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Open Source Momentum Continues

Smart Libraries Newsletter

Smart Libraries Newsletter delivers hard data and innovative insights about the world of library technology, every month.

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Smart Libraries

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Open Source Momentum Continues

One of the key characteristics of the current phase of library automation involves an unprecedented willingness for libraries to implement open source software for their core automation environment. We are seeing libraries of many types and sizes moving to open source ILS products, especially Koha and Evergreen. Both of these products, while offered as open source, also have options for support services through commercial companies, including LibLime, Care Affiliates, Index Data, and Equinox. Recently two major library organizations selected Koha as their next automation system.

Aloha, Koha

Howard County Library headquartered in Columbia, Maryland selected Koha ZOOM to replace its existing SirsiDynix Horizon system. Howard County stands among the middle tier of public libraries, with six branches, combined collections of about a million items, with annual circulation of about 4.7 million transactions. This library is one of the largest to date to select Koha. One of the concerns of these open source systems involves their ability to scale to the demands of large libraries, both in terms of performance and robustness of features. A successful implementation at the Howard County Library will strengthen the position of Koha as an automation system capable of serving libraries of this size.

The following table shows how Howard County compares to some of the other U.S. public libraries that currently use Koha. Apart from this group, the Near East University in Cyprus has implemented Koha for its collection of about 1.5 million items.

Library	Service Population	Collection size	Annual Circulation
Howard County Library	266,300	998,613	4,787,081
Stowe-Munroe Falls	37,890	117,368	746,169
Nelsonville Public Library	62,062	254,987	597,121
Crawford County System	88,696	246,616	518,382
Barberton Public Library	28,191	105,211	165,672
West Liberty Public	4,316	17,784	30,571

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The Howard County Library has earned a reputation for delivering exceptional service to its patrons. According to Hennen's American Public Library Ratings (HAPLR), in 2006 Howard County Library ranked second in the country among libraries serving populations up to 250,000.

The selection of Koha comes after a rocky experience with its current automation vendor. Howard County migrated to SirsiDynix Horizon on August 31, 2005 from a Dynix Classic system in place since 1993. The library experienced considerable difficulties in the transition from Dynix Classic to Horizon. According to a newspaper report in the Howard County Times (Leslie, Katie, Howard County Times, September 29, 2005), the Horizon software failed to perform as expected when it was placed into production use, resulting in patrons not being able to access many features to which they were accustomed with the previous Dynix system. The issues were largely resolved by the end of September 2005.

The Howard County Library has supplemented its Horizon integrated library system with automation products from other vendors, especially The Library Corporation (TLC). In January 2006 TLC announced that Howard County had selected the AquaBrowser interface along with its AuthorityWorks service to derive authority records for the library's bibliographic database. In February 2007, the library took its involvement with TLC a step further through the implementation of its Online Selection and Acquisitions (OSA) product. OSA

allows the library to do much of its selection and ordering of materials and other acquisitions activities through a remotely-hosted service rather than through a traditional ILS acquisitions module.

After only two years on Horizon, the library has decided to take quite a different turn. Earlier this year, SirsiDynix withdrew Horizon from the market, choosing to focus their future development on Unicorn. This move paved the way for the Howard County Library to adopt a strategy to implement the Koha open source automation system through the services of LibLime, a commercial service company providing open source solutions to libraries.

We Are in Central Kansas

LibLime also announced in September that The Central Kansas Library System (CKLS) has committed to Koha for a centralized automation system for its 33 libraries spread across seventeen counties. All of the libraries within this regional serve small communities. Of these libraries, 21 will migrate from existing automation systems and 12 will be automating for the first time. One library, the Smith Center Public Library, recently implemented Koha as its stand-alone system and plans to join the regional system. CKLS will implement Koha through LibLime's "Software as a Service" option, accessing the software on servers hosted by LibLime. The implementation project will occur in three phases. Phase one involves the migration of the 21 libraries currently running other automation sys-

tems, Phase two brings in the 12 libraries not currently automated, and the final phase involves the migration of the existing library running Koha.

Documents on the CKLS Website describe a process that initially narrowed the potential candidates to three, including Atrium from Book Systems, Safari from Surpass, and Koha supported by LibLime. The final selection of Koha was made based on survey responses by the member libraries. Financial terms for the contract with LibLime include \$77,000 for initial setup and data preparation and \$17,000 annually for hosting services and maintenance.

