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September 2008 Wins and Losses for VTLS

Smart Libraries Newsletter

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

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Wins and Losses for VTLS

Two announcements were made within the same week concerning VTLS—one involving very different completed implementation of Virtua at Queens Borough Public Library and the other revealing the decision of Oxford University Libraries in the UK not to go forward with their migration to Virtua. These contradictory events defy simple explanation.

A Stealth implementation of Virtua at Queens

In an implementation process that had been kept under wraps, the Queens Borough Public Library has completed its migration to a customized version of the Virtua library management system provided by VTLS. The library is moving from DRA Classic, which it has used since about 1989.

The Queens Borough Public Libraries are the busiest library system in the United States. It was reported that there were an astounding 21 million circulation transactions in 2007. The library system includes 62 branches and supports the 2.2 million people that live in Queens.

The implementation of Virtua at Queens took place on an accelerated schedule. The library began its implementation in January of 2008, putting the system through extensive testing and benchmarks to demonstrate its ability to support the transaction load and complexity of operations. The outcome was positive and led the library to instruct VTLS to go forward with the implementation of Virtua for production use. The system was implemented in July 2008 and involved a conversion of 6.8 million items from its current DRA system.

Queens had previously implemented AquaBrowser as the primary interface for its automation environment. The library licensed AquaBrowser from The Library Corporation, presenting it as the primary interface in August 2005. Queens was the first large municipal library in the US to implement AquaBrowser.

AquaBrowser was initially installed in conjunction with its DRA Classic automation system; it now fronts Virtua. Data from Virtua populates the AquaBrowser platform through a daily transfer of records. Real-time holdings and availability data are transferred from Virtua to AquaBrowser as needed.

The use of this third-party interface allowed Queens to make the transition of its library automation environment from DRA to Virtua with virtually no impact on its users. The library's Web site and catalog search interface look and function much the same with Virtua as it did with DRA. Library users interact directly with Virtua's Chameleon Web interface only for certain types of specialized searches.

Virtua provides the automation functionality necessary for the library staff members to carry out the work of this very busy and complex system. Virtua clients are now service points in the 62 branch libraries, where they are used for technical services and book processing. Over the last six months the library has executed an extensive training program to orient its personnel to the staff clients of Virtua.

Continued on page 2

IN THIS ISSUE

Wins and Losses for VTLS
PAGE 1

The Reverse Frontier Problem of Virtual Worlds
PAGE 3

Major Changes at Ex Libris
PAGE 4

CARE Affiliates acquired by LibLime
PAGE 5

The Search is Back On
PAGE 6

Staying Put, Staying Connected
PAGE 7



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New York Public Libraries (Manhattan, Bronx, and Staten Island)	Millennium
Queens Borough Public Libraries	Virtua
Brooklyn Public Library	Millennium

Figure 1. Automation Systems in New York Borough Libraries.

Library Automation in New York City

From a library automation perspective the five boroughs of New York City participate in three separate library systems, with the following automation platforms:

Queens had been in line to move to the new Horizon 8.0 platform prior to the announcement by SirsiDynix that it would focus on Unicorn (now dubbed Symphony) as its strategic automation platform. Queens' contract with SirsiDynix for Horizon 8.0 and a suite of other automation products was announced in March 2003. The migration to Virtua counts as a loss of one of SirsiDynix's major accounts. This year SirsiDynix also lost the 86 branches of the New York Public Library as they elected to move away from their Dynix Classic system to a consolidated Millennium system with the NYPL Research Libraries as we reported in the May 2008 issue of this newsletter.

VTLS selected as a Development Partner

The Queens Borough Public Library aims to build an automation platform that is not available in any of the off-the-shelf products. Its technology strategy goes beyond the initial implementation of the Virtua library management system and continues through an agenda of custom development of the software.

The selection of VTLS was based on the library's assessment of the company's ability to work with it as an ongoing development partner.

