



Smart Libraries™

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Smarter Libraries through Technology: Vendor Strategies Address Diverse Needs of Libraries

By Marshall Breeding

Companies in the library technology industry must continually assess and refine their target audience or market sector. No product or service can meet the expectations of all types of libraries. Vendors must make difficult choices on where to concentrate their efforts. In library technology, one size does not fit all, but rather each system must be designed to align with the strategic needs of their target market. Defining an area of specialization too narrowly can limit

opportunities. We can see examples where companies have widened their original target sector to expand their prospects for new customers. In a slightly different vein, it is also interesting to observe the technology products emerging from some of the larger and more diverse companies, especially EBSCO and ProQuest, and the dynamics that can come into play as these organizations become involved in supplying different categories of products. In all of these scenarios, libraries must work hard to identify the technology products best aligned to their strategic needs and the providers most in tune with their expectations.

Ex Libris, one of the largest of the technology-focused companies in the industry, has a long-established focus on the academic and research library sector. Its strategy has been to create a deep stack of products to support the multiple layers of needs experienced by these libraries. Expanding beyond its Aleph and Voyager integrated library systems, Ex Libris has defined new product genres or developed products in emerging categories. Examples include SFX as the first context-sensitive link resolver; Verde as an entrant in the stand-alone electronic resource management systems arena; Primo as an early discovery interface; Primo Central as an index-based discovery service;

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Rosetta for digital preservation; and Alma as a library services platform to manage all types of library resources. In its most recent phase, Ex Libris has expanded its scope of interest to the broader academic institution, breaking beyond those products specifically oriented to the library. This expansion began with the launch of its Leganto list management software, which leverages the infrastructure developed for the library, but is operated through the institution's learning management system. Its primary users are course instructors. The decision makers for this product may be in the campus-wide instructional support organization and not necessarily in the library. The acquisition of oMbiel and its campus platform brings the company a step beyond the library arena, but still within higher educational institutions. We cover the oMbiel acquisition and provide an update on Leganto in this issue.

Follett provides another example of a company focused on a specific sector. Through its technology products initially focused on the K-12 school libraries, the company has a well-established product strategy of developing or acquiring products that serve the information and administrative needs of the district. In addition to its Destiny Library Manager, the company has created versions of its flagship platform to manage textbooks or other assets. Its Aspen student management system has been adopted in many school districts. Beyond these technology tools, Follett offers multiple channels for selling books and electronic resources to schools.

Infor, Civica, and Capita have developed products to support many different aspects of local government

administration. Each also offers library management products, but these fall within a broader line of products. The domain expertise and marketing leverage overlaps to a smaller extent within the local government area than seems to be the case in the different educational sectors.

Even as companies offer products addressing a wide range of content or technology interests, few libraries would be in a position to work with a single vendor.

libraries may either work with one of Innovative's partners, such as with EBSCO Discovery Service. Innovative has also cast a wide net geographically.

It also has been interesting to observe the increasing involvement in the technology sector by companies traditionally rooted in the creation or distribution of content resources. EBSCO Information Services and ProQuest fit in this category. Both provide content products in general, multidisciplinary, or specialized disciplines. They also offer a variety of tools related to the management or access of library content. The following stable illustrates some of the striking similarities in the types business activities addressed by the two different companies and the products developed or businesses acquired to fulfill these roles. This comparative matrix may add some perspective to this month's feature on the acquisition of Coutts Information Service by ProQuest.

| | ProQuest | EBSCO Information Services |
|--|--|--|
| Ownership | Cambridge Information Group Goldman Sachs | Privately held by Stevenson family |
| Content delivery platform | ProQuest Platform | EBSCOhost |
| E-books | Ebrary Ebook Library—EBL MyLibrary | Ebooks on EBSCOhost, descended from NetLibrary acquisition |
| Book acquisition platform | OASIS (part of Coutts) | GOBI3 (from YBP acquisition) |
| Periodical subscription service | | EBSCONET |
| Discovery service | Summon | EBSCO Discovery Service |
| Link resolver | 360 Link | LinkSource, Full Text Finder |
| Library services platform | Intota (in development) | None (Integration strategy) |

Even as companies offer products addressing a wide range of content or technology interests, few libraries would be in a position to work with a single vendor. It's much more likely that libraries will work with a diverse set of vendors as they make their optimal selections for content and for resource management or discovery products. The mix of vendors and providers selected by libraries often results in scenarios where organizations that compete in one area must cooperate in others. It is not at all unusual for a library to purchase content from one provider and use resource management or discovery products from its competitor.

