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# AUTOMATED LIBRARY SYSTEM **VENDORS**

Eight major automated library system vendors offer portals as a part of their automated library systems: Endeavor, epixtech, Ex Libris, Gaylord, Innovative Interfaces, Sirsi, TLC, and VTLS.

Endeavor, Innovative, and TLC have licensed MuseSearch from MuseGlobal, and epixtech, Gaylord, and TLC have licensed WebFeat primarily for the linking components of their portals.

Although most target their own customer bases, Endeavor and Ex Libris have aggressively bid their products as standalone portals for libraries that have automated library systems from other vendors. Ex Libris estimates that 30% of its sales have been to libraries with automated library systems supplied by its competitors.

Two licensees of the same portal developer may choose to limit or expand the capabilities of the licensed product, so functionality may not be the same.

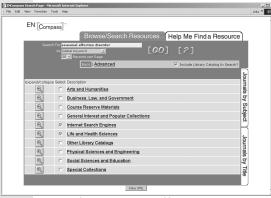
# **Endeavor Information Systems**

Endeavor offers its ENCompass (release 2.0) both as a module of its automated library system and as a standalone product. The product features multiprotocol searching (Z39.50, HTTP, and XML) across resources. ENCompass' federated searching allows libraries to incorporate resources that are not Z39.50-enabled, such as publisher sites, e-book sites, and popular noncommercial databases.

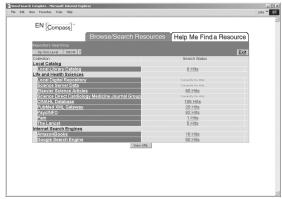
Dublin Core and EAD formats are supported, but not MARC. MARC records, though, can be searched and imported.

ENCompass has two versions: Resource Access and ENCompass for Digital Collections. Most libraries have purchased the full suite, but a few have chosen to install only ENCompass for Resource Access. Among the 24 installed sites are the Universities of Alabama, Connecticut, Rochester, Kansas, and Texas.

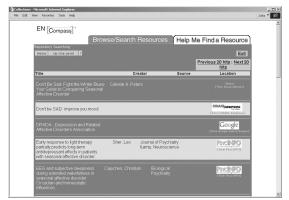
The following screens show the sequential steps of a search:



Initial search for "seasonal affective disorder."



Results found. Searching continues while presenting the first search results to the patron.



Results can be merged and displayed in relevanceranked order. The icons on the right show where the search results originated.

Patron authentication is supported through a link to a library's automated library system.

Open URL is supported.

Linking is facilitated with LinkFinderPlus, a thirdparty product. The links can be from citations to full text, additional resources, and to "more like this." The product, which is separately priced, is delivered with a preconfigured database of more than 11,000 URLs for electronic files of journals.

More than 35 academic institutions have purchased ENCompass.

Collection size is the basis for pricing.

**Contact:** Endeavor Information Systems

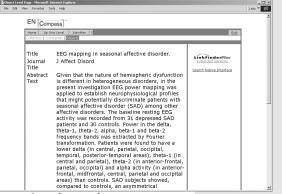
2200 E. Devon Ave., Suite 382

Des Plaines, IL 60018

**Tel:** 800-762-6300

Fax: 847-296-5636

Web: www.endinfosys.com



A retrieved record.



A typical LinkFinderPlus screen.

### epixtech

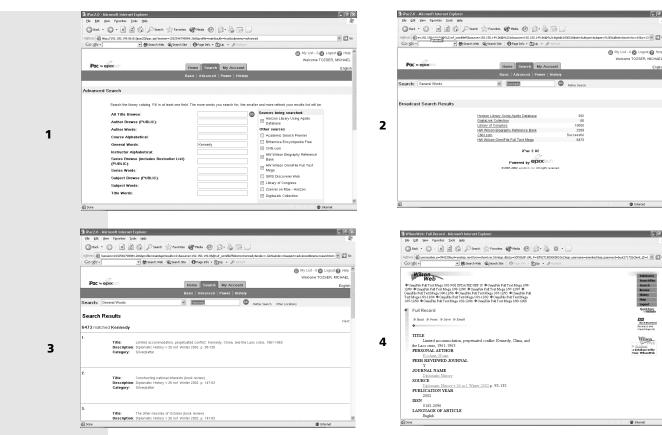
iPAC, the patron access catalog offered by epixtech for its Dynix and Horizon with Sunrise products, offers a multiprotocol single-search tool that can be accessed by a PC or Mac, Palm Pilot (personal digital assistants—PDAs), or Z39.50 client, but not a Web TV. The protocols supported are Z39.50, HTTP, and XMI

Results are returned in native mode when the target database conforms to Z39.50. Screen scraping is used when the target database does not conform to Z39.50.