Oxford Withdraws from Virtua Implementation

The Oxford University Library System announced that it has abandoned its effort to implement Virtua as its core automation environment. Oxford, with over 100 libraries, ranks as one of the world's largest and most complex library organizations. Oxford had contracted with VTLS in October 2005 for the basic library automation system but also for custom software to manage requests and retrievals from its many closed stack libraries.

The official announcement from Oxford highlighted many of the internal transitions that have occurred recently within their organization. The announcement also highlights the complexity of how implementing a new automation system may compete with other priorities a library may have. Oxford's announcement politely avoids issues of blame, but the fact that they will not move the system into production use despite three years of work makes the project seem less than successful.

This is not an isolated event—in the January 2008 issue of *Smart Libraries Newsletter* we reported a similar issue with Virtua in the libraries associated with New York University. NYU contracted with VTLS for Virtua for the

Library Consortium of Lower Manhattan in June 2004, and the implementation languished. In December 2007 NYU announced it had entered into a contract with Ex Libris to implement Aleph 500. Although, like Oxford, no public statements were made regarding specific problems with the software, the libraries did not put the software into production, the ultimate goal of any ILS implementation.

Thus far, no such difficulties have been applied at Queens. The initial announcement involved the successful implementation, not simply the selection of the product. While Queens followed a bold and ambitious execution of its migration, it took a cautious route regarding the publicity of the project. The library held back the announcement of the selection of Virtua until it had proven itself as its production environment.

It's a Risky Business

VTLS continues to be a source of interesting surprises, and shows how developing an ILS can be a risky business. Just when it looked like difficult circumstances were clouding VTLS's prospects, it leapt forward with dramatic fashion at the Queens Borough Public Library.

The company aims for some of the most difficult automation projects available—highly complex library organizations looking for custom-built solutions



well beyond what is available in off-the-shelf software. These projects come with a high degree of risk and can falter for a variety of reasons. It takes a bold company to specialize in this niche of the industry. VTLS shows great perseverance and determination in taking on a new project like the automation of the Queens Borough Public Libraries despite significant problems with earlier implantations.

In addition to Queens, other recent sales of Virtua include the National Library of Morocco, the National Library of Ireland, Chandragupta Institute of Management in India and Mas-

terskill College of Nursing and Health in Malaysia. The National Library of Wales put Virtua into production in May 2008.

Even though the recent history of VTLS includes some major blemishes, it should be viewed in perspective of the company's overall track record. As libraries consider the suitability of Virtua for their own automation needs there are positive and negative factors to take into account, but this isn't unusual. Almost all companies in the industry have a record of some failures mixed in with their overall record of success. Few, however, have such striking contradictions occurring simultaneously.

The Reverse Frontier Problem of Virtual Worlds

Will Rogers reportedly once said, "Buy land. They ain't making any more of the stuff." This is very true in the real world. Some things like land, oil or diamonds are non-renewable resources, or take so long to form that they are virtually non-renewable. Other resources, such as foodstuffs and information, can be created, grown, copied, and renewed easily, if not infinitely.

The fact that land is a finite commodity has had a profound influence on human development. The idea of a frontier is premised on the assumption that land is not infinite. The idea of colonizing other planets in order to gain more land and other non-renewable resources has been the stuff of science fiction for decades. We use land for various purposes, fight over it in courts, fisticuffs, and wars, re-use it, and reclaim it.

Virtual worlds often put an interesting spin on what we have come to expect and believe based on our experiences with the real world. As virtual worlds continue to proliferate and populate, the "reverse frontier problem" has arisen. Stated bluntly, in many virtual worlds the land mass is growing faster than the population. It is very easy and inexpensive to create new land parcels or rooms in virtual worlds. Many people come into a virtual world expecting to find a vibrant street scene similar to a big city

in the real world. Instead, they often encounter something like the Australian Outback.

