



Smart Libraries™

Formerly Library Systems Newsletter™

50 East Huron Street, Chicago, Illinois 60611-2795, USA

Smarter Libraries through Technology

by Marshall Breeding

A Meandering Tale of the Birth of a New ILS

This month's lead story illustrates real-world examples of some broader industry trends and how they manifest themselves in areas like business and technology. The research for this article was a fascinating exercise in tracing the roots of products familiar today back to the earlier era of library automation history that spanned multiple continents. Through this story, we can also see the way that a product initially created for a specific library takes hold regionally, nationally, and internationally. It has been an interesting process to untangle the antecedent products and companies, the technology issues, and even lawsuits involved in the background behind the launch of a new library automation system named Evolve.



I'm not aware of previous coverage of the Evolve Library Management System. It's a rare event when a new library automation product enters the market. It will be interesting to follow Evolve going forward, especially to see if InfoVision Software finds success in converting its current customer base without significant numbers of losses and expands to new sites. In a highly consolidated market, adding a new choice to the mix expands the competition, running contrary to the trend of ever-diminishing choices.

This story also involves OCLC's role in the library automation industry. Over the past few years, we've seen OCLC acquire a number of different ILS products and companies. OCLC now owns a number of aging products, including Amlib, SISIS-Sunrise, OLIB, CBS, and LBS, as it works toward completion of its Web-scale Management System. For US libraries running Amlib, InfoVision Software has guided them toward a new path based on their new flagship ILS. This path may differ from Amlib libraries elsewhere, where OCLC may have an interest in eventually attracting them to WMS.

We see the classic cycles of technology at play. In the article "Evolve ILS Launched by InfoVision Software Following OCLC Acquisition of Amlib" in this issue of *Smart Libraries Newsletter*, we see a historical set of transitions that begins with a mainframe-based library automation system called LIBRARY39. Powerful personal computers paved

Powerful personal computers paved the way for the development of new client/server automation systems with easy-to-use graphical interfaces such as Amlib.

IN THIS ISSUE

A Meandering Tale of the Birth of a New ILS
PAGE 1

Evolve ILS Launched by InfoVision Software Following OCLC Acquisition of Amlib
PAGE 2

Milestones in open source discovery products
PAGE 6



Receive *Smart Libraries* via e-mail

Subscribers that would like an e-mailed version of the newsletter each month should forward one e-mail address and all of the mailing label information printed on page 8 of the newsletter to moneill@ala.org. Type "e-mail my Smart Libraries" into the subject line. In addition to your monthly printed newsletter, you will receive an electronic copy via e-mail (to one address per paid subscription) at no extra charge each month.

the way for the development of new client/server automation systems with easy-to-use graphical interfaces such as Amlib. As the Web came to dominate all aspects of information management, these client server products began to sport Web-based interfaces, especially for patron access. Staff use of the system often continued to rely on Windows interfaces. More recently, we're seeing many examples, such as Evolve, where these hybrid systems are being displaced by fully Web-based systems. Current demands for interoperability with other enterprise systems demand a service-oriented architecture. The .NET framework upon which Evolve is based is one of several development platforms available for creating applications that embrace the service-oriented architecture.

The research for this piece also involved reviewing documents related to the lawsuit between InfoVision and OCLC that haven't previously been covered in the press. Though there were issues of serious conflict between the parties, it seems to me that they were able to settle their differences in fairly short order and to reach an amicable arrangement that involved the least disruption to the libraries involved.

While the story of this new ILS called Evolve seems especially convoluted, every automation product has its own set of twists and turns in its history and technical underpinnings. In this newsletter I aim to relate the context, background and history of each of the products we cover to help our readers understand the dynamics of the industry and to make well-informed technology decisions.

Evolve ILS Launched by InfoVision Software Following OCLC Acquisition of Amlib

In a time when it's rare to for a new product to enter the library automation market, InfoVision Software has quietly launched the Evolve Library Management System. This product targets public, school, and special libraries and will initially be marketed in the United States.

InfoVision Software developed the Evolve ILS, which was developed to replace the aging Amlib automation system that the company previously distributed on behalf of its Australian developer. In this early roll-out phase, Evolve will be primarily deployed to InfoVision Software's current client libraries running Amlib. The product will be actively marketed to other libraries as the company completes these migrations and finishes development on some final features.

