



ITALIAN EX LIBRIS USERS ASSOCIATION Annual Report 2009

**IGeLU SC and National/Regional User Group Representatives: joint meeting
Helsinki, Marina Congress Center
Sunday, 6 September 2009**

Introduction

ITALE was established in 1999 when a group of ALEPH libraries, that had started as an informal discussion group, was driven by the need to have a more formal organisation. Since January 2007, the Association is open to all Ex Libris products users

Members: At present, 41

Membership fee: 250 € (it covers group activities and projects)

Steering Committee: a new Steering Committee is working since January 2009; according to the Statutes it's remaining in office until 2011. The former chair (Alessandra Bezzi) is cooperating with the new Committee for one year term.

1. The Association aims

- to coordinate initiatives and activities in the field of library and information services
- to promote, distribute and implement new IT applications among its members
- to define common strategies and share standards for the development of innovative services among Italian libraries
- to cooperate to National and International research projects
- to coordinate all Members' requests for the development of Ex-Libris products
- to keep in touch with IgeLU and other user groups (national user groups, product working groups, ecc.)

2. Support

Until June 2009 Italian institutions have been supported by a Local distributor for Italy.

Last July an agreement has been reached by Atlantis (Italian national distributor) and Ex-Libris and the local distributor has been transformed into a Ex-Libris subsidiary for Italy and Slovenia. The technical staff (four members out of six) of the former company was included in the Global Support Organisation (GSO) and in the European Personal Services (European PS) of Ex-Libris Group

The changing has been really recent but ITALE members have positive expectations of this new framework: it could facilitate a better understanding from the part of Ex-Libris of the Italian market and its needs. We think that it should bring a faster support, due to the possibility to open "incidents" in English and to have them directly in the "Global Support Organisation" workflow.

For the end of the year we will have a meeting with Ex-Libris Italy to examine first results of the new framework and to discuss, in a more detailed way, some aspects not yet clarified at this stage.

3. Products

ALEPH500

29 member institutions are in production with ALEPH500 vs. 18, 2 member institutions, using vs 16, are testing vs 18, 6 member institutions have planned to move from vs 16 to vs 20 but the schedule for the delivery of a localized ALEPH vs. 20 is not defined yet.

SFX

16 member institutions are in production with SFX vs 3

MetaLIB

13 member institutions are in production with MetaLib vs 4

Digitool

1 member institution is working with vs 3

Two Product Working Groups are operative into ITALE organisation:

- Aleph Product Working Group
- SFX/MetaLib Product Working Group

4. Activities in 2008/2009

Since last IGeLU Meeting in Madrid (September 2008) we have organized two Seminars:

- The ITALE "yard": experiences, projects, future plans – University of Florence, 10-11 November 2008
- The New Italian Cataloguing Rules (REICAT) in ALEPH500: librarians, system managers and users remarks - Scuola Normale Superiore- Pisa, 26 May 2009. In this occasion we met Ex-Libris and Atlantis representatives and we were informed, at the first step, about the change in progress in the Atlantis structure

Moreover Antonella Trombone and Fernanda Canepa, members of the Steering Committee, attended the *75th IFLA General Conference and Assembly* and submitted the report "The New Italian cataloguing Rules (REICAT) and the UNIMARC standard: open problems and proposals for the application in library catalogues"

On December 2nd a Technical Seminar, devoted to Italian institutions, will be held in Parma about the SFX and MetaLiB implementations, in order to share experiences and special projects.

5. Projects

Integration between Italian ILL Network (ILL-SBN) and ALEPH Integrated ILL (ILL2)

Two ITALE institutions (University of Udine and University of Bergamo) for over an year have been cooperating with Central Institute for the Union catalogue of Italian Libraries and Bibliographic Information (ICCU) to integrate the National ILL Network (ILL SBN) with ALEPH Integrated ILL (ILL2). The final scenery will be:

- Locating bibliographic records in Italian National Library Service (SBN) OPACs using ALEPH clients;

- Sending borrowing requests from ALEPH clients to SBN Libraries through ISO ILL protocol;
- Allowing SBN libraries to locate bibliographic records in ALEPH catalogues and to enter ILL requests through ISO ILL protocol;
- Processing lending requests received from SBN libraries through ISO ILL protocol

Some tests have been done with good results; by next Autumn there will be the announcement of the project accomplishment.

