

Libraries in Transition: From Integrated Library Systems to Library Services Platforms

The 14th annual VALE / NJ ACRL / NJLA CUS Users' Conference-*Demonstrating Value for
Every User*

Sharon Yang
Rider University
Jan 4, 2013



Overview

- Introduction
 - Challenges
 - The integrated library system (ILS) vs. Library services platform(s)
- The Next Generation Library Systems/Library services platforms
 - Ex Libris-Alma
 - Serials Solutions-Intota
 - Worldshare Management Services (OCLC)
 - Siera-Innovative Interface Inc.
 - Kuali OLE
- Conclusion

Challenges

1. Acquisitions/cataloging → print, electronic, and digital collections
 - 50% of the collections electronic
 - 65% + materials budget¹
 - The ILS from 1990s for print collections only
2. OPAC → one stop searching for all library resources
 - Inadequacy of the ILS OPAC
 - A discovery layer in addition to OPAC?
 - Discovery layer-Content coverage-85 to 90%?
 - Real-time circ status?
 - Currency?
3. Interoperability with the parent institution and other applications

The Next Generation Library Systems

1. Library services platform(s)
2. The next generation library systems
3. Library management services (LMS)
4. Web-scale management services
5. Web-scale management solution
6. The next generation integrated library system



New Library Systems

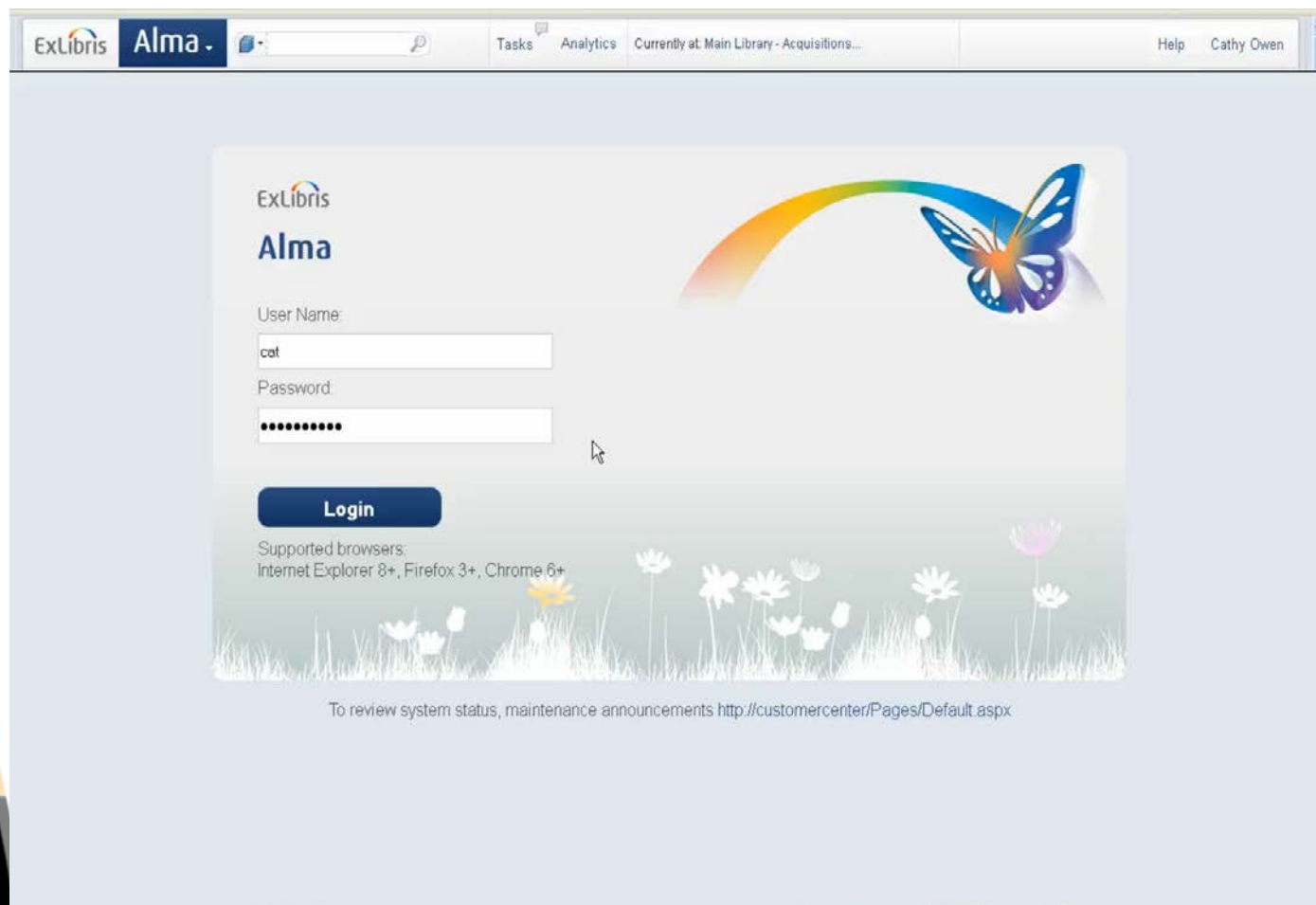
- Alma Library management Services-Ex Libris
- Intota-Serials Solutions in 2014
- [Kuali OLE](#) (Open Library Environment)-Open source (1.0 in early 2013)
- Sierra Services Platform-Innovative Interfaces Inc.
- Worldshare Management Services-OCLC



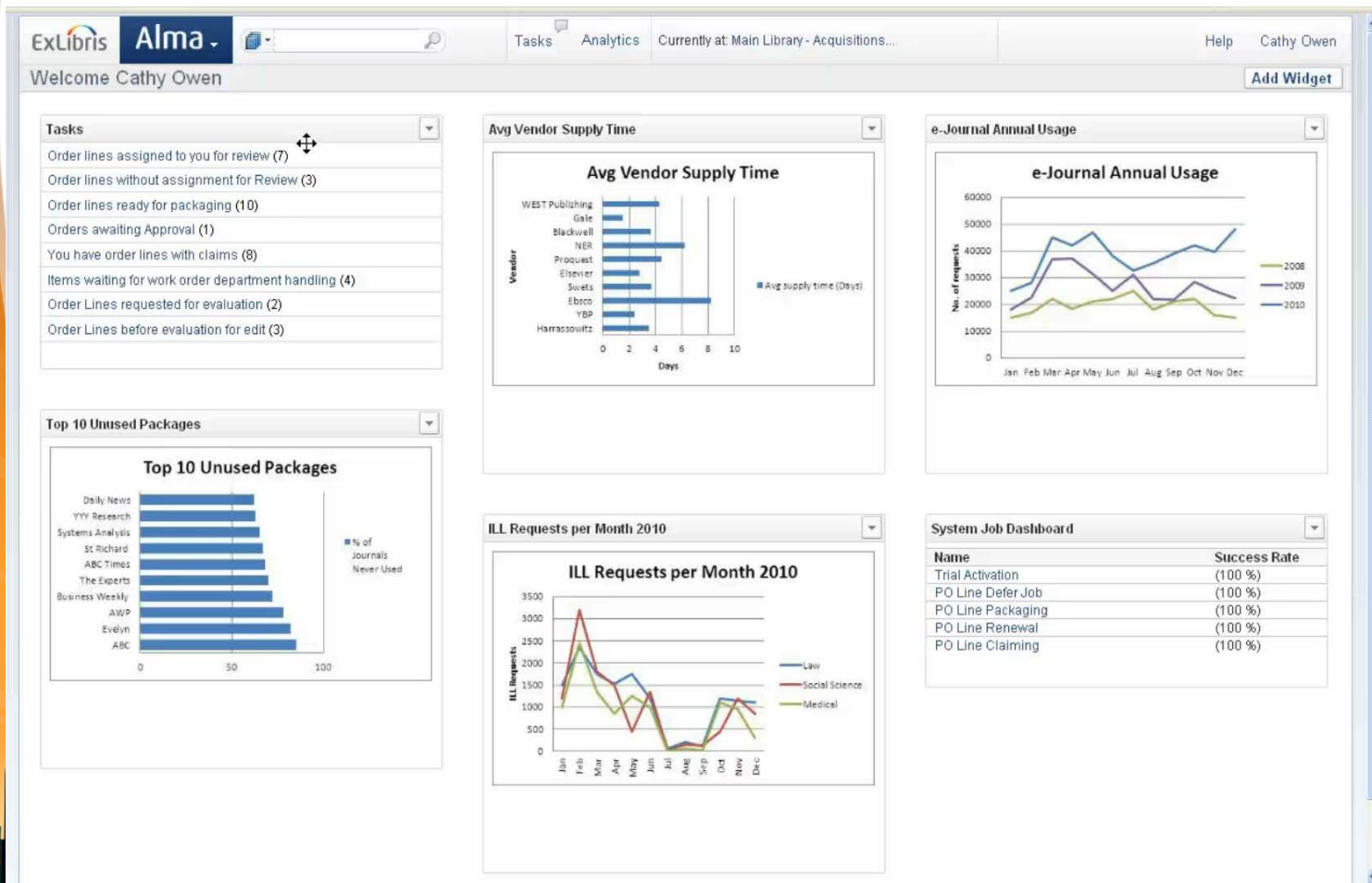
Discovery Layers²

Vendor	System	Discovery layer
Ex Libris	Alma (management)	Primo
Innovative Interface	Sierra (management)	Encore
EBSCO		EDS
OCLC	WMS (management)	WorldCat Local
Serials Solution	Intota (management)	Summon
Open Source	Kuali OLE (management)	VuFind

