



# The Ex Librian

April 2005 Volume 2 Issue 1

## A Word from Our CEO

Dear Colleagues,

Welcome to the third issue of the Ex Librian. I'd like to share with you some of my reflections on the role of libraries in our society, past and present, and the direction in which libraries and vendors are headed today.

For thousands of years, the keepers of knowledge were few. Then, in the fifteenth century, Gutenberg's invention opened up the world of print to ordinary people and dramatically changed the way in which they perceived knowledge and the power that it grants.

A few hundred years went by before the next revolutionary step occurred, the invention of the computer. This technological watershed enabled those who collected and organized the world's knowledge—librarians—to deal with rapidly expanding amounts of information and to make it more accessible.

In a matter of decades, the establishment of the Internet opened new horizons: not only could libraries and information providers enable users to access their resources in a simple manner, but a huge global repository, the World Wide Web, also engaged seekers of knowledge. A combination of carefully organized, high-quality information and massive amounts of more informal sources of knowledge soon became available through Web search engines that required little expertise and suited an impatient lifestyle, with its short attention span and resistance to steep learning curves.

Library-software vendors responded to these changes by developing tools that enable libraries to take advantage of the available technological infrastructure to manage their collections—traditional as well as digital—and offer them to the community that they serve. The diversity of information and information resources led to innovations such as open linking, through which libraries interlink the various information resources that they offer, including those not under their control. The next natural step was to facilitate access to the multiplicity of information resources by offering them under one umbrella—via a library portal and metasearch tool.

That brings us to today. New industry initiatives are triggering global changes in the scholarly information arena. On the one hand, we see initiatives that are offering e-content to end users, such as the recently announced Google projects,

particularly Google Print and Google Scholar; Amazon's expansion to e-books and e-documents, including their Search Inside the Book service; and Scopus™, which offers an abstracting and indexing database representing thousands of journals. On the other hand, new models of open access are motivating publishers to seek alternative means of obtaining revenue. Many such models today require that the author, rather than those who seek the information, pay the fee. Google, Yahoo, Amazon, and other new players are joining in, bringing unparalleled technological infrastructures.

Furthermore, the vast quantities of available data coupled with the changing expectations of users necessitate new methods of presenting such data. Along with the traditional search mechanism, which is becoming increasingly sophisticated, we see the emergence of discovery tools such as visualization of the search results, faceted browsing, and text mining, all of which are aimed at improving the organization and presentation of search results.

With their shrinking budgets, libraries are facing a great challenge in retaining their role as keepers of scholarly information. They need to ensure that users will be able to obtain accurate information fast and without violating copyright laws; and that information will be available where needed, via institutional portals, course management systems, or other channels of access.

Firmly established in the scholarly information industry, Ex Libris makes certain that its systems offer solutions to the rapid changes in technology and trends. We aim to capitalize on innovation to provide libraries with the right tools to help them meet these new challenges. And we are proud to collaborate with librarians all over the world, who encourage us and assist us in translating our vision into working systems.

Sincerely yours,  
Matti Shem Tov  
President and CEO, Ex Libris



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## Editor's Note

Dear Colleagues,

I am pleased to present you with the first 2005 edition of the Ex Libris. You will notice that whereas the Ex Libris products remain a central newsletter feature, this edition showcases many of the special achievements of our offices worldwide for 2004 and the first quarter of 2005. In addition to new members of the Ex Libris family, important projects that have moved into production, and product developments, we have highlighted two new Ex Libris initiatives aimed at further improving communication with our customers.

The first is the inauguration of the Ex Libris Support Center aimed at assuring that our customers receive the highest level of satisfaction at every stage of interaction with the company and its products. The second is our Webinar program, in which we invite our customers to receive product updates and informational briefings via online seminars.

As always, please feel free to contact me with comments or suggestions you have for the next edition of the Ex Libris.

Pleasant reading,  
 Laura Gilinski  
 MarCom Manager  
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## Verde News

In an article entitled "Electronic Resource Management Systems: The Need and the Realization", due to be published in *New Library World*, Mark Ellingsen (University of Bristol) and Tamar Sadeh (Ex Libris), have noted that the jobs of librarians who deal with electronic resources are extremely challenging. Among the reasons they list are the following:

- Growth in electronic collections
- The increasingly central role these collections play
- Large budgets
- Endless variation in packages offered by a multitude of players in the e-resource market
- Frequent changes in business models
- Lack of automated tools to deal with this complex environment

It is no wonder, therefore, that a meeting of the American Library Association (ALA) ALCTS Electronic Resource Interest Group, at which Ivy Anderson (Harvard University) and Ellen Finnie Duranceau (MIT) discussed their work with Ex Libris in the co-development of Verde, drew on 15 January 2005 a "standing room only" crowd of more than 400 people.

The impetus for the development of Verde came from a concept paper delivered by Mark Ellingsen, Owen Stephens, and Nadine Hill from AUG-UKI (ALEPH User Group, UK and Ireland) that was presented at a meeting sponsored by ICAU (International Consortium of ALEPH Users) at its annual meeting in 2002.

Following upon this work, co-development began with an initial exploratory meeting in December 2002 and continued with a series of review meetings in 2003/2004. Including other ICAU and NAAUG (North American ALEPH User Group) partners, these meetings have recently advanced to the point where Harvard and MIT have access to a development system populated with local data from Harvard and MIT.