InfoVision Software provides several different technology products for city or county governments and utilities. In addition to the Evolve Library Management System, the company offers software for project planning and records management.

Technology and Features

The Evolve Library Management System operates entirely through Web-based interfaces for all staff and patron access functions. It makes extensive use of Ajax (Asynchronous JavaScript and XML) to increase its efficiency. Ajax allows small units of information to be retrieved from the server as needed, avoiding the need to completely redisplay an entire page for each operation. InfoVision Software created Evolve in the Microsoft .NET 3.0 framework and is designed for

One of the key characteristics of Evolve LMS involves its facility for complete customization. Each library can specify the fields, data, and layout if their needs are not met by the default screen displays.

interoperability with other enterprise applications through .Net services. Evolve can be installed locally in the library or through a Software-as-a-Service subscription.

One of the key characteristics of Evolve LMS involves its facility for complete customization. Each library can specify the fields, data, and layout if their needs are not met by the default screen displays.

The Evolve LMS includes all of the expected modules including circulation, cataloging and authorities, Web-based OPAC, patron maintenance, periodical and serials control, and reports and statistics. SIP2 support comes as an optional capability. A bookmobile module is under development.

History and Background

Originally established as a distributor for technology developed in Australia, InfoVision Software has made a transition into a firm that develops and supports its own software products. The history of this company includes involvement with Amlib, a library automation system created in Australia.

lia, the company that originally created Amlib, and with OCLC when it acquired Amlib.

Connection with Amlib and InfoVision Technology

Evolve aims to move beyond client/server computing into a more modern Web and services-based architecture. Amlib, in its day, was a pioneering product—one of the first to break away from the mainframe computing that dominated the previous phase of the industry and deliver library automation through personal computers and graphical interfaces in a client/server architecture.

The Amlib library management was initially created in 1993 for the Canning City Library in Western Australia. The library wanted to move away from their aging mainframe system, called LIBRARY39, developed by ICL (International Computers Limited), and move to a new system with graphical interfaces that used less expensive personal computers rather than an expensive mainframe. The Canning Library developed specifications for a new PC-based system and engaged Roger Armstrong, the programmer that originally developed LIBRARY39. Armstrong formed a company called AMSystems to develop and support the software for the Canning Library and eventually for other libraries in Western Australia. The software was based on a database product called Gupta SQLBase, an early relational database and development environment for Microsoft Windows, and retained elements of the structure of LIBRARY39. Amlib was among the first library automation products that offered graphical clients for staff and public access functions. Gupta SQLBase was later renamed Centura SQL-