The New Italian Cataloguing Rules (REICAT) and ALEPH500

ITALE Steering Committee is taking part in the discussion about the revision of the Italian Cataloguing Rules and its effects for the Italian Ex-Libris Users. In addition to comments on the text of the new rules, ITALE has initiated among its members a shared experience of application testing by using a database of the University of Udine. The focus of this testing activity is on two main issues:

- main changes of the formal aspects of headings according to the New Italian Cataloguing Rules and their use of UNIMARC standards;
- main changes related to the application of FRBR in the New Italian Cataloguing Rules.

The first results have pointed out both UNIMARC standards and ALEPH software do not provide appropriate tools for the qualifiers and the data display required by REICAT.

We enclose to this report a summary of the testing activity to underline both the difficulties we have faced and the suggested solutions.

The list of ALEPH enhancement requests will be submitted with all the necessary formalities.

6. Concerns

We have to stress that the communications between ITALE members and Ex Libris customer support team are not very satisfying (sometimes the enhancement requests, submitted through Pivotal, are accepted in advance, exciting great expectations, and then they are not included in the product's road map).

On several occasions we have complained the resources (source and target) included in the SFX/MetaLib KB don't meet the requirements of not Anglo-American institutions.

In addition some aspects of consortia implementations for SFX/MetaLib (for instance statistical reporting tests) remain a serious concern.

7. Contacts

Steering Committee 2009-11:

Chair: Liliana Bernardis (University of Udine)
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Member Paola Mancini (Scuola Normale Superiore-Pisa)
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Member Fernanda Canepa (Berio Public Library- Genua)

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8. Information and Documentation

Information about ITALE, technical documentation, announcements can be found at our web site: <http://www.itale.it>

We have also three mailing lists:

itale@itale.it: devoted to ITALE members

it-elug@liste.uniud.it devoted to Italian Ex Libris products users

itale-sys@polito.it devoted to system and library managers, members of ITALE

For the ITALE Association
ITALE Steering Committee

August 2009



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The New Italian Cataloguing Rules (REICAT) and ALEPH500

The new Italian cataloguing code (Regole italiane di catalogazione, REICAT), published in June 2009 to replace the RICA, is based on the developments of online catalogues and networking in the last three decades.

The new code is designed to meet the needs of large cooperative catalogues, based on shared cataloguing.

The new code is centred around the **work**, with the goal of identifying all works represented in the catalogue and recording all relevant responsibilities. The identification of all works

is achieved by the use of uniform titles linked with author headings, if applicable, or followed by suitable additions or qualifiers. The recording of responsibilities for the work is required once for all at the work level, and not for each manifestation.

To achieve this union between work and author headings, the choice made was to put the author in the work field, the 500 UNIMARC bibliographic, using an owner local subfield for the main heading.

After the first cataloguing tests, the first requests of technical parameterizations of the Aleph software (version 18.01) sent to the University of Udine are as follows:

- for 500 bib. field it has been required the creation of the \$9 subfield called "Main heading", to be displayed after subfield \$a with a previous slash;
- the 500 bib. field is named "Work" instead of "uniform title", so it was considered it could be clearer for the end user the contents of the field;
- it has been required the creation of the field of local use 529 bib. for the uniform title of *expression*; the field must be used with the same indicators for 500 bib field.; the subfields \$a for the title of the expression and \$x for conventional additions are provided;
- for authority records it has been required the creation of a subfield \$9 for fields 230 auth. and 430 auth., called "Main heading", to be displayed after the subfield \$a preceded by a slash;
- it has been introduced the possibility to search and capture data about the author heading of a work from the heading lists; this function is related to subfields \$9 for fields 500 bib. and 230 auth.; this avoids duplication of names of the creators of works and links uniform titles to controlled headings.

According to the FRBR model, the visualization of *work*, *expression* and *publication* has given better results in the structure of the single record.

During the testing phase it has been thought to insert into the detailed display of bibliographic data that has been called the "REICAT layout". Work and any expression to

which a publication is bound are displayed in the upper left, separated from the rest of the data by some lines of space. Below the two results are shown, the first is the working interface, the second is the WEB OPAC:

OPERA	Oliver Twist / Dickens, Charles
	--- Oliver Twist (in italiano)
Num. sistema	000121062
Autore	Dickens, Charles
Titolo	Le avventure di Oliver Twist / Charles Dickens ; a cura di Augusta Grosso-Guidetti

WEB OPAC

OPERA	● Oliver Twist / Dickens, Charles
	● --- Oliver Twist (in italiano)
Autore	● Dickens, Charles
Titolo	● Le avventure di Oliver Twist / Charles Dickens ; a cura di Augusta Grosso-Guidetti

The indication "work" (opera) has been given, while it was preferred not to mention the technical definition of "expression", instead graphically shown through the possibilities currently offered by the software: entry spaces highlighted by dashes.