Clientless and in the Cloud-Alma³



Unified Workflows-Alma



User Roll-based Dashboard

ExLibris Alma

Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

Welcome Back to Home Page

Task

- Order
- Order
- Order
- Order
- You
- Item
- Order
- Order

ACQUISITIONS

- Purchase Order Lines**
 - Import
 - Review
 - Claim
 - Renew
 - Review Deferred
 - Manage Trials
- Purchase Order**
 - Package
 - Review
 - Approve
- Receiving and Invoicing**
 - Receive
 - Create Invoice
 - Review
 - Approve
 - Waiting for Payment
- Post-Receiving Processing**
 - Receiving Department Items
 - Scan In Items
- Import Processing**
 - Monitor Imports
 - Resolve Import Issues
- Acquisitions Infrastructure**
 - Vendors
 - Funds and Ledgers
 - Transfer Funds
 - Move Funds In Hierarchy
 - Licenses
- Advanced Tools**
 - Exchange Rates Report
 - Rollover Ledgers
 - Rollover PO Lines
 - Patron Driven Acquisition (PDA)
- Acquisitions Configuration**
 - Configuration Menu

RESOURCE MANAGEMENT

- Search and Sets**
 - Repository Search
 - Manage Sets
 - My Exports
- Cataloging**
 - Search External Resources
 - Open Metadata Editor
- Inventory**
 - Add Local Package
 - Add Local DB
 - Add Local Portfolio
 - Add Physical Item
 - Handle CZ Update Issues
 - Add Digital Representation
 - Manage Electronic Resource Activation
- Import**
 - Start New Import
 - Monitor and View Imports
 - Resolve Import Issues
 - Handle Issues in Digital Deposit
- Processes**
 - Run Process
 - Monitor Processes
- Resource Configuration**
 - Configuration Menu

FULFILLMENT

- Resource Requests**
 - Scan In Items
 - Manage Department Items
- Advanced Tools**
 - Create Fulfillment Sets

GENERAL

- Analytics**
 - Design Analytics
 - Configuration Menu

e-Journal Annual Usage

e-Journal Annual Usage

No. of requests

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

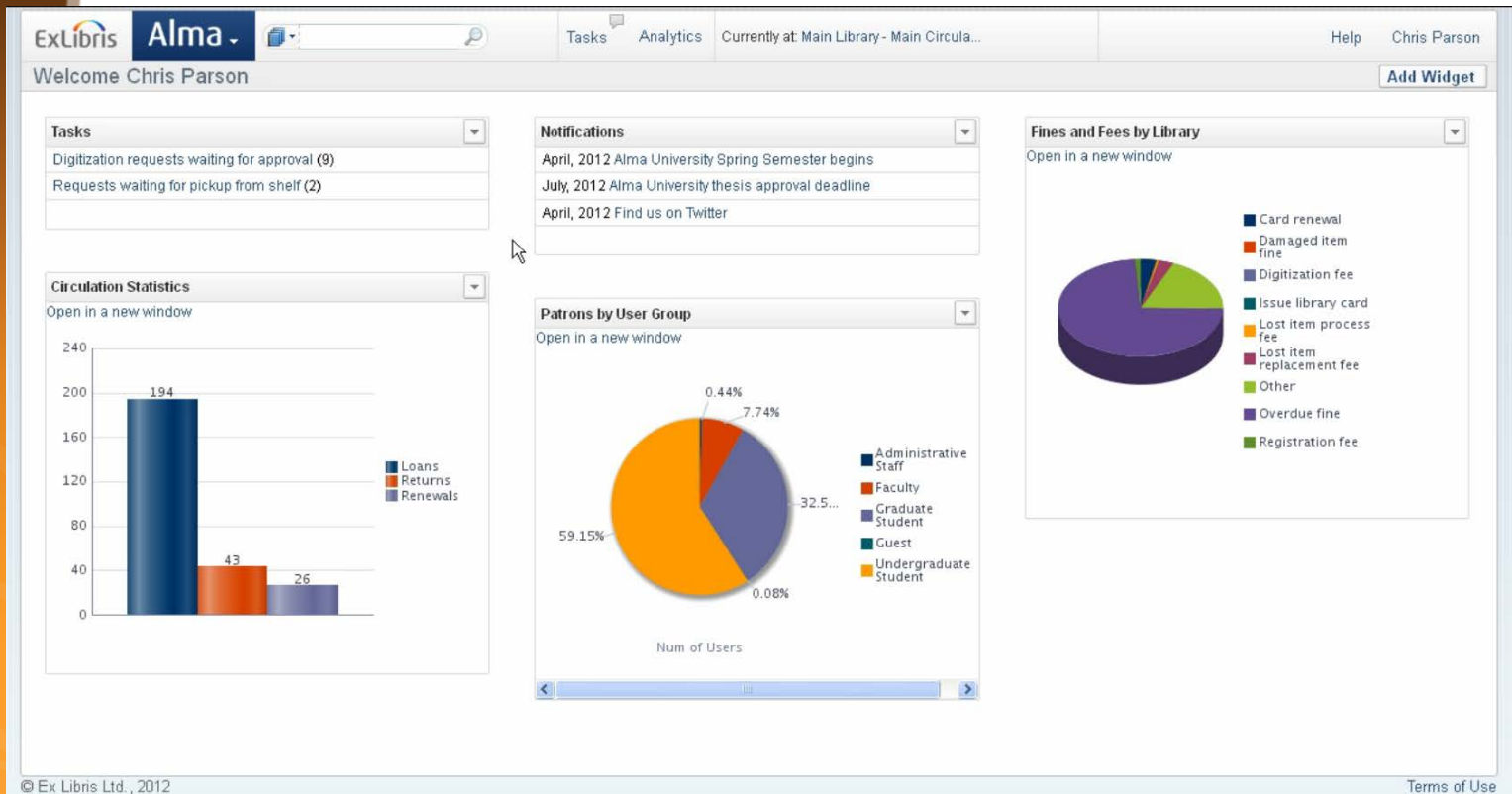
2008 2009 2010

System Job Dashboard

Name	Success Rate
Trial Activation	(100 %)
PO Line Defer Job	(100 %)
PO Line Packaging	(100 %)
PO Line Renewal	(100 %)
PO Line Claiming	(100 %)

02:47 HD

User Roll-Based Dashboard-Alma



User Roll-Based Dashboard-Alma

ExLibris Alma - Tasks Analytics Currently at: Main Library - Main Circula... Help Chris Parson

Welcome Back to Home Page [Add Widget](#)