According to Ms. Anderson, "We've been impressed with Ex Libris' grasp of the complexities of e-resource management and their understanding of the e-resource life-cycle workflow. The attention that has been paid in the system design to functional integration...while supporting the unique requirements of e-resources, is encouraging."

In their presentation, Ms. Anderson and Ms. Duranceau observed that the key features of this co-development process were characterized by being:

- Interactive, with extensive impact on design and development
- Focused, with close attention to a data model informed



## DigiTool in Action-the UK DigiTool Programme

Following ICAU in Vienna in 2003, Ex Libris (UK) Ltd., in partnership with the AUG-UKI (ALEPH User Group, UK and Ireland) Strategy Group [of Chief Librarians], launched the UK DigiTool Programme "to examine the use and role of DigiTool in handling a variety of corporate and library collections". The Programme Director, Dr. Paul Ayris (Director of Library Services, UCL) provided an update on the programme at ICAU in Porto in September 2004, an extract of which is below.

The UK DigiTool Programme comprises 3 projects:

- Managing Committee records (lead site — The University of Westminster)
- Managing E-Theses (lead site — UCL)
- Managing small image collections (lead site — Royal Holloway, University of London; partner site Goldsmiths College, University of London)

While each of the projects shares similar themes, their scopes vary slightly. For example, the scope of UCL's E-Theses project includes the investigation of:

- considerations of authentication, authorisation, and security
- deposit, including support for mediated deposit, and the ease and feasibility of self-deposit by authors
- interactions between DigiTool and the Information Landscape in UCL
- OAI-compliance, support for standard metadata schema, and ease of configuration
- role of digital object management in the library's E-Strategy
- search and retrieval, including indexing quality and ease and speed of retrieval
- storage and preservation issues
- support for multimedia content
- training implications, both for library staff and for end-users

Summer 2005 will see the 'Evaluation' strand of the UK DigiTool Programme, with the results being presented at ICAU in Sweden in 2006, and summarised in the October 2006 issue of The Ex Librian.

by "complex scenarios"

- Strong relationship to the Digital Library Federation (DLF) Electronic Resource Management Initiative (ERMI) guidelines (see <http://www.diglib.org/standards/dlf-erm02.htm>)

During this entire iterative process Ex Libris benefited enormously from Ms. Anderson's membership on the DLF ERMI committee and from Ms. Duranceau's participation on the DLF librarian reactor panel. Ex Libris in its turn participated in the vendor reactor panel. The latter involved cases where co-development efforts led to direct feedback to the DLF ERMI guidelines.

As Jenny Walker, Vice President for Marketing at Ex Libris has commented, one of the key features of Verde is its global knowledgebase. SFX customers can make use of their SFX data for a fast-track implementation of Verde—in fact, they are so far ahead of the implementation curve that SFX may put them at the half-way point toward going live with Verde.

"I agree that we have been impressed with Ex Libris' commitment to listen to its co-development partners and incorporate what they hear," added Ms. Duranceau, "leading to a real understanding of the challenges of managing e-resources. It has been rewarding to see that understanding brought to bear in designing Verde."

Among the goals that MIT hopes to realize from Verde is an integrated workflow that will minimize the present necessity of duplicate data maintenance between their integrated library system (ALEPH) and Vera, MIT's homegrown ERM system; simplified access for users; and the elimination of ongoing development for Vera.

While developed primarily as a staff tool, Verde will communicate with an institution's OPAC, library portal, link server, A-Z list, and other third-party applications via the Verde web services (SOAP) layer.

**Ex Libris' new electronic resource management system will debut in Q2, 2005.**



*Stanford University, the first Ex Libris site to go live with SFX® version 3, celebrates the event with freshly baked SFX cookies*



Thumbnail digital images (with associated metadata) in DigiTool Resource Discovery

The Evaluation strand (lead site — the University of East Anglia) will evaluate the potential of DigiTool to meet a range of teaching and learning, research, and corporate needs; all of which are relevant to academics for different aspects of their work.

## DigiTool Version 3 – Coming Soon

Ex Libris is pleased to announce that version 3 of DigiTool, a breakthrough concept in the management of digital assets for the academic community, will be ready for release during Q3 2005. Although we will have to leave you in suspense with the full product description until the next edition of the Ex Librisian...we will tell you that DigiTool version 3 is designed to address the vital issues of digital object preservation as well as enhanced collection creation, management, and sharing. This product version will enable institutions to create, manage, and preserve locally administered digital collections while providing local patrons and other institutions with easy, comprehensive access to them. Built to take a comprehensive e-campus view into consideration, DigiTool version 3 provides institutions with the means to easily integrate digital collections into

institutional portals, products, and services, including patron directories and e-learning systems—providing patrons with a seamless working environment.

Based on a unique set of modules that work together to provide complete solutions for the needs of a wide range of digital collection types, the modular, flexible, and open DigiTool architecture is targeted at addressing current and future requirements of:

- **Institutional repositories**—management and dissemination of digital materials created by the institution and its community members—such as theses, dissertations, and the like.
- **Educational material collections** including learning objects, e-reserves, and licensed collections—targeted at enhancing the learning experience and scholarly research efforts.
- **Special collections** held and preserved by institutions for the benefit of society including digitized cultural heritage collections.

For additional information on DigiTool, please see [www.exlibrisgroup.com/digitool.htm](http://www.exlibrisgroup.com/digitool.htm).



