



# Smart Libraries

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## SirsiDynix ILS Set on Single Course

Part of **The ILS Scoop** by Marshall Breeding

The June 2005 consolidation of Sirsi Corporation and Dynix created SirsiDynix, which stands as the largest company in the library-automation industry. Although many aspects of the company have been integrated, until recently the company sailed two flagship library-automation systems: Horizon and Unicorn. The company's mid-March announcement hoists a single flagship—marking a significant change in course—based on the company's *Unicorn platform*.

### Mapping the Route

SirsiDynix entered a new phase of its corporate history when San Francisco-based Vista Equity Partners, a private-equity firm that manages about a \$1 billion in assets, acquired it. Announced on December 27, 2006, the transaction closed on January 17, 2007.

As the company makes the transition from ownership by a relatively hands-off venture-capital fund to a more hands-on private-equity firm, it is reasonable to expect some adjustments in the company's strategic direction and in its leadership.

The change in leadership took place on February 16, 2007—just days prior to the company's main user conference in Colorado Springs—when Patrick Sommers abruptly resigned his president/CEO position. His resignation was effective immediately. Other executives to leave the company include Chief Marketing Officer Angus Caroll; Chief Operating Officer Don McCall; and CFO Dean McCausland.

Beginning with his January 2001 appointment, Sommers led the company through a series of mergers, acquiring competitors DRA and Dynix, ultimately amassing a small arsenal of automation products (DRA Classic, MultiLIS, Taos, Dynix Classic, and Horizon) and increasing the size of the company five-fold.

As of press time (mid-March), the CEO post remains vacant, with Vista principal Martin Taylor temporarily in charge.

### All Roads Lead to Rome

A mere 55 days after Vista obtained ownership of the company, SirsiDynix reported it would consolidate development efforts into a single ILS platform based on Unicorn. That system will be branded with a new name. Currently, this new system is identified via the code name of "Rome," and it will be aggressively enhanced to include some of the best features from the Horizon 8.0 development effort.

The initial release of Rome, slated for the fourth quarter 2007, will essentially be the upcoming Unicorn GL3.2, with some specific features added from Horizon 8.0. Additional features and functionality from Horizon will be integrated into Rome in future releases.

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# THE ILS SCOOP BY MARSHALL BREEDING

Ongoing development on Horizon has ceased. Horizon 7.4 will be its terminal version. The long anticipated Horizon 8.0 system (also marketed under the Corinthian brand) will not go forward beyond the 10 beta test sites now using the software in production. SirsiDynix will continue to support Horizon 7.x indefinitely, allowing those libraries to make the transition to Rome on their individual timetables.

Libraries operating one of the SirsiDynix legacy systems—including Dynix Classic, DRA Classic, INLEX/3000, and MultiLIS—will be offered a migration path to Rome. Those libraries with contracts already in place to move to Horizon will instead be offered Rome. Libraries running the Unicorn ILS will be least affected by this change, since the initial version of Rome is essentially Unicorn Version GL3.2.

Although Horizon 8.0 was scheduled for production release in February 2007, the company determined that another 12–18 months of development would be required before it could be considered a viable product. The results from the beta testing and initial production deployment of Horizon revealed that the system was not yet stable and reliable.

Unicorn, in contrast, has proven to be a mature system that offers libraries a very

reliable automation product. Unicorn was initially introduced in 1982 and has been gradually enhanced and developed over the course of a 25-year period. Though the internal architecture of Unicorn is less up-to-date than Horizon, it has established a solid track record as a feature-rich and solid system.

## Unicorn vs. Horizon

When Vista Equity Partners took the helm at SirsiDynix, it was not a far reach of the imagination to infer the company adopting a strategy that would focus on a single flagship ILS. Two separate ILS development efforts, particularly in an era in which the real focus of library automation lies in front-end interfaces and products that deal with the management of electronic content—are difficult to justify. The consolidation into a single ILS platform was an inevitable business decision.

Unicorn was introduced in 1982, originally developed by Sirsi Corporation at Georgia Tech University in Atlanta. The system has been incrementally enhanced throughout the subsequent 25 years. The system's internal architecture has evolved, but it still reflects its original design. The system has been one of the industry survivors and its development

has persevered through the many changes in technology that have transpired during the last quarter century: host-terminal, client/server, and n-tier application architecture.

Although the server architecture has remained stable, Unicorn's client software used for staff to access the system has been replaced multiple times, starting with a text-only telnet client, to the Windows-based InfoVIEW clients, to WorkFlows, originally written in C and later re-implemented in Java. Patron access to the system has evolved from the original telnet OPAC, to WebCat (1995), to iBistro/iLink (2000), and more recently to the Enterprise Portal Solution and the Rooms and SchoolRooms interfaces.