As the business arena becomes increasingly consolidated with a smaller set of companies offering ever more expansive portfolios of products and services, it's important for libraries to understand any potential tensions or incompatibilities. Libraries expect that products created by different vendors work well together. Library technology products are expected to follow standards, offer APIs for data exchange, or conform to any recommended practices that govern the openness of a product genre.

Ex Libris Acquires oMbiel, Introduces Leganto

Ex Libris has made an incremental step in expansion beyond the library technology arena, acquiring oMbiel, a company based in the United Kingdom known for campusM, a mobile and portal platform that enables institutions to provide a variety of services to students via a hosted, software-as-a-service platform optimized for mobile devices. This acquisition does not involve further consolidation in the library technology industry, but reflects the increase dominance of mobile access and the interest of Ex Libris in serving the broader campus environment.

oMbiel Corporate Background

oMbiel Limited was founded by Hugh Griffiths in the United Kingdom in March 2009 (Registration number 06833925) and is based in Wolverhampton, located northwest of Birmingham. Griffiths served as the company's Chief Executive Officer and had previously co-founded a systems integration firm that specialized in services-oriented architecture based on Oracle technologies. Following the development of campusM and its initial deployment in October 2009 at the University of Sheffield, oMbiel worked to establish itself as a major provider of mobile-based technologies to higher education in the UK, eventually gaining a presence in over a quarter of the universities in the country. The company has also seen adoption of its flagship products in other international regions, including two in the United States.

The products offered by oMbiel combine a multi-tenant software-as-a-service platform with lightweight responsive-web interfaces based on HTML5 and native apps for the major mobile environments, Apple's iOS and Android. Responsive web interfaces provide a portal for the institution for all devices,

including desktop and laptops. The emphasis oMbiel is the power of native apps and their ability to take full advantage of the capabilities of mobile devices, including push notifications, geolocation, access to the camera, and other features. The company has developed and deployed campusM as its strategic platform that follows a hybrid cloud architecture which taps data residing in business applications within an institution's infrastructure with a hosted scalable multi-tenant services.

One of the key concepts of the company involves providing tools for educational institutions to connect with students through all relevant devices and channels. oMbiel's campusM offers customized and branded apps and portals for its customer institutions. These apps include student-oriented features such as campus maps, directories, access to learning management systems, access to library online catalogs with self-service renewals and requests, distribution of campus news, alerts or other notifications, events, availability of PCs and printers, campus tours, and course and exam schedules. The platform also provides single sign-in, use reports and analytics, and an administrative console for administration and content management. In addition to the apps developed directly by oMbiel, the App Extension Kit enables institutions to create their own apps or perform integrations with other local systems, including those that target other audiences such as prospective students or alumni.

Selected Educational Institutions Adopting campusM

Some of the organizations in the UK using campusM and the library systems implemented include:

- London School of Economics and Political Science (Alma),
- Imperial College London (Alma),
- University of Sheffield (Alma),
- Lancaster University (Alma)
- Harper Adams University (Sierra)
- Liverpool John Moores University (Aleph)
- Keele University (Millennium)
- Royal Veterinary College (Symphony)
- University of Southampton (Symphony)
- University of Leeds (Sierra)
- University of Hull (Millennium)
- Bournemouth University (Alto)
- University of Winchester (Alto)
- University for the Creative Arts (Symphony)

The company has also expanded into other international regions:

- Copenhagen Business School (Aleph)
- University of Canberra (Millennium) in Australia,
- Central Queensland University (Virtua) in Australia,
- University of Cape Town in South Africa (Aleph),
- HEC Paris (research and education in management sciences) in France.

The company has also begun to enter the higher education arena in the United States. Queensborough Community College, a member of the City University of New York system and an existing Ex Libris customer using Aleph, implemented campusM in 2014, deployed as an app branded as QCC Connect.

Details of the Acquisition

oMbiel was privately owned by its founder and CEO Hugh Griffiths. Ex Libris, owed by Golden Gate Capital since December 2012, now gains full ownership of the company. Financial details have not been disclosed publicly.