## New ALEPH 500 Customers

**Join us on a trip around the world to meet new ALEPH 500™ customers!**

We start our journey in Tennessee, USA, land of country music and the Southern Adventist University, which has chosen the entire Ex Libris product suite– ALEPH 500, MetaLib/SFX, DigiTool, Verde. **The Southern Adventist University library** houses a very special collection of material on Abraham Lincoln and the Civil War

We then pick up the famous “Chatanooga Choo Choo” due east to the **Union Theological Seminary & Presbyterian School of Christian Education in Richmond, Virginia** that has selected ALEPH 500 and MetaLib/SFX. The primary mission of the Library is to support instruction at the three institutions that comprise the Richmond Theological Consortium — the Baptist Theological Seminary, the Samuel L. DeWitt School of Theology at Virginia Union University, and the Union Theological Seminary & Presbyterian School of Christian Education.

From Virginia we journey to the Connecticut River Valley in western Massachusetts, where **Five Colleges**, a consortium of the highest academic level, has opted for ALEPH 500, and the Verde electronic resource management system. Don't miss the free shuttle bus between the consortium members: Amherst College, Hampshire College, Mount Holyoke College, Smith College, and the University of Massachusetts Amherst. The consortium boasts an interlibrary loan program, allowing students and faculty to take advantage of all five campus collections.

Wave the Maple Leaf – we're going north! The Canadian ALEPH 500 family was honored to be joined by the **Novanet Consortium** on December 31<sup>st</sup> 2004. Novanet is comprised of the libraries of the Atlantic School of Theology, Dalhousie

University, Mount Saint Vincent University, Nova Scotia Agricultural College, NSCAD University, Nova Scotia Community College, Saint Mary's University, St. Francis Xavier University, University College of Cape Breton, and University of King's College. The total number of Ex Libris sites in Canada now reaches 39.

Hold on to your hat, we are about to cross the Atlantic and visit the European Commission, another new ALEPH 500 site. **The Central Library of the European Commission** is a special reference and research library, established to meet the library needs of the European Commission and its staff. The agreement signed by Ex Libris and the European Commission entails use and maintenance of the ALEPH 500 system for all members of the RéseauBib, the network of libraries of the European Commission's Directorates General and departments.

From Belgium, our tour takes us to one of the Switzerland's most northerly cantons, Aargau, where **the Library Network of Swiss Canton Aargau** has selected ALEPH 500 to replace its SISIS system. Aargau is the fourth Swiss canton to opt for ALEPH.

We bid adieu to Europe and travel eastward to Egypt! **The Institut Français d'Archéologie Orientale in Cairo**, established in 1880, is well known by researchers around the world for its incomparable treasures in the fields of Egyptology, papyrology, and the study of the Byzantine, Coptic, and Arab cultures. Researching the ancient treasures will now be facilitated by ALEPH 500.

Leaving the land of pharaohs and pyramids, our Ex Libris globetrotting tour arrives in China! Guangdong, in the southern part of the South China Sea, is home to **Guangdong University of Foreign Studies**, China's most prestigious school for international studies, and the latest ALEPH 500 site in China.

**Bon Voyage!**



## ADAM (ALEPH Digital Asset Management) — Now Available

The release of ALEPH 500 version 17.01 brings with it a wealth of new features including the optional ADAM module that enables libraries to manage digital assets—audio, video, image, and sound—and their associated metadata within the ALEPH 500 environment. Libraries are now able to load their full range of digital objects, create associated bibliographic data in the MARC format of their choice, and add technical metadata using the familiar ALEPH 500 Cataloging Module.

Patrons using the ADAM module can browse metadata, perform full-text searches, retrieve, and view digital objects in the library OPAC. Object Management settings define if an object can be viewed freely, requires copyright agreement, or is restricted to a defined group of users or IP address.

### Cataloging digital objects in ALEPH 500

The ALEPH 500 cataloging module includes an interface for uploading digital objects and creating and updating

associated metadata. As the cataloging method in ADAM is similar to that used in ALEPH 500, staff will master this quickly and easily. Importing metadata and/or objects and linking them to new or existing bibliographic records in the system can be handled manually or in batch mode. Simultaneous display of digital objects and bibliographic records allows catalogers to refer to the object while creating and/or updating the bibliographic record.

Staff can define object access rights as part of the definition process—for example, only patrons who have signed-in or have addressed the system via a particular IP address may view a specific object. Copyright notices may be attributed to select objects where appropriate. Authorized patrons wishing to view a copyright-protected object will be obliged to accept these conditions prior to accessing it. Libraries or departments within the library that do not wish to share their objects can set up unique directories to ensure that objects in their possession remain discreet.



*Full record view in Search*

*Full record view in ALEPH 500 OPAC*

### Digital rights management

Upon obtaining search results and before presenting them to the patron in the brief view page, ADAM verifies user permissions and digital object restrictions. If user permissions—determined by user sign-in—do not correspond with digital object restrictions, the user will be unable to view the object. Access to digital objects can be limited based on user status, IP address, course enrollment, sub-library, and expiration date. The system enables limiting access to a certain number of concurrent users.

Copyright statements may be presented to users prior to viewing any protected object. The library can maintain different types of copyright notices and specify which will be displayed before allowing patrons to access the object. Although ADAM is not a tool for digital object license management, it does support the recording of licensing information for objects acquired and/or purchased from external bodies.