Task

Digi

Req

Circ

Open

24

20

16

12

8

4

ACQUISITIONS

Post-Receiving Processing

Receiving Department Items

Scan In Items

Acquisitions Infrastructure

Licenses

RESOURCE MANAGEMENT

Search and Sets

Repository Search

Manage Sets

My Exports

Inventory

Add Local Package

Add Local DB

Add Local Portfolio

Add Physical Item

Handle CZ Update Issues

Add Digital Representation

Import

Handle Issues in Digital Deposit

Processes

Run Process

Monitor Processes

FULFILLMENT

Checkout/Checkin

Manage Patron Services

Return Items

Daily Report

Resource Requests

Pick From Shelf

Scan In Items

Expired Hold Shelf

Active Hold Shelf

Approve Digitization Requests

Monitor Requests

Course Reading

Courses

Reading Lists

Resource Sharing

Lending Requests

Borrowing Requests

Advanced Tools

Create Fulfillment Sets

Bulk Change Due Dates

View Restore Request Jobs

View Lost Loan Jobs

Offline Circulation

Fulfillment Configuration

Configuration Menu

GENERAL

User Management

Find and Manage Users

Purge User Records

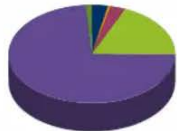
Load Desk/Department Operators

User Management Configuration

Configuration Menu

Fines and Fees by Library

Open in a new window

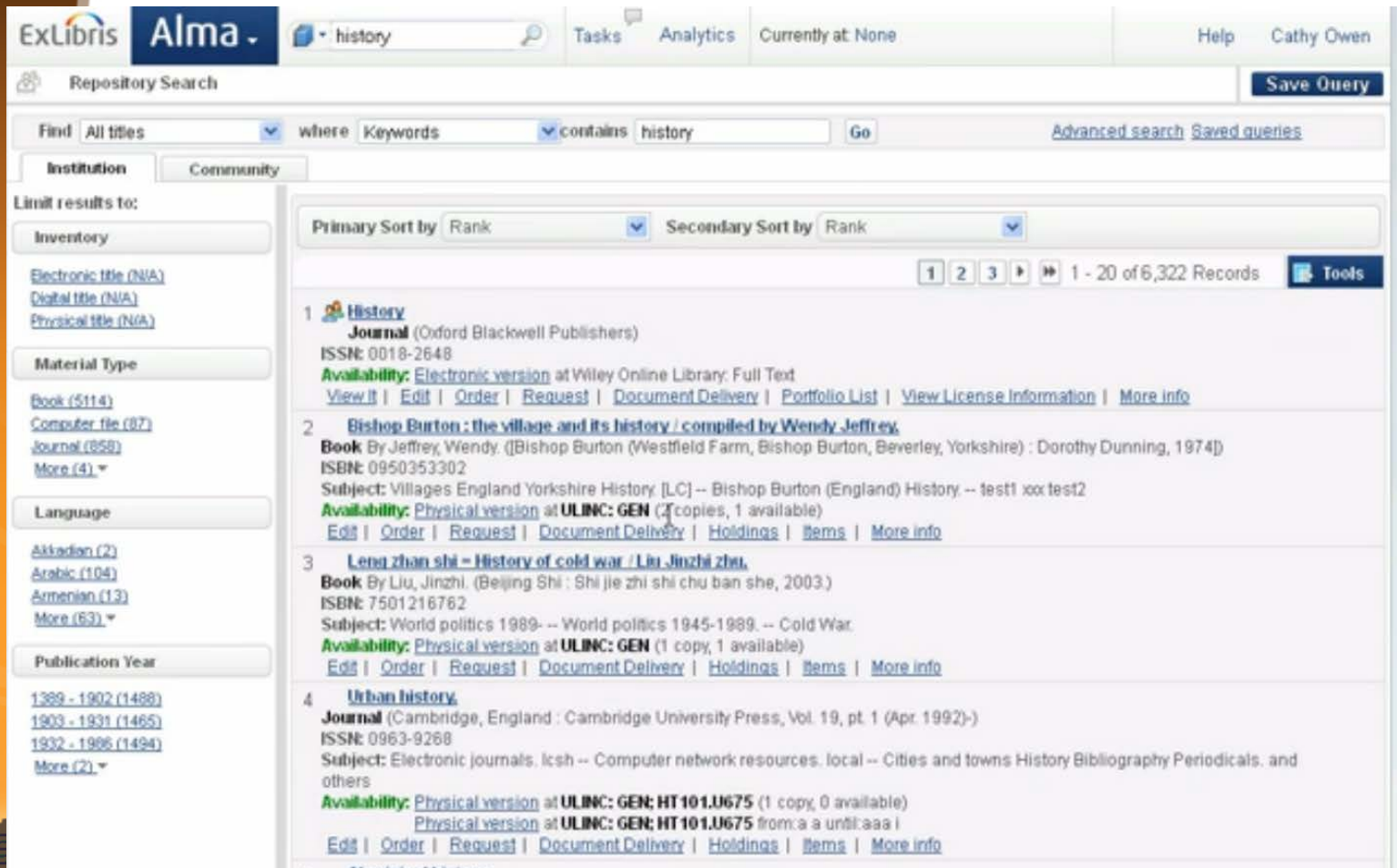


- Card renewal
- Damaged item fine
- Digitization fee
- Issue library card
- Lost item process fee
- Lost item replacement fee
- Other
- Overdue fine
- Registration fee

Num of Users

© Ex Libris Ltd., 2012 Terms of Use

The Knowledge Base-Alma



ExLibris Alma

Repository Search

Find All titles where Keywords contains history Go Advanced search Saved queries

Institution Community

Limit results to:

Inventory

Electronic title (N/A)
Digital title (N/A)
Physical title (N/A)

Material Type

Book (5114)
Computer file (87)
Journal (858)
More (4) ▾

Language

Akkadian (2)
Arabic (104)
Armenian (13)
More (63) ▾

Publication Year

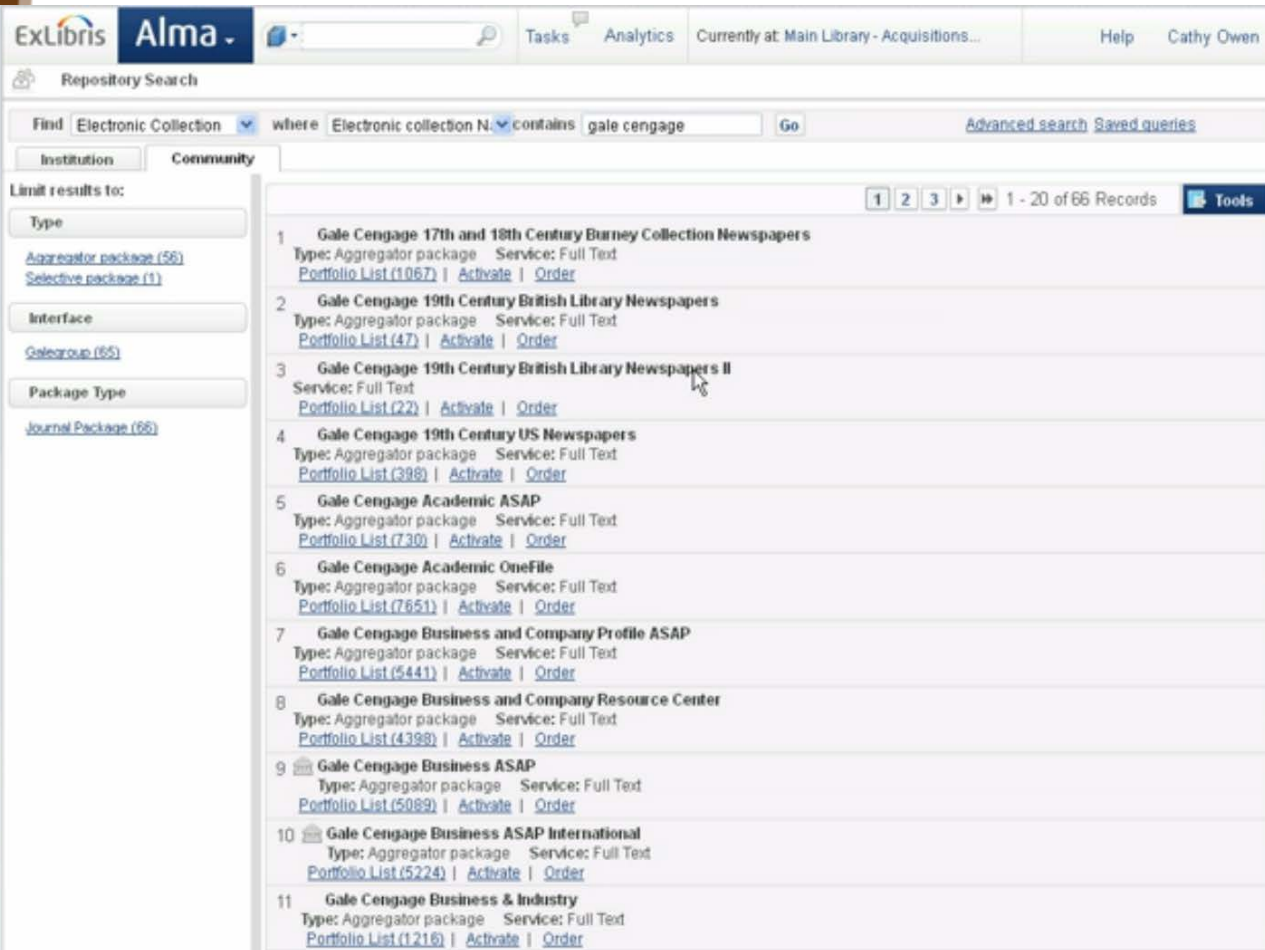
1389 - 1902 (1488)
1903 - 1931 (1465)
1932 - 1986 (1494)
More (2) ▾

