



Smart Libraries™

Formerly Library Systems Newsletter™

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Smarter Libraries through Technology:

The Ever Narrowing Range of Choices for Library Automation

By Marshall Breeding

In developing the articles for this issue of *Smart Libraries Newsletter*, I became a little more aware of, and a bit more concerned about, how few products are available to libraries for their critical automation systems. While in the last few years the industry has not seen business consolidations that eliminate competing companies, we are in a phase where ongoing paths of development result in fewer competing products. In some cases, this narrowing comes as the downstream result of company consolidation that transpired many years ago.

In the academic library market, Ex Libris has grown into dominance. In early phases of academic library automation, Aleph and Voyager competed as archrivals. That dynamic changed quickly when Ex Libris, with its flagship product Aleph, acquired Endeavor Information Systems, the developer of Voyager. For a while after the merger, both products continued to see some new sales, though the number of new libraries purchasing Voyager diminished fairly rapidly. Both Aleph and Voyager to this day continue to receive support—and even some new development as needed—but neither is actively marketed. Following a period of intense investment in research and development, Alma has been completed in its initial release and Ex Libris is pulling out all the stops in marketing it. We can expect only a few remnant sales of Aleph, which may continue to be a good choice for some libraries that need complex automation support, that see an eventual path to Alma, but that require a mature product. As a choice for academic libraries looking for a new product today, the once diverse product offerings of Ex Libris have consolidated into Alma.

Innovative's Sierra also continues as a strong choice for academic libraries. In contrast with Ex Libris as solely focused on academic and research libraries, Innovative designs its products for a wider range, also including public and special libraries. OCLC's WorldShare Management Services likewise addresses all types

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Company	Product	Database Technologies
Innovative Interfaces	Sierra	PostgreSQL
Equinox Software / Open Source	Evergreen	PostgreSQL
Polaris Library Systems	Polaris	Microsoft SQL Server
SirsiDynix	Symphony	Oracle, Microsoft SQL Server, C-ISAM
The Library Corporation	Library.Solution	Oracle
Open Source	Koha	MySQL

of libraries, has seen adoption by a wide variety of institutions, but has not yet seen a great deal of traction in the large academic library arena. It will be interesting to see how the dynamic of specialized versus more general systems plays out, but we might anticipate that the specialized systems might have an edge for those libraries with the more complex automation requirements.

Emerging candidates for academic libraries would include the open source Quali OLE and Serials Solutions Intota. Neither of these products is available quite yet, giving Ex Libris a good head start, which it has reaped with over 150 library commitments to date.

The options in the public library arena seem equally sparse. In recent years, Polaris has seen almost unstoppable momentum among the larger public libraries, including municipal systems, county systems, and consortia. Later in this issue we mention some of the major accounts Polaris has been able to attract. Polaris' winning streak in larger public libraries has seen only a few interruptions, notably the recent selection of SirsiDynix Symphony by the Houston Public Library in Texas.

Within SirsiDynix, the dual offerings of Symphony and Horizon remain for support and development, but Symphony has been the sole focus of marketing for many years. A few new contracts for Horizon are made each year, primarily as add-ons to existing implementations. SirsiDynix is doing some interesting work to layer modern service-oriented and cloud-based technologies on top of both Symphony and Horizon, which seems to be the company's direction toward its next-generation automation platform.

Among smaller libraries, Apollo from Biblionix has become quite popular, offering a relatively simple Web-based system deployed in a modern, multitenant architecture.

For libraries interested in open source automation software, Evergreen and Koha continue represent a significant portion of new automation migrations. Evergreen's main strength lies in consortia, primarily comprised of small to mid-sized libraries, with a

mix of consortia and independent libraries opting for Koha.

The Library Corporation also continues as a major player in the public library arena. Though it continues to develop and support both Library.Solution and Carl.X, all new sales for many years have been for Library.Solution.

Auto-Graphics continues to see some growth in sales of its VERSO ILS to public libraries. VTLIS made a big splash in the US public library arena with the adoption of Virtua by the Queens Public Library and internationally through the Hong Kong Public Library implementation, but so far this has not turned into a broad stream of sales.

While my intent is not a comprehensive treatment of the players for academic and public libraries, the the discussion here does reveal only a few really strong options available for these categories of libraries. And therefore, as libraries pursue new automation solutions, they will find only a small handful of options available well suited for their type and size.

This issue of *Smart Libraries Newsletter* includes an article discussing the selection of Polaris by the Salt Lake County Public Library (SLCPL). Among the many announcements of new library automation projects made each month, I found this one to be especially interesting. The purchase decision spanned a variety of initiatives, including updating the library's automation system, a major initiative to implement RFID-based technologies, and a systematic analysis of its processing workflows.