The business transition will bring no anticipated disruption for oMbiel's customers. Development and support will continue through the same personnel and facilities as before.

Hugh Griffiths, founder and CEO of oMbiel Limited, has joined Ex Libris as its Vice President for Mobile Campus Solutions, reporting directly to CEO Matti Shem Tov as part of the company's senior executive team. Ex Libris will operate the former oMbiel company as a third product business unit, complementing the existing units focused on library products, each headed by a corporate vice president:

- Resource Management: Bar Weinstein
- Discovery and delivery: Shlomi Kringel,
- Mobile Campus Solutions: Hugh Griffiths

oMbiel is a much smaller company than Ex Libris. Although specific personnel counts are not available, oMbiel is estimated to be less than a tenth the size of Ex Libris which employs a total of 565 personnel. As Ex Libris acquires a set of key technologies and products consistent with its expanding scope of interest in higher education, oMbiel's products will benefit from the large-scale personnel and technical resources of a large global company.

Strategic Synergies

The acquisition of oMbiel extends the reach of Ex Libris beyond academic libraries, while retaining its focus on higher education. In the same way that academic libraries in recent years have made increasing efforts to be more fully integrated in the business and technical infrastructure of their campuses, Ex Libris has acquired a business with promising opportunities in a growing niche of educational technologies and also gained access to technologies that will benefit its library products. Although Ex Libris has offered mobile apps for its Primo discovery service, its emphasis has been on desktop interfaces. The infusion of the mobile-first strategy into the company will benefit its products and services oriented to library users.

The decision makers and implementers of campusM would generally be part of a campus-wide information technology division. Through this business unit, Ex Libris will gain increased involvement and awareness of campus IT personnel and procurement issues.

Multiple layers of technology synergies also apply between Ex Libris and oMbiel. Both companies emphasize the deployment of products via multi-tenant software as a service. Although Ex Libris continues to support several products based on server-oriented architecture, such as Aleph and Voyager, those created more recently, especially Alma and Primo Central, are based on multi-tenant platforms. Joining the expertise and resources of both organizations will offer mutual benefits.

Integration into campus-wide applications is crucial to all the products involved. Library-specific and campus-wide mobile services depend on institutional authentication services, require data from student management systems, and need to interact with learning management systems. Any technical development related to interoperability with campus systems can be highly leveraged. Possibilities include additional

opportunities to increase the impact of the library's content and services via campus-wide mobile services.

A review of the institutions listed as campusM customers reveals a high proportion with libraries currently using Ex Libris products. This substantial overlap reinforces the common interests of the two businesses. Conversely, it shows that campusM coexists with non-Ex Libris library products. Interoperability between the campus mobile platform and library systems will need to span those from multiple vendors.

This acquisition provides leverage for the marketing of product lines. It provides to Ex Libris business opportunities beyond the library, including institutions that have opted for competing library technology vendors or products. Ex Libris library customer sites provide contacts and opportunities to pitch campusM at the institutional level.

Progress on Leganto List Management Solution

Ex Libris has recently introduced its new reading list management service, Leganto. This genre of reading list management tools was well established in the United Kingdom, but has not seen as much traction in the United States. These products provide instructors with an interface through which they can

select, organize readings associated with a course or research project, making the easily accessible to students. This functionality operates through the learning management system rather than through the online catalog or discovery service of the library, even while the majority of the content items included on the reading lists are provided via the library. Ex Libris Leganto operates in the intersection between learning management system and the library's infrastructure. Libraries appreciate that instructors have easier ways to incorporate their materials in their course pages, but also benefit from statistics and analytics on how the collection items are used and data that informs the acquisition of needed materials.

In May 2015 Ex Libris announced that it will be collaborating with Instructure, the creator of the open source Canvas learning management system through its certified partnership program.

Leganto remains in the development phase, with five institutions collaborating as partners, including the University of Oklahoma, KU Leuven in Belgium, Kingston University and Imperial College in the United Kingdom, and the University of New South Wales in Australia. Ex Libris anticipates an initial version available for testing by these institutions in August 2015.

ProQuest Acquires Coutts from Ingram Content Group

In a move that strengthens its offerings to libraries for managing e-books and other resources, ProQuest has acquired the assets of Coutts Information Services, including its MyLibrary digital content platform and Online Acquisitions and Selection Information System (OASIS) from Ingram Content Group. These tools will complement ProQuest's existing e-book initiatives.

