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JISC and SCONUL Library Management Systems Study Consultation Event

27 June 2008

Wellcome Collection Conference Centre
183 Euston Road, London



Society of College, National and University Libraries

Session 1 : Consortium & Shared Services (Robin Green)

Objectives:

1. Getting best value from LMS and data
2. Lowering barriers to library collaboration

Issues & Tensions:

1. Where is the community of LMS practice?
2. The risks of operating in isolation
3. No common articulation of 'interest'

Vision & Opportunities:

1. A consortial vertical search pilot perhaps leading to a national service (see AARLIN)
2. ERM / URM also presents an opportunity
3. Co-schedule hardware replacement and broker a deal (see Scottish DL)
4. Data opportunities & optimisation (perhaps through OCLC)

*Note – there are shared LMS services
(e.g. East Anglia, Bristol / Bath)*

Big Questions

Individual libraries
knowing how / where to start?
Are new modules just another silo
if implemented locally?

Session 2 : Interoperability & Institutional Positioning (Ian Dolphin)

Objectives:

- Move from 'silo' to SOA, typically based on Web Services
- Possible cost reduction (redundancy, reuse)
- More certainly flexibility & agility to meet user needs

Key Integration Needs

Finance?
VLE?

Issues & Tensions:

1. Expertise to achieve analysis of processes
2. Institutional issues – governance and attitudes
3. Balance between standards and innovation
4. How do we report & share the results
5. Better understanding of SOA on the ground

Vision & Opportunities:

1. Coming together of enterprise architecture and SOA agendas – the analysis is the key
2. Importance of workflow approaches (learning & research)
3. Join up JISC programme activity (helped by e-Framework?)
4. Open Source response: Duke (LMS), other Mellon projects

Session 3 : Data Liberation & Aggregation (Mark Brown)

Objectives

To push 'stuff' (owned, brokered) better towards users –
Anytime, anywhere & involving external resources
To build on the sunk cost?

Big Questions

What are we best at NOW?
What is our 'proper' role?

Issues & Tensions:

1. The LMS does not (could / should not?) provide a total solution
2. Weaknesses on delivery ('fulfilment') side – a challenge as the 'owned' material decreases
3. Recognising the diversity of the audience and the range of activity
4. The audience wants to be multi-channel – no single door
5. Making content & services accessible
6. Are we too focused on discovery, not addressing the delivery challenge?

Vision & Opportunities:

1. Is the LMS a back room system or a primary integrator?
2. Is the LMS the vehicle for multi-audience / multi-channel solutions
3. Aggregation might be best @ national level (or global?)

Session 4 : Web 2.0 & Library 2.0 (Caroline Brazier)

Objectives:

How to remain (become) a trusted service

Issues & Tensions:

1. Trust & Authority
 - Do they trust us? Evidently not (see OCLC, RIN, Google Gen reports)
 - Do they trust each other? It appears not - there is still a recognition of integrity
 - Do we trust them? Moderation is the big issue
2. Information literacy of both the users and the librarians
3. Understanding the network economy - managing personal data, rights, Web2.0 content
4. Is Quality of Data a defining issue – or simply ‘good enough’ to access the content?

Vision & Opportunities:

1. Make the ‘network level’ catalogue the default (Do we need local OPACs?)
2. Working where users work – e.g. being in FaceBook not imitating it
3. Focus on communities
4. Develop the new skill sets

Big Questions

Think the unthinkable:

Does Librarian 2.0 need a library?

Does Library 2.0 need a librarian?

Library systems - simply too much hassle?

Session 5 : Open Source (Marshall Breeding)

State of Play:

- Open Source VLEs have taken off in the past 18 months
- Focus mainly on Public libraries (e.g. Evergreen, Georgia) & Schools (OPALS, NY state)
- Service companies are emerging to support them (e.g. LibLine around Koha)
- [Note Index Data from Denmark who have previously been involved with JISC projects]
- No ARL members are using Open Source systems;
- However there is frustration about vendor business developments
- The Duke OLE Mellon project is the first major HE based project, focused on design

Issues & Tensions:

1. Are these systems OS versions of trad LMS?
2. What needs to be open? Not just the source code
3. Opening up the data is possibly more important
4. Data APIs need standards (2008 Berkeley Accord)

Vision & Opportunities:

1. This is a time for engagement & influence
2. Become involved in the Duke OLE project (via webcasts)
3. Address the other transitional drivers – SOA, open data

Big Questions

What is our business purpose?
Is this about transition
or transformation?
Will the 'magic' be down to
implementation?