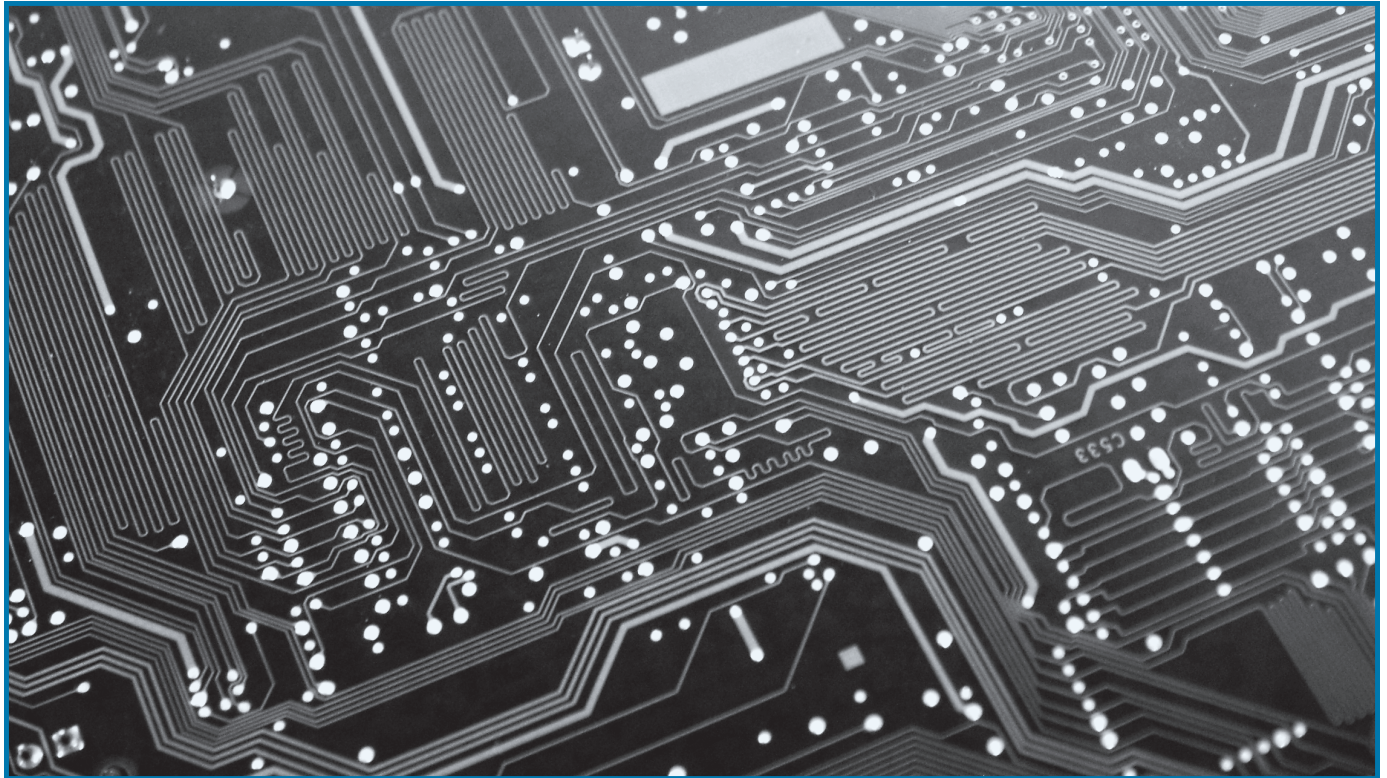
Base. Amlib was eventually extended to support Microsoft SQL Server and Oracle.

In 1995 Roger Armstrong joined forces with Harold Dykstra, who owned a firm called Mitec Computer Systems, to form a new company InfoVision Information Management to market Amlib throughout Australia. The company, then named InfoVision Technology, also offered a records management product called AUSInfo. Both of these products were based on the Microsoft Windows operating system.

Amlib proved to be a successful library management product in Australia. Since its introduction, it has been adopted by a large portion of the public and school libraries in Australia. Building on its domestic success, InfoVision Technology, as the company was known by that time, began creating arrangements to distribute Amlib in

other geographical regions. The agreements involved an arrangement where InfoVision Technology continued its role in developing the software and its distributor market the product to develop new customers in its defined territory and provide installation, training, and first level support. InfoVision Technology would be available for second tier support and deliver ongoing releases of the software with bug fixes and enhancements.

In April 2003, InfoVision Technology Limited, with Alistair Robinson named as Managing Director, was formed to distribute and support Amlib in the United Kingdom and Ireland. InfoVision Africa Pty Ltd was established in April as the distributor for Amlib in Africa. Marketing and support for Amlib in Africa has since shifted to Sabinet Online Limited (<http://www.sabinet.co.za/?page=library-management-systems>).



Amlib Launched in the United States through Brodart

In May 2000, InfoVision Technology created a partnership establishing Brodart as its exclusive distributor for Amlib in North America. Brodart was a well established provider of furniture, supplies, and other products to libraries. Brodart had its own Automation Division, established in 1974, and created a popular CD-ROM based cataloging product named Precision One and an online catalog called LePac. In 2001 Brodart acquired the automation products of CRS, Inc., including the Media Minder for the management of media center operations.

Brodart saw considerable early success with Amlib. By April 2001 Brodart secured 45 sales of Amlib in the United

States. In subsequent years, sales were not as strong. In 2004 Brodart exited its involvement with Amlib, allowing its agreement with InfoVision Technology to expire.

InfoVision Software Launched

InfoVision Software was formed in 2002 by Bruce Elliot to operate as the North American distributor for the records management product of InfoVision Technology, known by that time as the InfoVision eDRMS. Since Brodart had exclusive rights to market Amlib in North America, InfoVision Software was not initially involved in the library market, but focused on the content and document management products for local governments and federal agencies.

InfoVision Software began its involvement with libraries in 2004 following Brodart's withdrawal from marketing Amlib. InfoVision Software added this product to its portfolio and became the distributor of the Amlib integrated library system in North America. The company inherited the North American customers of Amlib, cultivated by Brodart, and began to market the software to new clients. By the end of 2009 InfoVision Software had about 80 library customers operating Amlib.

