INTRODUCTION AND SCOPE

This issue of *Library Technology Reports* provides an in-depth analysis of multiuser library automation systems and the companies that produce them. These systems automate the routine operations of a library, provide library users information about the library's collection, and serve as a channel for delivering key library services.

The term *integrated library system,* or ILS, describes the software that automates the many different library work categories. This common application is tied together with data residing in common databases (as much as possible) that are related to many different tasks. An ILS automates many library tasks that would otherwise be repetitive, labor intensive, and inefficient.

The acquisition and maintenance of an ILS is a major investment for a library. These systems are not inexpensive, either in the up-front costs involved or in the ongoing budgetary requirements.

The hardware, software, and personnel costs associated with the library's automation effort can represent a substantial portion of its annual budget. These expenditures offset a much larger set of labor costs that the library would incur without automation.

In today's world of a highly connected public, the capabilities of the ILS determine the library's ability to deliver relevant services. The ILS must operate within a world that is becoming ever more digital and where the delivery of services over the Web may rank just as high in importance as services delivered within the library building.

A library's overall ability to meet its users' expectations for high-quality services can be either fulfilled or hampered by the choices it makes in selecting a library automation system.

The landscape of the library automation companies and systems constantly shifts. Although the changes in the library automation arena tend to be glacial in comparison with other industries, libraries should be aware of the changes in options and opportunities related to library automation.

Mergers and acquisitions play a large role in shaping the options available to libraries. The evolution of preferred technology architectures and the survival or demise of computing platforms determine whether any given system will enjoy support into the indefinite future or will be doomed to legacy status.

Business and market forces and unpredictable trends play a larger role in survivability than technical merit. For example, most videotape experts considered Sony's Beta format to be technically superior to VHS, yet Beta ultimately failed.

In the same way operating systems such as VMS have lost out to Unix and its variants. Although VMS was a technically advanced and forward-looking computer environment, many library automation systems developed for that environment became dead-end systems.

Unix-based systems that trace their beginnings to the same time period have been able to evolve smoothly without major disruption. Libraries have to face the realities of business survivability as they select a new system. System survivability and vendor viability are key factors.

Multiuser systems. This report provides information on the current slate of library automation systems designed for many simultaneous users. These multiuser systems would be used by medium-sized and large libraries or by library consortia.

Small libraries might be users of these systems through a shared implementation but likely would not operate one of these systems independently.

The dividing line between PC-based systems and multiuser systems has become blurred in the last few years. Today's personal computer delivers the same level of computing power as high-end servers and mainframes of not that long ago. With such powerful hardware, systems originally designed for small libraries can extend their reach to larger libraries and groups of libraries.

This report does not cover the personal computer based systems designed for small libraries. The May-June 2003 issue of *Library Technology Reports* provides detailed information on PC-based library automation systems.

Focus on the North American scene. This report focuses on the library automation systems available in North America. Although the library automation market is becoming increasingly internationalized, many systems have proven to be popular in the United Kingdom, Europe, and other parts of the globe that have little if any presence in North America.

These international systems include the OLIB system from Fretwell Downing, Spydus from Civica, Concerto from Bibliomondo, CAIRS Total Library from the UK-based CAIRS, DS Galaxy from DS (not to be confused with the legacy Galaxy system developed by GIS Information Systems), the 2020 system from Soutron, the Talis Library Management System from Talis Information, Ltd., based in Birmingham, U.K., and numerous others.

To be included in this report, the system must have a sales and support facility in North America and have implemented products in many libraries.

Caveat. This report cannot present any conclusions for a library on what library automation system they should acquire. At best, it serves as a guide to help a library considering a new ILS to understand which products to consider and the issues and process that surround that decision. The specific needs and circumstances of each library vary widely.

Terminology

ILS. Although the term integrated library system or ILS is given preference in this report, library automation system, integrated online library system, and library management system are terms often seen that carry exactly the same meaning.

Flagship: A company's primary and strategic library automation system. For example, Millennium is the flagship system for Innovative Interfaces, Inc.; Unicorn is the flagship system for Sirsi Corp.; and Voyager is the flagship system for Endeavor Information Systems.

Legacy: The systems being phased out of service. Inlex/3000, for example, is a legacy system supported by Sirsi Corp.

Web OPAC: A Web-based online public access catalog.