Acquisition Details

In this transaction, ProQuest gains ownership of Coutts Information Services, originally founded in 1969 and since 2006 a wholly owned subsidiary of Ingram Content Group. Coutts had previously expanded through its own acquisitions. Coutts Library Services acquired Martinus Nijhoff International from Swets Blackwell in March 2002.

Key products involved in the acquisition include the OASIS and MyLibrary platforms. ProQuest Senior Vice

President Kevin Sayer will oversee the operations of this newly added division, which will continue to operate from its main facility in Ringwood in the United Kingdom and Nijhoff in The Netherlands. Coutts employees at its various locations will join ProQuest.

These two companies represent only a small portion of the business activities of Ingram Content Group. It retains its other businesses and services oriented to publishers, retail distribution of digital and print content, products for K-12 schools, and to libraries. Ingram will continue to offer, for example, its ipage online search, ordering, and tracking tool. Ingram is a major print-on-demand service provider and strategic partner for ProQuest in the fulfillment of print materials.

ProQuest is majority owned by Cambridge Information Group, with Goldman Sachs Partners holding a minority equity stake. Financial details regarding the purchase of Coutts were not released, with the deal expected to close in May 2015.

ProQuest Forwards E-book Strategy

ProQuest, a company offering a diverse range of content and technology products and services, has engaged in an ongoing effort to strengthen its position in the e-book arena. These activities include providing additional e-book content to populate the company's flagship content products as well as the creation of a specialized and dedicated e-book delivery and management platform. E-book content and technology has been a major focus of ProQuest's recent business acquisitions and subsequent development efforts.

ProQuest acquired ebrary in January 2011 from its co-founders Kevin Sayer and Christopher Warnock, who also served as President and CEO, respectively. Sayer joined ProQuest at that time and has since led the company's ever expanding e-book initiatives, currently as Senior Vice President and General Manager, ProQuest Books.

In January 2013 ProQuest acquired the Australian company Ebook Library, a company known for an innovative set of e-book acquisitions and lending models. These services included demand-driven acquisitions, short-term loans, and ability for libraries to purchase individual chapters for coursepacks. The company also developed and patented a service of Non-Linear lending which enables a library to purchase a single copy of a title that can be made available for multiple concurrent lending to patrons. EBL was founded in 2004 as a spin-off of Ebooks Corporation. Kari Paulson, President, joined ProQuest following the acquisition and currently serves as Vice President, Market Development.

In January 2015 ProQuest announced that it would brand its new e-book platform as ProQuest Ebook Central. This platform will incorporate elements of its previously separate EBL – Ebook Library and ebrary products and bring all of its e-book titles into a single management and delivery service. Platform components include LibCentral, a portal for library personnel to build and manage their collections, based largely on the EBL administrative console, and the Ebook Central Reader as the patron interface that carries forward features and technologies of the ebrary e-book reader.

With ProQuest's acquisition of Coutts, it significantly expands its already massive catalog of e-book titles. This move also consolidates the number of general e-book platforms oriented to academic libraries, with three of the four major platforms now under ProQuest. In addition to ebrary and Ebook Library – EBL, the company now owns

MyiLibrary launched by Ingram Coutts in 2004, another major competitor in this arena. The fourth pre-consolidation offering in this arena Ebooks on EBSCOhost, descended from NetLibrary. Another set of services, including OverDrive, 3M Cloud Library, and Baker & Taylor's Axis 360 focuses primarily on the public library sector. Many individual publishers offer their own e-book platforms. Academic library general e-book services have narrowed to mainly ProQuest and EBSCO.

ProQuest Resource Management and Workflow Strategy

ProQuest also gains an additional staff-oriented acquisitions tool. In addition to those already in its arsenal oriented to electronic resources, including 360 Resource Manager and Intota, ProQuest now gains OASIS, which many academic libraries use as one of their resources for the acquisitions of monographs.

Libraries use OASIS to search, select, and order books and e-books from a wide range of publishers and suppliers. The service includes downloadable MARC records that correspond to materials ordered with no additional fees. The service includes features such as the ability to monitor standing orders, get notifications for new titles within defined areas of interest, and manage approval plans. OASIS also includes detailed reporting capabilities and the ability to track ongoing orders and activities.