## Ex Libris Reports First ALEPH Reporting Center Customers

- **The University of New South Wales**, located in Sydney, Australia, serves over 40,000 students from over 120 countries. The UNSW Library is associated with many Australia-wide research and development projects.
- **Université Paris 3 Sorbonne Nouvelle** is part of the venerable Sorbonne University in Paris. Both the Library catalog and the Interuniversity Library for Oriental Languages run ALEPH.
- **Temasek Polytechnic** in Singapore is a pioneer in library portal development. The Temasek Library uses ALEPH, MetaLib and SFX.
- **University College London** has the highest number of professors of any university in the UK, and boasts 18 Nobel Prize winners among its staff and graduates.
- The Library of the **Southern Baptist Technological Seminary** in Louisville, Kentucky, USA was established in 1859, with 2000 items. The Seminary collection now numbers close to one million items.
- The Library of the **University of Tennessee Knoxville**, USA, an ARL member, added ARC to its current suite of Ex Libris products—ALEPH 500, MetaLib, SFX, and DigiTool.
- Another ARL member, **McGill University of Montreal**, Canada, has been an Ex Libris site since 1999. The McGill University Library System is comprised of 18 individual sites and collections.
- An **Ex Libris** corporate client, **MOL Hungarian Oil and Gas Plc** is part of the multinational MOL petroleum company.

## Q&A

This new section of the newsletter is designed to provide our readers with a place to ask specific questions regarding the Ex Libris products and their functionality. We welcome your questions which may be addressed to Laura Gilinski at [laura.gilinski@exlibrisgroup.com](mailto:laura.gilinski@exlibrisgroup.com). Please note, that while we will address a number of the questions received we may not be able to address all of them in the next edition.

During the last few months we have received a number of queries regarding the new PDS service that has been mentioned in much of our literature. In order to clarify this matter we have addressed it here:

### What is PDS?

The Ex Libris Patron Directory Service (PDS) is a back-end Web component that facilitates shared user authentication and single sign-on (SSO) capabilities among the applications in the Ex Libris suite of products. The PDS can be configured to authenticate users in reference to a database managed by the specific Ex Libris application in use, or to integrate with an existing—typically institutional—authentication system. The PDS supports integration with LDAP and Active Directory servers, and with Aleph patron directories; other authentication systems are supported via a generic 'hook' or interface. The PDS can also be configured to redirect authentication to a remote authentication server, bypassing the login screen of the Ex Libris application.

The PDS supports a two-part process for user authentication and authorization. First, the user's credentials – for example, the user name and password – are checked to verify the user's identity (authentication). Second, user attributes can be retrieved – for example, user group – for use in the authorization process, which is managed by the specific Ex Libris application. The PDS accommodates verification of user credentials against one system, and retrieval of user attributes from another system.

The service can be configured to work in a consortia environment in which several institutions share the same applications but each has its own authentication system.

The following products include the Ex Libris PDS component:

- ALEPH 500 version 17.01 and later
- MetaLib version 3.1 and later
- DigiTool version 2.4 and later

### PDS and Single Sign-On for Ex Libris products

The PDS component checks whether a patron who is attempting to access a given system has already been authenticated for access to another product in the suite. If so, the PDS logs in the patron without requesting a user name and password. Similarly, a patron who is logging off one application can be automatically logged off the PDS and all the applications that are working with it (single sign-off). The PDS component can be configured to prompt users who are logging off one system to select the other applications from which they also want to log off.

## The Ex Libris Support Center

Ex Libris believes that quality service is increasingly the feature that distinguishes library automation vendors. In order to assure that our customers receive the highest level of satisfaction at every stage of interaction with the company and its products, we invest a wealth of resources—human and technological—in enhancing our support infrastructure. Of the 240 professionals employed by Ex Libris around the world, over one-fourth are dedicated to supporting our customers in operating, upgrading, and troubleshooting their products.

The new Ex Libris Customer Support Center, inaugurated in January 2005, is a clear illustration of this commitment to support issues. An advanced Web application, the new Support Center provides customers with round-the-clock access to various Ex Libris support services.

The interactive **Support Center** is the portal through which customers track and manage support incidents. Using an intuitive user interface, customers can open new support incidents, quickly browse open incidents, perform searches, add notes to open incidents, close incidents, search the Knowledgebase, and update profile details with ease.

The Customer Support Center Knowledgebase consists of a wealth of data gathered from customer Support Incidents. The Knowledgebase, which increases in size daily, includes solutions to common problems and questions as well as product tips and tricks from Ex Libris.

The **Documentation Center**, located in the Customer Support Center, houses a comprehensive collection of technical, implementation, and support documents for each of the company's products. These can be searched by standard trees or via a special full-text search mechanism. The **Download Center** section of the Documentation Center is where our customers turn to download items such as Service Packs for software corrections.

### Geographical distribution

In order to ensure high-level service and support for all of our customers across six continents, we have established regional **Customer Support Centers**. These facilities are located close to Ex Libris customer bases around the world: in Australia, Brazil, China, France, Germany, Israel, Poland, the United Kingdom, and the United States. Each regional center provides technical support to customers in its geographic region, enabling analysts to respond to service calls quickly and effectively, regardless of location.

Additional local support offices are available via Ex Libris partners around the world: in the Czech Republic, Denmark, Hungary, Italy, Mexico, Norway, Portugal, South Africa, Spain, and Taiwan.

All regional Customer Support Centers and local offices are staffed by highly trained, experienced technical professionals dedicated to providing customers with excellent service in the customer's language of choice and in the appropriate time zone.