Primary Sort by Rank Secondary Sort by Rank

1 - 20 of 6,322 Records Tools

- History**
Journal (Oxford Blackwell Publishers)
ISSN: 0018-2648
Availability: [Electronic version](#) at Wiley Online Library: Full Text
[View it](#) | [Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Portfolio List](#) | [View License Information](#) | [More info](#)
- Bishop Burton: the village and its history / compiled by Wendy Jeffrey.**
Book By Jeffrey, Wendy. (Bishop Burton (Westfield Farm, Bishop Burton, Beverley, Yorkshire) : Dorothy Dunning, 1974)
ISBN: 0950353302
Subject: Villages England Yorkshire History. [LC] -- Bishop Burton (England) History -- test1 xxx test2
Availability: [Physical version](#) at **ULINC: GEN** (2 copies, 1 available)
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Holdings](#) | [Items](#) | [More info](#)
- Long zhan shi - History of cold war / Liu Jinzhi zhu.**
Book By Liu, Jinzhi. (Beijing Shi : Shi jie zhi shi chu ban she, 2003.)
ISBN: 7501216762
Subject: World politics 1989 -- World politics 1945-1989 -- Cold War.
Availability: [Physical version](#) at **ULINC: GEN** (1 copy, 1 available)
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Holdings](#) | [Items](#) | [More info](#)
- Urban history.**
Journal (Cambridge, England : Cambridge University Press, Vol. 19, pt. 1 (Apr. 1992)-)
ISSN: 0963-9268
Subject: Electronic journals. lcsh -- Computer network resources. local -- Cities and towns History Bibliography Periodicals. and others
Availability: [Physical version](#) at **ULINC: GEN; HT101.U675** (1 copy, 0 available)
[Physical version](#) at **ULINC: GEN; HT101.U675** from: a a until: a a a
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Holdings](#) | [Items](#) | [More info](#)

Manage Electronic Resources-Select a Database-Alma



The screenshot displays the ExLibris Alma web interface. At the top, the 'ExLibris Alma' logo is visible, along with navigation links for 'Tasks', 'Analytics', and 'Currently at: Main Library - Acquisitions...'. A user profile for 'Cathy Owen' is shown in the top right. Below the header, the 'Repository Search' section contains a search bar with the query 'gale cengage' and a 'Go' button. A dropdown menu shows 'Electronic Collection' selected, and another dropdown shows 'Electronic collection N'. To the left of the search results, there are filters for 'Institution' and 'Community'. Below these, a 'Limit results to:' section includes buttons for 'Type', 'Interface', and 'Package Type'. The 'Type' filter is expanded, showing links for 'Aggregator package (56)', 'Selective package (1)', 'Galegroup (65)', and 'Journal Package (66)'. The search results are displayed as a list of 11 items, each with a title, type, service, and portfolio list. The results are numbered 1 through 11. A 'Tools' button is located at the top right of the results list. The page indicates '1 - 20 of 66 Records'.

ExLibris Alma

Repository Search

Find Electronic Collection where Electronic collection N contains gale cengage Go

Advanced search Saved queries

Institution Community

Limit results to:

Type

Aggregator package (56)

Selective package (1)

Interface

Galegroup (65)

Package Type

Journal Package (66)

1 - 20 of 66 Records Tools

- 1 Gale Cengage 17th and 18th Century Burney Collection Newspapers
Type: Aggregator package Service: Full Text
[Portfolio List \(1067\)](#) | [Activate](#) | [Order](#)
- 2 Gale Cengage 19th Century British Library Newspapers
Type: Aggregator package Service: Full Text
[Portfolio List \(47\)](#) | [Activate](#) | [Order](#)
- 3 Gale Cengage 19th Century British Library Newspapers II
Service: Full Text
[Portfolio List \(22\)](#) | [Activate](#) | [Order](#)
- 4 Gale Cengage 19th Century US Newspapers
Type: Aggregator package Service: Full Text
[Portfolio List \(388\)](#) | [Activate](#) | [Order](#)
- 5 Gale Cengage Academic ASAP
Type: Aggregator package Service: Full Text
[Portfolio List \(730\)](#) | [Activate](#) | [Order](#)
- 6 Gale Cengage Academic OneFile
Type: Aggregator package Service: Full Text
[Portfolio List \(7651\)](#) | [Activate](#) | [Order](#)
- 7 Gale Cengage Business and Company Profile ASAP
Type: Aggregator package Service: Full Text
[Portfolio List \(5441\)](#) | [Activate](#) | [Order](#)
- 8 Gale Cengage Business and Company Resource Center
Type: Aggregator package Service: Full Text
[Portfolio List \(4398\)](#) | [Activate](#) | [Order](#)
- 9 Gale Cengage Business ASAP
Type: Aggregator package Service: Full Text
[Portfolio List \(5089\)](#) | [Activate](#) | [Order](#)
- 10 Gale Cengage Business ASAP International
Type: Aggregator package Service: Full Text
[Portfolio List \(5224\)](#) | [Activate](#) | [Order](#)
- 11 Gale Cengage Business & Industry
Type: Aggregator package Service: Full Text
[Portfolio List \(1216\)](#) | [Activate](#) | [Order](#)

Mange Electronic Resources-Activate a Database-Alma

ExLibris Alma

Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

Electronic Resource Activation Task List

Assigned to Me Unassigned Assigned to Others

Status: Opened Tasks PO Line Owner: All Find: in: All Go

1 - 6 of 6 Records Tools


Title	Type	Status	Status Date	Modified By	Identifier	PO Line Owner	Order Line	Notes	Actions
EBSCOhost Academic Source Complete	Aggregator package	Check Access	06/11/2012	System	-	Main Library	POL-6207		Actions
Gale Cengage 19th Century British Library Newspapers	Aggregator package	Check Access	05/22/2012	cat	-	-	-		Actions
Gale Cengage Computer Database	Aggregator package	Check Access	05/14/2012	-	-	-	-		Actions
Gale Cengage Gardening Landscape and Horticulture Collection	Aggregator package	Check Access	06/12/2012	System	-	Main Library	POL-6208		Actions
Palgrave	Selective package	Access Confirmed	04/23/2012	-	-	Main Library	POL-4709		Actions
Palgrave Connect eBooks Economics & Finance Collections	Selective package	Check Access	04/23/2012	-	-	Main Library	POL-5207		Edit Edit Resource Activate Assign to Release assignment Done

1 - 6 of 6 Records

Check Access Change Status

© Ex Libris Ltd., 2012 Terms of Use

Activate a Database-Alma

ExLibris **Alma**  Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

Activation Wizard: Package and Services Setup 1 2 3 [Cancel](#) [Next](#)

Package Information



Package name Palgrave
Type - Number of portfolios 82


Local Package Information

Public name

Full Text Service

Activate this package service ☒ Make service available ☒

Active from date 06/16/2012  Active until date 

Access rights Registered User  Automatically activate new portfolios ☒

Service public name

Service note

Service authentication note

[Cancel](#) [Next](#)

© Ex Libris Ltd., 2012 [Terms of Use](#)

Activate a Database-Alma

The screenshot shows the 'Activation Wizard: Select Activation Method' window in the ExLibris Alma system. The interface includes a top navigation bar with the ExLibris logo, the word 'Alma', and a search bar. Below the navigation bar, there are tabs for 'Tasks' and 'Analytics', and a status bar indicating 'Currently at: Main Library - Acquisitions...'. The main content area is divided into two sections: 'Package Information' and 'Select Activation Type'. The 'Package Information' section displays 'Package name: Palgrave' and 'Number of portfolios: 82'. The 'Select Activation Type' section contains three radio button options: 'Activate all - Activation of the complete package with no selection of portfolios' (which is selected), 'Activate package and selected portfolios via Excel file upload', and 'Manual activation - activate package and manually select portfolios'. Navigation buttons 'Back', 'Cancel', and 'Next' are located at the top right and bottom right of the main content area. A mouse cursor is visible over the 'Next' button at the bottom right.