Howard County and the Central Kansas Library System join other U.S. public library systems running Koha including the Nelsonville Public Library serving Athens County in Ohio, Barberton Public Library in Ohio, the Crawford County Federated Library System in Pennsylvania, the Heartland Public Library in Maine, and the West Liberty Public Library in Iowa.

—Marshall Breeding

More Info. @:

Howard County Library:

<http://www.hclibrary.org/>

Howard County Times article:

http://news.mywebpal.com/news_tool_v2.cfm?pnpid=573&show=archivedetails&ArchiveID=1137715&om=1

Central Kansas Library System:

<http://www.ckls.org/documents/CKLSLSTAAutomation.doc>

Koha: <http://www.koha.org>

LibLime: <http://liblime.com/>

HAPLR ratings:

<http://www.haplr-index.com/HAPLR100.htm>

Book Systems, Inc.:

<http://www.booksys.com/>

Surpass:

<http://www.surpasssoftware.com>

One of the concerns of these open source systems involves their ability to scale to the demands of large libraries, both in terms of performance and robustness of features.

BLC Joins OCA

Earlier this fall the Boston Library Consortium (BLC) announced that all nineteen of its member libraries have agreed to participate in a massive digitization project as part of the Open Content Alliance (OCA), which is affiliated with the Internet Archive. Founded in 1970, the BLC is a consortium of nineteen academic and research libraries located in Massachusetts, Connecticut, New Hampshire, and Rhode Island. Member libraries include Boston College, the Boston Public Library, Brandeis, Brown, MIT, Northeastern, Tufts, the Universities of Connecticut, Massachusetts, and New Hampshire, Wellesley and Williams Colleges, and others.

A much younger organization, the Open Content Alliance was founded in 2005 by the Internet Archive and Yahoo! as an initiative to offer open access to digital information in the public domain. Organizational members of the OCA include universities, research libraries, technology companies, national libraries and archives, foundations, and others.

Although the BLC massive digitization project will be largely self-funded by the BLC member libraries, they have received a grant from the Sloan Foundation to hold a summit on Universal Access to Information. The date of the summit has not yet been set, but Barbara Preece, the executive director of the BLC, said that it probably will be in the spring of 2008.

An initial two-year contract between BLC and OCA already has been signed, and a new Northeast Regional Scanning Center has been built in the Boston Public Library. OCA operates the scanning center, which currently has ten scanning machines and seven employees operating on two shifts. The target scanning cost is 10 cents per page. Volumes from non-BLC libraries may be scanned at the Northeast Regional Scanning Center as well.

Preece reported that the BLC already had made a philosophical commitment to the principles of open access under which the OCA has initiated its massive digitization project, which could be seen as a philosophical counterbalance to the commercial massive digitization projects underway by Google, Amazon, Microsoft, and others.

Now we have at least two major U.S. library consortia involved in massive digitization projects. Earlier this year the Committee on Institutional Cooperation (CIC), the academic consortium of the Big Ten universities and the University of Chicago, announced a consortial agreement with Google to undertake a consortially managed massive digitization project. Although BLC chose to partner with OCA, some observers are seeing this agreement as a deliberate snub of Google. In a Sep-

tember 28, 2007 post to xconomy, Wade Roush wrote that this announcements signals "...the growing resistance to Google's professed goal of organizing 'all the world's information.'" Perhaps a digitization gridiron bowl game lurks in our future, pitting the BLC Openers versus the CIC Googlers.

BLC seems to be taking the high road here. In the press release, Doron Weber, a program director at the Alfred P. Sloan Foundation, was quoted, "...the BLC has shown libraries all across the country the right way to take institutional responsibility and manage this historic transition to a universal digital archive that serves the needs of scholars, researchers and the general public without compromise." Ann Wolpert, the director of libraries at MIT, sees this initiative as a victory for taxpayers. In the Roush article, she is quoted, "These libraries, which are funded by taxpayers, really have a public purpose, and I think that for them, the argument of joining the OCA rather than going with one of the more commercial partners was simply a matter of being true to their funding base."