Both regional and local Customer Support Centers provide project management services coordinated with project managers from Ex Libris international headquarters. This ensures quick and efficient planning and support.

*Our Customer Support Service Center philosophy is based on geographical proximity to the customer, speaking the customer's language, and providing the highest level of support possible.*

## News From Around the World



### Ex Libris China - A year in retrospect

 2004 was an exciting year for Ex Libris China. Headed up by the energetic Fucheng Shen, our Chinese representatives had very little time to rest in-between important events and obligations. The year got off to a great start as the National Library of China chose the SFX content-sensitive link server and MetaLib® library portal to manage its large collection of hybrid electronic resources and provide seamless patron services. A member of the Ex Libris family since 2001, the National Library of China is one of the most important ALEPH 500 customers in China.

Professor Chen Li, Deputy Director of the National Library of China, commented that the library had compared and evaluated a large number of domestic and international systems and had opted for MetaLib/SFX® based on their successful cooperation with Ex Libris on the ALEPH 500 project.



*The National Library of China signs an agreement for the purchase of MetaLib and SFX*

At the end of 2003 the Beijing Jiaotong University library selected three Ex Libris products— ALEPH 500, MetaLib, and SFX—the first MetaLib/SFX installation in China. To celebrate the successful move to production of these three systems, the International Symposium on Knowledge Management and Digital Service was held at the Beijing Jiaotong University. The symposium served as a forum for local and foreign libraries to exchange practical experience on digital services and explore patterns for knowledge management—adapted to the development of the digital era. Approximately 50 participants, from over 20 universities, attended this seminar. Mr. Matti Shem Tov, President and CEO of Ex Libris, Prof. Xuewei Li, Vice President of Beijing Jiaotong University, and Ms. Xiaoming Li, an official from the Ministry of Education, gave warm speeches at the symposium.

*For more information on the International Symposium on Knowledge Management and Digital Services, see: <http://www.bj.xinhuanet.com/bjpd-zhuanti/bjtdx.htm>.*




*Attendees of the International Symposium on Knowledge Management and Digital Service held at the Beijing Jiaotong University*

The Annual Meeting of the China Consortia ALEPH User Group (CCAU) was held in November, 2004 at the Beijing Normal University Zhuhai Campus. Forty ALEPH 500 users from all over China were welcomed by Ms. Fu Ailan, Vice President of the Beijing Normal University Zhuhai Campus. This annual meeting focused on customization and localization of the ALEPH 500 system.



*A session at the annual meeting of the China Consortia ALEPH User Group (CCAU)*

### The Rise of SUNCAT (the Serials Union Catalogue): Unlocking Access to Serials in the UK

 The contents of journals and other serials represent an immense and invaluable resource for researchers in all subjects. However, the task of identifying, locating, and accessing these serials, held by institutions across the UK, has presented a significant challenge. SUNCAT — an implementation of ALEPH 500 — has been built to help meet that challenge.

Funded by JISC (The Joint Information Systems Committee) and the RSLP (Research Support Libraries Programme) since

2003, and developed by EDINA at the University of Edinburgh in partnership with Ex Libris, SUNCAT has achieved a critical mass of just over four million records. These are made up of records from national libraries, the largest UK academic library collections, and international databases. Phase 2 of the programme, which will see coverage of the catalogue extend to up to 60 new libraries across the UK, has also been funded by JISC and is now underway.

SUNCAT will also be developed to integrate fully with other services on serials within the JISC information environment, supporting work in the areas of electronic subscription information, online access to journals, electronic document delivery, e-theses, and repositories, amongst others. As such, SUNCAT will further develop as a key tool for researchers, librarians, and others within colleges, universities, and beyond.

The official launch of SUNCAT took place on 15th February 2005 at The Law Society, London. Following the welcome and introduction by Derek Law (Librarian and Head of Information Resources Directorate, University of Strathclyde), Derek and Ronald Milne (Acting Director of University Library Services and Bodley's Librarian, University of Oxford) discussed the origins and vision of SUNCAT and were followed by Peter Burnhill (Director, EDINA), Hugh Taylor (Head, Collection Development and Description, Cambridge University Library), and Andrew Green (Librarian, National Library of Wales) who discussed their experiences to date. Peter continued by outlining the processes for phase two of SUNCAT before the audience toasted the success of SUNCAT at a reception hosted by Reg Carr (Director of University Library Services and Bodley's Librarian, University of Oxford).

*To access the pilot SUNCAT service and for further information, please go to: <http://edina.ac.uk/suncat>*



## The Bavarian Central Union Catalog Project Goes Live



With the entrance of electronic data processing into libraries in the 1970s, a requirement arose for a descriptive cataloging system based on the shared creation and reuse of cataloging records. This led to the formation of library networks in some of the German states. In 1983, the German Consortium of Library Networks was established based on the Deutsche Forschungsgemeinschaft (DFG) recommendations for the development of regional networks. The chief tasks of the Consortium were the coordination and introduction of common, innovative library services based on general hardware, software, and data communications standards; coordination and application of library codes and standards for cooperative cataloging, indexing, interlibrary loans and data exchange; as well as the representation of Consortia members' interests within official bodies and institutions. By developing these consortia, German libraries began extending their services to remote users, expanding resource offerings, and supporting initiatives such as distance education. Library network centers and Die Deutsche Bibliothek—the German National Library, and the Austrian Library Network cooperate within the Consortium of Library Networks.

