



## A Message from our CEO



Dear Colleagues,

Welcome to the fifth issue of the Ex Libris newsletter, now in its third year as a major channel of communication between Ex Libris and our customers.

At this time, I am entering my fourth year as president and CEO of Ex Libris. Since I came on board, I've learned a great deal about our industry, the people in our community, and the motivation that drives all stakeholders to gather and preserve the world's knowledge and make it available to society.

Working in a multinational company and traveling around the world, I marvel at the diversity of our cultures and the richness of our communication channels. At every conference in which I take part, I enjoy the variety of languages that I hear spoken and yet appreciate how we all manage to communicate, regardless of our native tongue.

The heterogeneous nature of our world is setting new challenges for technological systems. Several bodies, such as the US-based National Information Standards Organization (NISO), the International Organization for Standardization (ISO), and the International Electrotechnical Commission (IEC), have set as their goal the establishment of a common ground for communicating. Most relevant to our industry are those standards that apply to protocols, identifiers and codes, interchange formats, character sets, file formats, and holdings descriptions, which are the basic building blocks of international information systems.

At Ex Libris we fully believe in and invest in standards. Not only do we deploy standards-based products, but we also take an active part in setting standards. One of the best examples of our collaboration with the industry in this area concerned the formation of the OpenURL standard, NISO Z39.88-2004. Oren Beit-Arie, today our chief strategy officer, played an important role along with Herbert Van de Sompel in submitting the draft standard to NISO and taking it through the formal procedures. Today a number of Ex Libris staff members are working with other industry stakeholders to define and set standards in areas such as metasearching, the exchange of circulation data and licensing information, and the harvesting of statistical reports from information vendors.

The development of our Verde electronic resource management system has demonstrated to the fullest the way in which standards emerge and the role they play. At the core of the library infrastructure, the exchange of information between systems and the ability to process information have proved to be a major challenge for e-resource management systems. And, indeed, new standards such as the Standardized Usage Statistics Harvesting Initiative (SUSHI) are emerging to make such interaction possible.

The balance between diversity and standardization is also evident in the way in which our user groups are working, and I'd like to take this opportunity to congratulate our users on the restructuring of the Ex Libris user groups. Adapting to the expansion in the Ex Libris product offerings, the user community has replaced ICAU, SMUG, and NAAUG with two new organizations, the International Group of Ex Libris Users (IGeLU) and Ex Libris Users of

North America (ELUNA). Representing a diversity of institutions, geographical regions, languages, and patron communities, on the one hand, and creating channels for collaboration and an efficient exchange of information among institutions and between institutions and Ex Libris, on the other, these new organizations are moving forward along the fruitful path paved by the previous groups. We are looking forward to the continued alliance.

Sincerely yours,

Matti Shem Tov  
President and CEO, Ex Libris

## ALEPH X-Services and Interoperability—A Forerunner in Standards Development

Ex Libris™ is, and has always been, dedicated to providing its customers with tools to enable integration of its products with other library and institutional systems and applications—even before the Web services concept was articulated. In the past, in the absence of standards for Web services, Ex Libris developed proprietary methods to ensure this integration.



The earliest versions of ALEPH® came equipped with a set of enabling APIs. As technology evolved, the APIs were replaced by the X-Server--an http/XML-based services interface--still widely used today in conjunction with the ALEPH 500 and MetaLib® products. As best practices and standards (e.g., SOAP) have emerged, Ex Libris has adopted these; and is committed to supporting these both in existing and future products.

The Ex Libris X-Server is used extensively by ALEPH and MetaLib customers for a variety of interesting and innovative integration projects. To advance the use of X-services, and to help direct and enhance development, an ALEPH X-Services Interest Group has been established. The ALEPH X-Services Interest Group follows a successful model of Ex Libris/customer cooperation for MetaLib X-Services. (More information on this subject can be found in the Q&A section of the October 2005 edition of the Ex Librian: (<http://www.exlibrisgroup.com/resources/general/The%20Ex%20Librian%20241005.pdf>)). The role of the customers in this developer-customer interest group, is to identify and prioritize needs with Ex Libris product management. Customers vet requirements and the Company goes on to develop the selected ALEPH X-Services. New and updated X-Services are then released to all ALEPH 500 customers as part of the service pack mechanism.

When evaluating proposed applications, the interest group considers the following:

- Does an X-Service (or other method) exist to enable the application?
- Can an existing X-Service be adapted?
- What would the X-Service look like? What are the potential impacts on performance and security?

Already the interest group has driven X-Services enhancements related to borrower information. This X-Service, which has been released for ALEPH 500 version 16 and up, enables the efficient display of borrower information in institutional portals.

Other X-Services under consideration include more interoperability with finance systems and other applications tangent to the library space.

*Ex Libris extends a special thanks to the members of the ALEPH X-Services Interest Group: Mark Ellingsen, University of Bristol, UK, Ed Gomes, Duke University, USA, Greg Lee, CCLA, USA, Randy Norwood, Texas Tech, USA, Owen Stephens, Royal Holloway, University of London, UK, Petr Zabicka, Moravian Library in Brno, Czech Republic.*

## Creative Uses of SFX

In the fall of 2004, Ex Libris began testing the concept of delivering product updates and informational briefings via online seminars (Webinars). The most recent of these was a Webinar held in December 2005 on the "Creative Uses of SFX". The presenters were Dave Stout, Walter Komorowski, Head of Library Systems, Williams College; and Tim Mori, Systems Librarian, North Carolina State University. Over 770 participants registered for the Webinar, including SFX customers and not-yet SFX customers from 26 countries.



The Webinar opened with a general overview of SFX®, highlighting its use as a central repository for information about a library's e-journals, and demonstrating three tools currently available in the SFX KnowledgeBase:

- the "Capture Citation" target which can be used by a library end user to save bibliographic details about a citation, including its OpenURL, perhaps for use in a bibliography or other list of articles;
- the Catalog "PlugIn," a dynamic threshold program which instructs SFX to check availability of a journal or book in the library catalog before showing the catalog target on the SFX menu;
- the ILL source configuration, which allows customers of the Innovative OPAC to configure OpenURLs from the library catalog to the SFX server using the 'WEBOPTION wwwaddress' functionality in the OPAC. This allows library users to identify further services for items they find in the catalog.

Tim Mori and Walter Komorowski described novel ways that their institutions had used the SFX toolkit to create local services specific to their user communities and library collection conditions and processing workflows.

Mori described the "Science Direct Rapid Request" service at NCSU that was supported by a local target in SFX. For budgetary reasons, NCSU decided to disassemble its "Big Deal" bundled Elsevier subscription, dropping titles which had received little use. In order to win faculty support for the changes in subscription, NCSU instituted a "Rapid Request" policy for specific Elsevier titles to which it no longer subscribed directly, guaranteeing 48-hour turnaround on requests. This service necessitated a separate workflow—not that of regular document delivery—in order to ensure that the requests were appropriately prioritized.

NCSU created a local document delivery target in SFX, and populated it with object portfolios for each of the affected Elsevier titles. An existing target parser was modified to prepopulate a special form which included hidden fields to identify it as a "Rapid Request." Thus when OpenURLs are submitted to SFX for one of the titles for which electronic access has been dropped, the library user is able to see availability of the special "Rapid Request" service on the SFX menu and easily submit a request for the material. NCSU went on to edit this service to work with ILLiad, a later acquisition. A simple modification to the ILLiad target parser filters requests to a separate queue within ILLiad.

Komorowski described four simple but effective local projects Williams College has undertaken with its SFX installation. To set the background, he explained that the

customization of library products is very important to his institution, because the Williams College library is constantly seeking to improve the ease with which patrons can exploit the capability of library tools. Staff want to make specific changes as quickly as possible to meet user needs. As often as possible, Williams College utilizes the "direct link" functionality in SFX to take patrons to articles without an intervening SFX Menu. Librarians have decided upon and implemented very specific display logic rules to guide a user to a specific type of publication. If more than one target is available, 60% of SFX requests take a user directly to full text. He also reported that library staff found the exercise of deciding on applicable SFX display logic rules an opportunity to more closely examine the different qualities of the resources to which the library subscribed.