This is a problem because many real-world citizens yearn for more space. The fact that space can be created ad nauseam in virtual worlds with a few clicks seems to be one of many instances where virtual worlds improve upon the conditions of life in the real world. Unlike in the real world, where parcels of land are not all created equal, in most virtual worlds each new land mass has an equal chance of becoming heavily populated, or at least heavily visited. In the real world, land parcels differ in terms of soil quality, weather, population and many other factors. Five acres of land in the Australian Outback are not as valuable to the human endeavor as five acres in a rich agricultural area, and everyone in the world knows this. No one is going to build a strip mall in the middle of the Null Arbor Plain, hoping with some reason that people will find out about it and want to frequent it.



Because land development in most virtual worlds is more or less a level playing field, many individuals and organizations invest lots of resources to develop their five virtual acres in the hopes that they will establish a presence and attract avatars.

The result of the combination of the reference frontier phenomenon and the level playing field in many virtual worlds may mean that many organizations are never going to achieve an adequate return on their investment. Libraries need to worry about and plan in light of the reverse frontier problem, just as do other for-profit and not-for-profit organizations.

—Tom Peters

Major Changes at Ex Libris

Francisco Partners has sold Ex Libris Group to Leeds Equity, another private equity firm. Leeds, based in New York, manages investments over \$4.1 billion. The firm specializes in companies in the educational sector. Other companies in its portfolio include Campus Management, EduK Group, Education Management, and eInstruction Corporation. The acquisition of Ex Libris marks Leeds' initial foray into the library automation industry.

Francisco Partners gained ownership of Ex Libris in July 2006, acquiring the company from its previous owners that included Israel-based venture capital firms Tamar Technologies and Walden Israel, the Hebrew University of Jerusalem, and current and previous executives and directors. During its tenure, Francisco Partners expanded Ex Libris Group significantly through the purchase of Endeavor Information Systems from Elsevier which was subsequently folded into the company. The consolidation of Ex Libris and Endeavor produced the largest company in the library automation industry focused on academic and research libraries. Israel-based Ex Libris has a customer base that includes many different regions of the world.



Name	Began	Ended
Carl Grant	Dec 1998	Mar 2003
Dan Trajman	Mar 2004	May 2007
Rob Mercer	May 2007	Jul 2008
Carl Grant	Jul 2008	present

Figure 2. North American Presidents of Ex Libris Group.

Ex Libris has followed an ambitious development agenda. Since 2006 the company has focused on the Primo discovery and delivery platform which has now been purchased by about 100 library organizations. More recently the company has announced its Open Platform Program, developing and documenting application programming interfaces that provide increased customer access to the data and functionality of its core systems. Current development involves the creation of a Universal Resource Management system—an automation platform designed to address all forms of library content, spanning print and electronic.

While under the ownership of Francisco Partners, Ex Libris followed a business strategy that included ongoing development of both its own ALEPH 500 product and the Voyager product it gained through the Endeavor acquisition. Both systems have seen new major releases during this period. This strategy of parallel development investments contrasts with the more aggressive approach of SirsiDynix to move to a single core automation platform following a similar merger of competing businesses.

The existing management team of Ex Libris Group will remain in place as the company gains new ownership. Matti Shem Tov will continue as the President

and CEO of the global company. The change in ownership coincides with the appointment of a new president of the company's North America operation.

A New President of Ex Libris North America

The North American division of Ex Libris Group gains new leadership as Carl Grant returns as President. Grant previously held this position from December 1998 through March 2003. During Grant's earlier tenure, Ex Libris grew its presence in North America from a small handful of libraries to one of the dominant suppliers of automation software to academic and research libraries.

An industry veteran, Grant has held major leadership positions in several companies that provide automation software to libraries. He left Ex Libris in March 2003 to become President and Chief Operating Officer of VTLS, a position that he held through February 2007. Grant served as Vice President of Data Research Associates from 1983 through April 1997 and as Vice President Sales and Marketing of Sales and Marketing at Innovative Interfaces from April 1997 through Dec 1998.