A number of consortial models have been developed to meet the requirements of these different regional units. One of the most basic requirements is a union catalog developed to enhance the specific workflow needs of each consortium. ALEPH Cluster, Ex Libris' unique, ever-expanding set of products designed to meet the complex functionality and service requirements of multi-site libraries, aids organizations that form one unit based on geographic proximity, institutional linkage, subject matter, or any other defined need; to share bibliographic data, users' data, and end user services while preserving the degree of autonomy required by each local member.

The summer of 2004 saw the successful migration of the State of Bavaria system from an old mainframe Central Union Catalog to ALEPH 500. This project, which began in February 2003, involved the conversion and migration of 13,000,000 title records and 7,000,000 authority records. In order to facilitate the move to ALEPH 500, 270 librarians were trained in a "train the trainer" method so that today there are approximately 800 ALEPH 500 catalogers in the State of Bavaria. The ALEPH 500 system runs on a SUN cluster environment based on 2 SUN V1280 and 2 SUN V880. The software "agents" required for this system were developed during the course of the project.

In parallel to the Central Union Catalog activities, the Bavarian State implemented the MetaLib-based "Gateway Bayern" as its central search environment. This includes a consortial SFX solution with instances for each Bavarian University. During the annual conference of Bavarian Library Directors,

which took place in Munich in December 2004, Mr. Eginhardt Scholz of the Central Office of the State Library toasted the final acceptance of the system with Michael Luetgen, Managing Director of Ex Libris Germany.

***The employees of Ex Libris (Germany) extend a warm thanks to all of their Bavarian colleagues that cooperated on this project.***

## The European Commission Selects ALEPH 500

Another major milestone for Ex Libris Germany was the decision of the EU Commission Central Library in Brussels to choose ALEPH 500 as its future integrated library system. The most challenging aspect of this project is that the system will be required to support at least 12 European languages simultaneously. Following the signing of the initial framework agreement in December 2004, additional EU libraries began joining the ALEPH 500 family. The first library to follow, in January 2005, was the library of the European Court of Auditors in Luxembourg—that chose the Alephino system. The Court Library is Ex Libris' 100th Alephino customer.

We welcome the EU libraries to the Ex Libris family and look forward to a long and fruitful cooperation.

*Implementation of the first EU library is planned for 2005.*

***Please note that Ex Libris Germany will move offices in April 2005. Notification will be sent out as to the new contact details. This information will also become available on our website: <http://www.exlibrisgroup.com/offices.htm#germany>.***

## Ex Libris in National Libraries

The leading if not the pre-eminent supplier of library management software to national libraries, Ex Libris has supplied products that currently run in 23 national libraries in Armenia, Austria, Belgium, Chile, China, the Czech Republic, Denmark, Finland, Iceland, Israel, Japan, Kosovo, Latvia, Lichtenstein, Luxembourg, Mexico, Netherlands, Russia, Sweden, Taiwan, Turkey, UK, and the USA.

Ex Libris has engaged in a great deal of research, regarding the unique requirements of national libraries in order to develop high-performance products robust enough to meet the needs of these institutions. National libraries are a category unto themselves, a few of whose distinctive characteristics include:

### National library as national repository

National libraries are generally a country's designated national repository, collecting literature published in the country, in the language of the country, or about the country they represent. At the end of the 16th century, the Prague censorship office

was the first to organize controlled delivery of publications. Since this time, print publishers in most countries have been obligated to provide their national library with a specified number of all publications—to be held for national use. With the increased prevalence of electronic publications, new legislation often requires national libraries to receive a copy of digital as well as print publications, making national libraries the owners of huge collections—requiring the most sophisticated of integrated library systems, such as ALEPH 500.

Cataloging in a national library requires efficient access to and flexible manipulation of data to process a large quantity of deposits quickly. Staff require the ability to add bibliographic records, holdings data, and items, and to change information about an item, including its location and barcode, and move or transfer items efficiently from one holdings or bibliographic record to another. They must do all of this while preserving ownership information, call numbers, and circulation history as well as safeguarding data integrity, including granular permissions and data validation routines.

A number of Ex Libris customers have opted for DigiTool to manage their legal depositories. The National Library of Belgium, for example, was motivated to obtain DigiTool following the extension of the Belgian law, dating from 1965, pertaining to the legal deposit of printed documents to include electronic publications. Features of interest to legal depositories include the ability to allow publishers easy, Web-based deposit of publications as well as status-driven deposit workflow management which allows approvers to review, revise, and approve deposits.

The sophisticated, flexible DigiTool product has also become popular with national libraries, interested in preserving special collections of national heritage treasures with which they have been endowed. These often digitized collections include rare manuscripts, ancient maps, newspapers, magazines, prints and drawings, music scores, and patents. Sound archives may carry anything from early recordings to the latest CD, DVD, and minidisc recordings.

### Multilingual system requirements

The National Library of China boasts over 22 million volumes and that of the British Library includes 150 million items representing *most known languages*. Clearly national libraries search out a product, which at its core deals easily and efficiently with numerous languages.

ALEPH 500 is Unicode-based, providing multilingual, multiscript support. The system is available in over 20 interface language options enabling libraries to select the languages that will best serve their patrons. Staff and patrons can interact with the system in any of the library-defined languages and can change their interface language preference at any time. Once specified, this language is linked to the patron's library profile; thereafter, all library functions are carried out in the patron's language of choice.

