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ATG Interviews Jane Burke, Vice President, Strategic Initiatives, ProQuest and Serials Solutions

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Vice President, Strategic Initiatives, ProQuest and Serials Solutions

by **Tom Gilson** (Associate Editor, *Against the Grain*) <gilson@cofc.edu>

and **Katina Strauch** (Editor, *Against the Grain*) <kstrauch@comcast.net>

ATG: *We've been hearing a lot about "Web-scale management," but what exactly does that phrase mean? And what unique elements does Serials Solutions' Web-scale management product Intota bring to the table? How does it differ from the solutions being offered by competitors like OCLC?*

JB: "Web-scale management" means a dramatic change in how we manage library collections. Instead of each library having its own isolated Integrated Library System (ILS), the functionality is provided from **Serials Solutions'** powerful platform over the Internet. While we take this model of computing for granted in many parts of our lives (such as travel sites, shopping sites, etc.), it is different than the way that libraries have traditionally managed their collections.

"Web-scale" of course, is a term first invented by **Amazon** to explain how it was going to be the Internet's book store. Summon from **Serials Solutions** was the first "Web-scale" discovery service, offered completely on our platform with a unified index across millions of records.

"Web-scale" means that the library no longer has to be concerned about hardware and hardware operations and maintenance. The necessary hardware, operating system, and maintenance are provided by the vendor as part of its "library services platform" (a great phrase from **Marshall Breeding**).

The benefits of Web-scale management go beyond the hardware, though. There are different models of "Web-scale." At **Serials Solutions**, the model is Software-as-a-Service, which means that, not only is the hardware centrally-provisioned, but so is the application and the knowledgebase. This allows frequent updates to functionality and supports integrated access to our knowledgebase of authoritative data. The entire solution is accessed via a Web browser, eliminating workstation-based client software. Web-scale is simply more efficient than the current ILS model.

The economic model for Web-scale is also different. Instead of a large perpetual license and expensive hardware, Web-scale is usually offered as a subscription service. This makes it more feasible to migrate sooner to the new model. In fact, Intota will be a subscription service.

Intota is a Web-scale collection management system, currently in development at **Serials Solutions**. It is being built from the ground up. It is unique in five aspects:

First, **unified, intelligent workflows** — Intota is being built to provide unified collection management. Instead of requiring separate workflows for print and electronic, the solution is designed to provide efficient and effective op-



erations for all formats within a single solution. Rather than the old module approach, which is inherently print-oriented, we are developing workflows that allow libraries to be very efficient, especially with e-resources and packages. Extensive profiling allows the library to have Intota perform many operations automatically, freeing up more staff time. Because **Serials Solutions** has no legacy of ILS, we are able to look at this with a very modern approach.

Second, **knowledgebase** — **Serials Solutions** invented the idea of a centrally-managed database of metadata for libraries 12 years ago when **Peter McCracken**, a working serials librarian, founded the company. With Intota, we are extending our vision to include bibliographic, authority, and other types of data, in addition to providers and packages. Our experience in managing and updating a knowledgebase is unique in the industry, and Intota will take full advantage of the knowledgebase. Intota is, in fact, built around the knowledgebase from the very beginning. The knowledgebase is being redeveloped and is designed using the FRBR/RDA conceptual framework, which provides a range of new opportunities.

Third, **assessment** — Libraries need to illustrate their worth more than ever before. Intota will offer integrated reporting and assessment throughout. More than just "reporting," assessment is being built in from the beginning. Intota libraries will not only have a broad range of views into their collections and usage but will be able to export data for use in campus data warehouse applications. In this way it will support the library contribution to student outcomes.

Fourth, **interoperability** — During our research for Intota, we heard many stories about

the ILS' inability to work with other campus applications, particularly student systems and financial systems. We also know that electronic ordering and invoicing are key and need to be brought out of batch mode. And, of course, Intota needs to communicate tightly with Summon, our discovery service. With Intota we are building in the standards and APIs from the beginning to ensure that Intota can communicate seamlessly with many applications.

