Mellon-funded OLE Project Underway to Define Next-generation Library Automation

Thanks to a $475,700 grant from the Andrew W. Mellon Foundation, there is a new initiative to design and create a next-generation library automation environment. The goal of the project is to develop a set of requirements for library automation based on a fresh analysis of the workflows that take place in libraries free from the constraints imposed by current library automation products. The project will follow principles and methodologies consistent with the service-oriented architecture (SOA). The current one-year project aims to produce a requirements document. A possible follow-up effort may result in the development of an open-source implementation built on the work of the OLE Project. Work to develop a project proposal and identify institutions committed to involvement in a build project will run parallel with the current design effort.

Duke University is leading this multi-institutional initiative, with Lynne O'Brien, Director of Academic Technology and Instructional Services for the Perkins Library serving as Principal Investigator. Other partners that will contribute substantially to the project include Lehigh University, the University of Kansas, the University of Pennsylvania, the National Library of Australia and the Library Archives of Canada, the Orbis Cascade Alliance, the University of Chicago, the University of Florida Libraries, Rutgers University, Whittier College, the University of Maryland, and Columbia University. Marshall Breeding of Vanderbilt University participates as Project Advisor. Representatives from these institutions will meet in-person and virtually over the course of the next year to engage in the process of designing a new library automation platform.

While these institutions and individuals provide stewardship of the project, a key value important to the group is broad-based community ownership of the initiative. In order to design a system capable of providing critical automation services for libraries, the project will require substantial input, feedback, and analysis from individuals and organizations in library community beyond the specific institutions named in the grant. To foster community participation the OLE Project will conduct its work in public forums such as open discussion groups, will conduct public Web casts, and is convening a number of regional meetings and other activities to actively solicit input.

The OLE Project conducted its initial two-day meeting on September 9th and 10th, 2008 at Duke University. Some of the event's key activities included team building, introductory training in SOA, and refining the project timeline. The team also drafted a scope document that that will define what activities, areas of functionality and operations the project will or will not address.

The initial meeting of the OLE Project follows many months of preliminary work. Grant writing activities commenced in November 2007, specifying the work to be accomplished, but also taking on the time-consuming task of identifying the institutions willing to participate in the process. The grant development process included defining project goals and objectives as well as broad solicitation of potential project partners.

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The completed grant proposal was submitted to the Andrew W. Mellon Foundation in April 2008 and approved in June 2008. As a project funding multiple institutions, substantial organizational planning and preliminary work took place between the positive funding decision and the first in-person meeting.

A basic tenant of the OLE Project is service orientation. The grant funds the services of SOA Systems, Inc., a leading firm offering consulting, training, and certification in the SOA domain. This design phase of the OLE Project embraces service orientation and remains agnostic to particular technologies that might be used to implement the design in any future project to build software based on the resulting design and requirements documents.

The primary deliverable for the OLE Project is a document that provides a blueprint for the proposed library automation environment. One of the activities of the project involves a series of structured exercises to identify and map the workflows involved in library operations. This analysis will attempt to parse out what library workflows would look like in the absence of the legacy software systems that currently impose specific ways of approaching library tasks. These legacy systems, for example, either specialize in print collections or electronic content as separate activities. The OLE Project will take the results of the workflow analysis as the basis for defining reusable services that can be composed into higher-level applications.

The OLE Project funding comes from the Program in Research in Information Technology of the Andrew W. Mellon Foundation. One of the key activities of this program is to fund projects involving "the creation of enterprise administrative and infrastructure software by means of distributed collaborative open-source development" (http://rit.mellon.org/). Other projects funded through this program of the Mellon Foundation include:

- The Sakai Collaboration and Learning Environment (sakaiproject.org);
- A series of projects under the Kuali Foundation addressing the administrative systems for educational institutions including the
    - Kuali Student System, "a next-generation student services system based on an enterprise services architecture" (http://www.kuali.org/communities/ks/)
    - Kuali Financial System, a "fund-based accounting and Enterprise Resource Planning (ERP) system for non-profit organizations" (http://www.kuali.org/communities/kfs/), Kuali RICE provides an "enterprise class middleware suite of integrated products that allows both Kuali and non-Kuali applications to be built in an agile fashion" (http://rice.kuali.org/)
- CollectionSpace, a collections management and access application for museums (http://www.collectionspace.org/), and
- Fluid, a project that focuses on user interface design, methodologies, and technologies that can be adopted by other community source projects.