The librarians noticed that library users, usually undergraduates, were submitting a high number of document delivery requests for abstracts from "Dissertation Abstracts," the UMI publication which publishes short descriptions of Ph.D. dissertations from institutions in the US and Canada. These types of requests are quite often fruitless, as the dissertations themselves are more difficult to acquire and are typically more in-depth than usually required for an undergraduate research project. Submitting these requests usually resulted in frustration and disappointment for the students, while clogging the library's ILL office--making it difficult for library staff to respond to more appropriate requests.

Komorowski and his colleagues decided to create a local target in SFX containing object portfolios reflecting the different sections of Dissertation Abstracts. When an OpenURL arrives at the SFX server for Dissertation Abstracts, instead of offering a document delivery request form, users are led to a library web page written by the instructional librarian, providing additional information about Dissertation Abstracts and the pros and cons of using dissertations in research. A link to the document delivery service page is made available from this page to help users still interested in requesting complete dissertations. Komorowski reported for the first 11 months of 2005, this page was accessed 407 times from SFX. Librarians considered that this access rate could also represent the number of ILL requests that had been "intercepted."

Williams College also created an intermediary page for Gale targets during the period in September 2005 when this provider underwent some rapid platform changes, rendering inbound linking inoperable for a short period of time. As the librarians liked the new platform for other reasons and did not want to move back to the old one, Komorowski created a local Gale target, copying the global Gale target that was in use by the library, and pointing it to an intermediary page containing text compiled by the instructional librarian, helping users access articles from Gale. This target was used at Williams College for about a week.

In January 2005, to help cope with tracking the multitude of year-end changes to the library's e-journal subscriptions regarding updates to publishers and platforms, Komorowski created a local SFX target that could be used by library staff. Staff found that publishers were slow in reporting changes, and it was difficult to know for sure when access at a new site had been granted. Komorowski's local target was made available to library staff only via the "IP Institute" feature and populated with records for journals which were "en route." He used the "Bulk" or general target parser in SFX to point the journal to the new publisher or provider's list of available titles. In this way all of the library's "questionable" titles were in one place, and access could be easily tested via the "Test SFX" button in the KBManager. When access was granted by the publisher, library staff activated the appropriate portfolio in the main set of SFX targets, and deactivated the in-process one. Komorowski described this target as his "mini-ERM."

The last local project offered by Komorowski involved his use of SFX in testing OpenURLs sent as part of an interlibrary loan product developed for his library's consortium, consisting of six private colleges in New England. As Komorowski had the ability to tweak SFX and its target URLs at a moment's notice, he ensured that he could easily perform the primary testing and send screenshots of results to his fellow consortium libraries, which were not SFX customers. Finally, he was able to provide better feedback on the ILL product, and

speed up testing by a notable factor.

The Webinar presenters closed by remarking that libraries need to continue to analyze how patrons use local services, gauge the ease of this process, and maximize their purchase accordingly. Williams College and NCSU will continue to use SFX as a development tool and look for new ways to use the product in their local environments.

For more information on attending or viewing pre-recorded Ex Libris Webinars, please see <http://www.exlibrisgroup.com/webinars.htm>.

## 'Shibbolizing' PDS for MetaLib Authentication

Shibbolize, verb. 'to Shibbolize': Adjust a Service so that access via Shibboleth is possible.

*IAMSECT Glossary of Terms*, <http://iamsect.ncl.ac.uk/glossary/>

Ex Libris recently collaborated with MetaLib customers in Finland, the US, and the UK to 'shibbolize' the Patron Directory Services (PDS) module, providing a seamless single sign-on (SSO) environment for MetaLib users.



### What is Shibboleth?

Shibboleth, a project of [Internet2/MACE](#) (Middleware Architecture Committee for Education-), is an initiative to develop an open, standards-based solution to meet the need for organizations to exchange information about their users in a secure and privacy-preserving manner. Shibboleth provides a framework for establishing a single sign-on environment where all applications are able to communicate with a central service, under the control of the institution, in order to gain authentication details. Through the Shibboleth architecture each application can query the users' authentication and authorize them to use the specific functionality, or in MetaLib's case, search the specific resources which their permissions allow.

More information about Shibboleth is available at <http://shibboleth.internet2.edu/>

### Ex Libris and Shibboleth

Ex Libris was involved in the Internet2/MACE Shibboleth project from its early development stages. Our first integration project, started in 2001, established SFX as a Shibboleth target to explore the feasibility of context-sensitive linking within the Shibboleth framework. A prototype system was developed for evaluation by two customer sites in 2002, but the conclusion was that it was too early to assess the value of such an integration given the early stage of Shibboleth development and its adoption by institutions. Nonetheless, we gained much knowledge and experience from this project, providing a good foundation for our recent PDS/Shibboleth integration work with MetaLib.

### Recent Integration Projects

#### FinELib, Finland

The National Library of Finland provides nationwide portal services via [FinELib](#), the Finnish National Electronic Library. The service, Nelli Portal, is currently used by university, public, and polytechnic libraries throughout Finland with future plans to also support special libraries and research institutes. Initially launched in 2004, Nelli Portal provides access to OPACs and a large variety of licensed electronic resources centrally purchased for Finnish libraries. MetaLib and SFX are integral components of Nelli Portal.

FinELib initially considered using LDAP for user authentication in the portal, but LDAP technology was in use in only a few Finnish universities. Instead, Shibboleth middleware was chosen to replace LDAP technology as the authentication system. FinELib, working cooperatively with CSC, the Finnish IT center for science, successfully implemented Shibboleth for MetaLib user authentication via MetaLib's 'remote CGI hook' authentication plug-in. Completed with MetaLib Version 2.15 and Shibboleth Version 1.1, the initial implementation was described in more detail by Ari Rouvari, Nelli Portal Project Manager, in the document '*NELLI – The Shibbolized Library Portal*'; available at: <http://www.lib.helsinki.fi/finelib/english/nelli/articles/shibbo.doc>.

FinELib, working with Ex Libris, recently implemented a full MetaLib/Shibboleth integration to incorporate Shibboleth Version 1.3, MetaLib Version 3.13, and PDS Version 1.2. As of late-February 2006, six FinELib institutions are 'live' with the new Shibboleth implementation with a seventh institution nearly complete.

*"The Finnish higher education institutes chose Shibboleth over LDAP and other authentication mechanisms for its security and use of well-known protocols and standards. Shibboleth is open and can be integrated into a wide variety of backend systems. It is also fairly easy for our customers to implement. After the organization has implemented the Identity Provider and joined the federation, we only need a few minutes to "turn on" Shibboleth for the organization in Nelli Portal. Shibbolizing Nelli has been an interesting experience and the cooperation with Ex Libris has been rewarding. It is good to see this new technology work so well in a live environment and benefit end users as well as administration.*

*We are also shibbolizing the library catalogs and other services to provide users seamless transition from one service to another."*

*- Ari Rouvari, Nelli Portal Project Manager; Ere Maijala, Nelli Portal Systems Analyst*

### **University System of Maryland and Affiliated Institutions (USMAI), US**

The [USMAI Consortium of Libraries](#) provides library services to sixteen libraries on the 12 campuses of the University System of Maryland and the 2 affiliated institutions of higher education in Maryland. Access to licensed remote resources is provided via USMAI's [Research Port](#) portal (MetaLib) and Find It (SFX).

USMAI, working with Ex Libris, also recently integrated MetaLib/Shibboleth, incorporating Shibboleth Version 1.2, MetaLib Version 3.13, and PDS Version 1.2. As of late-February 2006, the project was successfully completed in a test environment with plans to move the integration to Research Port's production environment April/May 2006.

*"Shibboleth authentication offers the opportunity for us to simplify the life of the patron while at the same time protecting IP rights and assuring that the user is who they say they are. In some measure this is the technology equivalent of cutting the Gordian knot. It is a long needed means of mimicking the first authenticated networks at Stanford, MIT and Carnegie Mellon, developed in the early days of distributed computing."*

*- Dr. Charles Lowry, Dean of Libraries, University of Maryland*

MetaLib/PDS and EZProxy will be the first services that will use USMAI's Shibboleth Identity Providers for user authentication.

*"We saw in Shibboleth an opportunity not only to create a single-sign-on option for users across multiple resources and services, but also to build the infrastructure necessary to simplify access operations management."*

*Thomas C. Wilson, Director, Information Technology, USMAI*

## University of Newcastle upon Tyne, UK

The [University of Newcastle upon Tyne](#) recently completed beta testing MetaLib/PDS integration with Shibboleth in a test environment, incorporating Shibboleth Version 1.3, MetaLib Version 3.13, and PDS Version 1.2.

