

ICAU 2004: PORTO, PORTUGAL: MONDAY 6 SEPTEMBER 2004

SHARED SYSTEMS (CONSORTIA) MEETING

Convened by Michele Newberry, Florida Center for Library Automation, USA, with assistance by Pat Busby, CALICO, South Africa.

Ex Libris staff in attendance: Omri Gersen, Judy Levy (Israel) and Rene Thomas, Peter Ahrens, Michael Luetgen (Germany).

Noted that "Shared Systems" was a better description than "Consortia" as a number of issues relevant to consortia are also relevant to individual Aleph installations supporting a number of sites. Also noted that "shared systems" have unique needs.

The meeting started with Michele Newberry giving a brief introduction by describing the initiative to develop a forum for discussion on consortia issues which took place in January 2004 at the American Library Association (ALA) mid-winter meeting. The initiative continued at the NAAUG meeting in Boston and the ALA Annual meeting in Orlando, which introduction was followed by all present giving a very brief overview of their shared system setups.

Issues identified during the meeting:

1. Multiple versus Single ADM's and the implications of implementing these choices.
Noted that institutions/consortia sometimes made decisions with regard to system setups in isolation and did not always realize the full implications of these decisions, and that a knowledgebase of what other institutions/consortia had implemented – and why – would assist in such decision making.
2. The need to come up with a workflow in order to reduce administration load, especially when centrally maintaining a large number of ADM's.
3. Shared User file (building on developments in Version 16). We should be able to synchronise data from 1 ADM to other ADM's.
Noted by Omri Gersen that we should be addressing this and not confuse the term "shared user file" with the SUF as developed for and implemented by IDS, Switzerland. It was noted by the participants that it would help to get clear descriptions and definitions of the differences between the two concepts.
4. The challenge of managing the web (complexity of design and extent of customization for many institutions) and how to simplify in order to minimize work but still retain flexibility.
Omri Gersen noted that Ex Libris should be looking at minimizing duplication of effort where there are many web pages across consortia.
5. Upgrades and minimizing duplication of effort.

6. Inter-library lending/circulation (Direct consortial borrowing) as well as general inter-library cooperation for consortia.
 - *Noted that development is in progress as contractually required for some USA clients (CCLA, FCLA & SUNY), and a document on these proposed developments has been made available in the USA by Ex Libris. Carmit Marcus (Ex Libris, Israel) is working on this with CCLA, FCLA and SUNY.*
 - *Noted by Omri Gersen that Ex Libris still has many questions, e.g. direct borrowing has more responsibility issues than ILL as patrons, not libraries, are borrowing material; and, if items can be returned anywhere, who is responsible?*
 - *Noted that while USA and European workflows may differ with regard to the union catalogue needs, direct consortial borrowing needs may be more universal.*
 - *Noted by Judy Levi that Direct Consortial Borrowing will take some time in development, and while contractual requirements (CCLA, FCLA & SUNY) demand rapid early development, this functionality will be further developed and there is no immediate deadline for other input – e.g. by this working group. There is also the need for further development for marketing purposes and also plans to look into inter-operability with other ILS systems, which the market is asking for. Phase 1 development would be meeting immediate contractual requirements, Phase 2 development would address other needs as these are identified, and Phase 3 development would address inter-operability.*
7. Union catalogue – individual catalogues (bib files) but also a union catalogue.
Noted that this is a political issue where libraries within consortia want their own bib files but the consortium as a whole wants a single access point – a union catalogue where all records are replicated.
8. We should look at the OAI protocol as a means of developing a union catalogue with Metalib as a portal.
Omri Gersen noted that this might be possible in Version 16 and that version 15.5 is OAI compliant as well.
9. Resource sharing – copy cataloguing as a means of adding value to union catalogues.
10. The need for multi-base searching.
11. Where many items are attached to one bib record, these are sorted by sub library/code in descending order, which is not user-friendly.
Noted by Omri Gersen that this may be a configuration issue.
12. How the use of logical bases could effect / enhance system performance.
13. Some concerns with regard to SSL and IP addresses with many institutions within a consortium.