The procurement of the ILS stands out in two ways, both related. One involves the library's interest in limiting the slate of candidates it would consider to those that employ a specific vendor's database technology: in this case Microsoft SQL Server. Adding this facet narrows the field of qualified contenders drastically. The table above gives a quick look at the permutations available for the mid to large public library options when limited to specific database technologies.

When considering the most popular products for larger public libraries, a requirement for Oracle, Microsoft SQL Server,

or PostgreSQL would result in only two qualified products.

For true multitenant software-as-a-service deployments, the database employed would be almost an abstract concept. Multitenant implementations would never provide individual organizations adopting the service direct access to the database engine, but would provide other tools to deliver equivalent access to customer data. Such systems might also rely less on traditional SQL-compliant relational database management systems, but might employ database technologies such as seen in the Apache Hadoop and Cassandra projects.

While any library may have strong business reasons for specifying a given name brand technology, it should also realize how drastically it limits its options. Database technologies and other technical middleware infrastructure are evolving rapidly in the shift from client-server to cloud technologies.

The other interesting aspect of the SLCPL procurement

relates to the vendor challenge to the process. The story mentions Innovative's protest to its elimination since Sierra is not based Microsoft SQL Server. Challenges to the outcome of a library procurement process take place only rarely, but they do happen. Some have resulted in hearings, such as the case here, with a local library board; others have involved lawsuits. Most are settled out of court under terms of nondisclosure. They rarely become part of the public discourse.

As the library automation industry becomes ever more competitive, with fewer players vying for a limited number of opportunities, libraries should expect ever closer scrutiny in the way that they conduct a selection and procurement process. I observe that libraries conduct their business with the highest level of integrity and transparency. I am also reminded that the competition for major contracts is brutal, and that the organizations involved are increasingly aggressive in their pursuit of the competition.

Salt Lake City Public Library Selects Polaris

As part of a comprehensive set of improvements in its technology infrastructure, the Salt Lake City Public Library in Utah has begun a process that involves replacing its core integrated library system, introducing RFID technologies, and reviewing its technical processing operations. Serving a population of just under 200,000 with a main facility and five branches, the library's collection of over 900,000 sees a vigorous circulation of 6.7 million transactions annually.

The Salt Lake City Public Library has a process underway to equip all its facilities with RFID technologies for self-service circulation functions and for automated material handling (AMH). One of the considerations involved in the infrastructure upgrades involved the interoperability between the ILS and the self-service and AMH equipment. The acquisition of the SIP2 licenses involved would represent a significant investment in the existing Millennium system in place since 1995, prompting the need to review the products available through an ILS selection and procurement process.

The library has aims to improve the efficiency of the way that it processes and handles its collection materials. An additional component of its strategy to improve its automation environment included engaging a consultant to evaluate technical services workflows.

The Salt Lake City Public Library has also selected BiblioCommons as its discovery interface, launched for its patrons in April 2013. This library joins the ranks of others including Bos-

ton Public Library, King County Public Library, Chicago Public Library, and Austin Public Library that have recently opted to implement BiblioCommons. Chicago Public has engaged in a broader partnership with BiblioCommons to extend its technologies beyond just replacing its online catalog, but to power its entire Web presence.

The library selected Polaris Library Systems to provide new integrated library system, manage its data migration process, and to support the integration with its new BiblioCommons catalog and RFID-based self-service and AMH equipment. Polaris was selected on the basis of its functionality, consistency with the library's technical infrastructure, and positive references from other customer libraries.

The procurement process has not been without complications. Innovative Interfaces, the incumbent vendor responded to the RFP with a proposal for the library to migrate to its Sierra library services platform. The library rejected Sierra for consideration since the request for proposals stipulated that the new system should be based on Microsoft SQL Server. Sierra is instead based on the open source PostgreSQL database management system, which provides similar support for SQL and ODBC (open database connectivity). When informed that Sierra would not be considered due to this issue, Innovative Interfaces challenged its eligibility relative to verbiage in the RFP and issued a formal protest to the award. A hearing on this issue was conducted before the Salt Lake City

Public Library board on April 22, 2013. (See: <http://www.slcp.lib.ut.us/board/>) The Board ruled that Innovative had not submitted its protest within required time limits and could not be considered on its merits. The implementation of Polaris will continue according to the schedule.