This is not a comprehensive list, but it illustrates the context of the OLE Project as part of the Mellon Foundation's broad initiative to foster the development of key infrastructure components to support higher education institutions, museums, and other non-profit organizations. Each of these projects follows principles of community ownership and open-source, service-oriented implementations.

Given its context within the other enterprise-level, service oriented projects funded by the Mellon Foundation, the OLE Project may be able to leverage not only the experience and knowledge of these other efforts, but may benefit

from infrastructure components previously developed.

For more information see the OLE Project Web site at oleproject.org.

Disclaimer: Marshall Breeding, the author of this article is a participant in the OLE Project.

Indiana Evergreen Takes First Step Toward Statewide Open Source ILS

With the support of the Indiana State Library, a pilot project is attempting to implement the open source Evergreen ILS, working toward an opt-in, potentially statewide automation environment. Following many aspects of the model established by the Georgia Public Library System, a shared library automation system based on Evergreen will be offered to libraries throughout the state. Unlike GPLS, where the participating libraries were already using a shared system, Indiana Evergreen will grow more gradually as the libraries in the state of Indiana currently run many different automation platforms.

The proposed project offers considerable financial incentives to the libraries opting to participate. The costs involved in maintaining Indiana Evergreen will be paid by the Indiana State Library, including purchasing and maintaining the central servers, personnel costs in operating the system, training, software development, data conversion, and other related expenses. Libraries joining will pay no fee. The governance of the consortium will be developed by the member libraries.

The Hussey-Mayfield Memorial Public Library in Zionsville, IN was the first to come online. This library serves a population of over 15,000 residents with a collection of 120,000 titles. The library migrated to Evergreen from a SirsiDynix Unicorn system.

The library contracted with Equinox Software for services related to the imple-

mentation of Evergreen. Equinox Software includes the original development team from GPLS and bases its business model on providing services surrounding the Evergreen ILS.

An additional seventeen libraries are expected to transition to Indiana Evergreen by January 2009. Under the current expansion plan, additional libraries may join the Indiana Evergreen system in 2009 and thereafter.

For more information on Indiana Evergreen, see: http://www.in.gov/library/5592.htm.

Traditional Vendors Continue to Prosper

Although open source library automation has gained unprecedented popularity in recent years, the industry is still dominated by companies offering traditionally licensed software. In discussing the new open source software projects, it's important to keep in mind that the vast majority of libraries continue to use proprietary ILS products and that the sales of these products to new customers is continuing at moderately strong levels. Innovative Interfaces and Polaris Library systems have made a number of new sales in North America. Ex Libris has made sales of Primo and Aleph internationally. A number of libraries have migrated from Dynix Classic and Horizon to SirsiDynix Symphony this year, although the company has made few public announcements.

Innovative Interfaces recently announced a list of ten libraries that have selected its Millennium ILS in recent weeks. These include:

- Athens State University in Alabama, moving from the Library Management Network consortium to its own hosted version Millennium
- Bridgeview Public Library in Illinois moving from Library. Solution provided by The Library Corporation to Millennium

- O'More College of Design in Franklin, TN,
- San Jacinto College in Pasadena, TX moving to Millennium from SirsiDynix Horizon
- Elmont Memorial Library joining the Automated Library Information System of Nassau County shared Millennium system
- National Institute of Environmental Health Sciences, moving from a Dynix system to Millennium
- Oral Roberts University migrating from a Dynix Classic system
- Puritan Reformed Theological Seminary in Grand Rapids, MN automating for the first time with Millennium
- Emirates College for Advanced Education a newly constituted university in the United Arab Emirates will automate its new library with Millennium
- Western Australia Department of Health library implementing Millennium

Some of the libraries moving to Polaris from Polaris Library Systems:

- Brampton Public Library, a five-branch library system serving a city of 450,000 in Ontario, moving to Polaris from SirsiDynix Horizon
- Fort Smith Public Library in Arkansas, moving to Polaris from Highland Library Systems which they have been using since 1989
- Eastern Shores Library System, a consortium of fourteen libraries in Wisconsin, moving from a SirsiDynix Horizon system
- Henderson County Public Library in Kentucky, moving from a Dynix Classic system
- The Pinellas Automation Library System, a consortium of 22 libraries in Florida Prince George's County Memorial Library, a system of 18 community libraries with a col-

lection of over 2 million volumes, moving to Polaris from an Infor PLUS system
- The Lee County Library System in Florida, moving form a Dynix Classic system

Ex Libris has attracted a number of new customers for Primo, its discovery interface product. These include the University of Haifa in Israel, four institutions in Australia including the State Library of Victoria, Curtin University of Technology, the University of New South Wales, and the Australian Institute of Aboriginal and Torres Strait Islander Studies. Libraries that have selected the Aleph ILS in recent months include:

- The University of Quebec in Montreal
- National Library of the Dominican Republic
- Southampton Solent University in the United Kingdom
- Fudan University in China
- Shanghai Jiao Tong University in China
- The Universite de Bretange Occidentale in France

These lists represent some of the publicly announced contracts involving the traditional vendors and are meant only to remind readers of that this type of activity continues.