Here, after visible spacing, the rest of the data follows in full format, and all the data of the bibliographic record are given except fields related to the work and the expression, which are not obviously repeated.

The upper part of the display format, the "REICAT layout", is reserved for the communication of couple work/expression; the bottom hand, describes the publication.

The fields of work and expression give access to heading lists from the web OPAC and from librarians interface. In accordance with the *Statement of International Cataloguing Principles*, the access to the bibliographic record reported above is given by:

- the titles of publications, which usually are not controlled;
- the controlled access points of the creators of the works;
- the controlled access points of the works and expressions incorporated in the resource.

The display of the single record obtained has been considered very good by the ITALE community. Very good also the idea to offer a dual-link, to *WORK* and, in the line below, to the *Expression/Manifestation*, where existing. Both possibilities are useful and can answer to different needs.

Moreover it could be intuitive for the user that clicking the first line (the *Work* line) gets all the editions, clicking the second gets (for example) all the editions in Italian. On the contrary, it's usually very difficult to make intuitive choices among different possible researches.

The TITLE LIST, both from the OPAC web and from the working interface, always displays the alphabetical list of works, expressions/manifestations and publications:

1	Record Brevi	The hamlet
9	Record Brevi	Hamlet
1		Hamlet and the acting of revenge
1		Hamlet. Ed.by Harold Jenkins
1	Record Brevi	The hamlet / Faulkner, William - [Record di Authority]
1		Hamlet <film> - [Record di Authority]
1	Record Brevi	Hamlet, Hiob, Heine
3		Hamlet (in italiano)
1		Hamlet (in sloveno)
1		Hamlet (in tedesco)
1		Hamlet oder die lange Nacht nirumt ein Ende
1		Hamlet op. 67 a
1		Hamlet, op. 67 a / Čajkovskij, Petr Il'ič - [Record di Authority]
		Hamlet, Prince of Denmark - [Record di Authority] Vedi: Hamlet / Shakespeare, William
13		Hamlet / Shakespeare, William - [Record di Authority]

This should be the appropriate display of *works* with uniform title *Hamlet*, based on a FRBR model:

[Work]

[The hamlet / Faulkner, William - \[Record di Authority\]](#)

1 [Record Brevi](#)

[Work]

[Hamlet <film> - \[Record di Authority\]](#)

1 [Record Brevi](#)

[Work]

[Hamlet, op. 67 a / Čajkovskij, Petr Il'ič - \[Record di Authority\]](#)

1 [Record Brevi](#)

[Work]

[Hamlet / Shakespeare, William - \[Record di Authority\]](#)

13 [Record Brevi](#)

----- [Hamlet \(in italiano\)](#)

3 [Record Brevi](#)

----- [Hamlet \(in sloveno\)](#)

1 [Record Brevi](#)



The data structure suggested above is not feasible with the tools currently available to parametrize the graphic data display of the Aleph software, which governs the catalogue. But there is no doubt that, after this initial test phase, they start to highlight the main limits posed by the UNIMARC standard and those resulting from the software Aleph, in case of adoption of REICAT.

An initial proposal for the organization of the lists of the kind "browse titles" could be:

- first should be shown the uniform titles of works followed by the authority access point (fields 500 bib. and 230 auth.)
- if present, it would follow the uniform title of the expression related to work, followed by related records (field 529 bib.)
- finally, should follow the titles of publications (field 200 bib.).

The titles of works should be highlighted graphically and preceded by the definition of "work".

Obviously, such a list should not be governed by purely alphabetic criteria and it should be checked the possibility of integration between alphabetical order and MARC fields. Again, however, it does not seem to be at the moment a solution to the problem of the link between the title of a *work* and the titles of *expressions* related to it. It has not been found a solution to the problem of displaying the link between *expression* and *work* if the two fields are included in a single bibliographic record.

There are two possible solutions. The first is a revision of UNIMARC and providing a structure of levels including linking fields type 4xx for work and expression. The second concerns a technical implementation of Aleph, which has to be done in any case.

Lists of works

It is already possible to build browse lists containing all the *works*. It would be better to have strictly only *work lists* (and not even containing *expressions*), in the sake of clarity and ease of reference.

It could useful to report in the line related to *work* that there exist some expressions bound to it, or that there are multiple versions. This aim could be reached using icons or symbols that, once activated, give access to the list of expressions bound to that *work*.