Michigan, Illinois, Indiana, Ohio, Kentucky, Oklahoma, Virginia, Georgia, Florida, Nevada, Arizona. Leasing, property asset management, industrial, retail, shopping mall centers, investment, ...
<http://www.mckinley.com/> - 21k - Friday, October 06, 2006
Source: Yahoo!

Magellan telescopes
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...The Magellan telescopes at Las Campanas, Chile....
http://en.wikipedia.org/wiki/Magellan_telescopes - Sunday, October 08, 2006
Source: Wikipedia

Enterprise Content Management Solutions (ECM) - Open Text Corporation
[Add to Working List](#) | [Post to del.icio.us](#) | [Bookmark](#) | [Email](#)
Open Text (Nasdaq: OTEX (TSX: OTC) is the market leader in providing Collaboration, Enterprise Content Management software solutions. Livelink, is an integrated compliant software solution for the global enterprise.
<http://www.magellan.com/> - 28k - Wednesday, October 04, 2006
Source: Yahoo!

Lotus Magellan
[Add to Working List](#) | [Post to del.icio.us](#) | [Bookmark](#) | [Email](#)
...Lotus Magellan, a file manager software....
http://en.wikipedia.org/wiki/Lotus_Magellan - Sunday, October 08, 2006
Source: Wikipedia

Magellan GPS
[Add to Working List](#) | [Post to del.icio.us](#) | [Bookmark](#) | [Email](#)

Magellan Project
Born in Portugal
Portuguese Expl...
World Explorer Ferdinand Magellan
Mission to Venus
Info about Magellan
Magellan GPS
Born in Portugal
Content Management
Travel Supplies
More...

magellan

Results Clustering

The screenshot shows a search results interface with a dark blue header containing the text "Clustered Results". Above the header are four tabs: "Topics", "Date", "Journals", and "Authors". The main content area lists several clusters of results, each with a blue arrow icon and a count in parentheses. The clusters are: "air pollution (100)", "Science (8)", "Health, Influence (10)", "Reviews (10)", "Emissions, Energy (5)", "Pictures (6)", "Crime (8)", "Flight, Airline (4)", "Rights, Property (4)", "Children, Asthma (5)", and "Cancer, Death (4)". A "More" link with a downward arrow is at the bottom of the list.

| Topic | Count |
|-------------------|-------|
| air pollution | 100 |
| Science | 8 |
| Health, Influence | 10 |
| Reviews | 10 |
| Emissions, Energy | 5 |
| Pictures | 6 |
| Crime | 8 |
| Flight, Airline | 4 |
| Rights, Property | 4 |
| Children, Asthma | 5 |
| Cancer, Death | 4 |

- “On the fly” subject categorization
- Facets
 - Journal Title clustering
 - Author clustering
 - Year clustering

What will be the new Discovery layer?

- Race is on!
 - New tools from ILS vendors – Primo, Encore
 - Open World Cat
 - Google Scholar
- Winner won't be print-oriented
- Until the winner(s), practice with what we have
 - Federated search – tie to the knowledgebase
 - OpenURL
- Don't wait !!

Serials

- Push your link resolver
- Skip the landing page !
- Demand “tuned” links
- Expect “search within link” to expand the reach of the resolver
 - My library
 - Print versions

Serials

- Give up checkin !
 - Don't worry about claiming
 - User notification – let RSS do it
- Demand that vendors support Onix for Serials
 - New Editeur/NISO standards
 - SPS
 - SOH
 - SRN
 - Lobby publishers and software vendors

What about an ERM?