While the dynamics of the library automation industry have changed to include an ever-increasing open source component, this must be seen in the context of a market where proprietary software continues to dominate. The extent to which this dominance will continue in the long term is a major question as the library automation industry moves forward.

—Marshall Breeding

Chrome Dome

Last month we reported that the search engine wars were heating up again, with several new entrants in the field hoping to eat into Google's market share and eventually end Google's longstanding dominance of the search field. In September a browser war also heated up.

In this case, Google assumes the role of (a well-funded) David, not Goliath. Google released the public beta version of Chrome, the browser software it hopes will garner market share from Microsoft's Internet Explorer and other popular browser programs.

At first glance, Chrome is as sleek as the pate of a bald man—perhaps a better analogy would be the shaved head of an Olympic swimmer. It has the minimalist look, basic font type and color scheme of many of Google's interfaces. One has to wonder whether or not users will eventually grow tired of the standard Google look. Will Google eventually overhaul its basic interface design, or just constantly tweak it, like the visage of Betty Crocker?

It is important to note that the public beta version runs only on Microsoft Vista and XP (Service Pack 2) operating systems. Mac and Linux versions have been promised eventually. It is a little disconcerting to note that to Google, XP is now the trailing edge of the Microsoft OS long tail. Perhaps the OS war will heat up in October.

The tabs across the top of the Chrome interface make it very easy to remember and access all the concurrent web activities you are using. In the options area of Chrome you can even articulate your preferences to have certain oft-accessed website autoload whenever you fire up Chrome. This could be handy both for public access and staff only workstations in a library. Chrome will automatically import bookmarks and saved passwords from other browser software, but this version does not allow users to organize their bookmarks the way they can in other popular browsers.

Accessing attachments is a snap. Downloading and saving email attachments is quite easy when using the Chrome browser. Most users will love the lack of any pop-up dialogue. By default, when you click on an attachment, Chrome automatically saves the file and creates an icon at the bottom of the browser window to access it. If you want or need to know where the file actually resides on your hard drive, it will go by default to your My Documents/Downloads folder.

According to Google, Chrome has lots of safety and security features under the hood. David Pogue, in his initial New York Times Circuits review of Chrome, notes that each tab resides in its own sanitized sandbox on your hard drive. If any spyware or malware lurks in the website you are exploring in that tab, the rest of your hard drive should be safe. Mark Mediati of PC World notes that Chrome is designed so that, if a website causes your browser to freeze or crash, only that tab should fail, not the entire program. If that works as advertised, it will eliminate a major pet peeve of many web users.

Chrome also has an Incognito mode that saves no history, password, cookies, or cache from your browsing session. This obviously will be a popular mode among the smut-surfing crowd, but it also could be a boon for public access workstations. Librarians and privacy advocates will love the idea of keeping the browsing activity of all library users private. Browser enhancements make for strange bedfellows, indeed.

The jury is still out on the overall accessibility of Chrome to blind and low-vision users, but the early testing and comments are not encouraging. A September 3rd blog post by Steve Faulkner notes some significant problems, such as the inability to access the help and options screens via keyboard shortcuts. In its current beta release Chrome does not handle and present well the high contrast mode features built into many operating systems. Faulkner concludes, "This release of Google Chrome does not appear to have been developed with the needs of users with disabilities taken into account."

Chrome is free—there are no out-of-pocket expenses to acquire and use it. Whether Chrome should or will be adopted and used widely by libraries and library users, however, is a complex issue. Beat release software may be buggy or unstable, so some libraries may opt to wait and see how Chrome fares in widespread real-life operation. Many password-protected library-related web resources will need to be tested to make sure they are Chrome-compatible. This will include not only web-based resources designed primarily for use by library end-users, but also web-based systems and services used primarily or exclusively by librarians and library staff members.