ExLibris Alma

Tasks Analytics Currently at: Main Library - Acquisitions...

Help Cathy Owen

Activation Wizard: Select Activation Method 1 2 3 Back Cancel Next

Package Information

Package name Palgrave

Type - Number of portfolios 82

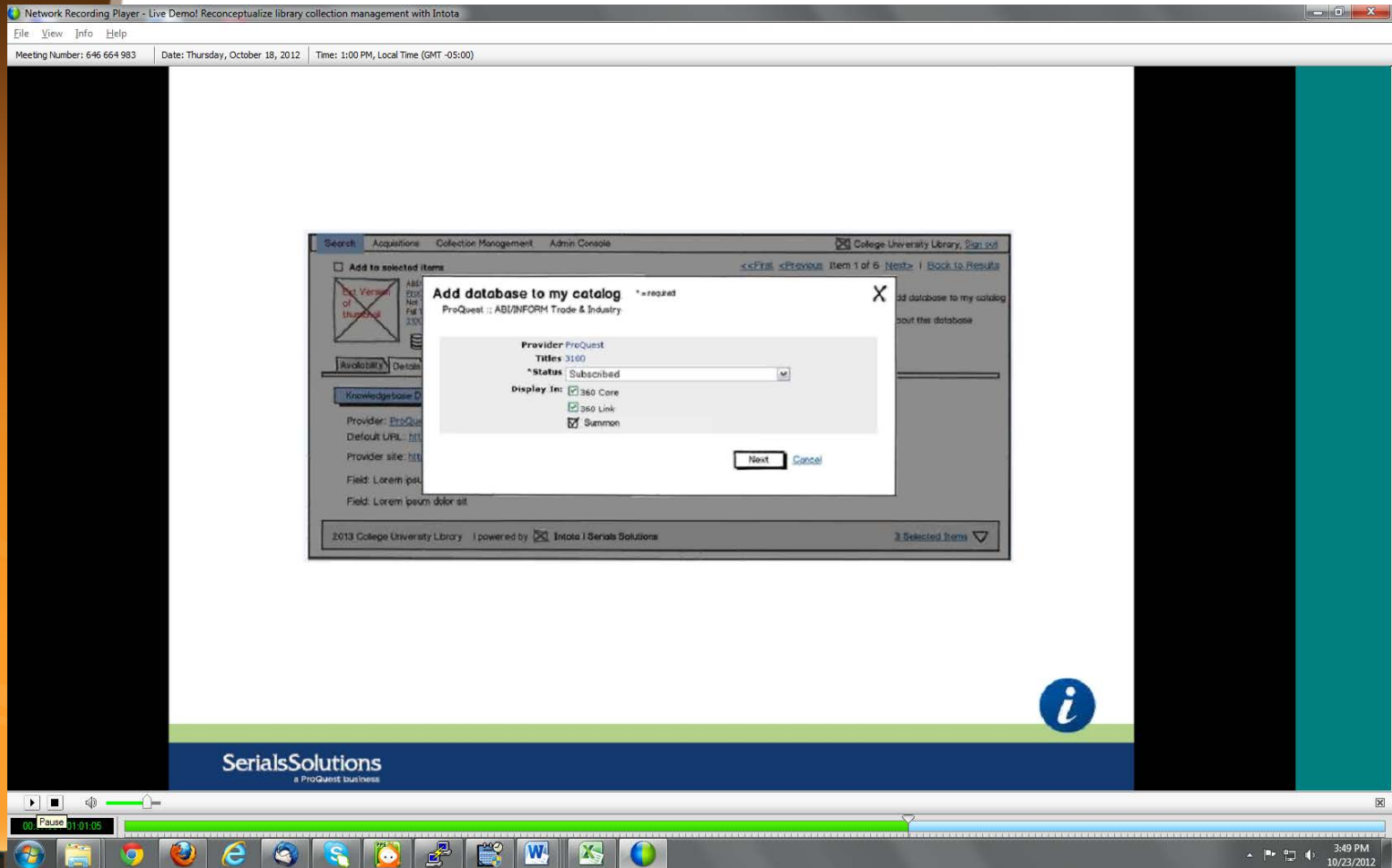
Select Activation Type

- ☒ Activate all - Activation of the complete package with no selection of portfolios
- ☐ Activate package and selected portfolios via Excel file upload
- ☐ Manual activation - activate package and manually select portfolios

Back Cancel Next

© Ex Libris Ltd., 2012 Terms of Use

Add a Database-Intota⁴



License Management-Alma

ExLibris Alma

Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

Licenses and Amendments

Filter : All Find : in : Name Go Advanced Search

Add License 1 - 7 of 7 Records Tools

Name	License code	License type	Licensor Code	Status	Start date	End date	Signed on	Actions
CSA	CSA	License	A D & L	Active	05/02/2011	04/30/2013	04/29/2011	Actions
Ebsco	EBSCO	License	0-123	Active	08/01/2011	07/31/2013	07/29/2011	Actions
Elsevier	ELS	License	0-012	Draft	12/14/2011	-	12/01/2011	Actions
Gale	GALE	License	0-011	Active	12/11/2011	-	11/01/2011	Actions
JSTOR	JSTOR	License	0-013	Active	12/22/2011	-	-	Actions
Proquest	PRO-567	License	A0902	Draft	08/01/2011	-	-	Actions
Wiley	W-1234	License	0415-WYLIE	Active	07/29/2011	-	-	Actions

Add License 1 - 7 of 7 Records Tools

© Ex Libris Ltd., 2012 Terms of Use

License Managemet-Alma

ExLibris Alma

Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

License Details [Cancel](#) [Save](#)

License: Gale Creation date: 12/11/2011 Created by: Cathy Owen License type: License


Summary License Terms Inventory Amendments Notes Attachments

Name *	Gale	License code *	GALE
License status	Active	Licensor	0-011
Signed by		Signed on	11/01/2011
Start date *	12/11/2011	End date	
License location	Finance Office	License review status	Accepted
License URI	Finance Office Legal Department Librarian's Office		

[Cancel](#) [Save](#)

© Ex Libris Ltd., 2012 Terms of Use

License Terms-Alma

ExLibris Alma -  Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

License Term Details [Cancel](#) [Save](#)

License: Gale Creation date: 12/11/2011 Created by: Cathy Owen License type: License

Summary License Terms Inventory Amendments Notes Attachments

Terms of Use

Fair use clause	Yes	▼
All rights reserved	Yes	▼
Database protection override clause	No	▼
Citation requirement detail		

Restrictions

Digitally copy	Prohibited	▼
Digital copy note		
Print copy	Permitted	▼


Perpetual Rights

Print copy note		
Scholarly sharing	Permitted	▼
Scholarly sharing note		

Obligations

Distance education	Permitted	▼
Distance education note		
Interlibrary loan print or fax	Permitted	▼

OCLC License Manager⁶

 WorldShare[®] Management Services

Acquisitions | Circulation | Metadata | **Licenses** | Admin | Help

Welcome, Doris Lanning | [Logout](#)

Manage Rights

Create New License

Browse Your Licenses

License Name:

Search

☐ OCLC EBSCO Master Agreement

Manage Templates

Manage Collections

Manage Vendors

OCLC EBSCO Master Agreement

Save | Delete | Clone

Please note:
Fields marked with an * asterisk are required.