Finally, **built and supported by Serials Solutions** — Today's library collection is predominantly digital. **Serials Solutions** understands e-resources better than any other supplier. We are experienced in SaaS and in Knowledgebase. We don't have a legacy of old ILS viewpoints to overcome. And our support services consistently receive high marks from customers around the world.

As to your question about **OCLC**, I would say that both offerings are designed from a "library services platform" perspective. Intota is different from **OCLC WorldShare** in a number of ways. The most important is Intota's ability to create and store local changes to bibliographic and authority records. Another is our rich knowledgebase and experience in curating it. Both organizations are dedicated to helping libraries be more effective so they can address their new mission.

That's the real point, of course. In an era of electronic collections, the library's warehousing function is no longer essential to the institution. The library needs to prove its value through other activities, such as being embedded in the departments and in academic projects and providing instructional design assistance. Intota's goal is to allow the library to focus on its new mission.

ATG: *Why should libraries worry about Web-scale management? What are the benefits to employing a new solution to library workflows and systems? With many libraries losing funds and staff, is now really the time to be spending even more money on new services?*

JB: Libraries need to move to Web-scale management specifically because support for the library is in question. Library staff need to be focused on serving users and programs, not doing repetitive tasks. The ILS, built for print collections and print warehousing activities, requires processes that don't provide the efficiencies that libraries need today. What we have observed is that libraries have built layers of redundancy around the ILS to compensate for its increasing shortcomings.

Unified, intelligent workflows will create more efficient operations in the library. We believe that an Intota library will save many

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hours that can be re-purposed. Intota will also provide data about the usage of the entire collection, allowing the library to make better decisions. Both of these are real return-on-investment items needed in this budget climate.

As for “spending even more money on new services,” I don’t see it that way. The library should look carefully at all of the systems it is using now — ERM, ILS, cataloging services, and its hardware platform. A modern system with unified workflows on a SaaS platform will displace many of those costs.

ATG: *How does Web-scale management fit with the discoverability part of the equation? Are there places where your Web-scale management intersects with and complements Summon? Will it complement other vendor discovery systems? Will it integrate with other library services like interlibrary loan?*

JB: Intota definitely will be tightly integrated with Summon. We see the discovery service as the patron access portion of the library’s automation solution. Intota will display transaction information to users through Summon and gather requests from Summon. We are also committed to having Intota work with other discovery services, and we are building the APIs to do that from the beginning. Of course, because Summon and Intota are our products and both share the knowledgebase, they will be “better together.”

Intota will integrate with a number of services, including interlibrary loan. The APIs for such interactions are also being incorporated from the beginning.

ATG: *Did you learn anything in developing and implementing Summon that had an impact on how you came to envision your Web-scale management solution, Intota?*

JB: Absolutely. Beyond simply the vision of “Web-scale,” we have learned a number of lessons to apply to Intota. First of all, the scale of search transactions from Summon is huge — more than 250 million searches in 2011. Knowing we can manage that load makes us confident about managing the Intota transactions.

Secondly, we have maintained a pace of very frequent updates for Summon — every three to four weeks. This makes us confident that we can do the same with Intota.

Thirdly, we have learned how to manage many implementation projects at one time. We can utilize our project implementation team’s expertise for Intota, building on what we’ve learned from implementing and supporting Summon. And satisfaction with our support team consistently is rated at 90% or above by our customers.

Finally, the ingestion engine that we built for Summon is very powerful. Summon ingests lots of records from publishers and libraries every day. That’s a great base for building Intota databases.

ATG: *Is there anything that you learned in the development of Intota that has influenced the way you think about discovery systems?*

against the grain people profile

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Jane Burke

BORN AND LIVED: In the Chicago area. I grew up in the town I live in now — Naperville, Illinois. I lived in Boston for a time and also in Seattle for several years.

EARLY LIFE: My undergraduate degree is from a college that went out of business the next year — so my BA is from an unaccredited, non-existent school. I went right on to library school and then got an MBA from **Northwestern University**.