- It is the acquisitions module
- Get one, but don't treat it as "new"
 - Make it part of workflow from Day #1
 - Minimize "data entry"
 - Demand data from your vendors
 - Subscription data via SPS
 - License terms data
 - Utilize consortial effort (Web.20)

Gotta have XML

- Get an XML server layer for your ILS
- Understand XML gateways to publishers
 - Inherent need to understand publisher tools
- Support NISO MXG
- Speak ONIX
 - SOH
 - SRN
 - License terms

Buy your metadata

- You don't have time to do it yourself
 - CONSER records are great
 - Get them customized
 - Save local expertise for local resources
- Users don't examine MARC records
- You can't keep a knowledgebase up to date
 - Link resolvers are dependent on good metadata
 - Fed search connectors
 - Subscription and license data
- Knowledgebase vendor \neq ILS

Use Hosted Systems

- You don't have time to do it yourself
 - Did I say that already?
- This is where end users are -- SaaS
- Preserve time and money for unique resources
 - Institutional repositories
 - ILS upgrades
- "Community" almost requires a hosted service
- Definitely Web 2.0

What New Tools are coming?

- Authentication services
 - Shibboleth hosted
 - COINS
- “Business Intelligence” -- true ROI
 - Usage data
 - SUSHI
 - Analytic tools across multiple resources
- “SuperMetasearch” – Feb. 15 LJ

Pieces and Parts aren't enough

- We need integrated solutions
- We can't maintain multiple knowledge bases



We need ERAMS !!

E-Resource Access and Managements Services (ERAMS)

A *new way of thinking* about how we manage library collections and make them accessible

- Technologies used for physical collections are not suited for the challenges of electronic resources
- ERAMS augment the physical library and the ILS

■ A *planning and budgeting category*

- ERAMS help ensure the capabilities and relevance of libraries moving forward

■ A *collection of tools and services* that help

- Optimize access, usage, collections and workflows

The Foundations of ERAMS

The Comparative Landscape



- Focus on e-resources
 - E-resources are the essence of ERAMS: a clear focus on e-resource issues is essential
- Focus on the knowledgebase
 - ERAMS depends on a comprehensive knowledgebase that provides an accurate library-centric view of holdings

The Four C's

ERAMS requires technology vendors to develop tools and services that accomplish four essential procedures

- **Collect**
a comprehensive e-resource knowledgebase
- **Correct**
the knowledgebase to maintain accuracy
- **Connect**
people with answers using the best method
- **Control**
budgets, collections, and workflows to optimize value

Individual Product Categories Within ERAMS

Today's Individual Product Categories

- A-to-Z Title lists
- Link resolvers
- Federated search engines
- MARC updating services
- ERM applications
- ... ? ...

Tomorrow . . .

- In the future, ERAMS will expand functionality to provide for continued enhancement of libraries
- As new services are introduced, they must work *together* as a cohesive and effective solution

Research project said librarians want:

- Way to search that provides seamless integration and access to all content repositories both internal and external
 - Including e-books, audio, video, etc.
- Integration of all solutions into one product...
- ...and interoperability

Success: Part 1

- Users find what they need quickly
 - In a simple way
 - Wherever they are
 - So they don't have to go somewhere else

Success: Part 2

■ Measurement

- What's being used and how often
- The meaning behind the statistics
- Some way to measure return on investment

Success: Part 3

- Providing a competitive advantage over the Internet
 - Honing in on the value we add to the research experience