General

Collections (2)

Collection Lookup:

Add Collection

Included in this license

EBSCO Business Source Premier: Government Edition	(EBSCOhost)	Remove
EBSCO America: History and Life	(EBSCOhost)	Remove

Terms of Use (2)

Public Terms: ☐

Interlibrary Loan: Add License Term

Interlibrary Loan: ☒ Yes ☐ No ☐ Silent Remove

Additional Rights and Restrictions

<input checked="" type="checkbox"/> Non-Profit Only	<input type="checkbox"/> Record Keeping Required
<input type="checkbox"/> Loansome Doc Required	<input type="checkbox"/> Same Country Only

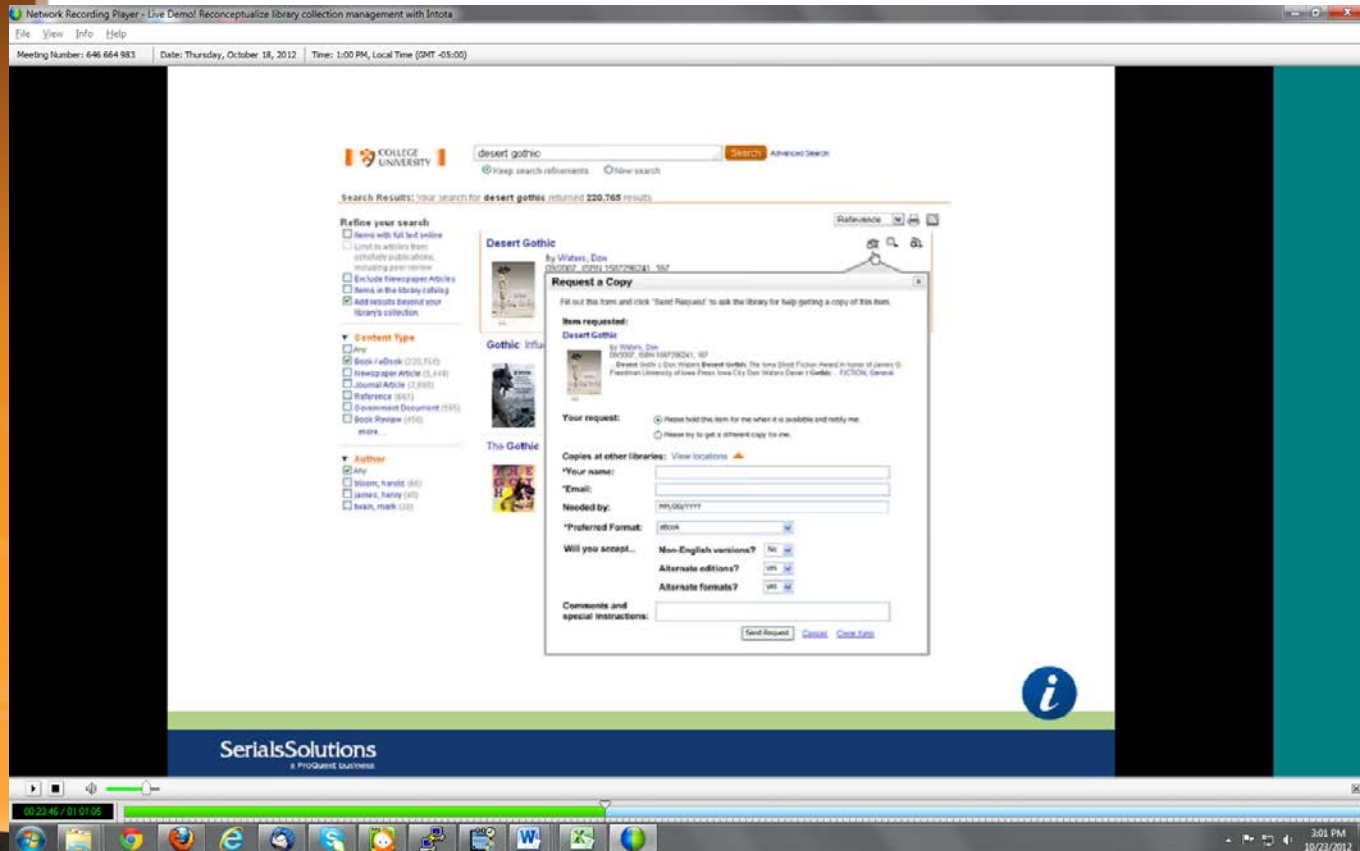
Methods Supported

<input type="checkbox"/> Electronic Copy limit to <input type="text"/>	<input checked="" type="checkbox"/> Secure Electronic (e.g. Ariel, Odyssey) limit to <input type="text"/>
<input type="checkbox"/> Print or Fax limit to <input type="text"/>	

Contact Support

Branch: OCLC Library Main Branch

User Driven Acquisition-Intota/Summon



User Driven Acquisition-Intota/Summon

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 | Date: Thursday, October 18, 2012 | Time: 1:00 PM, Local Time (GMT -05:00)

SerialsSolutions

Selection and Acquisitions

Contact Us


[Home](#) | [Selection Lists](#) | [Purchase Orders](#)

Unified Selection List as of 6/24/2012

[Automatic Approval Settings>](#) [Filter this list>](#)

Selector	Requested	Title	Requester	Rec'd by	Library	Purchase	U.S. Cost	Format	Source	Fund	Action	Status
Yvonne	6/23/12	\$20 per gallon: how the inevitable...	jphillips	6/29/12	Lib1	\$9.99		print	Amazon	Economics	buy	request
Kevin	6/22/12	Desert Gothic	mrooe	7/1/12	Lib2	\$8.80		ebook	Amazon	Literature	buy	request
Yvonne	6/23/12	Holy Cow: An Indian Adventure	jphillips	6/29/12	Lib1	\$10.17		print	Amazon	Sociology	buy	request
Yvonne	6/22/12	Solar Energy Conversion: The Solar Cell	CCM	6/28/12	Lib1	\$260.00	\$17.50	print	ILL	Engineering	buy	request
Amanda	6/22/12	Understanding Economic Growth			Con1	\$119.00		ebook	YBP	Economics	buy	App plan
Amanda	6/22/12	Made to Break	joseward	6/25/12	Con1	\$16.25	\$21.00	print	Amazon	Economics	buy	request
Yvonne	6/21/12	Philanthropy in a Flat World	wfox	7/3/12	Lib1	\$27.95		ebook	ebRARY	Economics	buy	request

*Serials Solutions® is a registered trademark of Serials Solutions.
©2000-2012 Serials Solutions

**SerialsSolutions**
a PROQUEST business

User Driven Acquisition-Intota/Summon

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 | Date: Thursday, October 18, 2012 | Time: 1:00 PM, Local Time (GMT -05:00)

SerialsSolutions

Selection and Acquisitions

Contact Us

Home | Selection Lists | Purchase Orders

Unified Selection List as of 6/24/2012

Accept Cancel Automatic Approval Settings> Filter this list>

Selector	Requested	Title	Requestor	Rec'd by	Library	
Yvonne	6/25/12	\$20 per gallon how the inevitable...	jphillips	6/25/12	Lib1	\$
Kevin	6/22/12	Desert Gothic	mccoe	7/1/12	Lib2	\$
Yvonne	6/23/12	Holy Cow: An Indian Adventure	jphillips	6/29/12	Lib1	\$
Yvonne	6/22/12	Solar Energy Conversion: The Solar Cell	CCM	6/28/12	Lib1	\$
Amenda	6/22/12	Understanding Economic Growth			Con1	\$
Amenda	6/22/12	Made to Break	johnewat	6/25/12	Con1	\$
Yvonne	6/21/12	Philanthropy in a Flat World	wfox	7/3/12	Lib1	\$

Serials Solutions is a registered trademark of Serials Solutions.
©2000-2012 Serials Solutions

Filter This List


Select column: Fund

Select value(s):

- ☐ Biology
- ☐ Chemistry
- ☐ Communications
- ☐ Computer Science
- ☐ Economics

Cancel

SerialsSolutions
a PROQUEST business



00:26:19 / 01:01:05

3:11 PM
10/23/2012

User Driven Acquisition-Intota/Summon

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 | Date: Thursday, October 18, 2012 | Time: 1:00 PM, Local Time (GMT -05:00)

SerialsSolutions

Selection and Acquisitions

Contact Us

Home | Selection Lists | Purchase Orders

Unified Selection List as of 6/24/2012

[Accept](#) [Cancel](#) [Automatic Approval Settings>](#) [Filter this list>](#)

Selector	Request#	Title	Requester	Rec'd by	Library	Purchase	Acq. Staff	Format	Source	Price	Action	Status
Yvonne	6/23/12	600 per centon how the inevitable...	lphillips	6/25/12	Lib1	\$9.99		print	Amazon	Economics	buy	request
Kevin	6/22/12	Desert Gothic	mscoe	7/1/12	Lib2	\$8.80		ebook				
Yvonne	6/23/12	Holy Cow: An Indian Adventure	lphillips	6/25/12	Lib1	\$10.17		print				
Yvonne	6/22/12	Solar Energy Conversion: The Solar Cell	CCM	6/26/12	Lib1	\$260.00	\$17.50	print				
Amenda	6/23/12	Understanding Economic Growth			Con1	\$119.00		ebook				
Amenda	6/22/12	Made to Break	jleward	6/25/12	Con1	\$16.25	\$21.00	print				
Yvonne	6/21/12	Philosophy in a Flat World	wfox	7/3/12	Lib1	\$27.95		ebook				