The University of Newcastle's integration differs from the integrations at FinELib and USMAI. At Newcastle, a user with a Shibboleth session is automatically logged in to MetaLib – SSO is fully configured – while users who do not have a Shibboleth session access MetaLib as guests. At FinELib and USMAI, users access MetaLib as guests with Shibboleth authentication invoked only after a subsequent login request by the user.

### How does it Work?

Each of the MetaLib customers profiled implemented MetaLib and Shibboleth to meet the unique requirements of their institutions. There are some local variations in their PDS/Shibboleth integration projects, but the general implementation of PDS/Shibboleth for MetaLib user authentication at FinELib and USMAI is similar.

The following description is summarized from a document recently written by David Kennedy, IT Database Administrator, USMAI. "*Shibbolizing' PDS - Customer Perspective*" is available in its entirety at [http://usmai.umd.edu/auth/Shibbolizing\\_PDS.doc](http://usmai.umd.edu/auth/Shibbolizing_PDS.doc).

### Basic Concepts

There are three main components in the Shibboleth architecture: Service Provider (SP), WAYF, and Identity Provider (IdP). The Service Provider is the resource that is protected by the Shibboleth architecture. The Identity Provider is the authentication source that provides verification of users attempting to access restricted resources. WAYF ('Where Are You From?') is a service that allows the user to choose the appropriate Identity Provider when they attempt to access a resource protected by a Service Provider.

In the Shibboleth architecture implemented at FinELib and USMAI, PDS serves dual roles as the WAYF and as the Service Provider. When a user attempts to access a PDS application, or attempts to log into PDS directly, they are presented with a list of PDS institutions (PDS acting as a WAYF). When a user selects a Shibboleth institution from the list of available institutions, they are redirected to a Shibboleth Service Provider application that links directly to one Shibboleth Identity Provider for authentication. This Service Provider application behaves similarly to the remote-login/load-login functionality already provided by PDS. The difference is that a single application performs both the remote-login and load-login functionalities. The Service Provider, in conjunction with the Identity Provider, presents the user with a log in screen as well as gathering user attributes and creating a PDS session.

### PDS/Shibboleth Implementation

The general steps required to implement PDS/Shibboleth include:

1. **Service Provider Installation** – Shibboleth Service Provider software must be installed on the server where PDS is installed. Service Provider installations are platform and Apache version dependent.
2. **Apache Configuration** – MetaLib's Apache must be configured to use Shibboleth Service Provider software.
3. **PDS Configuration** – PDS must be configured for Shibboleth institutions, implementing the Load-Login, Bor-Info, and Shib-Logout (optional) PDS services.

Shibboleth to PDS attribute mapping is also required.

## Future Plans

Our recent collaborative work with FinELib, USMAI, and the University of Newcastle was helpful in identifying the prerequisites for successful PDS/Shibboleth integration with MetaLib. Each project presented challenges to these customers that required a thorough understanding of Shibboleth as well as technical skills to resolve.

Based on these projects, Ex Libris plans to adopt a gradual roll out of Shibboleth support for MetaLib. We will continue to work with customers interested in 'Shibbolizing' PDS for MetaLib authentication. Interested customers must complete the following prerequisites before PDS/Shibboleth integration with MetaLib can be deployed:

1. The institution must implement a Shibboleth Identity Provider that can provide user attributes necessary for MetaLib to make authorization decisions.
2. The institution must implement logout functionality suitable for their environment. Logout functionality is currently being addressed in Shibboleth Version 2.0 planning – see [Shibboleth 2.0 Authentication System](#) for more information.
3. The institution must implement the latest versions of MetaLib and related components: MetaLib Version 3.13, PDS Version 1.2, and Apache Version 2.0. Integration with Shibboleth Version 1.2 or 1.3 is supported.

*"Ex Libris continues to see the importance of the Shibboleth initiative as it offers a standards-based, scalable solution to a challenge that many institutions face. We appreciate the collaborative efforts and contributions of FinELib, USMAI, and the University of Newcastle upon Tyne in our recent projects – we have greatly benefited from their participation. We are pleased to see the resulting PDS/Shibboleth integration with MetaLib now deployed in real-life environments, including two large scale consortia. As we learned from institutions, integrating Shibboleth with existing library services and institutional infrastructure can present challenges, and we hope that these successful implementations will provide good input for other institutions to follow. We remain committed to the Shibboleth initiative and look forward to further deployments in other MetaLib institutions."*

*- Oren Beit-Arie, Chief Strategy Officer, Ex Libris*

## Upcoming Events

FinELib and USMAI will discuss Shibboleth implementation in their environments, as well as their experiences 'Shibbolizing' PDS for MetaLib authentication, at a number of upcoming events – mark your calendar!

### FinELib

- [ELUNA 2006](#) – June 4-7, 2006 in Knoxville, Tennessee, US
- [IGeLU 2006](#) – September 4-7, 2006 in Stockholm, Sweden

### USMAI

- "Preparing Your Institution for Shibboleth and Shibboleth Deployment Sites Panel Discussion", with Brown University, Georgetown University, London School of

*Economics and Political Science* – [Spring 2006 Internet2 Member Meeting](#) – April 24-26, 2006 in Arlington, Virginia, US

- [ELUNA 2006](#) – June 4-7, 2006 in Knoxville, Tennessee, US
- [EDUCAUSE 2006](#) – October 9–12, 2006 in Dallas, Texas, US

## OAI and the DigiTool System



What is OAI--or rather OAI-PMH? And what it is used for? OAI-PMH stands for Open Archives Initiative Protocol for Metadata Harvesting, a protocol that allows for the sharing of information between libraries. The goal of OAI is "to supply and promote an application-independent interoperability framework that can be used by a variety of communities who are engaged in publishing content on the Web" (<http://www.openarchives.org/OAI/2.0/openarchivesprotocol.htm>). In other words, OAI facilitates the sharing of information between libraries, making materials more accessible to other libraries and to end users. The protocol is based on the simple HTTP protocol (like any Web page) and XML syntax for describing the metadata.

OAI-PMH works like a conversation. As in any conversation, even between two machines, there are two sides. In this case, one side is the OAI data provider, which offers its information to external users, and the other is the OAI harvester (officially termed "service provider"), which harvests information from the data provider. Using the OAI protocol, any library can easily harvest information from another library and offer the information to its users--hence increasing the volume of content that it can provide to users and making that content more readily accessible. By creating sets of records that are only part of the full record set, a library as a data provider can easily limit the information that it wants to make accessible to other libraries. Each set can be described with more than one type of metadata (such as MARC, DC, or MODS), and each set of a particular type of metadata serves as a target for a harvesting library to import to its database.

So how does all of this relate to the next version of the DigiTool digital collection management system? The DigiTool team has worked hard at developing an OAI application that will constitute an additional module in DigiTool and will give libraries a robust, simple OAI solution. Based on an open-source OAI application developed by the Digital Library for Earth System Education (DLESE), the OAI module will offer both harvesting and data-provision capabilities, enabling one library repository to communicate easily with another. Through the new OAI module, a library will be able to create a variety of record subsets based on the full record set in its database. The system will also support third-party plug-in converters so that a library can even offer information in a metadata format that differs from that of the metadata stored in the database.

And now for some real meat: hzb (Hochschulbibliothekszenrum des Landes Nordrhein-Westfalen), a large consortium serving 1195 university, college, special, and public libraries in Germany, will be using the DigiTool OAI application to enable the National Library of Germany (Die Deutsche Bibliothek) to harvest information from the hzb database. The National Library provides national persistent identifiers (NBN URNs) and a resolver so that every library in Germany can report its digital repository records to the National Library and make them more accessible. Using the OAI module, hzb will create a set of records that is relevant to the National Library. At the request of the National Library, this set will be converted to the X-EPICUR format during creation.

Stay tuned for more information on the next version of DigiTool, digital collection management system in the next issue of the *Ex Librian* newsletter.

## Q&A

### What is Primo?

This section of the newsletter provides our readers with an opportunity to ask specific questions regarding Ex Libris products and their functionality. Please send your questions to Laura Gilinski, at [laura.gilinski@exlibrisgroup.com](mailto:laura.gilinski@exlibrisgroup.com). Although we will respond to a number of questions that we receive, we may not have the space to address all of them.