Session 6 : Strategic Shared Vision (Ken Chad)

Objectives

To compete (even to survive?) we need to work together

Issues & Tensions:

1. The library function will go on with or without us
2. The global players (e.g. Google) will not ask us so we have to take the initiative
3. Who are our partners in this and how do we work with them?
4. The user needs to drive business requirement which necessarily involves
 - multiple systems
 - dynamic change

Vision & Opportunities:

1. Adopt a pragmatic list of things to DO in order to start to inhabit this landscape
2. Identify the common purpose to go forward with the right range of partners

Big Questions

Should we build on existing large scale services like COPAC, SUNCAT?

We need to

- Understand why we are in this business
- Adopt a pragmatic list of things to DO in order to start to inhabit this landscape
- Identify the common purpose to go forward with the right range of partners

Go forward with what?

- User Behaviours - across the learning, teaching & research space
- Service & Toolset Futures – beyond traditional systems boundaries
- Data Exploitation – at the right network level
- Shared Services – to liberate effort
- Community Engagement – at all professional levels

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Vendor : ExLibris (Alan Oliver)

Perspective now

1. We generally accept the LMS Study findings
2. We have some concern over its ERM conclusions
3. We are seeing a paradigm shift in library services

Immediate Priorities for HE libraries

1. Vertical search
2. URM
3. Integrating the back end with other systems
4. Better integration with learning & research environments

Actions together

1. TILE project is of interest
2. Share the ExLibris open platform strategy



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Vendor : Infor (Ian Manson)

Perspective now

1. You should involve us

Immediate Priorities for HE libraries

1. Open the architecture
2. Make use of your suppliers

Actions together

1. A good start today by opening up the dialogue



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Vendor : Innovative (Colin Carter)

Perspective now

1. Leadership 'crisis' – a lot of change is taking place in UK HE libraries
2. Internationalisation of HE – overseas campuses

Immediate Priorities for HE libraries

1. Services requiring real time interactions (as opposed to data exchange)

Actions together

1. Determine who is the 'community'?
2. A range of suppliers need to be engaged – not just LMS



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Vendor : OCLC (Simon Day)

Perspective now

1. Fragmentation of management systems
2. Duplication of services (e.g. 180 OPACs)
3. Open Source does not offer a fundamental shift

Immediate Priorities for HE libraries

1. Machine-to-machine communication
2. Service layer to present library functions and data to other systems
3. Consolidation of shared resources

Actions together

1. Services to enable cooperation
2. Move towards industrialisation of workflows
3. Define what really needs to be done locally



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Vendor : SrsiDynix (Andy Panayiotou)

Perspective now

1. There are things that libraries can do now to implement the study recommendations
2. Note that public libraries are making more of the same LMS systems –
3. There is the opportunity to share practice
4. Examples of underexploited capabilities:
 - SaaS
 - EDIfact messages
 - APIs linking systems
 - Consortia
 - User experience solutions

Immediate Priorities for HE libraries

1. ERM integration (note NISO standards work)
2. User experience solutions

Actions together

1. JISC could facilitate the creation of consortia



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Vendor : Talis (Richard Wallis)

Perspective now

1. Mature technology
2. Mistrust of vendors - expectations exceed delivery
3. Lots of ideas - but no coherent vision
4. Community leadership vacuum
5. The 'cloud' concept of systems & services

Immediate Priorities for HE libraries

1. Loosely coupled integration of systems
2. Simple web native standards
3. Starting to share content
4. Getting services out there

Actions together

1. Build common purpose
2. Engage in collaboration & conversation – using Web 2.0 tools
3. Develop leadership



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Did we really say that?

Think the unthinkable

Does Librarian 2.0 need a library?
Does Library 2.0 need a librarian?
Library systems - simply too much hassle?

Survival

What is our business purpose?
What are we best at NOW?
What is our 'proper' role?

Network Level Services

Are we really sure about xxxx as a future service?

Should we be talking to Google et al?

Should we be operating at this level?

Open Source or any next generation system

Is this about transition
or transformation?

Will the 'magic' be down to
implementation?

Shared services

Individual libraries
knowing how / where to start?

Are new modules just another silo
if implemented locally?

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Summary

Go forward with what?

- User Behaviours - across the learning, teaching & research space
- Service & Toolset Futures – beyond traditional systems boundaries
- Data Exploitation – at the right network level
- Shared Services – to liberate effort
- Community Engagement – at all professional levels

Next Steps

- Things already in hand or available?
- Things we can link up with?
- Things we need to start?
- Things to leave for later?



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Some things already in hand

- Studies
 - TILE Library 2.0 & associated Pain Points
- Development
 - D2D development (COPAC, SUNCAT, ZETOC)
 - Personalisation (DPIE)
- Other JISC projects
- Vendor projects
- Possible links with the Duke University OLE Project



Delegate suggestions for a 'Call to Action'

- National Union Catalogue
 - this has been a discussion point for far too long
- Open up local data
 - get the data out there and see what happens in the developer and service community
- Community of Interest
 - not excluding other stakeholders (BL, RLUK, vendors). Should SCONUL initiate this?
- Road Map
 - setting out the key actions