Serials Solutions is a registered trademark of Serials Solutions.
©2000-2012 Serials Solutions

Select Action

- ☒ buy
- ☐ borrow
- ☐ place a hold
- ☐ trial
- ☐ reject

[Apply](#) [Cancel](#)

SerialsSolutions
a ProQuest® business



Acquisitions

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 Date: Thursday, October 18, 2012 Time: 1:00 PM, Local Time (GMT -05:00)

Intota - Windows Internet Explorer

http://ccmapp001.alpha.qa.sersol.lib:8080/public-ui/search

File Edit View Favorites Tools Help

anatomy heart lungs - Fin... hypothermia and carcase i... University Library - Search... Intota

Page Safety Tools

Intota Search Acquisitions Authorizations Settings

Ball State Log out

hypothermia Search Clear

Searching: Ball State Catalog and Knowledgebase Options (+/-)

Welcome to Intota

Version: 0.29-SPRINTSEVEN Sep 5, 2012 English

Announcements

Curabitur aliquam

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam vel neque quam, mollis elementum justo. Proin auctor suscipit augue et ornare. Maecenas consequat, neque quis lacinia dictum, tellus purus gravida lacus, quis vehicula est elit a mauris. Vestibulum eget risus justo. Curabitur aliquam egestas lacinia. Fusce sodales turpis a mauris tristique ut scelerisque risus ullamcorper.

Fusce sodales

Cras sem mauris, iaculis quis commodo ut, rutrum sed lectus.

Search tips:

- Boolean Operators: AND, "+", OR, NOT and "*" (Must be ALL CAPS)
- To find a phrase use quotes: "arctic circle"
- Wildcard Searches: one character="?", multi-character="***", fuzzy="~"
- By default all fields are searched. Click "options" to see the choices for narrowing fields.

Shortcuts to other resources

- [Lucene search syntax](#)
- [Dartmouth Summon](#)
- [Legacy Client Center](#)

©2012 Serials Solutions® | Powered by Intota

Acquisitions Go

Internet | Protected Mode: Off 100% 1:28 PM

00:27:46 / 01:01:05

3:15 PM 10/23/2012

Acquisitions-Intota

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 Date: Thursday, October 18, 2012 Time: 1:00 PM, Local Time (GMT -05:00)

Intota - Windows Internet Explorer

http://ccmapp001.alpha.qa.sersol.lib:8080/public-ui/View/10224773?tabName=external&sortField=title&sortOrder=asc&rows=30&pageNumber=1&formats=BOO

File Edit View Favorites Tools Help

Intota Search Acquisitions Authorizations Settings

Ball State Log out

Details Availability Reviews and Summaries

Availability in Library
Not available

Regional Holdings
[View regional holdings](#)

Available from Vendor

Vendor	Formal Action	Condition	Availability	Price	Shipping Unit	Price per unit	Add to Purchase Order
Amazon (Payton*34)	Buy	New	Usually ships in 1-2 business da	\$48.99	1 copy	\$48.99	<input data-bbox="1110 839 1141 862" type="button" value="+"/>
Amazon (Goodbooks4cfe)	Buy	Used	Usually ships in 1-2 business da	\$48.43	1 copy	\$48.43	<input data-bbox="1110 868 1141 891" type="button" value="+"/>

©2012 Serials Solutions® | Powered by Intota

Acquisitions

Done

Internet | Protected Mode: Off

100%

1:34 PM

00:34:05 / 01:01:05

3:42 PM 10/23/2012

Acquisitions-Intota

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help
Meeting Number: 646 664 983 Date: Thursday, October 18, 2012 Time: 1:00 PM, Local Time (GMT -05:00)

Intota - Windows Internet Explorer
http://ccmapp001.alpha.qa.sersol.lib:8080/public-ui/view/10224773?tabName=external&sortField=title&sortOrder=asc&rows=30&pageNumber=1&formats=BOO

File Edit View Favorites Tools Help
Favorites anatomy heart lungs - Fin... hypothermia and carpsae i... University Library - Search... Intota

Intota Search Acquisitions Authorizations Settings
eBook, M4M

Details Availability Reviews and Summaries
Availability in Library
Not available
Regional Holdings
View regional holdings
Available from Vendor

Vendor Formal Action Condition
Amazon (Payton*34) Buy New
Amazon (Goodbookscate) Buy Used

Add to Purchase Order
Vendor: Amazon (Payton*34)
Condition: New
*= required
Quantity* 1
Choose Location* Choose
Choose Catalog* Choose
Fiscal Period* FY2012
Ledger* Choose
Fund Code*
Purchase Order* Create new Purchase Order
Purchase Order Name*

©2012 Serials Solutions® | Powered by Intota
Acquisitions

Done
Internet | Protected Mode: Off
100%
1:34 PM
00:34:30 / 01:01:05
3:44 PM
10/23/2012

PO Ready-Intota

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help

Meeting Number: 646 664 983 | Date: Thursday, October 18, 2012 | Time: 1:00 PM, Local Time (GMT -05:00)

Acquisitions - Purchase Order - Windows Internet Explorer

http://ccmapp001.alpha.qa.sensol.lib8080/public-ui/acquisitions/PO/1011500

File Edit View Favorites Tools Help

anatomy heart lungs - Fin... hypothermia and caspase L... University Library - Search... Acquisitions - Purchase... X

Page Safety Tools

Intota Search Acquisitions Authorizations Settings

Ball State Log out

created: 10/18/12 10:35 AM intota@bsu.edu
modified: 10/18/12 10:35 AM intota@bsu.edu
Order Type: Choose order type
Status: New

October 18 PO # 1011500 Vendor: Amazon

Denote Move Duplicate

Title/ID	Qty	Fund	Location	List Price	Discount	Purchase Price	Total	Requester	Note
A practical approach to microarray data analysis / ISBN/ISSN: 9781402072604	1	Ledger: State Engineering \$48.99	Main Library	\$185.00	\$136.01	\$48.99	\$48.99		
Book or Document									
Details									

PO Notes:

Shipping Address: Main

Note to Vendor:

Shipping Method: Standard

Currency: USD
Item Total: \$48.99
Shipping: \$0.00
Tax: \$0.00
Total: \$48.99

Place Order

©2012 Serials Solutions® | Powered by Intota

Acquisitions Go

Done

Internet | Protected Mode: Off

100%

1:35 PM

00:35:30 / 01:01:05

3:46 PM 10/23/2012

Order Placed

Network Recording Player - Live Demo! Reconceptualize library collection management with Intota

File View Info Help
Meeting Number: 646 664 983 Date: Thursday, October 18, 2012 Time: 1:00 PM, Local Time (GMT -05:00)

Acquisitions - Purchase Order - Windows Internet Explorer
http://ccmapp001.alpha.qa.sersol.lib:8080/public-ui/acquisitions/PO/1011500

File Edit View Favorites Tools Help
Favorites anatomy heart lungs - Fin... hypothermia and carpsa i... University Library - Search... Acquisitions - Purchase...

Amazon.com: Please Confirm Your Action - Windows Internet Explorer
http://www.amazon.com/gp/cart/aws-merge

File Edit View Favorites Tools Help
Favorites Amazon.com: Please Confirm Your Action

amazon Your Amazon.com Today's Deals Gift Cards Help
Shop by Department Search Go Hello, Sign in Your Account

Add to Shopping Cart

Please confirm that you want to add the item(s) listed below to your cart.