MARC, EAD, and Dublin core formats also are supported.

Scoping can be fixed by staff at several levels, including "everywhere," and can be broadened or narrowed by patrons at any point in the search. A

**Scoping** is the ability of a user to determine the breadth of a search.



The search sequence for epixtech.

search can be limited by language, country of origin, geographic region, year of creation, or range of years of creation. A search can be refined based on a previous search result. Merging and deduping of search results is planned for release no later than the fourth quarter of 2003. Relevancy is determined by the frequency of a keyword in the search result.

No date has been set for the inclusion of a thesaurus. Templates are available for setting up user interfaces and tying them to back-end services. Adding external databases is possible by merely typing URLs into the system. The single-search capability is an integral part of the iPAC patron access catalog so it adds no cost.

Patron authentication is available as a separately priced product. It consists of an interface to the patron database of the automated library system. The vendor is working to more fully integrate patron authentication with the rest of the portal so only one logon will be required.

Linking is available using WebFeat's translators, the software that links the search entered by the user to electronic sources of information. The translators are the only part of the WebFeat product that epixtech uses in its portal product. Content enhancement is available from Syndetic Solutions. The vendor quotes content enhancement as separate line item in its bids.

No date has been set for conformity to the OpenURL standard.

epixtech's portal is the least expensive one on the market because it has no separate charge for the single-search capability. Only patron authentication, the WebFeat translators, and the content enhancement product of Syndetic Solutions are not included in the price of the portal.

The price of patron authentication will not be established until the product has been rewritten. The translators cost up to \$1,000 in the first year and up to \$850 in future years, but the unit price drops as the number of translators is increased. The Syndetic Solutions product costs about 10 cents per record.

Contact: epixtech, Inc.

400 W. 5050 North

Provo, UT 84064

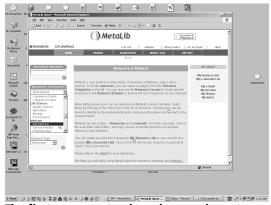
**Tel:** 800-288-8020

**Fax:** 801-223-5202

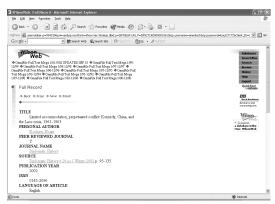
Web: www.epixtech.com

# **Ex Libris**

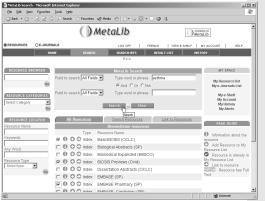
Ex Libris offers a portal either as an integral part of its automated library system or as a standalone product. Its major sales have been to statewide academic systems or consortia that have many different automated library systems, including the State University of New York, California State Universities, and the Washington Research Libraries Consortium.



The first screen not only welcomes the patron but allows subject category search selection. The patron also may personalize the portal using the options on the right.



A results summary.



The resources in the category is selected: biomedicine.



A display of brief records. The last step would be the display of the full record.

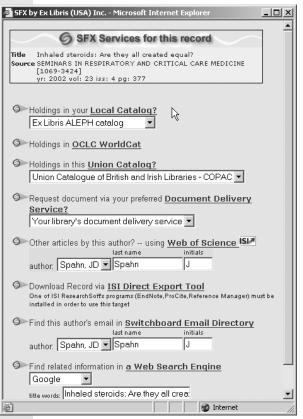
The search sequence for MetaLib from Ex Libris.

Two products, MetaLib and SFX, together constitute a portal. MetaLib is a gateway to any type of resource, locally hosted or off-site, free or licensed. It conforms to the Z39.50, HTTP, and XML protocols.

It supports MARC, EAD, and Dublin Core formats.

Screen scraping is used when possible, but a native interface is used to access records in EAD format. MetaLib has no provision for loading a thesaurus.

MetaLib includes patron authentication either within MetaLib or through a link to the patron file in a library's automated library system.



A library determines which links are available on the SFX linking screen.

Contact: Ex Libris (USA) Inc.

1919 N. Sheffield Ave.

Chicago, IL 60657

Tel: 773-404-5527

Fax: 773-404-5601

Web: www.exlibris-usa.com

SFX allows a library to link bibliographic records to the full text of an article, provides links to preselected websites, and links to preferred document delivery suppliers and other services. SFX permits context-sensitive linking among these resources so the target of a link depends on the resource and library facility from which the user is requesting the link. Users will not be linked to a new information source to which they do not have rights of access.