As of early September, for example, Content Reserve from OverDrive did not work with Chrome. Apparently OverDrive has designed Content Reserve to work exclusively in Internet Explorer. If other browser software is detected, you receive an error message. Perhaps some designers of web resources will even make the leap of faith and design (or re-design) their resources to optimize them for Chrome, rather than for IE. If Chrome does gain significant market share and

turns the browser market into a one without a single dominant program, the entire design practice of optimizing a web-based resource for one specific browser will need to be re-examined.

Many reviewers have been positive about Chrome as software and its chances in the browser wars. Mark Mediati noted that Chrome is "clever and convenient [in ways that make] using the Web a more organic experience than you'd get with either Microsoft's Internet Explorer 8 or Mozilla's Firefox 3." Chrome is open source software, too, so feel free to tweak it if you are so inclined. If you want more information about Chrome delivered in an entertaining cartoonish style (38 pages long, rather than the usual 3-4 panes), check out http://www.google.com/googlebooks/chrome/index.html

—Tom Peters

More Info. @

Chrome Home:
   http://www.google.com/chrome

Mark Mediati's review in PC World:
   http://www.pcworld.com/article/150579/article
   .html?tk=nl_wbxnws

Steve Faulkner's blog post:
   http://www.paciellogroup.com/blog/?p=92

Telepresence: Videoconferencing Gets a Facelift

This is the presence decade—everyone and every organization is striving to develop a presence somewhere. Whether it is on the Web, in virtual worlds, on a blog on TV or anywhere else, this is the time when everyone wants to make themselves known. Currently, with telepresence systems, a library or library-related organization can beef up and burnish its real-world presence, too. According to Wikipedia, "Telepresence refers to a set of technologies which allow a person to feel as if they were present, to give the appearance that they were present, or to have an effect, at a location other than their true location."

Currentrly, telepresence systems are being used to hold real-time meetings with dispersed participants. There are at least five ways that a group can meet in real time: in person, via telephone conference, in a virtual world environment, using web conferencing software, and using video conferencing systems. As the costs of in-person meetings continue to skyrocket, most organizations and many individuals are exploring the four other ways to have group meetings.

Libraries, library consortia, library associations, library vendors, and other library-related organizations are all in the same boat as we explore and test digital and virtual meeting options, technologies and systems.

Although it's difficult to predict how each of these five basic meeting modes will gain or lose market share of library-related meetings over the next few years, it seems safe to assume that in-person meetings will lose market share if the costs of transportation and travel remain high. It also seems safe to assume that this will be the case. Telephone conference calls are relatively "thin" communication channels, in that they only handle voice communication. They may lose market share as people want to share documents, text chat or co-browse the web. Web conferencing and virtual world meetings currently have only a tiny percentage of the meeting market share, but they may gain significantly in the next few years.

That leaves us with one of the more complex and clunky solutions—video conferencing. Some VTel and Polycom

video conferencing systems that are installed and in use in libraries, library consortia, and library networks may seem like legacy systems ready to be put out to pasture, videoconferencing system developments and improvements continue to be made. Recently several videoconferencing vendors have spruced up their systems, and now go by the generic name of telepresence systems.

Telepresence systems can be understood as videoconferencing for the 21st century. They allow people to place-shift during meetings and to attend from from far-flung locations. The sense of presence created for these remote attendees is so realistic that it is uncanny. For example, Hewlett-Packard has developed a next-generation videoconferencing system called Halo Collaboration Suites. Cisco Telepresence is another player in this market

These systems are not cheap. Most cost six figures, putting them beyond the financial reach of most libraries and library-related organizations. Nevertheless, prices are already beginning to fall. Although telepresence systems were

developed initially for large and well-funded for-profit corporations and governmental units around the world, plans already are underway to develop telepresence systems that would be affordable to not-for-profit organizations, extended families, and even individuals.

Libraries and library-related organizations need to watch how meeting technologies of all types evolve over the next few years, raise consciousness throughout our organizations that

meeting in person may no longer be the best way to meet, and keep an eye out for affordable and effective telepresence systems.

—Tom Peters

More Info. @:

Wikipedia article on telepresence:
    http://en.wikipedia.org/wiki/Telepresence

Green Library PCs

Many libraries are striving to become more environmentally responsible and efficient with non-renewable resources, which will also save them money. Decision makers in this area have many areas to examine—lighting, overall electrical usage, HVAC systems, chemicals used during cleaning and the processing of library materials, as well as initiatives to recycle or use less paper.

When it comes to personal computers there is much to consider. Liza Boyd of PC World has compiled and created a useful 11-minute presentation entitled "Going Green: How to Save Money, and the Environment." The guide focuses on selecting, using, and disposing of computers and peripherals with a green sensibility. Please note that although viewing this video is free, you do need to register and provide quite a bit of information, including an email address and phone number.