CARE Affiliates acquired by LibLime

Following Grant's exit from VTLS, he and Lou Leuzzi founded CARE Affiliates, a company focused on providing services for open source software for libraries. The company was involved in a number of partnerships, especially with Index Data, LibLime and WebFeat. The OpenTranlators initiative launched by CARE Affiliates involved providing access to the collection of connectors developed and maintained by WebFeat to libraries using other federated search platforms such as the MasterKey federated search environment developed by Index Data. During its year of operations CARE Affiliates signed agreements with OpinionArchives for services related to MasterKey and with the Ohio Public Library Information Network for OpenTranslators.

Though CARE Affiliates ends its brief 12-month existence as a company devoted to open source for libraries, the work that it has accomplished in the furtherance of open source software in libraries will continue under LibLime. With Grant departing from CARE Affiliates, the company will be sold to LibLime, with that company assuming its assets and taking responsibility for its contractual commitments. The organizations that contracted with CARE Affiliates should not experience disruption as support transfers to LibLime. One advantage of open source software is that it does not

impose the risk of a forced system change in the event of a business transition, which might be the case with a traditional licensing model.

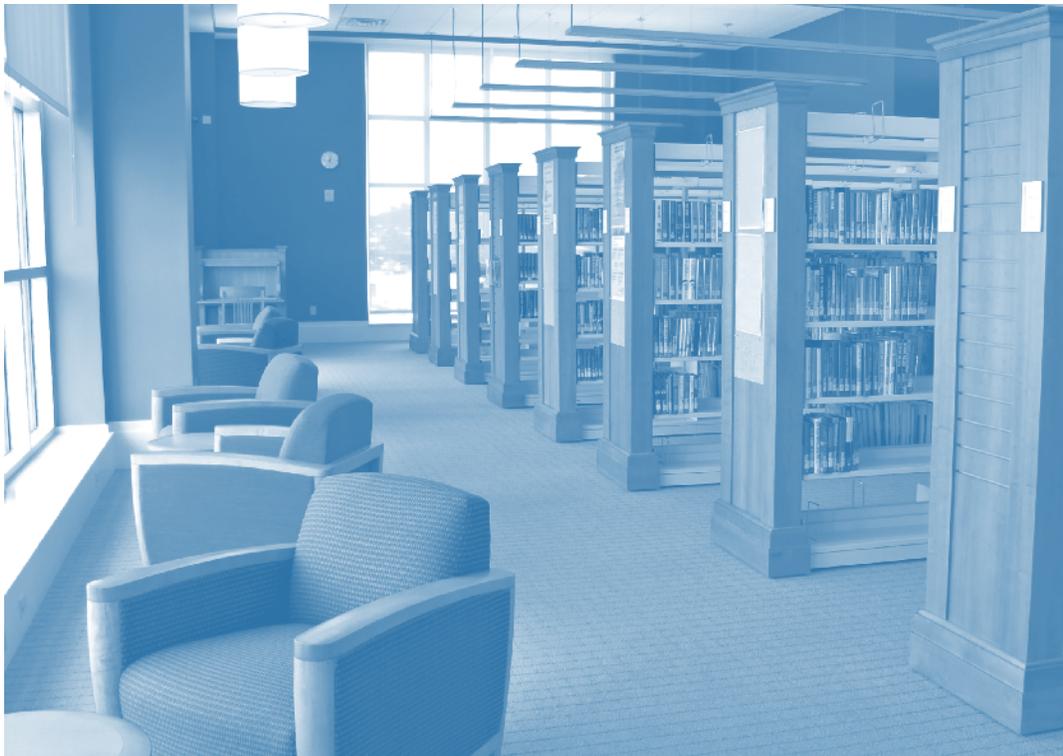
LibLime frames this arrangement as its third business acquisition, however, these are relatively small transactions compared to what is normally understood in the industry as a business acquisition.

The acquisition of the Koha Division of Katipo Communications involved taking on three employees at that New Zealand-based company. These employees were involved with the initial development of Koha and also transferred intellectual property assets associated with Koha including trademarks, domain names, documentation and other content. Two of these individuals left the company

in Feb 2008 which led to LibLime closing its New Zealand office.