SFX contains a product component called Knowledgebase that has tools to facilitate linking and a collection of more than 360 preconfigured links. OpenURL is supported. Content enhancement by Syndetic Solutions is available at additional cost.

Pricing is based on the number of fulltime-equivalent (FTE) faculty students. A small library with fewer than 1,000 FTE can obtain both MetaLib and SFX for about \$10,000 if it participates in a consortium. Annual costs for application software maintenance, Oracle support, and Knowledgebase updates are about 25% of the first-year costs.

# **Gaylord**

Polaris, Gaylord's client-server-based automated library system, is claimed to incorporate a portal in the PowerPAC patron access catalog, but it still lacks many features. Although it can be used as a single-search tool, it has no

multiple levels of scoping for patrons to determine how widely the search is to be broadcast, nor is that capability planned.

The Z39.50 protocol is supported, as are HTML and XML.

Only MARC is supported at this time, but Gaylord has plans to support EAD and Dublin Core by the end of 2003.

Search limiting is available, but it does not include country of origin, geographic region, year of creation, or range of years of creation. No date has been set for merging and deduping of search results. Relevancy ranking is planned for an unspecified future date. An integrated thesaurus is supplied by Inso Intelliscope in PowerPAC, and the product can use online thesauri.

Remote patron authentication is in planning, but no general release date has been set.

Linking is available using WebFeat. No templates are available for setting up user interfaces and tying them to back-end services. A collection of preloaded links is available. Content enhancement using data from Syndetic Solutions is available.

Open URL support is in planning, but no firm date is committed.

**Contact:** Gaylord Information Systems

Box 4901

Syracuse, NY 13221

Tel: 800-272-3414 Fax: 315-457-5883

Web: www.gaylord.com/automation

**Innovative Interfaces** 

The vendor offers MAP (Millennium Access Plus), a combination of three products, available individually or bundled:

- Metafind
- Web Access Management
- WebBridge

MetaFind is the universal single-search interface and is built on MuseSearch. It links users directly to external databases, including Z39.50, HTTP, and SQL.

MARC, EAD, Dublin Core, TEI, and XML format are accommodated.

Access can be from PCs or Macs with browsers, PDAs, or Z39.50 clients. The scope of a search can be preset for specific groups of users, with workstations in a particular location initially retrieving only titles in that location. The library has the option to confine users from specific locations to a particular scope, or to set a default scope but allow users to change the scope of their search. The scope can be:

- All of a library's local resources
- All of the library's resources in an area
- All of a library's local resources and the online databases to which it subscribes

Inso is a British company that produces a search enhancer built on a thesaurus. An organization can load an existing thesaurus or build one using the tools in the Intelliscope product. It is available not only in English, but also in French, German, and Spanish (www.inso.com).

- All the foregoing plus selected URLs
- "Everywhere," including the entire Internet

Loading a thesaurus is possible if it conforms to the MARC 21 format. If a non-MARC thesaurus is loaded, it will be outside the scope of the automated authorities processing program.

Users can limit a search by language, materials type, country of origin, geographic region, year of creation, range of year of creation, and or where the item is located. Results lists are unified and returned in a library-customized interface, identified by source, and hyperlinked to hits at the source.



An example of a MetaFind search screen (used with permission of the University of Houston Libraries).

Relevancy ranking is not supported in MetaFind but is available by using the advanced search feature of the Millennium Alta Vista search engine.

Innovative appears to be the only vendor that forewarns prospective purchasers that subject searching may be handicapped since different thesauri are used by the databases accessed in a single search. Typing synonyms for the search terms obtains better results.

Web Access Management (WAM) is a remote patron authentication product that enables library users from any place to access Web-based licensed databases as

well as many nonlicensed resources. Although WAM uses a proxy server, as do most portals, the product is unique because instead of the browser specifying the proxy, the URL itself redirects the user through the portal. The advantage of this method is that the library users do not have to configure a proxy in their browser to use licensed library resources. The component also may be used to apply chargebacks to users who have accessed databases only available for a fee.

WebBridge is the linking component. It links users directly from a bibliographic record display to related resources, such as full-text journal articles or book reviews, based on library-managed tables. If content enhancement is supplied by Innovative, it is Syndetics' product.