Key Technology Requirements for ERAMS

■ Integration

- Requires data, access, and management tools to work together seamlessly

■ Interoperability

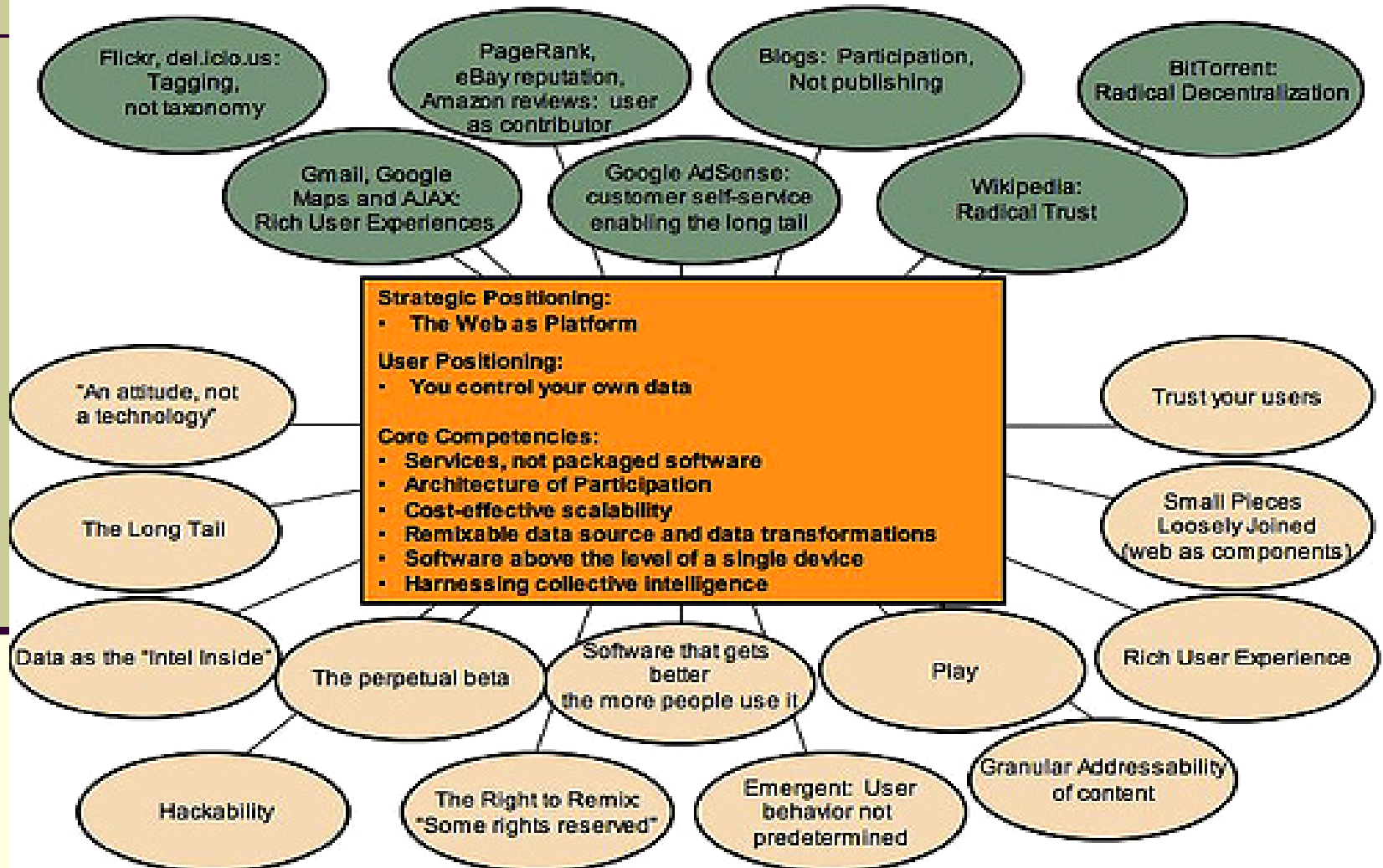
- Requires active participation within the library community and standards bodies, and partnerships with libraries of all sizes