PROFESSIONAL CAREER AND ACTIVITIES: I have lots of experience in library automation, following several years as a public services librarian at the **Cook Memorial Library** in Libertyville, Illinois. I went to work for the first commercial library automation company and then was hired to create the technology transfer company for commercializing a system built by **Northwestern University Library**. From there, I was one of the founders and the CEO of **Endeavor Information Systems**, which created the Voyager system (now owned by **ExLibris**). After a short stint as a bookseller at **Barnes and Noble**, I joined **ProQuest** in 2005 as the General Manager of **Serials Solutions**.

FAMILY: I have been married to my husband **Mike O’Brien** for 30 years. He is my hero.

IN MY SPARE TIME: I collect — all sorts of stuff. I love garage sales and flea markets.

FAVORITE BOOKS: I read at least three books a week, but it’s all fiction.

PHILOSOPHY: Libraries are important. We all need to work to keep libraries relevant.

MOST MEMORABLE CAREER ACHIEVEMENT: I have many wonderful memories of working with libraries. I treasure all of them.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I believe that libraries will have successfully re-invented themselves. Academic libraries will be working closely with faculty in new ways, lending their expertise to support the curriculum. Public libraries will have found a central place in their communities, publishing local information and supporting learning at all levels. 🌱

JB: Yes. The obvious lesson is the stark difference between patron access and staff access in today’s environment. The ILS and its OPAC were architected around individual print items. Users searched for individual books and journals, and the library bought them individually. In the old ILS model, we expected patrons to search the way that staff did — specific indexes and preset limits. Everyone was dealing with individual bibliographic entities. That is not a valid approach for today’s users or today’s library purchasing environment.

Libraries today primarily buy packages of e-resources, but users want access at the object level within those packages. The orientation of the two solutions is very different, even while they must communicate with each other.

A second point is about sharing physical resources. Intota’s architecture makes it very easy to share resources among Intota subscribers. Since all of the records and transactions are on the same platform, it is easy to provide for resource sharing, which is difficult and expensive in the ILS model. But to facilitate this, Summon must support the requesting functions and user feedback functions.

ATG: *Speaking of Intota, it was recently released in beta. How is it going so far? Have you learned anything yet that might lead you to consider refinements?*

JB: We are making good progress in developing Intota. In June, we made the first functions available in our testing environment to our six Development Partners. The second iteration was released to them in September. We are adding new functions to that environment frequently.

It is going well, and we are definitely getting great suggestions from our Development Partners. Lots of them! Some of them are being implemented right away because they are logical improvements to the user interface and navigation. Others are definitely being considered for future refinements.

ATG: *You recently announced some other new service features and enhancements like 360 Resource Manager and 360 Counter. What are they, and how do they benefit libraries processes? Are they part of your vision for Web-scale management? Do they have any bearing on Discovery? If not, what new features and enhancements do?*

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JB: 360 Resource Manager and 360 Counter are services that **Serials Solutions** has offered for a number of years. Together, they make up the Serials Solution ERM Solution. 360 Resource Manager manages the information about an e-resource through its lifecycle in the library. 360 Counter provides for consolidating and analyzing usage data for these resources. We have been aggressively enhancing those services over the last 18 months, with functions that help libraries get data into our ERM solution, help them use that data more efficiently, and provide an improved user experience. We will continue to enhance our ERM solution.

The market is evolving, and we can use what we learn in building Intota to make all of our products work better. Of course, Intota is taking this to a new level, but we are addressing known challenges in our existing services as well.

For example, we have just announced a license template library in 360 Resource Manager to make the entry of license data more streamlined because we know that libraries were still spending too much time entering license data. Similarly, enhancements to 360 Counter improve how libraries can utilize and communicate usage data.

The functions performed by 360 Resource Manager and 360 Counter, as well as the 360 MARC Record service, are all part of the vision for Intota. Eventually, all of the functions of these existing services will be also included in Intota.

The ERM Solution also relates to Summon. When a library chooses to acquire an e-resource, it becomes part of their list of e-resources in these services. At that point, the library specifies whether it also wants the resource searchable in Summon. So, these services are actually a part of the current Rights Management function that Summon checks before displaying results.