Our readers have asked for additional information about the new Primo user discovery tool. We hope that our answers below fit the bill.

#### **What is Primo?**

Primo is an enterprise-level solution for the discovery of institutional resources and the delivery of materials and services for different types of collections including electronic, digital, and print materials. A key component in the Ex Libris strategy, Primo helps libraries move toward new-generation, user-centric library solutions.

#### **Is Primo just a search engine?**

Primo is more than just a search engine; it is a complete solution for the discovery and delivery of diverse content types. Primo preprocesses, normalizes, and enriches library-selected content and makes the discovery and delivery of many data sources possible.

Primo includes:

- Single-point discovery of materials held in multiple catalogs, repositories, and remote resources. Because users searching for information do not care how the library stores or delivers content, Primo provides discovery and delivery from many data sources through one user interface. Primo accesses a variety of back-end applications transparently to the users.
- An end-to-end discovery-to-delivery service that optimizes the delivery mechanism—for example, by linking directly to electronic full text if available or by indicating the availability of a print copy.
- Sophisticated navigation of search results. Primo offers faceted browsing, ranking, sorting, filtering, “Did you mean?” and other tools to focus and broaden search results.
- Social computing features, which enable users to interact with the system by contributing and sharing items such as reviews and tags.
- A publishing platform that normalizes and enriches data harvested from various applications. This enrichment includes grouping similar items (FRBR- **F**unctional **R**equirements for **B**ibliographic **R**ecords), organizing data into categories (such as date ranges), enabling full-text searches of content, and processing of results to support advanced functionality.

#### **Can Primo be used with non-Ex Libris products?**

Primo works with diverse data sources, both from third-party vendors and from Ex Libris. Out-of-the-box, Primo will support data from the ALEPH 500 integrated library system (ILS) and the DigiTool digital asset management system --as well as third-party ILS products and third-party digital repositories.

#### **What is the relationship between Primo and MetaLib?**

Primo is an end-user discovery and delivery tool for library-selected resources. Primo optimizes and enhances searches for locally controlled resources that can be harvested (“just-in-case” processing); and displays search results together with results from other, often remotely hosted, resources such as abstracting and indexing databases (“just-in-time” metasearching).

Primo uses the metasearch capabilities of MetaLib to perform the searches on remote databases.

### **Is Primo customizable?**

Yes. Customers with little or no programming skills can control many user interface elements. Ex Libris will publish a full set of Primo Web services for customers interested in completely re-designing the user experience.

### **Why does Primo harvest and process data held in local repositories in advance?**

Several reasons are behind this philosophy:

- Speed! Based on their “Amazoogole”<sup>[1]</sup> experience, users expect fast search results. In Primo, the search engine preharvests and indexes the data.
- The normalization of results harvested from multiple sources into a common format, which makes possible, deduplication, effective relevance ranking, and other functions.
- Data enrichment through the addition of tables of contents, book reviews, and book covers, for example

The Primo Publishing Platform (PP), a component of Primo, handles the harvesting, normalization, and enrichment of data.

### **How does Primo compare to my OPAC?**

Primo reaches beyond the traditional OPAC in scope and capabilities:

- Scope: Primo includes data from many sources. This allows the user to benefit from library-selected resources regardless of the type or location (local or remote).
- Capabilities: Primo provides for social computing (tagging, reviews, and ratings), facets, linguistics, grouping (“FRBRization”), relevance, sorting, and more.

Traditional OPACs are limited by the rate of change in back-office infrastructure. Primo separates the user experience from back-office applications and thus enables fast adaptation of the system to meet rapidly changing user expectations.

### **What kinds of technology does Primo employ?**

Primo, like the Ex Libris Verde and DigiTool systems, is based on cutting-edge technologies such as J2EE and JBOSS and adheres to appropriate accessibility guidelines and Web and library standards. Primo offers Web services and supports portal standards such as JSR168.

Primo will become available to customers in the fourth quarter of 2006. For additional information on the product and where you can see it in the near future, please contact Katriel Reichman at [katriel.reichman@exlibrisgroup.com](mailto:katriel.reichman@exlibrisgroup.com).

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[1] A term coined by Lorcan Dempsey (<http://orweblog.oclc.org/>)

## **News From Around the World**

### **SuperCJK Support in ILS Makes a Difference**

The Ex Libris product suite is developed for an international customer base requiring multilingual, multiscrypt support. Our sensitivity to language, dedication to industry

standards, and constantly growing Asian customer list requires us to always be 'on our toes' with regard to any and all developments in the field of Unicode\* support.

CJK, which commonly refers to the Han characters of the Chinese, Japanese, Korean, and occasionally old Vietnamese languages--making this CJKV-- is one of those issues that has always been very close to our hearts. Initially CJK support was extremely important for our work with large, non-Asian libraries holding diverse collections that required cataloging abilities in these languages. As our presence in the Asian markets grew, these requirements became even more pronounced and well articulated.

Many national standards existed with regard to CJK character sets prior to the introduction of Unicode. These included Chinese standards--GB 2312-1980, GB 12345-90, CNS 11643-1986, CNS 11643-1992, CCCII, Big Five, HK SCS; Japanese standards--JIS X 0208-1990, JIS X 0212-1990; Korean standards--KS X 1001:1992, KS X 1002:1991, as well as those of the US--ANSI Z39.64-1989 (EACC).

The current Unicode standard--version 4.0--defines 20,902 characters in the basic Han character set, 6,852 characters in Han Extension A, and 42,711 characters in Han Extension B--a total of over 70,000 Han characters. The Unicode Consortium is now working on Han Extension C-1. SuperCJK represents a superset of unified CJK ideographs of Han Extension B, as well as the future Han extensions, in which the characters are defined out of the Basic Multilingual Plane of the Unicode standard. Unicode Standard Version 4.0 corresponds to the ISO/IEC 10646-2003 standard.

ALEPH 500, as well as the other Ex Libris products, is completely Unicode compliant, thus data storage, editing, display, indexing and search of CJK characters are all based on the basic Unicode Han character set. Ex Libris is now taking CJK support one giant step further with support for SuperCJK.

So why are Unicode and SuperCJK so important in the ILS world? As is always the case, the list of answers is long:

- Unicode with SuperCJK is the largest superset of CJK character set standards;
- Only Unicode with SuperCJK can meet the digitization requirements of East Asian library collections;
- Unicode architecture provides the best support for Han character mapping, including mapping of simplified and traditional Chinese characters, formal and variant Chinese characters, and Chinese and Japanese Han characters;
- Unicode with SuperCJK is the only standard that can provide seamless data exchange between libraries, as well as system interoperation, without any character set limitations;

The Unicode standard is continually developed by the Unicode Consortium and has been adopted as a national standard by some national standards organizations. The Ex Libris product suite is developed for an international customer base requiring multilingual, multiscript support. Our sensitivity to language, dedication to industry standards, and constantly growing Asian customer list requires us to always be 'on our toes' with regard to any and all developments in the field of Unicode support.

With ALEPH 500 version 18, Ex Libris always an information technology forerunner, now enables users to display and edit data with SuperCJK characters in Search/Browse results and in the Record Editor of GUI clients. Also, all records with Unicode characters contained in CJK Extension A and B can be displayed in the Web OPAC. Indexing and searching, also under development, will be available in the near future. Stay tuned!

\* The Unicode Standard is a character coding system designed to support the worldwide interchange, processing, and display of written texts of diverse languages and technical

disciplines of the modern world. In addition, it supports classical and historical texts of many written languages. For additional information on Unicode, please see: <http://www.unicode.org/>.

*Ex Libris is an associate member of the Unicode Consortium*

## 2006—A Big Year for Ex Libris Korea



2006 started off with a bang for Ex Libris Korea. General Manager Jun Hong and his team began the year by signing Ex Libris' first customer in Korea—the influential Samsung Economic Research Institute (SERI). The Samsung Economic Research Institute chose a suite of Ex Libris products including ALEPH 500, MetaLib, and SFX, to serve as the next-generation information solution for the Institute's information center.