“We simply felt we were not treated fairly during the procurement process,” stated Gene Shimshock, Senior Vice President, Product and Market Management. “The protest was the one way we could escalate our concerns. However, once our protest was denied, we accepted Salt Lake City Public Library’s decision and no further action is planned at this time.”

The Salt Lake City Public Library limited consideration to products based on Microsoft SQL Server in order to simplify its technical infrastructure and to ensure that it can use specific tools and techniques to access data related to the system, including SQL Server Reporting Services from Microsoft. While SSRS does work with non-Microsoft products via ODBC, maintaining a heterogeneous environment comprising different database engines can be more complex to manage.

Any complications related to the procurement process should not cloud the momentum behind Polaris in winning contracts for large municipal libraries in recent years. In recent years, Polaris has been able to win the majority of the competitive procurements in the municipal library sector. Boston Public (In 2012 migrating from Horizon), New Orleans Public (2012 from Horizon), Columbus Metro Library (2012, from Discovery Place a locally developed system), Tampa-Hillborough County (2012, Horizon), Santa Monica (2011, Symphony), Dayton, OH (2011 Horizon), Topeka and Shawnee County (2011, Horizon), Denver Public (2010, Carl), Miami-Dade County (2009, Horizon), Phoenix Public (2007, Carl),

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Dallas Public (2007, DRA) and Palm Springs, CA (2009, Symphony), as well as county systems such as Baltimore County, MD (2009, Carl), Bergen County, MD (2010 Symphony), Harford County, MD (2010, Horizon). In 2012 Polaris also was also selected by the Illinois Heartland Library System, the largest library consortium in the United States.

Other new accounts captured by Polaris so far in in 2013 this year include those for Gwinnett County in Georgia (migrating from Horizon), Westport, CT (from Horizon), Bartlesville, OK (Horizon), Colton, CA (Horizon), Warren Library Association, PA (SirsiDynix Symphony), Jackson-Madison County, TN (Library.Solution), and Pfeiffer University (Ex Libris Voyager). While Polaris has been especially successful in the public library sector, it also continues to win over some small to mid-sized academic libraries.

According to Julianne Hancock, Manager of Communications and Library Innovation, the Salt Lake City Public Library stands confident in their choice of Polaris. She reports that library staff members were generally well pleased with the demonstrations of the Polaris systems, which were perceived as delivered in straightforward manner and that the operation of the software was intuitive. The library has been with its incumbent system for 17 years and anticipates a long relationship with its next vendor. Polaris provided an extensive list of current customers as reference.

Developments in E-book Lending Technologies

The support of e-book lending stands as one of the crucial technology issues for public libraries. The initial phase of library e-book lending was mostly based on acquiring titles from one or more e-book providers and then delivering users to platforms provided by those vendors for selection, check-out, and downloading titles to e-reading devices. Libraries naturally want to provide a similar service for e-books as they offer for their print collections. General expectations would include the ability to develop a collection shaped according to the interests and research needs of its community and for library patrons to borrow

e-books without cost, for reasonable loan periods, and with protected privacy. Yet, fulfilling ideal expectations for library e-book lending services continues to face a number of obstacles. From a technology perspective, challenges lie in simplifying the way that patrons can select, check-out, and download items. On the business and legal front, only portions of the collective e-book universe are available to libraries to purchase for their lending programs, and in many cases higher costs per title apply and possibly limitations on lending terms. The developments seen in recent months reflect ongoing progress in each of these areas.

Improving Technology, Expanding Content

Two threads of progress related to library e-book lending are emerging. One is integrating the user experience for the discovery and borrowing into the library's Web environment. Also, the availability of titles is expanding, both in terms of publisher participation and business issues such as cost to the library and policies concerning patron loans.

Integration Opportunities

Libraries benefit from integrating their e-book loan service into their existing Web-based environment in addition to, or instead of, relying on e-book lending platforms provided by service providers such as OverDrive, 3M Library Services, or Baker & Taylor. Using the same interface offered for dealing with other materials, patrons potentially experience a simpler e-book check-out process. A single sign-on into their library account should give patrons access to all of the services that apply to both print and e-books, including the ability to view items currently charged, request holds for items of interest currently out to other users or on order, or to renew items needed longer. With e-books, the library should be able to complete the transaction completely online, enabling patrons to check-out an item and begin reading, either on the Web or by downloading it on their e-reading device, such as a tablet, dedicated e-reader, or smartphone.

We have previously covered some partnerships, such as that between Polaris and 3M Library Services or BiblioCommons and OverDrive, that improve the state of the art of e-book loan integration into library catalogs or discovery interfaces. A variety of additional announcements in this area have been made in recent weeks.