In August 2006, InfoVision Software began phasing out their involvement with the InfoVision eDRMS in favor of their own product. The company was especially concerned that the InfoVision eDRMS was not able to pass the requirements for Department of Defense certification. Named RMConsole, this new product was based on the Micro-

soft .NET technology, which provided a modern platform that could be engineered to deliver features not available in the original InfoVision product. The product has recently been branded the Evolve ERDMS.

In January 2007, InfoVision Technology launched its own next-generation content and document management product called InfoXpert, based on Web interfaces and Microsoft .NET architecture to succeed the InfoVision eDRMS.

OCLC Acquires Amlib

In September 2008, the course of Amlib events took a new turn when OCLC acquired the rights to the Amlib Library Management system. Just prior to this transaction, InfoVision Technology separated into two companies: Amlib Pty. Ltd, dealing with the Amlib ILS and InfoXpert Pty. Ltd, which held onto the company's interests in document, content, and records management. In January 2007, the company had launched its new generation product, called InfoXpert, to succeed the InfoVision eDRMS as its flagship document and recordsmanagementplatform. InfoXpert continues to operate, with Trevor Dykstra as Managing Director and has recently expanded with the launch of its new KnowledgeXpert integrated knowledge management and enterprise search solution.

OCLC folded Amlib into its UK operating division, formed when it acquired Fretwell-Downing in 2005. OCLC (UK) took responsibility for ongoing development and second-tier support for its distributors, including InfoVision Software. More recently OCLC has organized its library automation products into a division called Management Services and Systems. This division includes the entire portfolio of OCLC's library

Timeline:	
1993	Amlib developed for the Canning Public Library in Western Australia by AMSystems
1995	AMSystems becomes InfoVision Management Systems
May 2000	Brodart becomes exclusive distributor for Amlib in North America
2002	InfoVision Software founded by Bruce Elliot
April 2003	InfoVision Technology Limited formed to market Amlib in the UK and Ireland
2004	Brodart withdraws as distributor of Amlib
Jan 2004	InfoVision Software assumes role to distribute Amlib in North America
Aug 2006	InfoVision launches RMConsole, later known as Evolve ERDMS
Jan 2007	InfoVision Technology launches InfoXpert
Sept 2008	InfoVision Technology separates into two companies and InfoXpert Pty. Ltd.
Sept 2008	OCLC acquires Amlib Pty. Ltd
June 2009	InfoVision Software begins development of Evolve Library Management System
Dec 9, 2009	InfoVision Software files lawsuit against OCLC (UK)
Dec 14, 2009	OCLC (UK) terminates InfoVision Software license to distribute Amlib
Feb 1, 2010	InfoVision Software and OCLC (UK) reach out of court settlement

automation products, including Amlib, SISIS-Sunrise, OLIB, LBS, CBS, and the Web-scale Management System.

Conflict with OCLC

The transition of ownership between InfoVision Technology and OCLC did not

go well from InfoVision Software's perspective. Dissatisfied with the lack of development of Amlib, InfoVision Software withheld payment of its license fees to OCLC. When OCLC threatened to become involved with its US customers by appointing a new distributor, InfoVision Software filed a lawsuit claiming that ongoing development and second-level support had not been provided and asking the court to prohibit OCLC from contacting its customers. In the absence of substantive development and secondary support, InfoVision Software claimed it was not obligated to pay the license fees to OCLC. In response to non-payment OCLC terminated the license for InfoVision to distribute Amlib effective December 14, 2009.

InfoVision Software filed its complaint in the United States District Court Southern District of California on December 9, 2009, case number 3:09-cv-02714-JMA. In its complaint, InfoVision Software submitted a motion to maintain its current status including a prohibition against OCLC approaching its customers. The court issued a preliminary ruling against this motion, not on the merits but on issues of jurisdiction. In lieu of further proceedings, InfoVision and OCLC were ultimately able to amicably settle their differences, as reflected in the transcripts of an "early neutral evaluation" hearing held in court on February 1, 2010. InfoVision Software would not continue as an Amlib distributor and would pay only a portion of the license fees due prior to the termination.