Preece also noted that libraries, unlike search engine companies, are not interested primarily in the economics of search (and the advertising revenue therein), but in providing open access to information for everyone. The BLC mass digitization project will involve both monographs and serials. Although collectively the BLC member libraries provide access to over 34 million volumes, the total number of volumes to be scanned through this project is not yet known. Scanning already has begun, with the personal library of John Adams held in the Boston Public Library being among the first collections to be scanned.

Preece sees this project as dovetailing well with BLC's long-standing commitment to resource sharing among its member libraries. Once the digital fruit of the scanning begins to mount, Preece hopes that the BLC will be involved in designing and testing some value-added features and functions. —Tom Peters

More Info. @:

Press Release:

http://www.blc.org/news/blc_oca_release.html

Boston Library Consortium: <http://www.blc.org/>

Open Content Alliance:

<http://www.opencontentalliance.org/>

Xconomy article: <http://www.xconomy.com/2007/09/28/coalition-of-boston-libraries-chooses-the-un-google-route-to-digitization/#comments>

The John Adams Library: <http://www.johnadamslibrary.org/>

A Thoroughly Modern Library

On October 8, 2007 Ben Vershbow posted a long post on the if: book blog, a project of The Institute for the Future of the Book (IFB). In his request for comments, he outlined some formative thinking about a proposed joint initiative between the IFB and the Digital Library Federation (DLF) centered around the questions and opportunities posed by all the current mass digitization projects, not only of printed books held in research libraries around the world, but also mass digitization of still images, moving images, and sound recordings. The working name for the proposed initiative is The Really Modern Library.

The IFB describes itself as "...a small think-and-do tank investigating the evolution of intellectual discourse as it shifts from printed pages to networked screens." They are funded by the MacArthur Foundation, affiliated with the University of Southern California, and headquartered in Brooklyn, New York. The DLF is a consortium of research libraries and related agencies dedicated to using electronic information technologies to extend library collections and services.

During October brainstorming sessions were held in Los Angeles, London, and New York. That's wonderful that a series of brainstorming sessions was held, but one has to wonder why they didn't offer online access to at least one of these sessions, so that creative minds in the hinterlands (i.e., not LA, London, and NYC) could join in the discussions and planning in real time. Exclusively face-to-face meetings almost certainly will not be a hallmark of The Really Modern Library.

According to the blog post, "The goal of this project is to shed light on the big questions about future accessibility and usability of analog culture in a digital, networked world." Vershbow notes that we are in the midst of an historic upload of huge quantities of printed materials, still images, analog sound recordings, and film and video prints, yet "...it is still barely understood how the media of the past ought to be preserved, presented and interconnected for the future."

The intent of this proposed joint initiative is not to build a physical, digital, or virtual library, but "to stimulate new thinking about mass digitization and, through the generation of inspiring new designs, interfaces and conceptual models, to spur innovation in publishing, media, libraries, academia and the arts." If the project moves forward, the leaders plan to hold an international design competition for a hypothetical really modern library.

The network, not the medium, is the main message. Those proposing the project hold the strong belief that "...it is the network, more than the simple conversion of atoms to bits, that constitutes the real paradigm shift inherent in digital communication." The proliferation of digital networks and all the digital content flowing through those pipes is changing the relationship between humans and analog information objects. These shifting relationships and attitudes probably will profoundly influence the library as a social network, long conversation, or whatever the library evolves into.

Vershbow correctly speculates that these fundamental changes to the information ecosystem probably will affect some basic human behaviors related to information, such as browsing, searching, and reading. New forms of human information behaviors may emerge, too.

Other interesting questions being posed include:

- How can we reveal the connections between works in ways that illuminate rather than overwhelm?
- How can The Really Modern Library help us visualize the additions and connections that individuals and communities will make to this massive body of digital content?
- How can the conversations be meaningfully, effectively presented?
- All media forms seem to be converging onto single handheld devices. How will future generations understand the historical differences between media forms when they are all available in the future as a more-or-less seamless experience?
- What happens if computers become better at thoughtful reading than humans?
- What happens if the divided human attention now characterized as multi-tasking and multi-worlding becomes a permanent characteristic of our interaction with an information environment?