OverDrive Expands its API Toolkit

In the past two years, OverDrive has made significant progress in making the capabilities of its e-book lending services available to libraries or other organizations that want to use their own interfaces rather than its own platform. As a pioneer of the library e-book lending arena, Overdrive developed a content delivery platform, based on Adobe Content Server technologies, which offered a complete environment for discovery and fulfillment. Over time, expectations have evolved, with an increasing number of libraries preferring more control over their e-book lending services. OverDrive, accordingly has developed a suite of APIs that it makes available through its Developers portal (<https://developer.overdrive.com>). Other providers, notably

3M Library Services, entered this arena at a much later stage, offering APIs in their initial offerings.

OverDrive's initial set of APIs included the ability to search for titles and to determine availability for loan, but did not extend to the loan transaction itself. OverDrive is currently developing additional APIs that will extend functionality to enable loans directly through third party interfaces and to facilitate collection development. According to Steve Potash, CEO and President of Overdrive, "Once live, our Content API will enable libraries and any other approved third parties to have a variety of direct borrowing, place a hold, return services from their OPAC, search layer, or app for OverDrive-supplied media." Potash added "We are also working on an Acquisition API to automate collection development routines and a Report API that will come out later this year. All of these will be available to all of our partners."

Innovative to Incorporate E-Book Services

Innovative interfaces recently announced an ambitious strategy to integrate e-book lending into its strategic products. The company has entered into a partnership with Overdrive to integrate e-book discovery and lending into its Sierra library services platform and Encore discovery service. The project will be based on the APIs available on both Innovative's and OverDrive's platforms. Innovative's development path includes taking advantage of the APIs currently available that support the basic level of integration of discovery and status information of e-book and other content types from OverDrive, but to also implement the next phase of APIs to allow patrons to perform check-outs and downloads through Encore. Innovative also describes its plans to exploit OverDrive's Acquisitions API, allowing library staff members involved in the selection and procurement of library materials to make selections from the OverDrive Content Reserve through Sierra. Taking advantage of the full suite of current and anticipated APIs from OverDrive, Innovative plans to bring e-books and related content into both the interfaces oriented to patrons and into the acquisitions workflows performed by library personnel.

Polaris, the first ILS vendor to begin integrating e-book lending into its patron interfaces through a partnership with 3M Library Services, announced an additional partnership to bring in similar capabilities for libraries that subscribe to the Axis 360 e-book lending service from Baker & Taylor. The services addressed include browsing or search content from Axis 360, place holds for items of interest, and to directly check out items when available. Since these transactions take place within the Polaris system, libraries will be able to generate statistics

and reports that describe the use of both its print and electronic collections. Polaris and Baker & Taylor plan to have this integrated service underway in time to demonstrate at the American Library Association Annual Conference in June 2013.

Content Deals

Recently, we've heard several announcements of expanded publisher participation in library e-book lending services.

3M Cloud Library now includes content from Macmillan. A new pilot program offers 1,200 titles from the Minotaur Books imprint. Titles will be priced at \$25 for a two-year term of availability, or total of 52 loans, whichever comes first.

3M has also launched a pilot program with Simon and Schuster for the New York Public Library and Brooklyn Public Library. Through this pilot, all digital titles from this publisher will be available to the library for purchase, which can then be made available to patrons for loan. The announcement did not reveal pricing details or any specific limitations regarding permissible number of loans.

3M Library Services has also made a partnership with Hachette Book Group to make that publisher's full catalog available to its customer libraries with no embargo on new titles. The general availability of these titles follows an earlier pilot program. With the execution of these deals with Macmillan and Hachette, the 3M Cloud Library offers at least some content from all of the "Big Six" publishers.

OverDrive has also completed a contract with Hachette Book Group to make its entire catalog of e-books available to

Once the publisher makes the commitment to a platform, it tends to not work in exclusive arrangements.

its subscribers in school and public libraries in the United States and Canada, beginning May 8, 2013. OverDrive states that it now offers over 1 million titles including e-books, audio books, music, and video. The company provides its content services to over 22,000 libraries, schools, and retail companies.

Baker & Taylor also announced that the entire catalog of e-books from Hachette Book Group will be available through its Axis 360 digital media library.

This series of announcements illustrate a common dynamic in the e-book lending arena. One or more library organizations or e-book suppliers may initially work to open the door for a publisher to release titles for library lending. But once the publisher makes the commitment to a platform, it tends to not work in exclusive arrangements, but to offer similar arrangements to all the major channels.