### Remote storage facilities

The sheer quantity of materials held by national libraries requires the storage of some items in off-site, remote storage facilities. Once transferred to the remote storage facility, the library is often challenged by the need to supply a specific item to a patron at a set time. The ALEPH 500 closed stack and off-site materials storage functionality assists national library staff in providing patrons with items they require, to the requested reading room in a timely fashion.

After the patron has placed an items request, the ALEPH 500 materials paging utility identifies the exact location of the item and—if it is stored in a remote facility—the closest van pickup time and date. An interface that interacts with depository management software transfers information about requested items and provides users with immediate feedback regarding availability and the time that their requested item will be delivered to the library, and to their preferred reading room. A system-generated paging slip prompts staff to pull the requested material and transfer it to the designated pickup location.

National libraries are generally closed-stack institutions, a fact that may potentially create a problem for patrons who would like to use an item continuously rather than one time. A special Reading Room functionality, originally developed by Ex Libris for the Royal Library of Sweden, alleviates this difficulty. Upon requesting a specific item, patrons are presented with a pull-down menu offering a choice of the Reading Rooms in which the item can be used. Once the request is processed, the system automatically assigns the items to the patron who has ordered it and changes its location to that of the selected reading room. From this point, the item is available to the patron, in the selected reading room, for a library-designated period of time. After each use, the patron returns the item to the librarian responsible for the reading room. The item is returned to closed stacks after the library-specified period of time has elapsed.

As national libraries materials are generally not permitted to be removed from the premises, patrons often request that a photocopy of all or part of a required document be provided them. Sophisticated, library-defined Document Delivery functionalities enable staff to process these requests easily. Document Delivery requests can be made directly by patrons from the ALPEH 500 Web OPAC or by staff in the Windows client. As soon as a patron photocopy request has been made, a print request or pull slip can be generated and printed at the appropriate circulation desk. Patrons can be billed according to the paper size used for the photocopies after which the copies can be delivered to a particular location or held for patron pickup. Photocopy requests can be deleted after the requested document or portion has been printed.

### Portals for National Libraries

National libraries are typically also very much engaged in providing Web access to the broad subject area of local language, history and culture. Through the library, access is provided to a wide range of Web-accessible material including the catalogues of the library's own holdings, to databases and e-journals under license, to electronic full content stored locally, to digitized image material, to Web expositions, and to much other informative material. With this diversity it is necessary to manage a wide range of access controls, search mechanisms and linking facilities. Such infrastructure should be of no concern however to the audiences that a national library attracts over the Web: the general public but also students and researchers. Each should experience easy search and access.

The Koninklijke Bibliotheek (KB) in the Netherlands, the National Library of the Czech Republic, and the National Library of Finland represent some of the national libraries who have selected MetaLib as their library portal.

For the KB MetaLib and SFX offer a portal product and dynamic linking solution with which it can begin to realize its goals of hiding digital library complexities for the very diverse audience that they serve. MetaLib has been integrated in the KB Web site by giving it the same look and feel and by using the MetaLib "deep linking" capabilities to link directly to MetaLib search results from a search box on the library's home page. The KB patrons can easily navigate between the library's home page and MetaLib. The MetaLib QuickSearch feature, the default entry point at the KB, is being used effectively to provide searching in predefined lists of resources of general relevance to Dutch language, history and culture. The merged, ranked and deduplicated search results support a general audience.

The KB staff believes that modules like MetaSearch, the MetaLib resource discovery tools, and the personalization features are more applicable to the specialized needs of students and researchers. The KB staff will undertake further evaluation to refine their assumptions and to better assess the effectiveness of the way MetaLib is customized and integrated into their local environment.

The library staff at the National Library of the Czech Republic have written and presented extensively on their deployment of MetaLib and SFX. For a comprehensive description of the MetaLib implementation at the Czech National Library which received the INFORUM 2002 AWARD, given to the most important Czech and Slovak products, services or acts related to electronic information resources, see <http://www.inforum.cz/inforum2002/english/ceny.htm>

For further details on the Finnish National Portal, see <http://www.lib.helsinki.fi/finelib/english/>

## Who's Who and Who's New at Ex Libris?



### **Jun Hong, Regional Manager, North East Asia, Ex Libris Ltd.**

— Based in downtown Seoul, Korea, Jun represents Ex Libris from his office situated in an area called King's Place as it is graced with four beautiful palaces.

Jun has extensive experience in library operations and business practices in Asia. During his most recent tenure as Asia Pacific Library Services Executive at OCLC, Jun was in charge of operations in India, Korea, Pakistan, Thailand, and Vietnam.

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### **Dr. Peter Ahrens, Senior e-Library & Integration Consultant (SFX, MetaLib & Verde) Ex Libris (Deutschland) GmbH**

— Peter has 15 years of experience in business development and sales management in the electronic publishing field. Prior to joining Ex Libris he held positions at Elsevier Science and Ovid. Peter holds degrees in Medicine and Informatics.

**René Thomas, Sales Representative (DigiTool), Ex Libris (Deutschland) GmbH** — Based in Hamburg, René is responsible for the sales of DigiTool-Projects in the German

office. René has over eight years of experience in sales and sales management complex-output management solutions with Xerox Corp.

In January 2005 the Ex Libris Group announced some strategic changes to its senior management team—designed to leverage the entrepreneurial spirit and vision that have characterized the Information Services Division (ISD) team for the benefit of all Ex Libris products.



