Information Strategy Development in the UK and Ireland: a role for Aleph

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Structure of my talk

– Who are we?
– Our institutional context
– A Top 10 Wish List in the light of what we have heard so far
– Conclusion: Aleph development in a national UK and Irish context
Who are we?

- A Strategy Group of UK and Irish Chief Librarians
  - whose institutions use Aleph as their library management system
  - meeting two or three times a year
  - members from Ex Libris in the UK join us at these meetings
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<th>City</th>
<th>Country</th>
<th>Type of Library</th>
<th>Date</th>
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Or

• Universities/academic
  – Anglia Polytechnic University, Bristol University, British Library, Canterbury Christchurch University College, Coventry University, University of East Anglia, Goldsmiths College (University of London),
And

- King’s College London (University of London), Lancaster University, Loughborough University, Napier University, Newcastle University, Nottingham University, Royal Holloway (University of London),
And

- UCL (University College London), University of York, University of Westminster;
- National University of Ireland: Galway, Maynooth; Royal College of Surgeons, Dublin
What is our role?

• Our role
  – *is not* to comment on or direct operational developments in the Ex Libris product range
  – *it is* to develop partnership with Ex Libris
Partnership

- for exchange of information
- to oversee the changing world of Information provision
- to oversee the emerging information strategies of our own educational institutions
Partnership

– to fuse these developments together in an educational and technological setting
– to see if existing Ex Libris products can meet the need
– to identify future development paths for the Ex Libris suite
Or

How we get there together

Where we are now → Where we want to be
Corporate Plan (Institutional Strategy)

Corporate Systems Strategy

Academic strategies:
Teaching and Learning
Research

IT Strategy

Administrative strategies:
Finance, Development, HR, Estates, Registry

Information/Library Strategies

UK+Ireland Strategy Group

slide 13
UK+Ireland Strategy Group

MLE/VLE (e.g. WebCT)
Student records
Residences
Space management
Finance
Staff records
Alumni records
Library
Student computing
Web pages
Many other systems
MLE/VLE (e.g. WebCT)

Vision: Integrated Information Environment

Student Portal
Staff Portal
Web Interface

UK+Ireland Strategy Group
Vision: The Student Experience

Initial enquiry about courses

Application

School Transcripts

Interview

Offer

Course options

Halls of Residence

Access to:
Timetable
Lecture rooms
Reading lists
Course materials
Study packs
Assignments
Record of progression

“Smartcard”
Cashless transactions
Access to buildings
Authority to use
Library
and IT facilities

Assessment

Graduation ceremony

Transcript

Alumnus

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Alumnus
What more do we need?

- Identified through
  - meetings of the UK and Ireland Strategy Group
  - conversations with individual Librarians, especially British Library, Nottingham
  - e-mail request for contributions
A Top 10 Wish List

- A Top 10 can consist of:
  - Back to the Basics
  - Corporate context
  - E-Journals
  - E-Books
  - Open Archiving
A Top 10 Wish List

– OAI compliance
– Catalogue
– Management Information
– VLEs/MLEs
– International debates
1: Back to the Basics

• Not essentially strategic, but...
  – everyone I spoke to about Vienna said, ‘say this’:-
  – Ex Libris must look at their basic level of service provision
1: Back to the Basics

- there needs to be improvement in:
  - communication between the company and the customer
  - documentation
  - support for customers in software upgrades
2: Corporate Context

- Ex Libris products are not stand-alone. They need to:
  - help a university deliver its Mission and Vision
  - be inter-operable with other institutional tools, e.g. Finance System
2: Corporate Context

– be user-centred, not library-centric
– help the library address institutional imperatives such as the student experience
– the UK and Ireland Strategy Group provides input on this
2: Corporate Context

but

– it is not yet clear how these strategy discussions get translated into development work by the company
– do we now need to rethink the whole development process?
3/4: E-Journals/E-Books

- The UK and Ireland Strategy Group has discussed the role of the Aleph periodicals control module as universities are moving to an e-only environment.
3/4: E-Journals/E-Books

– many universities want to use the library management system to manage their e-journals purchasing, to control access+authentication, & to monitor use of e-journals by end-users
3/4: E-Journals/E-Books

– UK and Ireland Strategy Group worked with UKI Aleph Users Group & Ex Libris to facilitate discussion about a role for Aleph
3/4: E-Journals/E-Books

• E-Books have been discussed by the Strategy Group
  – Hazel Woodward, University Librarian at Cranfield, has been very helpful as Chair of the JISC E-Books Working Group
3/4: E-Journals/E-Books

– provision of full-text suitable for UK Higher Education is extremely poor
– does Ex Libris see a role for itself as a content supplier?
– Aleph will certainly need to cope with purchase, access to,
3/4: E-Journals/E-Books

– authentication, and distribution of e-texts
– potentially of great importance for supporting taught courses
– users want 24x7 access, on-campus, off-campus
3/4: E-Journals/E-Books

- Ex Libris and JISC are in further discussion on this issue
- we await the outcome!
5: Open Archiving