The vendor builds the page layouts for the initial user interface, one that accesses not only all in-house applications but also external ones identified before the initial installation. Templates and graphical utilities for setting up user interfaces and tying them to back-end services are in development. A collection of preloaded links is in development (more than 300 have already been defined), but no date for general release has been announced.

Among the libraries that have implemented MAP are the Westerville Public Library and Brock University.

**Contact:** Innovative Interfaces

5850 Shellmound Way

Emeryville, CA 94608

**Tel:** 800-917-4774 **Fax:** 510-450-6350 **Web:** www.iii.com

# Sirsi

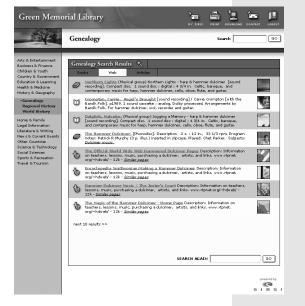
Sirsi's iBistro, or the academic version known as iLink, was one of the first modules to be called a portal, but initially its function was limited to supporting a single-search of many Z39.50-compliant resources. The company plans to introduce a true portal in January 2003. The product will be available bundled or as three separate components: single-search, patron authentication, and linking. The name of the portal and the names of the components have not yet been announced.

The single-search feature will be Z39.50-, HTTP-, SQL-, and XML-compliant. It will support the MARC, EAD, and Dublin Core formats. Users will be able to search from a PC or Mac with a browser, a PDA, or a Z39.50 client. Many search keys and search limiting options will be available, and users will be able to merge and dedupe search results. Relevancy ranking will be supported based on the frequency with which search keys appear in a record.



The opening screen (above) gives patrons the option of doing a keyword search using the box at the top right or selecting a category from the center of the screen

The results screen *(right)* offers patrons the option of customizing the portal.



Loading a thesaurus or accessing an online thesaurus will facilitate searching.

Patron authentication is available, but it will be redone with more options. The ability to even see a gateway will be via login and a password. Database providers' requirements can be embedded in the gateway URL.

A linking tool, Sirsi's own product, will be included, but the company will contract with a third-party vendor to supply a knowledge base of thousands of preselected URLs to help libraries create links.

OpenURL support is in testing.

Content enhancement (tables of contents, jacket art, reviews) is available from Syndetic Solutions. Sirsi does not support the mounting of tables of

ebrary, www.ebrary.com

contents, jacket art, or other enhancements from vendors other than Syndetic Solutions. The company has signed a contract with ebrary to provide access to that company's database of more than 10,000 books from more than 130 publishers.

The vendor will build the page layouts for the initial user interface—ones that access not only all in-house applications but also external ones identified before initial installation.

Each user can create My Bistro, a personalized access center in which the user identifies favorite authors and subjects so that he or she can obtain alerts about new acquisitions.

Contact: Sirsi Corp.

101 Washington St. SE

Huntsville, AL 35801

Tel: 800-917-4774

Fax: 256-704-7007

Web: www.sirsi.com

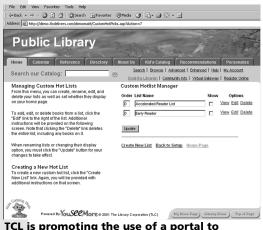
### **TLC**

YouSeeMore, a portal with enhanced search capability is available from TLC for both the Library. Solution and CARL. Solution products. The portal uses MuseSearch from MuseGlobal. Multiprotocol searching can be undertaken using a PC or Mac with a Web browser, a Palm Pilot (or other PDA), a Z39.50 client, or Web TV. The supported protocols are Z39.50, HTTP, and XML.

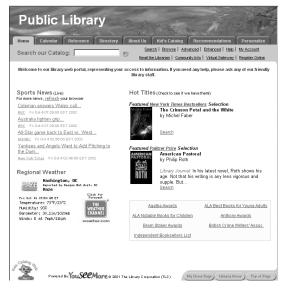
The portal can be tailored for different categories of users and for individual staff members.

All material types can be accessed, but only the MARC format is supported in the TLC implementation, not EAD or Dublin Core.

Multiple levels of scoping include: all records of the library, all records of



TCL is promoting the use of a portal to feature "hotlists," titles of bestsellers or books of particular local interest. The screen above shows what the patron would see. The screen to the right shows how a library would set up the list.



libraries in the area, all records of libraries in the area and records in online subscription reference services, and "everywhere." Patrons can broaden or narrow a search at any point in the search. The system merges and dedupes search results and offers multiple options for merging and deduping search results. Relevancy ranking is done on the number of times a particular word or words are used in a document. Maintaining a thesaurus on the portal is possible, or users can connect to a third-party thesaurus on the Web.