On winning this important contract Jun Hong remarked, "I am very pleased to be able to work with such a renowned institution as the Samsung Economic Research Institute and am confident that the Ex Libris solutions are the best fit to help SERI fulfill its vision of becoming a knowledge hub for creative solutions. Ex Libris will work together with SERI to develop the Institution's system into an excellent reference site for the Korean market."

More information on this and other projects taking place in Asia will be discussed at length by Oded Scharfstein, VP Asia and other members of our corporate management at the upcoming IFLA (International Association of Library Associations and Institutions) conference to take place in Seoul, Korea on 20-24th August 2006. IFLA will also be attended by the managing directors of Ex Libris Korea, China, and Australia who will be joined by members of their staff and distributors from Japan and Taiwan at the Ex Libris booth (number 9).

If you will be attending IFLA and are interesting in receiving Ex Libris updates on activities related to the event, please contact Jun Hong at [jun.hong@exlibrisgroup.com](mailto:jun.hong@exlibrisgroup.com).

## Super Search Me or the Metasearch Portal Project Implementation Process at the University of Western Australia Library



Following a rigorous selection process, including a competitive Request for Proposal and vendor demonstration, in May 2005 the University of Western Australia Library purchased both MetaLib and SFX for its Metasearch Portal Project. The process of implementing both systems was conducted as two

parallel projects overseen by a single project coordinator managing two implementation teams. The project coordinator was devoted full time to implementing MetaLib, SFX, and also coordinating a third project.

The 12 person Metasearch Portal Project Implementation Working Group included staff from the Library's Information Technology section, Information Resource Access Management (IRAM; i.e. technical services), and Reference Librarians. IT staff included Systems Analysts, Network/Systems officers, and the Web Coordinator. Reference staff from the University's nine Subject Libraries were asked to select 40 information resources from their collections. These lists were collated and prioritised by the Working Group. Librarians from IRAM were then responsible for creating new or editing existing IRDs (Information Resource Databases) for these resources and liaising with publishers and vendors for information where required. In total, 275 resources were added in this first batch, with approximately 200 requiring an IRD to be created from scratch.

Reference librarians identified those resources which were to be searched directly from MetaLib. Where a search configuration was not supplied as part of the CKB, System

Analysts attempted to create or customise one. The search configurations and OpenURLs were then tested by the project's reference staff to determine whether the resources worked as expected. These reference staff also liaised with subject library staff to categorise resources into UWA's subject hierarchy and specify and populate QuickSets--a process which took approximately 80 working days to complete.

While resources were being loaded into MetaLib, work was also underway to customise the interface. The UWA Library's Web Coordinator liaised with reference staff on the Working Group to identify design requirements and modify the template files.

During the 75 working days that this process took in total, the Library also wrestled with the most contentious issue of the project - what to call the new service? Over 50 names were suggested by all Library staff and eventually the name "SuperSearch" was selected.

SuperSearch was launched for "internal Library-use only" in mid-November, almost 100 days after the software was first installed. It was launched for end-user access on 23 January, 2006.

While the Metasearch Portal Project is almost at an end, development surrounding SuperSearch is expecting to continue well into 2006. The Library will soon begin implementation of an Oracle Portal, and will investigate ways to expose MetaLib functionality through this interface.

The OpenURL Resolver Project Working Group membership was almost identical to that of the Metasearch Portal Project Implementation. Here IRAM librarians worked on both the implementation of SFX, and the implementation of the Library's Innovative Interfaces ERM system. The implementation of SFX occurred concurrently with the implementation of MetaLib.

Implementation of SFX was less complicated than MetaLib--taking less than 60 working days. This was greatly assisted by the Library's existing subscription to SerialsSolutions and to the fact that Library IT created a script which reformatted a SerialsSolution spreadsheet into a text file compatible with SFX's DataLoader.

The SFX Services Menu was customised including graphic design and layout and selection and configuration of services to offer from the Menu. The CitationLinker (renamed Article Finder) and the A-Z list of electronic journals were chosen to be offered to the Library's clients. A poll of Library staff indicated that the SFX service should be known as Find it @ UWA as this clearly described to clients the purpose of the SFX button - locating the most appropriate copy of the full text.

To allow Library staff to familiarise themselves with the Find it @ UWA system, six databases were selected and trial accounts set up which linked to the Library's Find it @ UWA service. This trial was launched to staff on 25 October--just 78 days after installation. The service was made available to the Library's readers on 23 January 2006.

During implementation, the UWA Library commissioned Ex Libris to modify the SFX resolver to allow it to resolve URLs containing an Object Portfolio ID. These OpenURLs therefore specify not only the title to link to, but also the "instance" of the title (i.e., the title offered via a particular platform or aggregation). The OpenURLs are said to be "persistent", as the object's real URL is maintained only within SFX. The UWA Library has begun to experiment with loading these OpenURL PURLs into the Library's IIR ERM. The Library also intends to investigate other ways to integrate data obtained from SFX into other Library systems.

You can take a peak at the University of Western Australia's interfaces at:

<http://supersearch.library.uwa.edu.au/V>

[http://www.library.uwa.edu.au/find\\_information/article\\_finder](http://www.library.uwa.edu.au/find_information/article_finder)

[http://www.library.uwa.edu.au/find\\_information/a-z\\_journals](http://www.library.uwa.edu.au/find_information/a-z_journals)

The University of Western Australia, the State's first university, was established in 1911 and opened with 184 students in three faculties: Arts, Engineering and Science. Today the University enrolls over 15,000 students, in nine faculties.

*Brian Poleykett - Project Coordinator  
The University of Western Australia Library*

## Katholieke Universiteit Leuven to Use DigiTool 3.0



In January 2006, the Catholic University of Leuven, an existing ALEPH 500 customer, chose DigiTool 3.0 to serve as the basis for its enterprise-wide digital content management platform. The most important requirement for the institution's information system, that will manage and present scientific, scholarly, and cultural digital data, was that it take into account the different needs of the University's various digital collections to be managed.

DigiTool, a central software solution driven by the IT-service provider of KU Leuven--LibisNet--is a consistent, integrative platform which will make it possible for the different divisions of the institution to independently manage their dedicated collections in one central repository. Although materials are held in one locale, each division can manage its collections as if they were located in an autonomous "Virtual Repository". The central management of the system will be handled by LibisNet.

The Catholic University of Leuven has concrete plans to implement a number of different projects. These include integration into the institution's Virtual Learning Environment, building up a powerful institutional repository, and the preservation of digital objects for the archive of the KADOC Documentation and Research Center for Religion, Culture and Society. <http://kadoc.kuleuven.be/eng/index.html>.

The goal of the KADOC archive project is to preserve all new, incoming digital content that the institution has special interest in. The KADOC Archive will conform to the ISAD (G) Standard (General International Standard Archival Description--[www.ica.org/biblio/cds/isad\\_g\\_2e.pdf](http://www.ica.org/biblio/cds/isad_g_2e.pdf)) and will use the EAD ([Encoded Archival Description](#)) industry standard as the metadata format for describing items in the archival environment. Ex Libris, aware of this emerging industry standard, will provide EAD as a usable metadata format in DigiTool.

Ex Libris is pleased to be cooperating with the Catholic University of Leuven on the implementation of this challenging Digital Asset Management project that will exhibit the flexibility and potential of DigiTool 3.0 and prove its power not only for libraries but for the enterprise.

## SMS—SFX Smart Mapping Services--Jumpstarting SFX Activation



Ex Libris Germany is pleased to announce the recent release of Smart Mapping Services (SMS) version 1, a service, developed in conjunction with EZB (Elektronische Zeitschriftenbibliothek) that will save time and effort in SFX holdings setup and maintenance. This is especially useful for libraries in the German-speaking library world that also maintain local holdings for e-journal subscriptions in the EZB.

The EZB is a publicly-funded, cooperative effort between libraries in German-speaking nations (and others) to share bibliographic information on scientific and academic full text electronic journals and make them available to library users via the Web. Since most

libraries in the region had already incorporated local updates of holdings into EZB as part of the local workflow, it was desired that the libraries' EZB data be used as seamlessly as possible to set up and maintain their local SFX KnowledgeBase, which is used for determining full text and extended services on an SFX menu, and for target link resolving.