### **Oren Beit-Arie, Chief Strategy Officer, Ex Libris Ltd.**

— Oren, who led ISD since February 2000, has now assumed a new role as Chief Strategy Officer. As such, he will focus on the strategic development of all Ex Libris products while exploring new product initiatives to meet market needs.

**Jenny Walker, VP Marketing, Ex Libris Ltd.** — Previously VP Marketing and Business Development of ISD, Jenny extends her marketing responsibilities from ISD products to all Ex Libris products, and will be responsible for all corporate marketing activities, including product management.

**Susan Stearns, VP Customer Services, Ex Libris (USA) Inc.** —

Susan, previously Director of Operations for ISD, has been promoted to VP Customer Services. In this role, she will manage the North American implementation, training, and support teams for all Ex Libris products.

## Events

### **Ex Libris Delivers Product and Informational Updates via Webinars**

In the Fall of 2004 Ex Libris began to test the concept of delivering product updates and informational briefings via online seminars (Webinars).

The first of these, in October 2004, "How to Expose your Digital Assets to the Light of Day Yet Preserve them From Fading?" was dedicated to DigiTool and featured both customers (Robert McDonald [Florida State University] and Este Paskausky [Boston College]) and Ex Libris staff (Michael Kaplan). Ex Libris received over 250 registrations of which over 150 actually logged in for the session. (Some login sessions were broadcast to rooms with more than 20 attendees.) Attendees came from Algeria, Canada, China, Jamaica, Kosova, Macao, Macedonia, South Africa, and the USA.

In December 2004 Barbara Rad-El delivered a Webinar entitled "ALEPH Reporting Center (ARC): Bringing the Power of Web-based Reporting to your Desktop" that attracted over 200 participants.

Both Webinars were recorded for later viewing and over 400 people have registered to view the recordings to date! If you would like to register to view the recordings please visit <http://www.exlibrisgroup.com/webinars.htm>.

Following the success of the first two Webinars, Ex Libris has been busy planning events on a variety of topics including ADAM, Verde, SFX eXpress, DigiTool 3.0, SFX 3, MetaLib 3, ALEPH Monitor, and Metasearching—some of these will have been held by the time this newsletter debuts.

Some broadcasts will continue to be initiated in North America, but others will be targeted at and timed for a European audience. All will, however, be recorded for later viewing.

If you are interested in receiving notice about our Webinars, please contact your local Ex Libris office or keep an eye on <http://www.exlibrisgroup.com/webinars.htm>.

## ICAU 2005 - London

The British Library, St. Pancras will serve as the venue for the 16th Annual ICAU (International Consortium of ALEPH Users) meeting this year. ICAU will take place from September 12-14, immediately followed by the SMUG (SFX/MetaLib User's Group) meeting on September 15-16. Both meetings will be held in the British Library's Conference Centre which provides excellent conference facilities.

Delegates will be able to visit the exhibitions in the main BL building and stroll on the piazza during breaks – provided it doesn't rain of course!

Never leaving participants with a dull moment, three evening events have been organised around the ICAU events. The first, hosted by the AUG-UKI (ALEPH User Group – UK & Ireland) on September 12, will be a reception in the impressive entrance hall of the main building of the British Library, dominated by the tower of the King's Library.

The second, hosted by the UK and Ireland Directors Strategy Group on September 13, will be an evening at the historic Globe Theatre. Participants will enjoy exhibitions of costumes and props used in the theatre's productions whilst eating and drinking to the accompaniment of minstrels. As if this were not enough, the third event will be hosted by the SMUG committee on the evening of September 15th—details of which will be revealed later.



The ICAU 2005 website for booking places at both meetings is now opened ([www.ucl.ac.uk/ls](http://www.ucl.ac.uk/ls)). Participants are advised to book early to ensure a place. The British Library Conference Centre holds 255 people so places will be limited to two delegates per organisation initially, though this will be reviewed if all places are not filled. It is also advisable to book hotels as soon as possible to ensure you find rooms to suit your requirements and flights so that you can take advantage of the best available deals.

The organising committee are looking forward to meeting you all in September!



## Come See us in Person

### Ex Libris will participate in the following events

#### **SCONUL Conference and AGM 2005**

Brighton, UK  
April 6-8, 2005

#### **ACRL 12th National Conference**

Minneapolis, Minnesota  
April 7-10, 2005

#### **UK Serials Group 28th Annual Conference and Exhibition**

Edinburgh, UK  
April 11-13, 2005

#### **Olybris - the 2005 Ex Libris Seminar**

Kos, Greece  
April 17-22, 2005

#### **Library and Information Show 2005**

Birmingham, UK  
April 20-21, 2005 Stand 819

#### **NAAUG-SMUG 2005 Annual Conference**

University of Maryland, College Park  
June 5-10, 2005

#### **ALA Annual Conference**

Chicago, IL  
June 23-29, 2005

#### **71st IFLA General Conference and Council**

Oslo, Norway  
August 14-18, 2005

#### **ICAU 2005**

The British Library, London, UK  
September 12-15, 2005

#### **SMUG**

The British Library, London, UK  
September 15-16, 2005

#### **Frankfurt Book Fair**

Frankfurt, Germany  
October 19-23, 2005

#### **Online Information 2005**

London, UK  
29 November-1 December, 2005

For additional information on activities in your region, please contact your local sales office:

[www.exlibrisgroup.com/offices.htm](http://www.exlibrisgroup.com/offices.htm)

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