Boyd points out that personal computers consume a lot of energy, and that much of it is wasted, particularly because many computers are left on at full power during long periods of non-use. Most computer operating system allow various lower-energy-consuming "sleep" modes to initiate after user-specified periods of non-use. An initiative called Climate Savers Computing Initiative provides step-by-step instructions on how to do this.

There are many free and low-cost ways to make your library's computing environment greener. One easy change

would be for us all to break our relationship with those cute screen saver software programs. Most new monitors don't need to be saved and screen saver software often wastes energy. There are greener ways to display photos of your kids, grandkids, and pets. Cut back on printing, too. Even though many of us love to pick up printed handouts at meetings, workshops, and conferences, we can survive without lugging all that pulp around with us. Cutting back on ink and toner usage generally is a great, green cost-cutter for a library organization.

If your library is in the market for new computers and peripherals, you may want to consult the EPEAT website. According to the homepage, the Electronic Product Environmental Assessment Tool is "a system to help purchasers in the public and private sectors evaluate, compare and select desktop computers, notebooks, and monitors based on their environmental attributes." EPEAT will help you assess the greenness of the computer from its manufacture to it final resting place.

When it comes to disposing of old computers, monitors, and printers, organizations of all types and sizes have ample opportunities to improve. Boyd cites Environmental Protection Agency reports that indicate that as recently as 2005 up to 85 percent of discarded computers and peripherals, which are laced with toxins, ended up in landfills.

Some manufacturers of computer equipment will take back their old models at no additional cost to the purchasing organization. The Computer TakeBack Campaign summarizes the policies of many computer companies.

The issues and opportunities surrounding "going green" are generating much interest in libraries, other non-profit sectors, and for-profit sectors. In Second Life, the three-dimensional virtual world, an island called Emerald City recently came into existence, devoted to providing reliable, unbiased information and library services about going green. Clearly, the green trend is one that's not going away, so librarians need to continue innovating, adapting and reducing the ecological footprint of their operations.

—Tom Peters

More Info. @

Registration page for the Liza Boyd webcast:
    http://reg.itworld.com/servlet/Frs
    .frs?Context=LOGENTRY&Source=
    email_082608&Source_BC=17&
    Script=/LP/50022308/reg&

Climate Savers Computing Initiative:
    http://www.climatesavers
    computing.org/

Computer TakeBack:
    http://www.computertakeback.com/

Have Kirtas, Will Scan

Mass digitization projects involving library materials take a variety of forms. Some large libraries enter into formal agreements with large for-profit technology companies, such as Microsoft and Google. Others elect to go the open source route, through collaborative partnerships with organizations like the Open Content Alliance. Some existing library consortia, like the CIC, have launched consortial mass digitization projects in partnership with one of the large for-profit technology companies.

Some libraries have decided to follow a go-it-alone route. For example, McGill University recently announced that has acquired a Kirtas APR (Automated Page Turning) Book Scan 2400 to ramp up their book digitization project, which is now over a decade old. As the name of the device suggests, it can scan 2,400 pages each hour.

McGill plans to make the digital versions of the scanned books available free of charge to users worldwide. They also have agreements in place with Amazon and Lulu.com to offer print-on-demand sales of these digital works.

McGill and other research universities that are engaged in mass digitization projects often plan to use the revenue stream from their POD sales to help defray the cost of the overall project. Time will tell if this strategy pans out, especially if more people decide that the free digital version is fine for their purposes.

These routes and strategies for mass digitization projects are a good thing. Different processes and alliances are receiving major field tests, they also will create some new challenges. As all of these mass digitization projects begin to amass significant archives, a great end-user service would be to offer some sort of union catalog or union library collection, really, because all the full text of all these dispersed mass digitization archives will be available. If some end-user participatory or contributory interface were blended into the search and use interface, so that end-users could add ratings, annotations, reviews, references, and perhaps even more digitized books and interact with the worldwide union library of digitized books, it would be a boon to library users everywhere. A BookGlutton type interface to a digital collection of tens of millions of books could be socially and culturally transformative. The last thing we need is a bunch of mass digitization content silos.

—Tom Peters

More Info. @

McGill's Press Release:
http://www.mcgill.ca/newsroom/news/item/?item_id=101150
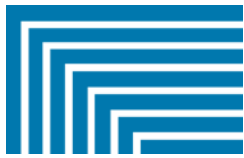
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Open Library Environment Group Launches Project
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