Smart mapping services (SMS) is the perfect solution for easy, automatic loading and recurring synchronization of e-journal portfolios in SFX. SMS cuts down the time and effort required to identify, match, load, and update SFX targets & titles (less than 1 hour for over 5000 titles!) while providing libraries with several valuable match reports that provide a good overview of licensed interfaces, targets, and packages. This allows for cross-checking of the submitted A-Z title information quality (approximately 95%-99% automatic match rate). In addition to all of this, SMS reliably detects typos and helps clean data.

SMS works with holdings export files such as the xPort2-format--developed in conjunction with EZB. It checks multiple input values such as titles, ISSNs, provider-homepage URLs, and other optional data and compares them with the current SFX KnowledgeBase and additional mapping algorithms.

SMS is currently in use at over 25 customer sites in Germany and neighboring countries. Additional information regarding this service can be obtained from [info@exl.de](mailto:info@exl.de).

## The Ex Libris Reign in Spain



The expansion of the Spanish library community running one or more Ex Libris products has increased dramatically over the last two years. In addition to the adoption of MetaLib, SFX, and DigiTool as basic library management solutions, the first Verde sale to a Spanish institution has extended the Ex Libris reign in Spain.

"More and more we are seeing institutions that have not had any direct contact with GreenData or the Ex Libris product suite approach us as potential partners to assist them in fusing their technological resources to obtain maximum yield," explains Hugo Agud, President of GreenData. A clear example of this is the Q4 2005 sale to the **Universidad de Navarra**, a long-time Innopac customer, that chose MetaLib, SFX, and Verde to serve as the basis for its digital library. "Whereas MetaLib and SFX represent reliability and the optimization of resources, DigiTool and Verde provide our product suite with new and innovative attributes that are seen as leading the modern library into the future. This first Verde win was therefore a major victory for us as it will serve to introduce our ERM (Electronic Resource Management) system to the Spanish market."

Following a rigorous, year-long decision making process the Universidad de Navarra chose the Ex Libris product suite from amongst a large number of strong contenders, for its functionality, scalability, and development plans.

Two new DigiTool projects are underway in Spain. The **Universidad Autónoma de Madrid**, currently Spain's largest digital library project, was convinced by DigiTool's multi-object management capacity that cannot be matched by any *opensource* solution. The **Residencia de Estudiantes**, one of the most important Spanish cultural centers with major collectionsof contemporary art and science, has demonstrated that DigiTool is the perfect enterprise solution for handling non-library materials.

"Undoubtedly, we will continue to be leaders in Spain as the market sees us as the dominant player," sums up Hugo Agud. "Ex Libris and GreenData have become synonymous with library technology in Spain. As the number of libraries that see Ex Libris as a supplier of reliable, long-term solutions grows so does our customer base, which has become a major commercial force."

## Is SUNCAT still rising?

"The Rise of SUNCAT (the Serials Union Catalogue): Unlocking Access to Serials in the UK" was introduced in the April 2005 edition of the Ex Libris. In this article, we discussed the funding, development, and launch of SUNCAT – a JISC/RLSP (The Joint Information Systems Committee/Research Support Libraries Programme) funded project. Almost one year on, is SUNCAT still rising?

Managed by EDINA at the University of Edinburgh, and built on an implementation of ALEPH 500, the national serials union catalogue provides access to the serial holdings of major UK research libraries via a comprehensive series of search options within an easy to use interface. By searching a single title, users can readily find which institutions hold it, what holdings they have and whether or not an online version is available, and under what privilege. At the time of writing, SUNCAT has over 4 million bibliographical records and serials holdings for 22 major UK research libraries (<http://www.suncat.ac.uk/about/contributing.html>) – with an aim to add a further 60 libraries in the current phase.

While coverage of major UK research libraries continues to grow, SUNCAT is also beginning to attract smaller, more specialised research libraries (including The Royal Society, the Wellcome Library, the Library of Amgueddfa Cymru – National Museum Wales, the Royal Botanic Gardens, Kew, and Zoological Society of London) bringing to the service many bibliographical records and serials holdings unique to the scholarly community in the UK.

SUNCAT is scheduled to operate as a service from August 2006 onwards. However, further development of SUNCAT is envisaged post-August 2006. Most obvious, is the extension in the number of contributing research libraries, obliging firmer definition of what is a UK research library and what is not. There is also the matter of electronic subscription information, the integration of SUNCAT into the larger UK digital library environment, and linking to article supply – so watch this space!

Today, in partnership, EDINA and Ex Libris continue to develop SUNCAT. Current development work includes a unique 'work'-level 'SUNCAT identifier', (to use a FRBR (Functional Requirements of Bibliographic Records) term) which will improve the matching between records, ensuring that SUNCAT becomes more and more reliable. A 'Librarians Interface' is also being developed, which will allow contributing libraries to download records from SUNCAT (via a Web-interface in addition to Z39.50), and the facility for contributing libraries to check on unmatched records for upgrading – leading to higher quality serials bibliographical records across the UK.

The SUNCAT project has been, and is, both ambitious and complex, reflecting the importance of journals and other serials for scholarly communication. There is a considerable challenge in understanding and meeting expectations in the digital era within the context of the legacy position inherited by the UK serials community, and the commitment to access the scholarly record, in both print and electronic format.

There is still work to be done to create an invaluable, top-quality resource for researchers and librarians. From a standing start, though, much has been achieved and a solid platform is in place to allow SUNCAT to play its part in the evolving information environment by serving the needs of researchers and librarians.

Without doubt, SUNCAT is still rising!

**SUN**CAT  
UK Union Catalogue of Serials

Basic Search | Advanced Search | Browse | Results List | Search History | Marked Items | Help

About the SUNCAT pilot service

**Full View of Record**

1 of 1 items

Previous Record | Next Record

**This Record:** | Marked | View Holdings

**Title** The Journal of Hellenic studies  
**Uniform title** ●Journal of Hellenic studies (Online) .  
**Added title** ●Archaeological reports (London, England : Online)  
**Author** Society for the Promotion of Hellenic Studies (London, England)  
 JSTOR (Organization)  
**ISSN** 0075-4269  
**Publication details** ●London : Published by the Council for the Society for the Promotion of Hellenic Studies, 1880-  
**Current frequency** Annual, 1940-  
**Former frequency** Semiannual, 1880-1939  
**Publication history** Vol. 1 (1880)-  
**Notes** Title from title screen (viewed Dec. 12, 2002).  
 Latest issue consulted: Vol. 116 (1996)  
 Provides image and full-text online access to back issues. Consult the online table of contents for specific holdings.  
 Restricted to institutions with a site license to the JSTOR collection.  
 Vol. for 1957 issued in two parts.  
 Bit-mapped images; PDF, PostScript, and TIFF formats available for printing  
 Online version of the print publication.  
 Mode of access: World Wide Web <URL: <http://www.jstor.org/journals/00754269.html>>.  
 System requirements: Graphical World Wide Web browser software; appropriate software is needed to print PDF, PostScript, and TIFF formats.  
 Digitized and made available by: JSTOR.  
 Volumes for 1955-1957 contain unnumbered supplements: Archaeological reports, later issued separately.  
**Notes**  
**Notes** Volumes for 1955-1957 contain unnumbered supplements: Archaeological reports, later issued separately.  
**Subject heading(s)** ●Greek philology -- Periodicals.  
 ●Inscriptions, Greek -- Periodicals.  
**Subject heading(s)** ●Greece -- Antiquities -- Periodicals.  
 ●Archaeological reports (London, England : Online) (DLC) 2002227388  
 Continued in pt. by

Library	Shelfmark	Availability	Notes
Birmingham Univ. Main Library	Periodicals q DF 10.38		Vol.115- , 1995-
Birmingham Univ. Store	Periodicals q DF 10.38		Vol.1-28, 1880-1908, 33-114, 1913-1994 Index,
Bristol Univ. Arts and Social Sciences			Vol.1 (1880)- [6 plates to v.1-8] General index: v. 17-110. numismatic index 1880-1969
British Library Document Supply	4996.950000		VOL. 1, 1880-
British Library Humanities and Social Sciences	Ac 2667		
Cambridge Univ. Library	TS20 b 2 [p./hole R.152]		Vol. 1- (1880-)
Cardiff Univ. * Internet		Available online	Full text available from JSTOR Arts and Sciences II Collection. 1880 to 1998
Cardiff Univ. * Internet	Electronic Journals		
Cardiff Univ. Arts & Social Studies: Journals	Humanities Periodical		1(1880)- Report for the Session 2002-2003
Durham Univ. journal			Vol.1-69, v. 71- 1880-. In progress

[To save space, this is an extract of 'Holdings']

Adapted from an article "SUNCAT as a national serials' facility for researchers and librarians" by Fred Guy (Project Manager) and Peter Burnhill (Co-Director and Director of EDINA), Edinburgh University Data Library.