Resolutions of the meeting

1. Agreed that the meeting would form a formal “ICAU Shared Systems Working Group”, and follow-up on progress would take place in London at ICAU 2005.
2. Agreed that all attendees of this meeting, and any other interested parties, would be added to the Shared Systems list serve for communication purposes.
[Action: Michele Newberry]
3. Jiri Kende (ICAU Steering Committee) suggested that the ICAU Secretariat be approached to provide a Shared Systems platform for information, on the ICAU web site in the new Plone document storage tool (<http://www.plone.org>).
[Action: Pat Busby]
4. Agreed that we should share what we do within our own environments and develop a knowledge base of different consortial/shared system setups.
 - Noted that James Steenbergen (Ex Libris, USA) is developing a database of USA consortia set-ups. Michele Newberry would follow-up with regard to progress made and the format used, and would circulate the proposed format via the list serve for input by the members as to the format we should use within the ICAU Working Group to develop the knowledge base.
[Action: Michele Newberry]
 - Agreed that all members would provide details as per the format agreed upon, and that this would be made available on Plone. ***NB: this information should include problems encountered as a result of system set-ups implemented, solutions found to address these problems, and [very importantly] the reasons why the institution/consortium decided on the particular set-up they've implemented.***
[Action: All, coordinated by Michele Newberry]
5. Ex Libris would provide 2 documents on different shared systems set-ups and a case study of Germany and different union cataloguing options, on the Document Portal. [Ex Libris would prefer a more standard approach – within Aleph’s flexibility – so as not to have to support too many different and unique set-ups].
[Action: Michael Luetgen, Ex Libris Germany]
6. Omri Gersen would discuss with Carmit Marcus and other Ex Libris staff as to who would be the central Ex Libris liaison person with regard to Direct Consortia Borrowing developments, and how this Working Group would be able to interact with Ex Libris and provide input into the development process, including Ex Libris providing information on the existing proposed developments, as these are being addressed in terms of CUNY and SUNY requirements, in Plone.
[Action: Omri Gersen, Ex Libris, Israel]
7. Agreed that a formal “Shared Systems Working Group” meeting would be scheduled for ICAU 2005, which could include presentations by members and/or Ex Libris (e.g. Shared Consortial Borrowing Developments). The meeting would be organised by Michele Newberry, Pat Busby and Ronald Schmidt, and members are requested to let

these organisers know what they would like included in the meeting. The 2005 meeting would then identify further objectives for the Working Group.

[Action: Michele Newberry, Pat Busby & Ronald Schmidt]

8. Agreed that Michele Newberry (flcmin@cns.ufl.edu) and Pat Busby (pat@chec.ac.za) would coordinate the Working Group's activities between ICAU 2004 and ICAU 2005.

Attendees of the meeting

The attendees list is attached.

Pat Busby
CALICO
South Africa
2004-09-17

ICAU 2004, PORTO – SHARED SYSTEMS MEETING -- ATTENDEES

Name	Consortia	Country	email	Add to listserv?
Ana Cosmelli	Siro UL	Portugal	cosmelli@reitoria.ul.pt	YES
Andres Von Arx	IDS Switzzlerland	Switzerland	andres.vonarx@unibas.ch	YES
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Christian Vandel	DET Kongelige Bibliotek	Denmark	csv@kb.dk	NO
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Jean-Claude Kuperminc	Alliance Israelite Universelle	France	biblio@aiu.org	NO
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Peter Ahrens	ExLibris	Germany	peter.ahrens@exl.de	YES
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Regina Bost	Max Planck Society	Germany	rbost@gwdg.de	YES
Ronald Schmidt	Hochschulbibliothekszenrum NRW	Germany	schmidt@hbz-nrw.de	YES
Sigrun Hauksdottir	Landskerfi Bokasafna	Iceland	sigrun@landskerfi.is	YES
Jan Pokorny	Charles University in Prague	Czech Republic	jan.pokorny@ruk.cuni.cz	YES
Victor Babitchev	Austrian Library Network	Austria	victor.babitchev@bibvb.ac.at	YES, use a-consortia@bibvb.ac.at
Wolfgang Hamedinger	Austrian Library Network	Austria	wolfgang.hamedinger@bibvb.ac.at	See above