This is an interesting proposed initiative that gets us collectively thinking and imagining beyond the current era of digital empire building. Vershbow's post also should be applauded for emphasizing the exploration of the affordances of transformed and new information ecosystems. In this context, an affordance

can be understood as a behavior or action or trait of a technology that the overall technology tends to support strongly or encourage. For example, compared to trains and planes, cars afford frequent stops and impromptu side trips. In a similar vein, networked digital information/communication/entertainment networks probably will afford different things than printed and analog information systems afford.

“The call for entries will go out to as broad a community as possible, including designers, artists, programmers, hackers, librarians, archivists, activists, educators, students and creative

amateurs.” If I were a betting person, I’d put some money on that rowdy pack of creative amateurs. — Tom Peters

More Info. @:

If:book blog post:

http://www.futureofthebook.org/blog/archives/2007/10/the_really_modern_library.html

The Institute for the Future of the Book:

<http://www.futureofthebook.org/>

Digital Library Federation: <http://www.diglib.org/>

Composing a Symphony

Since their announcement in March 2007 of their single-product strategy, SirsiDynix has been hard at work enhancing Unicorn, their strategic ILS product recently re-branded as Symphony. Initial announcements used Rome as the name that would be used temporarily to refer to the company’s new ILS. Now that SirsiDynix adopted Symphony to describe its strategic product, the temporary designation falls away.

SirsiDynix positions Symphony as more than the renaming of its previous system, but a concerted effort to take forward features and functionality from each of its previous ILS products. A key question, however, involves whether Symphony actually represents a major transformation of Unicorn to incorporate the types of change that would normally represent a new product.

The company has assured its Horizon customers that their remaining flagship ILS will be expeditiously enhanced to include the major features that these libraries were expecting to

receive in Horizon 8.0. Libraries using any of the SirsiDynix ILS products, including Unicorn, Horizon, and Dynix Classic have a strong interest in what features will be delivered in Symphony and the timeframe in which they will be delivered.

In late August 2007, SirsiDynix announced its progress and plans for the delivery of Symphony.

SirsiDynix indicates that the initial release of the product will be called Symphony 3.2, reflecting its heritage as an incremental extension of Unicorn 3.1, the last version offered under that name. The company has enlisted a diverse group of twenty libraries to assist in beta testing of Symphony 3.2, participating in a process it calls a “community technology preview.” As this preview phase progresses and the software moves into production, time will tell whether Symphony will live up to expectations. Unicorn customers will be looking for features and improvements previously slated for development. Libraries involved with Horizon will gauge whether Symphony meets their requirements.

So far, libraries appear to be taking a wait-and-see approach to Symphony. SirsiDynix has announced a relatively small number of sales announcements for Unicorn/Symphony so far in 2007. These libraries include the San Diego Public Library with its 35 branches, migrating from a DRA Classic system, the TAFE (Technical and Further Education) New South Wales in Australia with 100 library facilities, and three libraries in the UK, including University College for the Creative Arts, St. Helens Council Libraries which includes 12 facilities, and the Warrington Borough Libraries which includes a main facility and 12 branches. —Marshall Breeding

More Info. @:

SirsiDynix Symphony:

<http://www.sirsidynix.com/Solutions/Products/integratedsystems.php>



Innovative Interfaces Reports Strong Sales

Despite the surge of interest in open source alternatives, commercial vendors offering proprietary systems continue to represent the vast majority of library automation implementations. In reviewing the activity in the library automation arena so far in 2007, Innovative Interfaces stands out as one of the commercial vendors that continues to prosper despite the turmoil in the marketplace and the recent bias against proprietary software.

One barometer that gives some measure of the activity in the automation marketplace involves the press announcements that the companies make. While not every sale warrants a press release, companies tend to announce their larger contracts. It may take several weeks between the time that the library signs a contract and any public announcements.

With those caveats, we note that Innovative Interfaces has experienced a very strong year, not just for its Millennium integrated library system, but also for its new Encore product and its electronic resource management system based solely on public announcements. Many of the other companies have likewise seen strong sales, which will be highlighted in subsequent issues of this newsletter.

Contracts announced for Millennium to date in 2007 include the following:

- Akron-Summit County Public Library in Ohio
- Palos Verdes Public Library District

- County Clare Libraries in Ireland
- Cairo University
- Rolling Meadows Library
- California State University, Stanislaus
- Pratt Institute
- University of Canberra
- Washington-Centerville Public Library
- Colburn School of the Performing Arts
- Virginia Theological Seminary
- Pine River Library District/Mancos Public Library

In addition to drawing new libraries to Millennium, Innovative Interfaces has also seen additional sales of its Electronic Resource Management product to California State University in Fresno, Brock University, Furman University and Lehigh University. Over 200 libraries have licensed this product to date, maintaining the company's lead in this product genre.