## Exciting Developments in the Library! MetaLib — the New Library Portal at Imperial College, London

Reproduced from: *Impact (The Imperial College London Library Newsletter)*, Issue 6, Autumn 2005. Available in full at: [http://www.exlibrisgroup.com/metalib\\_articles.htm](http://www.exlibrisgroup.com/metalib_articles.htm).

The Library is very excited to announce that in October 2005 we will be launching MetaLib, a new library information portal enabling access to all our electronic resources. MetaLib will enhance research and allow users to optimise their use of the electronic environment. MetaLib is part of the Digital Library and can be accessed via the library website.

Imperial's library staff have been working tirelessly behind the scenes for over a year to deliver this new service to users, which will add a new dimension to searching electronic collections for academic staff, researchers and students.

Why are we so excited? Isn't it just a new 'e' thing that will fall out of fashion in a year or two? No, we're excited because MetaLib provides a fundamentally new way to search and access electronic resources, enhancing our services enormously. MetaLib enables the Library to seamlessly manage a diverse range of electronic resources, such as the library catalogue, reference databases, subject based web gateways and electronic journals, within a single web interface. This will allow you to find resources quickly and easily.

MetaLib can be accessed 24/7 via your standard College username and password from within College and remotely via VPN (virtual private network) over the internet.

MetaLib offers cross searching functionality. In other words, many electronic resources can be searched simultaneously rather than one at a time. Search results are returned in ranked and merged lists, without displaying duplicate records. Used in conjunction with SFX, which the Library launched last year, it is possible to link directly to the full text of many electronic journals to which the Library currently subscribes. This will help you manage your research time more effectively and ensure that the resources you are finding are of high quality, unlike many you will find by just using a search engine on the internet.

Where resources cannot be cross searched, MetaLib enables direct linking to their native interface.

MetaLib offers simple and advanced search options. It is possible to perform quick, basic searches but if you need to use a more sophisticated search technique MetaLib also provides options for complex searching of electronic resources.

MetaLib allows users to browse and search alphabetical lists of electronic resources and electronic journals. However, if you are not sure which resources you should be using, MetaLib allows users to search subject based 'quick sets'. These are organised by faculty. Library specialists in each field have selected the most useful and relevant resources and organised them into subject based lists to give users direct and easy access. Once you are familiar with the resources and know which ones are most useful for your discipline, you can create your own quick set with the resources that best support your area of research.

A number of powerful personalization features are also included within MetaLib. In addition to creating your own quickset, you can also save your search history. Electronic resources are updated on a monthly, weekly even daily basis which means that you may want to perform the same search on a regular basis to maintain your current awareness within a particular research field. To save having to rerun your search everyday, you can set up email alerts to notify you when new items matching your search criteria have been added to the selected databases.

Undergraduate students who are new to the College will receive instruction on how to use MetaLib during the Library Information Literacy (IL) sessions. Postgraduates will receive information during the Graduate School IL sessions. Continuing students or anyone who is not participating in the formal IL sessions can contact their faculty liaison librarian for further help if needed. MetaLib will enable fast and easy access to thousands of electronic resources, providing the most accurate, relevant and timely search results to support all areas of academic research. We know all our users will benefit from the implementation of MetaLib which will be available at:

<http://www.imperial.ac.uk/library/metilib>

*Thanks to Debbi Boden and Lorraine Windsor, Imperial College London Library*

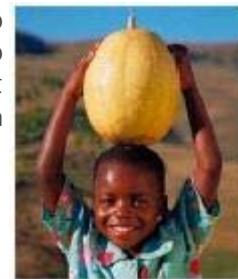


## Our 30th UK ALEPH Customer



To celebrate our 30th ALEPH customer in the UK and Ireland, our UK office decided to share its success in the best way possible. This month, 30 children in Kenya received school equipment kits. According to Oxfam Unwrapped ([www.oxfamunwrapped.com](http://www.oxfamunwrapped.com)--the organization responsible for distributing the kits), these gifts have already had a huge impact on people's lives...

Rebecca Lokalii, a student in Kenya is quoted as saying: "I want to stay at school as long as I can, and when I finish I want to find work so that I can help my family. I'd like to be a doctor... school is a path that can take you far. It has a small beginning, but it can lead you far from the place where you started."



## From Our Users

### ELUNA — A New Perspective

Like the proverbial birds of a feather, users of library software products tend to flock together, and Ex Libris' customers are no exception. The North American ALEPH Users Group (NAAUG) was established in 2000, very soon after Ex Libris had established a presence in the US and Canada. By 2004, NAAUG was a mature organization, with its conference attended by over 300 people.

At the same time that NAAUG was getting established, the users of SFX and MetaLib also lost no time in flocking. Initially the preponderance of U.S. members of the SFX/MetaLib Users Group (SMUG) were also ALEPH customers, and that made life easier for everyone -- SMUG was able to tack its North American meetings onto the end of NAAUG's. SMUG, established in 2002, was and remained a more informal group than NAAUG. With no elected officials, by-laws, formal structure, or budget, SMUG convened for the purpose of sharing ideas and information on the use of the two products, and largely relied upon NAAUG and ICAU (the International Consortium of ALEPH Users--Now IGeLU—International Group of Ex Libris Users) to handle most of the logistics for its meetings.

By 2004, SMUG too had grown: nearly 200 were in attendance at its North American meeting, of whom only about 60 had attended NAAUG's meeting. With a group of that size, and with so little overlap between attendees, the informal arrangement between the two organizations was becoming unwieldy. The programs, too, had gotten longer, more complex, and harder to plan and manage. Meanwhile, DigiTool was new to the market but already its customer base was growing and its users were starting to think about starting up a user group of their own.

For all these reasons, the NAAUG Steering Committee began to consider the potential benefits of consolidating the North American Ex Libris user groups as one single organization. Months of discussion with the steering committees of SMUG and ICAU followed, and in January 2006, NAAUG ceased to exist as a formal entity, and ELUNA (Ex Libris Users of North America) was born.

ELUNA encompasses product groups for North American users of all of Ex Libris' applications – presently ALEPH, SFX, MetaLib, DigiTool, and Verde. Our activities will continue to focus on communication and collaboration among the users and between the users and Ex Libris. As always, we will seek to accomplish our goals by way of annual meetings, listservs, and the web site (<http://www.elu-na.org/> .) Another extremely important ongoing activity is the process of proposing and prioritizing enhancements to Ex Libris for each of the products represented in our organization. We hope that having a single user group across all of these products will allow us to promote programs and discussions aimed at furthering the interoperability of the Ex Libris product suite, in addition to continuing to promote activities that focus on the functionality of a single application.

The first annual ELUNA meeting will be hosted by the University of Tennessee at Knoxville, from June 4 to June 7, 2006. It is open to all users of Ex Libris' software, and will include program tracks for each of the products; visit the meeting website (<http://www.lib.utk.edu/eluna2006/>) for more information. I encourage all North American Ex Libris customers to join ELUNA and benefit from interacting with a collegial, convivial, and creative group of peers – not to mention the extremely advantageous member rate if you choose to attend our meeting.

*Nina Davis-Millis*  
*Chair, ELUNA Steering Committee*

## MELI Update



MELI, one of the newest Ex Libris users groups, has recently been formed in Israel. The group's aims are to further the interests of all users in Israel, foster communication between members, and further knowledge through sponsorship of meetings, seminars, lists and training sessions.

Although Israel was the first site of an ALEPH installation, it has been one of the last to establish an official users group. In the past, the small group of Israeli university users was able to influence development of ALEPH in an unofficial way. With time, Ex Libris grew into a larger company, and the Israeli user base diversified. In order to accommodate all Israeli user needs we have now formed MELI. To date we have 35 members, all from the public sector: universities, colleges, teachers training seminaries, and government authorities.

