Hybrid library requirements defined by HeadLine

This listing includes functionality that has been included within the PIE and also functionality that the project has identified as being desirable (*) to include.

General requirements of hybrid library systems

- Modular nature of software – so that a library can choose to implement a single, or a combination of hybrid library functionality.
- A uniform Interface – to allow the provision of access to the whole range of library resources, systems and services via the same interface.
- Accessible from anywhere at any time.
- A single point of authentication, then seamless access to password protected resources. Hence users log into the system (once) and are then able to use resources for which they have access rights.*
- User metadata module to allow metadata to be provided by existing sources (e.g. LDAP, the LIMS etc.)
- A system that knows where the user is, so that the user can see which resource locations are available to them from their current location (e.g. from off campus).
- The metadata associated with collection level resources to be contained within a relational database (RDB) that allows ease of up-dating (it can be edited from on or off campus), and that eliminates duplication of effort (resources can appear many times in the system, but are only up-dated in one place in the RDB).
- The ability to share the RDB with multiple institutions.
- Search functionality that allows the resource metadata to be searched therefore enabling the user to locate resources of relevance to their research.
- Search functionality that allows searching within collection level resources and the presentation of results within the hybrid library system interface.*
- Cross-searching functionality that allows searching across both Z39.50 and other protocols.*
- Subject/course related discussion areas to allow users to contact library staff and, in the case of course areas, to interact with their peers.
- Automated creation of resource lists alphabetically, by subject and by type (e.g. journals).
- Current awareness services, such as the automatic generation of lists of resources recently added to the system.
- The ability to generate management information from the system e.g. with regard to resource usage or numbers of users using the system.

Discovery-to-access requirements

Discovery-to-access tools help users to go from the discovery of for example, a bibliographic reference to a way of accessing the referenced item (which may be a book, a journal article, a working paper etc.) and then to the item itself.

- Provide or facilitate access to the broad range of information resource types (e.g. shelved resources such as printed journals or books, and resources available in electronic formats).
- The ability to launch external resources from within the system – e.g. CD-ROMs.
- A system that can display multiple locations of the same resource and metadata associated with holdings and depth. For example the last 20 years of a particular journal may exist on the library shelf, the last 10 years of the same journal may exist in abstract form on a CD-rom, and also in full-text form via a web-based service.
- A document delivery component that allows users to request items that are not currently available in electronic form. For example, HeadLine's EEDD (End-user Electronic Document Delivery) module allows users to request an electronic copy of a print

document (such as a journal that is not available in electronic form via their library), via their library, or via a library within the EEDD scheme.

Personalisation and customisation requirements

Personalisation requirements

Personalisation functionality allows users to create their own "library", their Personal Information Environment, their own area within the system. Users can build collections of resources and create current awareness services that are personally relevant to them and that they can share with other PIE users with similar interests if they wish.

- The ability for the user to build their own collections of resources within their own area by adding existing resources (those already provided by the system) to this area.
- The ability for the user to add resources that aren't currently contained within the RDB (e.g. a favourite website) to their personal area.
- The ability to import links contained within favourites/bookmark files into the personal area.*
- The ability to export "atomic" resources (e.g. bibliographic references) from the personal area or from the search area to bibliographic software.*
- The ability for the user to attach notes to resources contained within their personal area – e.g. "Remember to read this article before writing essay".
- The ability to save a list of search results to the personal area and also to edit a saved search.
- Ability to add individual resources contained within search results to their personal area.
- Personalised current awareness - searches that can be re-run automatically at a specified (regular) time (e.g. daily).
- The ability for the user to share their resource collections with other system users by assigning read and perhaps also edit rights to other users.
- Ability to personalise the look of their personal area – the colours etc.
- Where relevant, the ability to change the title/name of the personal area, collection names in personal area, names of resources in personal area etc.

Customisation requirements

Broadly, the customisation functionality enables the system administrators (Library staff) to tailor the system to the needs of the Library and its users.

- Ability for the Library to customise the look of the interface – inclusion of the Institutional logo, institution specific urls, colour scheme etc.
- The ability to customise the range of functionality available to users.
- The ability for the institution to tailor system's help files to their needs where relevant and the ability to add the URLs of help files associated with particular resources that are provided via the system.
- The ability to create different "user groups" and to provide groups with different levels of access rights to resource locations and also to particular areas (e.g. subject areas or course areas). This helps to reduce information overload by avoiding the presentation of resources that are not relevant to particular users.
- The ability to catalogue an unlimited number of collection level resources within the RDB and to create unlimited collections of resources within the system.
- The ability to import resource metadata from existing sources.
- The ability to customise the interface so that un-authorised users are able to browse the collections and access unrestricted resources.
- The ability to customise the names of resources – e.g. some libraries refer to "ABI Inform Global" whereas others know this as "Proquest".

- The resource metadata to be editable from any location (from on or off campus).