As a platform that enables libraries to select titles from many sources, OASIS has established relationships with many different providers. These include EBSCO, a direct competitor of ProQuest. As OASIS comes under the ownership of ProQuest, EBSCO has stated that it will continue offer its catalog of 700,000 e-book titles through OASIS, an example of the many scenarios in the industry where organizations compete in one context and cooperate in others.

ProQuest also continues the development of Intota v.2 as a library services platform to manage a library's digital and print resources. Intota v.1, providing a new set of tools and workflows for electronic resources, has been completed and implemented by around 30 academic libraries. Intota v.2, which expands the scope of the platform to include print materials, is anticipated to be ready for production use in 2016. No specific announcements have been made regarding expected integration or synergies between OASIS and Intota.

Marshall Breeding's Library Systems Report

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<http://goo.gl/daEkBC>

Library Technology News

Announcing the Library Technology Guides Procurement Registry

Library Technology Guides now includes a new resource to bring together the Requests for Proposals, Tenders, or other procurement documents related to libraries acquiring integrated library systems, library services platforms, discovery services, or other strategic technology products. This Procurement Registry is intended to fulfill several purposes.

It enables libraries to post their procurement documents in a repository with high visibility and have confidence that they will be seen by qualified vendors. Registering procurement projects in this resource will complement and not necessarily replace other processes the library may be required to follow to advertise procurement opportunities.

It provides a central aggregated repository of projects of interest to providers of library technology products and services. The Procurement Registry supplements the many municipal, state, and proprietary procurement sites that require qualification, registration, or payment for notification or access to procurement documents. Since these other procurement sites include all types of procurement projects, finding those related to library technology offerings can be an expensive and time-consuming process.

It serves as a research resource. Libraries considering a new procurement project gain access to a large number of RFPs issued by other libraries and can be aware of the characteristics and requirements specified. Those using the registry in this way should naturally be mindful of copyright and seek permission from the creators of any documents before making use of any specific statements or text within the documents. The Procurement Registry also serves as an historic archive of past projects and their associated documents. Libraries are encouraged to register completed projects and upload the corresponding procurement documents regardless of the year issued. These materials contain ongoing research value.

The Library Technology Guides Procurement Registry is a free service. No fees are charged to register procurement projects or upload documents. All content is provided without any guarantees for accuracy and completeness. The Registry provides no mechanisms for communication between those posting opportunities and vendors. Vendors will naturally continue to follow instructions specified in the procurement documents regarding designated contacts and response procedures.

Libraries posting opportunities are encouraged to post outcomes of the process to the registry or to Marshall Breeding. Please also contact Marshall with any comments or suggestions for improvements to the registry.

Access the registry at: <http://www.librarytechnology.org/procurement>

Follett appoints Ray A. Griffith as President and CEO

WESTCHESTER, IL, May 4, 2015 – Follett Corporation, a trusted partner to preK-12 schools, districts and college campuses for more than 140 years, today announced that its Board of Directors has appointed Ray A. Griffith as the Company's President and Chief Executive Officer, effective immediately. He succeeds Mary Lee Schneider, who has retired from Follett as both President and Chief Executive Officer and Director.

Mr. Griffith, 61, has served as a member of Follett's Board of Directors since February 2013. As President and CEO, he will continue to serve on the Board. Mr. Griffith brings more than 35 years of transformative leadership experience to Follett, most recently serving as the President and CEO of Ace Hardware until April 2013. At Ace, Mr. Griffith modernized the locally-owned hardware store, pioneering the "next generation" retail store format and opening more than 990 new locations in eight years.

SirsiDynix furthers work with EBSCO on BLUEcloud integrations

LEHI, UT (April 20, 2015) – SirsiDynix is furthering its work with EBSCO Information Services, a leader in library workflows, in integrating EBSCO tools and services with BLUEcloud products. This partnership between industry leaders has already resulted in a tight integration with SirsiDynix's Enterprise discovery tool and EBSCO Discovery Services (EDS) search results.

SirsiDynix and EBSCO plan further integration. For instance, YBP Library Service's GOBI product will automatically push order information to BLUEcloud Acquisitions. After creating an order in GOBI, library staff can see the resulting data in their LSP. Likewise, an order entered via EBSCO ECM for e-books, or on EBSCONET for journal subscriptions, will be readily available within BLUEcloud Acquisitions as well.



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