Patron authentication is provided.

Templates and graphical utilities are provided for setting up user interfaces and tying them to back-end services using the cataloging module and the 856 tag. A collection of preloaded links is available. Adding external databases is possible by typing URLs into the system.

Libraries may specify that WebFeat translators be used for the links. Content enhancement from Informata or Syndetic Solutions is available as an extracost option. More than a dozen new book lists are available on a subscription basis.

OpenURL conformity is under consideration, but development work has not yet begun.

TLC has done more than most vendors with personal saved

searches so a patron can create stored searches that are of ongoing interest to the user for later access. After login, all items relating to the saved search topic display instantly. A patron online registration component enables users to pay fines and receive e-mail notices.

**Contact:** TLC Research Park

Inwood, WV 25428

**Tel:** 800-325-7759 **Fax:** 304-229-0295

Web: www.TLCdelivers.com

### 🗿 Corvallis-Benton County Public Library - Microsoft Internet Explo □ Back • → → ② ② ③ ③ ② Search ■ Favorites ② Media ③ □ □ • ■ Address <equation-block> http://library.ci.corvallis.or.us/corvallis/default.asp Corvallis-Benton County Public Library Branch Libraries: Alsea | Monroe | Philomath | Bookmobile Hot Titles (Check to see if we have them?) En Español For Kids Servicios & Recursos Catalog | Storytimes | Sites Featured New York Times Bestsellers Selection A Mind at a Time Quick Links by Mel Levine Publishers Weekly: Children have different ways of learning, argues Levine, a professor of pediatrics at the Univer... Catalog | My Account Contact Us | Locations & Hours Events, Classes & Programs Ask a Librarian Purchase / ILL Requests CRCPL Book Club Magazine articles & more Select your top 6 choice Independent Booksellers List Publishers Weekly Bestsellers Teen 'scape Sites By Subject ibrary's Financial Condition Search Google Rating Zone City of Corvallis Benton County Government Updated: October 3, 2002 Please mail us your comments Powered By: You See More @ The Library Corporation (TLC) Library Home Top of Page

A library can tailer the interface to fit is own priorities. The Corvallis-Benton County (Ore.) Public Library's opening screen shows the "sites by subject" option, which is the way patrons can go to selected URLs and online reference services the library subscribes to.

# **VTLS**

VTLS introduced the Chameleon iPortal in October 2001. The product is highly modular so a library must choose the breadth of its implementation at the time of purchase. The elements are:

Broadcast searching across multiple Z39.50 databases



A patron portal as presented by VTLS in its product literature. Not only do patrons have many searching options, but they also have an option to select from different types of popular searches. When a patron retrieves a bibliographic record, enriched content displas to the right. If "extended information" is selected, the patron can learn more about the title or go to Amazon or Barnes & Noble to purchase a copy.

- Access to subscription or external databases
- Thesaurus search
- E-commerce
- A library calendar of events
- Selective dissemination of information services
- Integrated message board, forums, and chat rooms
- Conformity to the Open Archives Initiative to facilitate access to archival materials

Some of these features are included in the base price; others are at additional cost.

Thesaurus searching is supported, both with a locally loaded thesaurus and with access to online thesauri. VTLS will load any thesaurus a library has. The MeSH thesaurus and a military thesaurus are provided with the product.

One of the special features of the VTLS portal is a series of customized user interface using skins, which are screen options that define the look, feel, and functionality of a user interface. The skins can be by level of user, special needs user (large print), and broad subject area.

An optional linking component is called Extended Bibliographic Services, which is an unidentified

third-party product. (Knowing the third-party product name would allow libraries to compare among vendors that use the same third-party product.) The links include contents enhancement from Syndetic Solutions.

Pricing is complex because so many components are available to the portal.

**Contact:** VTLS 1701 Kraft Drive

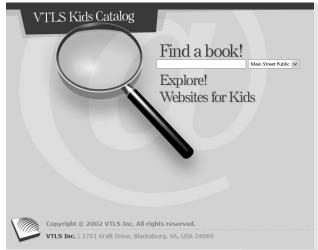
Blacksburg, VA 24060

Tel: 800-468-8857

**Fax:** 540-557-1210 **Web:** www.vtls.com



One library, the Peddie School in New Jersey, chose to tailor the portal for its high school students. In addition to providing several search options, the portal emphasizes news.



The portal can be tailored to a particular type of patron. The Kids Portal is simple and provides for only a simple keyword search.