The acquisition of Skemotah Communications involved assuming some Koha-related Web sites and content from Stephen Hedges. Hedges was director of the Nelsonville Public Library at the time that it implemented Koha and currently serves as the Executive Director of the Ohio Public Library Information Network. These business transactions don't quite compare with the mergers and acquisitions of the larger companies that have reshaped the industry.

LibLime continues to grow rapidly as a company both in terms of libraries served and personnel employed. The acquisition of CARE Affiliates represents another step in its growth.



The Search is Back On

Back in the 1990s, new web search engines seemed to launch every week. It was fun to test each new search engine, read all the online reviews and rating systems, and watch a new industry come to life. Then Google came along and began its steady march to capture market share and advertising revenues. The web search engine industry seemed to settle into a groove, perhaps even a dogmatic search slumber.

Now it seems the search for a better search is back on. Two new search engines, Searchme and Cuil, recently launched and are generating quite a bit of buzz. Searchme, which released its public beta version in late June, uses a highly visual and intuitive results display to allow the searcher to “flip” through the resulting hits. In her review of Searchme, Mary Ellen Bates of Bates Information Services noted that “Solely in terms of user-friendliness, Searchme is one of the best search engines I’ve seen.” Time Magazine already has designated California-based Searchme as one of its 50 Best Websites of 2008.

There is no search button on the Searchme interface—rather, as soon as you start typing, Searchme starts searching. It also begins clustering the found items and displays cluster icons below the search input box (of course, the cluster categories change from search to search). You may click on a cluster to retrieve a subset of the results, or click on the “search all” button to pull back all the search results. The results are displayed as webpages that you can flip through like a hand of cards or the pages of a magazine. If you find a webpage of interest, you simply click on the small-scale image of the webpage to actually go to that website. Or you may add that URL to a stack of pertinent websites built from your

search terms. You may save, alter, delete, or share your stacks with others. Stacks trump tags, one reckons. Bates notes the versatility of this feature, stating that “You can share a stack with others in several ways – emailing the URL of the stack, inserting the URL in a blog entry, or sharing it in Digg, Reddit, del.icio.us, Twitter or MySpace.”

Searchme offers three realms for searching: the web, video, and images. As a test of the image database, I searched for images of Maxito Ricardo, my avatar in Second Life and Lively. Sure enough, the search pulled up some images not only of Maxito the pilgrarlic avatar, but also of posters in Second Life announcing some in-world book discussions that were facilitated by Maxito Ricardo.

Searchme also offers featured stacks – clustered pre-defined searches on timely topics, such as top news stories, top business stories and top tech news. This feature even includes time-sensitive topics, such as (as I write this) news about the 2008 Olympic Games and a Paris Hilton rebuttal video to John McCain. The sample video search I performed pulled back results from YouTube videos. By default, the videos you retrieve will be played automatically, but you can go into your Searchme preferences to turn video autoplay off.

The default preference in Searchme is to filter out adult content. You need to edit your preferences to get unfiltered results. I tried searching for a word that has both sexual and non-sexual meanings with the filter turned on and off, and the results were quite different.

Cuil, another new search engine, had a rockier launch in late July. The Cuil developers, headquartered in Menlo Park, California, claim they can index the public web faster, less expensively, and

more extensively than Google and the other search engines. The pushback from the blogosphere, however, is that, regardless of the efficiency and extent of the indexing, the ranking algorithm needs some major work.

Cuil has some nice features. For example, as you type in a search term, Cuil will call up a dropdown list of possible words and phrases for which you might be searching. After executing a search, the Cuil interface may offer a pop-up window containing narrow and related terms to your search terms—shades of controlled vocabularies! Roll-over definitions also are sprinkled through the results interface. The results are clustered into tabs, with the “all results” tab on the left, as opposed to Searchme placing its “search all” icon on the right.