InfoVision Software goes forward with Evolve Library Management System

Given the company's experience as a software developer and its concern that Amlib would not be developed in a way that would attract new customers, InfoVision elected to create a new library automation product. According to InfoVision Software president Bill Elliot, "the company saw a good opportunity for a well-engineered, fully configurable product.

Many of the other library systems on the market are based on obsolete technology."

InfoVision Software began the development of Evolve LMS in June 2009. Such rapid development was made possible through the company's earlier work to create a configuration engine for the .NET platform as the basis of its development of earlier projects such as its Evolve Electronic Document and Records Management System. With this configuration engine in place, applications for new vertical industries, such as library automation, could be produced in a matter of months. InfoVision has also created Evolve Planning, a project management product for city and county governments.

Currently, InfoVision Software is busy completing the finishing touches on its Evolve LMS and migrating its existing customer base from Amlib. Though the license to distribute Amlib has ended, InfoVision Software and OCLC work together to ensure that the libraries continue to receive support until they are able to migrate.

Sources: E-mail interviews conducted with Trevor Dykstra, General Manager of InfoVision Technology; Bruce Elliot, President of InfoVision Software; Judi Willmott, Library Manager of Canning Library Services; documents filed related to Infovision Software vs OCLC (UK).

InfoVision Software:

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

InfoXpert:

<http://www.infoxpert.com.au/>

OCLC Management Services:

<http://www.oclc.org/services/management/>

—Marshall Breeding

Milestones in open source discovery products

Commercial products dominate in the realm of discovery products and services. Open source alternatives, however, continue to fulfill a niche. Recent weeks have seen some major milestones accomplished among open source discovery products.

VuFind, the first open source discovery interface, has been available as a beta version for many years. Developed at Villanova University and initially released to SourceForge in June 2007, VuFind has been adapted, customized and implemented at many

The integration between Summon and VuFind provides an interesting example of the separating the interface layer from the underlying search technology as a library implements a discovery solution.

libraries, including the National Library of Australia, the Consor-



tium of Academic and Research Libraries in Illinois, Auburn University, and naturally, at Villanova University. SLN covered VuFind in its September 2007 issue. On July 15, 2010, the beta period completed, and VuFind 1.0 was released. Some of the recent improvements found in this release include support for metadata formats in addition to MARC, a mobile-friendly interface, and a recommendations feature.

VuFind can also now integrate with Summon discovery service from Serials Solutions. This capability makes it possible for a library to use VuFind as the interface it offers to its patrons and take advantage of Summon's massive index for providing access to its collections, includ-

ing resource management in the ILS, articles associated with its subscriptions to electronic resources, and its digital collections. The integration between Summon and VuFind provides an interesting example of the separating the interface layer from the underlying search technology as a library implements a discovery solution. Andrew Nagy, the original lead developer of VuFind at Villanova University, currently serves as the Senior Discovery Services Engineer for Serials Solutions.

Another open source discovery product, called Hydra, initially developed at the University of Virginia, has also gained considerable attention. Hydra was previously known as Blacklight, and like VuFind,

makes use of the open source SOLR and Lucene search engine technology. But while VuFind was created primarily with the PHP programming language, Hydra is based on the Ruby on Rails environment, which has become a favorite among Web application programmers.

Hydra has also crossed the threshold as a production product. The University of Virginia Library recently launched their new Virgo catalog based on Hydra, replacing its traditional catalog. Though implementing a new discovery layer, UVA continues its use of its SirsiDynix Symphony ILS.

—Marshall Breeding



Smart Libraries Newsletter
American Library Association
50 East Huron Street
Chicago, IL 60611-2795 USA
Address Service Requested

NON PROFIT
US POSTAGE
PAID
PERMIT 4
HANOVER, PA

September 2010 A Meandering Tale of the Birth of a New ILS

Smart Libraries Newsletter

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

Editor

Marshall Breeding
615-343-6094
marshall@breeding.com

Managing Editor

Dan Freeman
312-280-5413
dfreeman@ala.org

TO SUBSCRIBE

To reserve your subscription, contact the Customer Service Center at 800-545-2433, press 5 for assistance, or visit alatechsource.org.

The 2010 subscription price is \$85 in the United States and \$95 internationally.

Production and design by the American Library Association
Production Technology Unit.
Smart Libraries Newsletter is published monthly by ALA TechSource,
a unit of the publishing department of the American Library Association.
Copyright American Library Association 2010. All rights reserved.