• Open Archiving is of great interest in the UK
  – JISC/CURL-funded national project called SHERPA
  – Securing a Hybrid Environment for Research Preservation and Access
5: Open Archiving

- 13 inter-operable Open Archive repositories
- containing pre-prints/post-prints of research output, material for teaching and learning, grey literature, Ph.D. theses
5: Open Archiving

– metadata will be harvested by OAI service-providers
– full-text will be available to anyone with an Internet connection
– Russell Group Research Vice-Chancellors engaged
5: Open Archiving

– project is re-inventing the role of a university in managing its information assets

– intellectual property rights management is a key part of this project

– see http://www.sherpa.ac.uk
5: Open Archiving

SHERPA

SHERPA aims to investigate issues to do with the future of scholarly communication and publishing. In particular, it is initiating the development of openly accessible institutional digital repositories of research output in a number of research universities. These so-called 'e-print archives' will contain papers by researchers from the participating institutions.

The project will investigate the IPR, quality control and other key management issues associated with making the research literature freely available to the research community. It will also investigate technical questions, including interoperability.

News

Draft report on preservation of eprints available
5: Open Archiving

- Ex Libris products are not part of this ground-breaking UK development
- OAI software used is: eprints.org and D-Space
- Ex Libris needs to be e-prints and D-Space compliant
6: OAI compliance

- Further fruits of OAI compliance
  - libraries would like to use OAI to exchange their bibliographic records
  - metadata could be exposed on the web
6: OAI compliance

- metadata can then be loaded into larger union catalogues
- is this a more robust model than using Z39.50?
- do we need to test this in a working environment?
- can Ex Libris help?
7: Catalogue

• OPAC
  – no longer the central gateway to an institution’s information assets
  – 70% of US undergraduates use the Internet before using their Library
7: Catalogue

- users want the library interface to look like Google
- RLG’s ‘RedLightGreen’ project is addressing this issue
7: Catalogue

– Aim of ‘RedLightGreen’ is
to offer rich, reliable library information that is unique in the Web environment and to deliver that information in ways that meet the expectations of Web-savvy users
### Search Results

**All matches** (58)
- **Author matches** (0)
- **Subject matches** (23)
- **Title matches** (45)

**Viewing:** 1-10 of 68 results

#### 1. Banished Children of Eve, by Peter Quinn
- 19 editions published between 1916 - 2001 in 5 languages.
- Primary Subject: New York (N.Y.)--History--Civil War, 1861-1865--Fiction.
- 17 books, 2 audio recordings.
- Held by 78 contributing institutions

#### 2. No Irish need apply, by Marcia Rock
- 1 edition published in 1993 in 1 language.
- Primary Subject: New York Riots--Irish--1863.
- 1 video recording.
- Held by 75 contributing institutions

#### 3. Historiographical evolution and the causes of the New York City draft riots, by Jeremy Scott Klaff
- 1 edition published in 1999 in 5 languages.
- Primary Subject: New York--Riots--Irish.
- 1 book.
7: Catalogue

– pilot deployment scheduled for autumn 2003
– underlying data is 126 million bibliographic records representing 42 million titles
– how will the results be fed into Aleph development?
8: Management Information

• A strategic need
  – UK libraries provide returns to SCONUL for benchmarking
  – statistics used to argue a library’s case institutionally and nationally
  – used to monitor performance
8: Management Information

– Aleph not perceived as being good in providing management information anywhere in the UK and Ireland

– need for improvement and dialogue here
8: Management Information

– interesting to hear Dalia Mendelsson’s description of the Data Warehouse
– but this is the first time we have heard of the development
– can Ex Libris work *with* libraries on this?
9: VLE/MLE

• Virtual/Managed Learning Environments
  – Most UK and Irish universities developing these
  – support the student experience
  – need to study and model better linkages between MetaLib as
9: VLE/MLE

portal software and e-learning packages: WebCT / Blackboard

- improvement in Aleph reading list module would be required
- noted as being available in Aleph v. 17, but why do libraries have to wait so long?
9: VLE/MLE

- also the general ability to take information from Aleph (e.g. Loans) into other applications
- Could MetaLib be developed to be able to harvest OAI-compliant records from elsewhere and incorporate them into a search service
9: VLE/MLE

– Considerable partnership work is needed in all these areas
10: International debates

• Are there other international fora that can be used to generate ongoing strategic discussion to help Ex Libris development paths?
Conclusion

• Higher Education in the UK is extremely high-profile
Conclusion

Conclusion

- Debate on ‘top-up’ fees, the amount universities can charge students directly, is intense
- Higher Education is a highly politicized and competitive market
Conclusion

in this context, libraries must
– support the institutional mission
– deliver
– support their customers
– be cost-effective
Conclusion

- the Ex Libris suite of tools is vital in enabling libraries to tackle these agendas
- Ex Libris has fine products
- for my own institution, the purchase of Ex Libris tools has been well-received
Conclusion

– customers need a continuous software development path
– we believe that the creation of the UK and Ireland Strategy Group helps to fulfil that need
– we look forward to continuing the partnership with Ex Libris
And

– Thanks for listening