Item	Price	Qty
A Practical Approach to Microarray Data Analysis	\$48.99	1

[Continue](#)

No, thank you. Please take me back to [Amazon.com](#).

created: 10/18/12 10:35 AM intota@bsu.edu
modified: 10/18/12 10:35 AM intota@bsu.edu
Order Type: Choose order type
Status: New

[Delete](#) [More](#) [Duplicate](#)

Item	Purchase Price	Total	Requester	Note
01	\$48.99	\$48.99		

Currency: USD
Item Total: \$48.99
Shipping: \$0.00
Tax: \$0.00
Total: \$48.99

[Place Order](#)

©2012 Serials Solutions® | Powered by Intota

Acquisitions [Go](#)

Done Internet | Protected Mode: Off 100%

00:35:37 / 01:01:05 3:46 PM 10/23/2012

Database Trial Management-Alma

ExLibris **Alma** Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen

Manage Trials

Limit results to:

Alert

Mandatory information is missing or erroneous (5)
Purchase Order Line is not active (6)

Vendor

Gale (2)
Boardman (1)
Undefined (5)

Reminder Notification

Undefined (2)
Earlier (5)

Trial List


Filter: All Find: in: All Go


1 - 8 of 8 Records Tools

Name		Status	Vendor	Start Date	End Date	PO Line #	Public	Participants	Actions
EBSCOhost	2	Draft	-	12/27/2011	02/14/2012	POL-2507		✓	Actions
MEDLINE Abstract									
Gale Cengage 19th Century British Library Newspapers	2	Draft	-	05/09/2012	05/31/2012	POL-5509			Actions
Gale Cengage Business ASAP	2	Requested	-	-	-	POL-502			Actions
Gale Cengage Expanded Academic ASAP	2	Draft	Gale	05/23/2012	05/31/2012	POL-2602		✓	Actions
Gale Cengage Health & Wellness Resource Center & Alternative Health Module	0	Draft	Gale	01/11/2012	03/13/2012	POL-2903	✓	✓	Actions
ProQuest ABI/INFORM Global	1	Draft	-	09/26/2011	10/26/2011	POL-501		✓	Actions
ProQuest Wilson Applied Science and Technology Abstracts	2	Requested	Boardman	-	-	POL-1201		✓	Actions
Wilson Art Full Text	0	In analysis	-	03/12/2012	06/01/2012	POL-503	✓	✓	Actions

1 - 8 of 8 Records Tools


Database Trial Management-Alma

ExLibris **Alma**  Tasks Analytics Currently at: Main Library - Acquisitions... Help Cathy Owen





















 Trial Details Cancel Export Save

Name: Wilson Art Full Text
Description: Wilson Art Full Text, Wilson
Status: In analysis Type: Public Reference number: POL-503

Summary Survey Form Participants Analysis Alerts Attachments Notes

Select questions 

Questionnaire
Add question Press Esc to exit full-screen mode. 1 - 10 of 10 Records Tools

Question	Move Down	Move Up	Group	Range	Actions
1 Do you think the content of this package is valuable			Conclusion	Scale Of Satisfaction	Actions
2 Is the interface user friendly			Interface	Scale Of Satisfaction	Actions
3 Which journal titles do you think most useful?			Content	Free Text	Actions
4 Do you study or conduct research in the field related to the package's content?			Content	Scale Of Satisfaction	Actions
5 How satisfied are you with the contents of the package?			Content	Scale Of Satisfaction	Actions
6 Rate the academic level of the package's contents			Content	Scale Of Satisfaction	Actions
7 Should we take out a subscription on the package?			Conclusion	Scale Of Satisfaction	Actions
8 List the things that you didn't like about the interface			Interface	Free Text	Actions
9 List the things that you liked about the interface			Interface	Free Text	Actions
10 Should we take out a subscription on the package?			Conclusion	Scale Of Satisfaction	Actions

Add question 1 - 10 of 10 Records Tools

Cancel Export Save

Database Trial Management-Alma

Assignment: Research on Alma, Reports

Status: In analysis Type: Public Reference number: [POL-503](#)

Summary Survey Form Participants **Analysis** Alerts Attachments Notes

General Information

Participants	0	Requested	9	-	-
Faculty	-	Graduates	-	Under Graduates	-
Library Staff	-	Others	-	Staff	-

Conclusion

1 - 4 of 4 Records [Tools](#)

Order	Question	Responses	Average	
1	Do you think the content of this package is valuable	0	0.00	View
7	Should we take out a subscription on the package?	0	0.00	View
10	Should we take out a subscription on the package?	0	0.00	View
Total	-	0.00	0.00	View

Interface

1 - 2 of 2 Records [Tools](#)

Order	Question	Responses	Average	
2	Is the interface user friendly	0	0.00	View
Total	-	0.00	0.00	View

1 - 2 of 2 Records [Tools](#)

Order	Question	Responses	
8	List the things that you didn't like about the interface	0	View
9	List the things that you liked about the interface	0	View

Kuali OLE (Open Library Environment)

- Open source and free
- A functional version 1.0 to be released in early 2013
- Similar functionality like other next gen library systems
 - The Global Open Knowledgebase (the community maintained knowledge base for Kuali OLE by a Mellon grant 2012 to March 2013)⁷
 - Interoperability with campus systems
 - License management
 - Unified resources management
- Waiting...
- [Demo](#)



Summary-Features

- Work with any discovery tool
- Clientless and in the cloud
- Login through a browser
- Unified workflows/Combined library workflows into one interface
- Centrally hosted knowledgebase of bib records, database profiles, vendor information, publishers' inventories, serials information and more
- Shared data among user/member libraries
- Unified Resources Management (print, electronic, and digital)
- Electronic resources management
 - Link to publishers directly for searching and ordering
 - Order/activate a database and all the journal titles will load automatically into the discovery layer
 - Communicate with publishers directly
 - Link to licenses
 - More

Summary-Features

- License management/License manager
- Statistical analysis/assessment/reporting
- Inherent RDA
- User driven acquisition from the discovery layer
- Trial database management
- More...

	Alma	Sierra	WorldShare Management Services	Intota	Kuali OLE
Responsible Organization	Ex Libris	Innovative Interfaces Inc	OCLC	Serials Solutions	Kuali Foundation
Release Schedule	Released, 2012	Released, 2012	Released, 2011	Will release in 2014	Will release Kuali 1.0 in Spring 2013 (full functional)
Manage Print, Electronic, & Digital materials in a single system	Yes	Yes	Yes	Yes	Yes
Central Knowledge Base	Yes	Yes	Yes	Yes	No
Acquisitions, including the management of both financial and license terms	Yes	Yes	Yes	Yes	Yes
Unified Workflow	Yes	Yes	Yes	Yes	Yes
Cloud-based hosted	Yes (by Ex Libris)	Yes (Note: two options - hosted locally or in cloud by Innovative)	Yes (by OCLC)	Yes (by Serials Solutions)	No (Note: may be provided by the Kuali Commercial Affiliate program)
Integration with third party applications (such as external campus systems)	Yes	Yes	Yes	Yes	N/A
Real-time Interaction with Discovery Layer	Yes (Primo)/No (other layers)	Yes (Encore)/No (other layers)	Yes (WorldCat local)/No (other layers)	Yes (Summon)/No (other layers)	No
Number of customers	Over 100 institutions (worldwide, Ex Libris Webinar, Oct	535 institutions (worldwide, Library Technology Guides, Nov	88 institutions (worldwide, Library Technology Guides, Nov 12, 2012)	6 development partner libraries	17 partner libraries

Conclusion

- Time for change?
- Cost?
- Staff training?
- Wait and see until the systems are more mature?

References

NOTES

1. Burke, Jane. Web-scale Management solution. A Webinar at <http://www.serialssolutions.com/en/services/intota> (accessed January 1, 2013)
2. Lee, Yanyi and others **“Technical Report of the WALDO ILS Working Group On the Future of Library Automation Systems”** at <http://wmswiki.pbworks.com/w/page/52969289/FrontPage> (accessed January 2, 2013)
3. Ex Libris. “Alma Classes” at http://discoveralma.com/classes_secure&-jaks804y23bb932y8y23y3h38.html (access January 2, 2013).
4. Burke, Jane. “Intota.” A recorded Webinar at <http://www.serialssolutions.com/en/webinars/recorded/> (accessed January 2, 2013)
5. Lee, Yanyi and others. “Technical Report of the Waldo ILS Working Group.”
6. OCLC. “Features of Web-scale.” <http://www.oclc.org/webscale/features.htm> (accessed January 2, 2012).
7. Electronic Resources and Libraries 2012: [Introducing the Global Open Knowledgebase \(GOKb\)](http://www.kuali.org/sites/default/files/ole/Introducing%20GOKb_Collins_Wilson.pdf) http://www.kuali.org/sites/default/files/ole/Introducing%20GOKb_Collins_Wilson.pdf (accessed Jan 3, 2013).

SPECIAL THANKS

WALDO Working Group on the Future of Library Automation Systems and their Technical Report, 2012.

FAQ

Thank you for coming to my presentation

Sharon Yang, Associate Professor/Systems
Librarian, Rider University

yangs@rider.edu