3M Enhances Collection Development Tools

In April 2013, 3M Library Systems released its Catalog Acquisitions Tool (CAT) designed to simplify the process of selecting and purchasing e-book and related titles and adding them to library collections. Some of the features of CAT include more precise searching capabilities and easier workflows for selecting and purchasing titles.

Developments at Ex Libris

Ex Libris reports that it more than 150 institutions, primarily academic libraries, have now signed contracts for its new Alma library services platform and the Primo discovery platform. The Leddy Library at the University of Windsor announced its selection of Alma in April 2013. The library will migrate to Alma and Primo from its current Evergreen ILS, an open source product, which finds use primarily in consortia of public libraries. This migration represents one of the very few examples of libraries moving away from Evergreen. In this case, the move toward a suite of products specifically designed for academic libraries

and away from one used mostly by public libraries may be more relevant than the preference for open source or commercially licensed software.

On the personnel front, Ex Libris has appointed Koby Rosenthal as its new General Manager for the European Region and Corporate Vice President. This position was formerly held by Marc Daubach, who left the company in January 2013. From Ex Libris's earliest days, Europe has been one of its most successful markets, especially for Aleph, SFX, and Primo. Marketing Alma there will be a critical opportunity for the company.

Library Technology News

Bowker, ebrary and Choice team to enhance RCL

New Providence, N.J. and Palo Alto, Calif., April 10, 2013—ProQuest affiliate Bowker, ProQuest e-book business ebrary and Choice, a publishing unit of the Association of College and Research Libraries (ACRL) uniting to improve the accessibility and utility of Resources for College Libraries (RCL), the popular collection development tool for academic libraries. Choice and Bowker, whose unique partnership created RCL, have launched a variety of enhancements including a mobile application for the web-based resource, which is used by academic libraries to identify core titles for scores of academic subject areas. Additionally, more than 13,000 RCL titles will now be available on the ebrary platform.

Originally launched in 2006, RCL is a suite of works based on the American Library Association's classic reference work, Books for College Libraries (BCL). As ebrary collections, universities, colleges, and other institutions can provide their users with anytime, anywhere access to RCL's essential titles. RCL titles can be browsed by its broad range of subjects—traditional liberal arts and sciences curriculum, business, computer science, education, engineering and health sciences—or by publisher. The titles are supported with ebrary's popular features, such as free mobile apps for the iPad, iPhone, iPod touch and Android, along with InfoTools, granular usage statistics, and sophisticated searching and navigation. Through ebrary, RCL titles will also be surfaced through the ProQuest platform and the Summon service, significantly enhancing its discovery. RCL titles can be purchased as a perpetual archive and enabled for patron-driven acquisition.

Via Bowker, the RCL interface has been updated with a simpler browse function, faster search results and improved mobile access through Bowker's BookWire app, which enables subscribers to login to access book details and add titles to selected lists from any location. RCL also includes RSS feeds for new titles, dynamic facets to help refine search. Content includes the full text of Choice reviews and easy identifiers for Choice Outstanding Academic Titles.

Three Bowker subscription options include the traditional RCL collection, which allows libraries to discover and collect over 80,000 essential titles in 61 core subject areas; Resources for College Libraries: Career Resources (CR), an essential list

of 4,500 titles in 56 subject areas covering vocational, technical, and career programs for two-year and four-year undergraduate institutions; and, RCL Plus, which includes both RCL and CR products.

Soutron Global compliant with Resource Description and Access (RDA) standard

San Diego, Calif., April 23, 2013—International library transformation company Soutron Global announces full compliance with the new cataloging standard Resource Description and Access (RDA), the new preferred standard for library cataloging that succeeds the Anglo-American Cataloging Rules 2nd Edition (AACR2).

An exciting outcome of this new standard is the support for clustering bibliographic materials in order to show relationships between works and their creators and enabling the disclosure of different editions, abridgements, translations, or formats of any work.

VuFind 2.0RC1 Released

Villanova, Penn., April 29, 2013—The first release candidate of version 2.0 of the VuFind Open Source discovery software has just been released. This release provides a preview of the functionality and architecture that will be seen in the full 2.0 release, due later this summer.

The new release includes several significant enhancements:

- Significant security improvements, including more secure password storage and protection against spammer abuse.
- A "MultiBackend" driver which allows VuFind to interact with multiple integrated library systems at once.
- A new and flexible search system with more modular, reusable code.
- 2.0 versions of all new features introduced in the 1.4 release, including support for hierarchical records and the Clickatell SMS service.

Additionally, several bug fixes and minor improvements have been incorporated.

Questions about the new release or VuFind in general can be directed to Demian Katz, the lead developer of the project at Villanova University.



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