ATG: *What realistically would you say is the shelf-life of these services with new applications, platforms, and products coming out all the time?*

JB: Libraries will set their own timeframes for migrating to a Web-scale collection management solution. Not all libraries will move off the ILS in the short term. They need good solutions for managing their e-resources today because their ILS doesn't do it. E-resources consume the majority of every academic library's acquisitions budget today. So we expect to support the ERM Solution for the foreseeable future.

Plus, using the ERM Solution today gets the data about the e-resources "converted" into a standard definition. It makes the data ready for migration to a Web-scale management solution, which will make the overall migration shorter and easier for the library. 🌱

against the grain

publisher profile

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AFFILIATED COMPANIES: **Serials Solutions** is a **ProQuest** business, headquartered in Seattle, Washington. **ProQuest** is an energetic, fast-growing organization, which includes the **Bowker**, **Dialog**, **ebrary**, and notable research tools such as the RefWorks, Udini, and Pivot services.

OFFICERS: **Serials Solutions** is privately held and does not have officers.

ASSOCIATION MEMBERSHIPS: The company is active in many industry organizations, associations, and standards bodies.

VITAL INFORMATION: **Serials Solutions** provides industry-leading technology solutions for libraries worldwide. The company helps libraries work better by providing innovative, practical Software-as-a-Service (SaaS) solutions for discovery and management. Driven by a comprehensive knowledgebase and coupled with unparalleled client support services, these solutions uniquely merge unsurpassed understanding of libraries. **Serials Solutions** is a dedicated partner of libraries working to remain vital and relevant to their users and communities.

KEY PRODUCTS AND SERVICES:

Data Solutions — **Serials Solutions'** comprehensive, managed knowledgebase powers our discovery and management solutions. Our expert team of librarians gathers, vets and verifies, and enhances information from multiple sources. The result is a knowledgebase that delivers authoritative, enriched, and continuously-updated data that makes your resources discoverable, manageable, and reportable. Products include: KnowledgeWorks, The Summon Service Index, Ulrich's, and Ulrichsweb.

Management Solutions — Built on a foundation of leadership in e-resource management and assessment services, **Serials Solutions'** management solutions put you in control of the complexities of managing your library and collections. From selection to assessment, our integrated services streamline workflows. Authoritative data and centralized reporting allow for data-driven decision-making and enable you to demonstrate the value of your library and further your mission. Products include: Intota, 360 Resource Manager, 360 Counter, 360 Core, 360 MARC Updates, Ulrichsweb, Ulrich's Serials Analysis System, and Ulrich's XML Data Service.

Discovery Solutions — **Serials Solutions'** discovery solutions instill user confidence in the library and invigorate the research experience. From award-winning Web-scale discovery to linking, researchers discover and gain access to relevant information through our services that employ emerging technologies and leading Web interface design to deliver a more rewarding user experience and a greater return on investment for your library. Products include: Summon Discovery Service, 360 Link, 360 Search, 360 Core, 360 MARC Updates, AquaBrowser, and Ulrich's XML Data Service.

CORE MARKETS/CLIENTELE: **Serials Solutions** serves more than 3,000 libraries worldwide, covering 77 countries and support in more than ten languages, with a focus on academic libraries.

NUMBER OF EMPLOYEES: 240+ and growing.

ADDITIONAL ITEMS OF INTEREST TO ATG READERS: **Serials Solutions** is developing Intota, a new Web-scale solution that will address the work flow challenges facing libraries. This new solution is based on extensive research, librarian participation and input from six development partners, and **Serials Solutions'** long history of managing e-resources.

The Summon discovery service, used by more than 500 libraries in more than 40 countries, is the first and only discovery service based on a single, unified index of content, leveraging the richest possible metadata from multiple sources to improve discovery across the breadth of a library's collection. In just three years, the Summon unified index has grown from 200 million items to more than one billion items — with the vast majority of article and book content full-text searchable. 🌱