The results display in Cuil is columnar and decidedly textual, with a few thumbnail images sprinkled over the results. Many of the early public beta tester-bloggers noted that the images often had little or no correlation with the websites found.

There are only two preferences users can specify—whether to have safe search turned on or off, and whether to having typing suggestions turned on or off.

Like Searchme, Cuil by default has its “safe search” feature turned on, which supposedly filters out adult-oriented web content. The same search for the multi-meaning word that I tried in Searchme with safe search turned on in Cuil I pulled up some undeniably adult-content websites. When I turned safe search off, the search engine delivered almost entirely adult content. A search for Maxito Ricardo impressively pulled back over 2500 results, and most of those on the first few pages seemed relevant. It is amazing how exhaustively Cuil indexes the web—it

pulled out dine around sign-up sheets at library conferences and text chat transcripts from events in Second Life.

The management team at Cuil includes many former Google employees. According to the Cuil FAQ page, the word “cuil” is not some computer-generated meaningless word, but the old Gaelic word for both knowledge and hazelnuts. There’s an amusing tale about a famous poet, a thumb-sucker named Finn, and the Salmon of Knowledge.

Both Searchme and Cuil are free of charge for everyone – libraries, library users, and everyone else—in the sense that there is no direct out-of-pocket expense for using these search engines.

ust as there is much debate and speculation over what it will take for electronic books to unseat the dominance of the printed book, one has to wonder what it will take for a hot new search engine to root out and replace Google as the dominant force. Both Searchme and Cuil have some interesting and nice features, but they may not have yet achieved the critical mass of features and indexed content to become Google beaters. The search for a better search engine continues.

—Tom Peters

More Info. @:

SearchMe website:
<http://www.searchme.com>

Mary Ellen Bates’ Review of SearchMe:
www.BatesInfo.com/tip.html

Time Magazine article about Searchme:
http://www.time.com/time/specials/2007/article/0,28804,1809858_1809955_1811466,00.html

Cuil website:
<http://www.cuil.com/>

Staying Put, Staying Connected

Throughout most of human history, the vast majority of people have not traveled very far from the places of their birth. Most people were born, lived and died in the same general area. Traveling was not for the masses.

Today, many things cloud our appreciation of this fact. First, the historical record tends to pay more attention to those who traveled and moved about—explorers, emigrants, and well-to-do travelers—than to those who stayed put. Second, for the past 60 years or so – since the end of WW II – we have experienced an anomalous era of remarkably inexpensive and democratized travel opportunities. In most developed nations, for instance, the automobile has given many people mobility never before imagined. In the 1970’s, a combination of inexpensive transatlantic flights and Euro rail passes allowed college students and other American travelers the chance to explore Europe for a pittance. More recently, Southwest Airlines has adopted the slogan, “You are now free to move about the

country.” Travel, both as an idea and as a fact, was within reach of many.

The recent rise in fuel prices and travel costs may signal the dawn of a new era, a return to the more historically “normal” situation where traveling is reserved for a relatively small percentage of the population. The ability to travel is becoming precious again.

The golden age of travel may be coming to an end unless or until we discover some radical new means of locomotion. It is interesting to note that most popular expressions of science fiction, from the Jetsons to Star Wars and Star Trek, include the assumption that travel in the future will be easy, inexpensive, and amazingly green.

While librarians and library organizations have rightly worried about the effects of rising travel costs on travel budgets and the overall future of face-to-face professional meetings, there may be a silver lining to these current problems with travel. As library users travel less, reducing both their long-range and

short-range travel, they may actually use the library even more than they did during the golden age of travel. They may not physically visit the library as much, but they may use online and in-world library systems, collections, and services more. The library may morph into a highly valued and used online and in-world resource for the denizens of the stay-put era.

Thankfully, our profession already has had a long conversation about the idea of the library without walls, so we are well-prepared for the age where people will travel less, but stay connected more. The end of the golden age of travel does not mean that some new dark age based on ignorance and superstition is dawning. Librarians need to hunker down and prepare for the onslaught of armchair library users.

—Tom Peters