Choice in Discovery
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Choice in Discovery: Bundled or à la carte?

History and market context

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History of increased integration

- The history of library automation has seen a consistent pattern of ever increasing consolidation of library technology systems.
First-generation Library automation

- Early phase of library automation began with separate modules for each major area of activity in the library.
  - CLSI: Libs100 Circulation
  - Gaylord System 100
  - OCLC: SC350 Serials Control; ACQ350 Acquisitions
  - The Library Corporation: BiblioFile Cataloging
  - Innovative: Black Box > INNOVACQ > INNOPAC > Millennium > Sierra

- The result was the Integrated Library System providing comprehensive management and discovery for library (print) resources
OpenURL linking

- OpenURL link resolvers introduced to provide context-sensitive linking.
- Replaces hard-coded links which were impossible to maintain at the scale of massive volumes of content represented in library subscriptions.
- Based on knowledgebase of e-resource holdings. Offered as a separate product.
Electronic Resource Management Modules

- Electronic resource management originally addressed via separate modules:
  - Ex Libris Verde
  - Endeavor: Meridian ERM
  - Serials Solutions: 360 Resource Manager
  - Innovative: Electronic Resource Management
ERM Characteristics

- ERM products generally provided resource management capability based on the knowledge base original developed for OpenURL link resolvers.
- DLF created the ERMi specification that defined the data elements which should be supported by and ERM product.
- Not an especially successful genre of library automation. Products had a reputation
Next-Generation Library Catalogs

- Movement to provide better patron interfaces than the online catalog module included with an ILS
  - Endeca ProFind -- NCSU
  - AquaBrowser Library
  - VuFind
  - BiblioCommons (later phase)
  - Blacklight (later phase)
Re-integration of the catalog

- Subsequent phase where many libraries reverted to the online catalog or discover service from their ILS vendor.
The process of synchronizing an catalog or discovery layer with the ILS requires multiple points of technical integration:

- Harvest records from ILS for re-indexing in discovery layer
- Patron profile and authentication: recreate a patron account feature in the discovery layer that replicates and extends the functionality available in the online catalog.
- Real-time availability: API or NCIP transaction for each item displayed in the discovery layer. Definitive status maintained in circulation tables

- ILS-DI workgroup of the Digital Library Federation defined levels of interoperability to accomplish integration between integrated library systems and discovery layers.
Index-based Discovery (Web-scale discovery)

- A new approach to discovery for academic and research libraries where the service includes a central index that represents the (supposed) totality of content of interest to academic libraries. Profiled so that patrons see only the results from resources included in their library’s subscriptions, open access materials, etc.

- Index-based discovery services also make use of the knowledge base associated with the link resolver to manage links presented through the interface. Many also use proprietary smart linking mechanisms to provide more reliable links.
Commercial Index-based Discovery Services:

- ProQuest Summon
- Ex Libris Primo
- EBSCO Discovery Service
- OCLC: WorldCat Local / WorldCat Discovery Service
Current phase: Library Services Platforms

- Move away from fragmented resource management model
- The concept of the library services platform has been well accepted in academic libraries:
  - Support for workflows in managing library collection items that span all formats, especially print and electronic.
  - Reliance on knowledgebases populated with e-resource coverage data, expanded for print and other formats. Extends the model of management for electronic resources.
  - Delivered though web-native multi-tenant platforms.
  - Shared knowledgebases and other resources across all implementers of the product.
Bundled product offerings

- Library Services Platforms were created by organizations which also offered index-based discovery services:
  - Ex Libris: Alma + Primo
  - OCLC: WorldShare Management Service + WorldCat Local
  - ProQuest: Intota + Summon

- Vendors leverage existing discovery customers for new library services platform sales.

- Vendors with both products offer business incentives for libraries to acquire both products.
Advantages to bundled packages:

- The bundling of discovery with resource management provides advantages for libraries:
  - Built-in integration between discovery and back office functionality
  - Leverage of common knowledgebases
  - Fully supported by vendor with no intervention by third parties
Disadvantages to bundled packages

- Drivers for patron-facing services quite different than resource management platforms operated by library staff
- Libraries may prefer discovery services other than the one associated with their ILS provider
- Some libraries want to provide fully customized patron experience based on open source interfaces
- Best match to library collection coverage may or may not be the bundled option
Un-bundling obstacles

- Technically separable, but integrations with other discovery services are outside of normal support. Bundled package comes with full integration between front-end discovery and resource management.

- Pricing incentives to encourage libraries to use both resource management and discovery. Discovery often included in the price, making it financially difficult for a library to purchase a separate discovery service.

- Both resource management and discovery services rely on knowledgebases. Efficiency is gained when they are able to use the same knowledge base. No need to keep knowledge bases synchronized.

- Automatic integration and synchronization between patron profile data as managed in the resource management system with account functionality in the discovery service.
Current market dynamics

- The model of bundled systems currently prevails in new selections by academic libraries.
- Ex Libris Alma paired with Primo and OCLC WorldShare Management Services paired with WorldCat Discovery Service currently dominate.
  - Alma / Primo: 626 total selections by end of 2015
  - WorldShare Management Services: 386 selections
  - Sierra: 582 selections – Most upgrades from Millennium
- Ex Libris is positioned to achieve strong dominance among academic and research libraries for both resource management and discovery. New implementations of Alma displace other discovery services.
- Acquisition by ProQuest results in Summon as an additional interface option for Alma. Both will rely on a consolidated central index. Choice, but within Ex Libris product family.
Relevance/Value ranking
Metadata
User Experience
UI/Configuration
Interoperability

Quality
evaluating discovery
Discovery in the enterprise
Old Fashioned
Old Fashioned

All in one systems

Discovery
Circulation
Acquisitions / Serials
Cataloging
Reporting
Good Enough?
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Buy, Build, Lease

LOST OUR LEASE
Open Source

GPL
Interoperability

Duct Tape

Duct tape was an official part of every on-orbit tool kit.

The Museum of Flight Collection
HOW TO BUILD
COMMUNITY
Community
Curtis Thacker

Director Discovery Systems - Brigham Young University | @curtisthacker
The sound of music

DVD


DVDC 3938

Floor 4-S, HBLL Media Center Desk

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1 request

Edition

40th anniversary ed.; widescreen format.

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OSS & Libraries
Choice in Discovery

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