On the next-generation interface front, Innovative has contracted with over 50 libraries for its new Encore product, a remarkable number given its recent entry into the market.

—Marshall Breeding

More Info. @:

Innovative Interfaces: <http://www.iii.com/>



Holo Emitter: Cool Tool for Virtual Libraries

In the best of all possible virtual worlds, every feature and function of that virtual world would meet, if not surpass, the set of features and functions we find in the real world. Second Life, unfortunately, is not yet the best of all possible virtual worlds. For example, normally only about 70 avatars can exist on any 16-acre parcel of land. This does not compare well with the real world. A built space in Second Life also easily becomes overloaded with prims—the primitive building blocks of objects in Second Life—often resulting in a cluttered visual field of displays, posters, calendars, screens, etc.

For libraries in virtual worlds, the growing array of exhibits and collections is creating not only visual clutter but also potential sim overload. The situation is similar to what many real-world museums face: they have many art objects, but only so much exhibit space. As a result, at any given time most of the collection is packed away and out of sight most of the time.

The old adage, “Find a need and fill it,” applies to virtual worlds, too. Troy McConaghy (his Second Life avatar is named Troy McLuhan) has developed an open source Holo-Emitter tool for use in Second Life. According to the blog post announcing the release of the Holo-Emitter, “It’s similar to the holodecks you see in Star Trek—you click it, a menu comes up, you select a scene and poof! The scene appears in all its 3D glory.”

Soon visitors to virtual libraries in Second Life and other three-dimensional virtual worlds will be able to select individually and on demand which of the many exhibits, immersive learning environments, focused collections, and even meeting space configurations they need for their particular projects and interests.

Troy’s Holo-Emitter is free and open source (GPL 2.0—GNU General Public License, version 2). The scene-on-demand that the Holo-Emitter creates can spread over an entire sim in Second Life. Also, all of the objects generated by the Holo-Emitter are positioned relative to the Holo-Emitter. If you need your interactive exhibit on the Harlem Renaissance moved from the second to the first floor of the library, just move the Holo-Emitter and rez the scene again in the new location.

Troy also has created a User’s Guide to his Holo-Emitter System. The guide provides step-by-step instructions for packing up the scenes that your Holo-Emitter will be able to create.

The Holo-Emitter provides a glimpse of how virtual world libraries can soar beyond real-world libraries in terms of customizability and usability. Imagine a large library with only one range of shelves. You use the Holo-Emitter to determine which area of the collection resolves onto that range. When you’re done browsing that part of the overall collection, simply command the Holo-Emitter to create another section of the collection. It’s like compact shelving taken to the next stage of development and usability, without the need for superlevel floors.

The Holo-Emitter does not just create pretty static scenes. Once objects are called forth from a Holo-Emitter, they are fully functional and interactive. The scene that a Holo-Emitter creates is as real as virtual reality gets.

Or, recall some meeting where, halfway through, the group decided it would be better to have the meeting space configured in some other way. With a Holo-Emitter, that new room configuration

is only a click away. Having a workshop or conference in a holo-emitted virtual space could create exciting new possibilities for group work and interaction.

The Holo-Emitter enables time-shifting of exhibits. Rather than having a library’s or museum’s main exhibit rotate every few months, now visitors can choose from a list of available exhibits. This extends the impact of the time and talent that went into creating each exhibit.

Another analogy Troy uses to help people conceptualize his Holo-Emitter is that it turns a virtual world into a 3D computer. Just as most computers store large numbers and types of files, displaying only a few of those files at a time, so too can a virtual world hold lots of potential scenes and displays, yet present a display only when someone working in that virtual world wants and needs a particular display.

Holo-Emitters and other emerging cool tools for virtual worlds create interesting new design and service possibilities for virtual world libraries.

More Info. @:

Troy’s blog post announcing the Holo-Emitter:

<http://www.troyconaghy.com/blog/2007/9/12/open-source-holo-emitter-for-sl.html>