MELI held its inaugural meeting at the end of September 2005. A full day of lectures by members of the organization and representatives of Ex Libris celebrated the event. Members lectured on ALEPH tutorials developed at different institutions; The Israeli College Consortium, which has outsourced ALEPH development and management to an outside body which will work with Ex Libris as a representative of the consortium; The Hebrew University's conversion of 15 OPACS into a single one running ALEPH 500; and new developments in the OPAC. Ex Libris representatives described the Company's structure, new products, and developments

Many of MELI's members also belong to IGeLU (International Group of Ex Libris Users). They enjoy good relations with members of IGeLU and ELUNA (Ex Libris Users of North America), give presentations at IGeLU meetings and have served on the IGeLU steering committee. This year, a MELI representative is a member the IGeLU ILL Focus Group. MELI is also happy to represent Israeli users at the annual ANUG\* meeting, and help with any

issues that arise in that forum.

To date, 2006 events include voting on enhancement requests (January), a training session for serials librarians (February), a 2-day Systems Seminar (June) in conjunction with Ex Libris, and the 2<sup>nd</sup> annual meeting (Fall).

*Janet Lefkovitz,  
MELI Chairman  
Head, Automation and Development  
Hebrew University - Mt. Scopus Library for Humanities & Social Sciences*

*\* ANUG is an informal forum made up of representatives from individual national/regional ALEPH User Groups.*

## In the Press

### Google Scholar versus Metasearch Systems

At the end of 2004, Google launched the beta version of a new service, Google Scholar, which provides a single repository of scholarly information for researchers. Will this service replace metasearch systems?

To find out more, see Tamar Sadeh's highly cited article on the subject, "Google Scholar Versus Metasearch Systems" (2006). *High Energy Physics Libraries Webzine* 12 (February). <http://library.cern.ch/HEPLW/12/papers/1/>.

### ERM Standards and Ex Libris

Verde has been designed as a staff tool to assist in the management of electronic resources. As an ERM system, it sits in the center of a number of interactions—some internal to the library (such as interoperability with an OPAC, a link resolver, and a metasearch engine) and some calling for interoperability with external sources of data. Interoperation across an industry is far easier and more efficient if shared, negotiated, and accepted standards exist. Lacking standards, time and effort are wasted on idiosyncratic solutions to individual problems.

Therefore, by working with vendors and publishers to deliver ERM data efficiently through standards-based mechanisms, Ex Libris aims to enhance the value of Verde as a core component in delivering library management solutions.

To make sense of the ERM 'alphabet soup,' see Verde Product Manager Ted Koppel's White Paper:

[An Introduction to the Rapidly Changing World of ERM Standards](#)

## Events

### Ex Libris Seminar @ Knoxville

In 1992, Ex Libris launched its first Technical Systems Seminar, then called the "ALEPH Systems Seminar". Created to provide our early installations with the opportunity to receive high-level training with the developers of the original ALEPH product, the seminar was held every two years. Over the years, hundreds of libraries have attended these seminars and report that they have benefited from the training and contact with other libraries and systems experts.

The programs in recent years have been expanded to include the entire Ex Libris product suite—ALEPH, SFX, MetaLib, DigiTool, and Verde. The agenda also contains opportunities for our clients to interact directly and closely with our product managers and product developers, at sessions covering topics of global interest and important emerging issues in libraries today.

Feedback from these sessions is invariably positive with one exception: many North American sites have been unable to attend due to the cost and distance involved with attending meetings (in exotic locations such as the Greek Isles!) Over the last few years, many North American customers have requested that similar sessions be held in North America so that they would be accessible and affordable to more US and Canadian libraries. The invitation you received last week was our first attempt to address that feedback--to hold a high level Ex Libris Technical Seminar in the US, preferably attached to a user group meeting, at a reasonable cost.

This will not be a sales session. This is not a "Product Update" session. All of our new products and product updates will be previewed at the ELUNA meeting at no additional cost to our members beyond the registration fees that ELUNA will charge. This **is** a training session divided into two tracks that will offer our customers training by, and access to, the people that design and build our products!

The tracks and sessions description can be found at [www.exlibrisgroup.com/usaseminar](http://www.exlibrisgroup.com/usaseminar). Registration is available at <http://www.exlibrisgroup.com/usaseminar/register.htm>

## VALA Conference - No Longer Just Library Automation

Early February saw the return of the biennial VALA conference in Melbourne, Australia. VALA is the conference for the Victorian Association for Library Automation; but it has become a truly international conference with a widely expanded scope that goes way beyond its origins of traditional library management systems

VALA is – and always has been - a conference attended by information professionals of all library types--from large academic to small special libraries--all eager to find the best use of current applications and discover new technology solutions.

Some of this year's main conference themes were new technologies, digital repositories, teaching and learning environments, usability, delivery of online content, digital and e-publishing, metadata, and information management and knowledge sharing. All of which are very relevant in the modern electronic environment and in line with Ex Libris product strategies.

Ex Libris participated in two vendor presentations, showcasing Verde and DigiTool. Both generated a lot of enthusiastic traffic to our booth. In a "starring" role was Primo – the proof of concept generated much excitement amongst the audience and an eagerness to see more. The response certainly vindicated the vision for and the direction of Primo.

We shared the conference venue with the "Year of the Dog" celebrations and as the Dog Year is a good time for business, containing many original ideas, it was a propitious association. A most impressive dragon provided additional entertainment and as you can see it was an ideal photo opportunity.



*Tamar Sadeh, Ex Libris Director of Marketing, Jenny Paradiso MetaLib/SFX Support Manager, Ex Libris Australia, and Matti Shem Tov, Ex Libris President and CEO with the VALA dragon*

## ALA Mid-Winter Meeting 2006: Ex Libris Delivers a Trifecta

This past January, the American Library Association held its annual Mid-Winter Meeting in San Antonio, Texas, at the Henry B. Gonzalez Convention Center.

In addition to the standard booth exhibit, Ex Libris decided to make its presence felt with three seminars that were designed to spotlight us as *the* thought leaders in the industry. The seminar themes focused on the compelling issues that both librarians and their users are currently grappling with. These challenges include the gamut of activities that librarians perform, such as managing and developing their existing OPAC and navigating the infinite number of electronic resources—activities that are reshaping the role of the librarian. If that weren't enough, librarians are also involved in the product implementation process and seek ways of executing the implementation of their solution in a manner that will not drain their diminishing resources. We must have struck a nerve. Two of the seminars were filled to capacity, with many participants standing and straining just to get a glimpse of the future.

Oren Beit-Arie and guest speaker Ezra Schwartz kicked things off on Saturday morning with the Haystack in the Needle seminar. The advent of social computing has raised the bar with regard to user expectations for search and retrieval. This generation has been weaned on user-centric applications such as Google and Flickr. The Haystack session laid the groundwork for the hotly anticipated release of primo, the Ex Libris vision of the next generation of library solutions. primo is a user discovery tool that will surely turn existing library systems as we know them on their heads. Apparently, we're not the only ones who think so. Upon seeing the preview of primo, a press contact from *Library Journal* commented, "This is fascinating stuff," and a longtime Ex Libris customer endorsed it as "way cool."

On Sunday, Ted Koppel was assisted by Tony Harvell, head of Acquisitions for UCSD Libraries, in a discussion of the importance of standards in the fast-growing area of electronic resource management (ERM). The purpose of the seminar was to impart the critical need for an industry standard for ERM systems that applies to vendors and

publishers as well as librarians. Ted and Tony also encouraged librarians to become part of the process and to take an active role in influencing the decisions regarding the standards development process.

Finally, Susan Stearns hosted a Sunday afternoon session on ASP and managed services, with an emphasis on the numerous choices that librarians now have for managing their implementation. In the software industry, regardless of whether you develop library systems for universities or enterprise resource planning systems for business-to-business environments, customers are looking to engage not just a vendor but also a partner, one that can assist them with implementing the best industry practices that will allow them to focus on their core competencies.

In addition to hosting our three seminars, Ex Libris was selected by ALA's Technology Showcase to present the DigiTool 3.0 digital asset management system. Michael Kaplan gave a 30-minute demonstration during the last day of the ALA meeting.

But it wasn't all academic—or business, for that matter. We hosted our annual customer cocktail reception at the historic Menger Hotel. More than 300 of our customers joined us for cocktails and hors d'oeuvres on Sunday evening. No big messages, no presentations—just good spirits and relaxed conversation. Sometimes the best way to face the future is to sit still for a few moments and enjoy the present.