■ Web-native technology

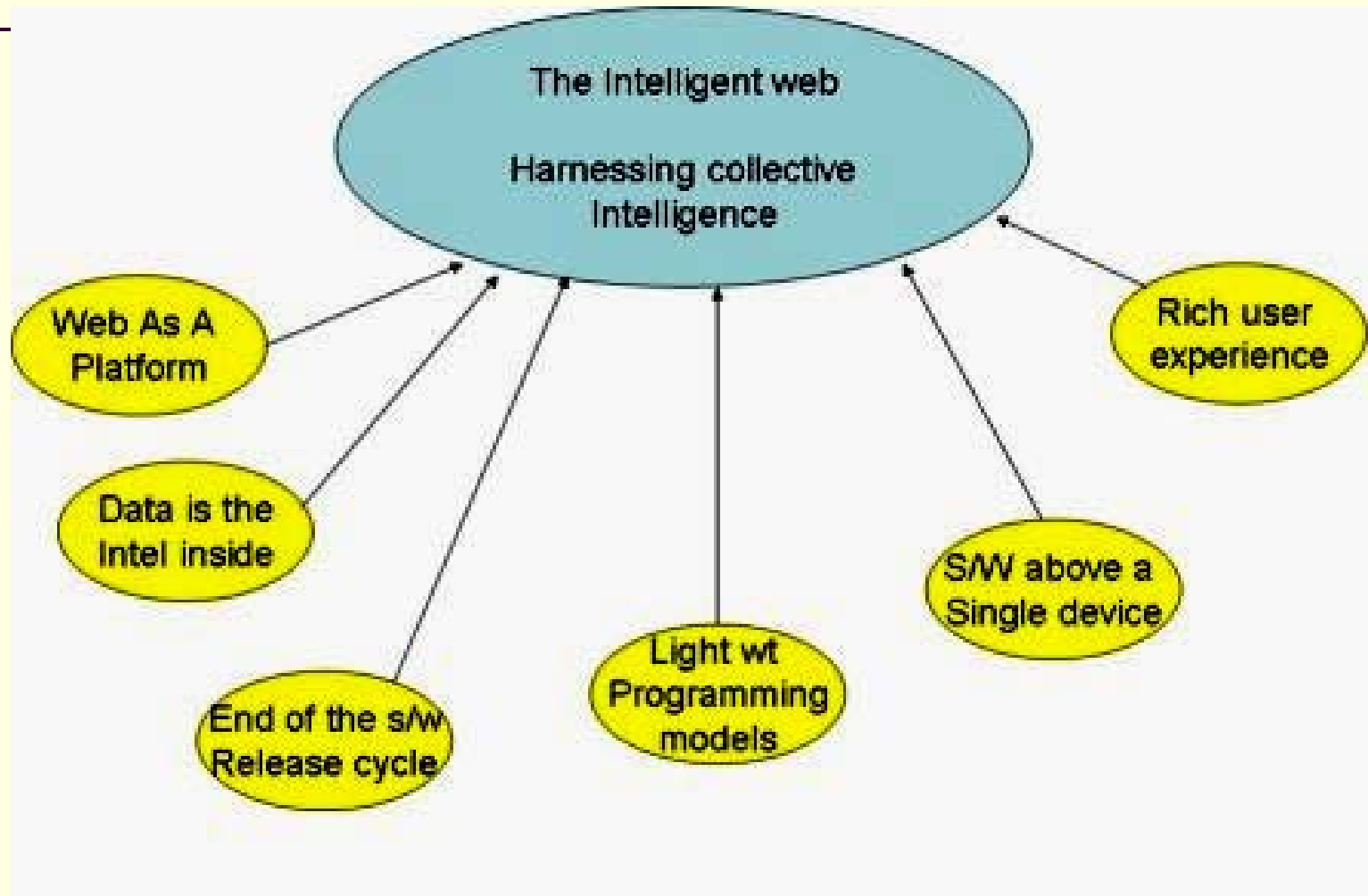
- Requires technology that has been designed for the Web from the ground up

Web 2.0 is THE technology model

Web 2.0 Meme Map



Easier picture – same principles



Establishing ERAMS as a product category

- Clearly separates the issues of e-collections.
 - Necessary intermediate step
- Provides foundation for organizational and budget decisions.
- Justifies spending for needed tools and services.
- Supports integration of processes
- Provides framework for defining enhancements from vendors.

Hurry Up !!

- This is a time of “revolution” – not evolution
- Give print only the percentage of time it earns by circulation
- Flip the mental switch – it will lead to the right behaviors and expectations