Horizon's development is based on the Marquis system, launched by Dynix Systems in 1991 through a spin-off company of the same name. Marquis was the one of the first graphical client/server library-automation systems, and it originally had strong presence in the niche of large special libraries; for example, the Microsoft corporate library was its second customer.

Prior to its acquisition by Sirsi, Dynix had begun a massive effort to redevelop Horizon. Horizon had been incrementally enhanced through version 7.4. Horizon 8.0 would be an entirely new system, based on a completely re-engineered architecture and current-day technologies. At the Midwinter ALA 2007 Meeting, SirsiDynix officials slated Horizon 8.0 for general availability release by early March 2007 and reported its completion was the company's number-one priority.

Horizon and Unicorn have roughly the same size of customer base. Although sales of both systems have declined somewhat in recent years, Horizon has outsold Unicorn for the last four years.

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## Impact on Libraries

The business decision to discontinue Horizon has an enormous impact on libraries. The 1,583 libraries currently running Unicorn can expect a smooth migration, with only a minor course correction to accommodate the changes expected as the system evolves into Rome. The 1,597 libraries running Horizon face an inevitable migration. Though SirsiDynix indicates that these systems will be supported long into the future, they are clear that no future enhancement and development will take place.

About 700 libraries currently run Dynix Classic. In the last few years, the majority of Dynix users were choosing to migrate to Horizon, while only a handful selected Unicorn. Contrary to this trend, the remaining Dynix libraries will be

enticed to now move to the Unicorn-based Rome platform.

Libraries that have recently implemented Horizon may be the most disrupted. Changing to a new automation system consumes enormous resources—migrating data, training staff, configuring software, etc. It's not a process that librarians and library staff want to go through very often, and newly minted Horizon sites now face the daunting task of migrating once again.

Given SirsiDynix's interest in executing a single-platform product strategy, other options might have had an even greater impact on libraries. If the company had gone forward with Horizon 8.0 as its sole path, both Unicorn and Horizon 7.x libraries would have faced migrations.

This set of transitions demonstrates the realities of product development in the library-automation industry. The decisions that impact libraries the most aren't always worked out in the marketplace or in the software-development arena, but instead are made in the corporate boardroom. ■

### More Info. @:

"SirsiDynix Introduces New Integrated Technology Platform with Powerful Features," [http://sirsidynix.com/Newsevents/Releases/2007/20070313\\_technology\\_platform.pdf](http://sirsidynix.com/Newsevents/Releases/2007/20070313_technology_platform.pdf)

"SirsiDynix Is Building Rome," David Lee King Blog, [www.davidleeking.com/2007/03/13/sirsidynix-is-building-rome-2](http://www.davidleeking.com/2007/03/13/sirsidynix-is-building-rome-2)

## The Business Side of Open Source: LibLime Buys Koha Div.

LibLime, a small company established to provide support for the open-source library-automation system Koha, has expanded by acquiring the Koha division of Katipo Communications, the consulting firm that originally developed Koha. This move expands the staff of LibLime from 6 to about 9 employees, bringing into the company individuals associated with Koha's original development.

Katipo Communications provides a range of consulting services, primarily related to Web development and content-management systems. The company became involved in library automation initially through the development of an online catalog for the Wellington City Library and an automation system for the Horowhenua Library Trust (HLT).

In 1999, the four libraries in HLT consortium were in need of a library system to replace their existing individual

text-based systems prior to the Y2K transition; Koha went into production use in the four HLT libraries in early 2000. Katipo released Koha as open source so that other libraries could adopt and further develop the software. The name Koha comes from a word in the local Maori language meaning a "gift." Releasing Koha into the open-source realm provided the means for ongoing support for the software without the need for either HLT or Katipo to take on the full burden of future development and marketing of this new automation system.

Following the transfer of the parts of the company related to Koha, Katipo Communications will continue offering its consulting services in areas outside library automation. The arrangement includes a non-competition agreement restricting Katipo from further business activity in this sector.

Prior to this new arrangement, Katipo employed a total of 10; 3 will transfer to LibLime. According to Katipo managing director Rachel Hamilton-Williams, the transfer of Koha to LibLime by no means spells the end of Katipo. The company will continue to engage in other projects, including a contract to develop an open-source digital repository for arts, culture, and heritage commissioned by HLT.

The acquisition involves the transfer of staff from Katipo to LibLime, including the original author of Koha, Chris Cormack. Assets involved in the acquisition include existing support contracts with libraries that contracted with Katipo for support of Koha; copyrights and trademarks related to Koha; and the koha.org domain. The transfer was scheduled for completion March 31, 2007.

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## THE ILS SCOOP

### The LibLime Line

In 2002, the Nelsonville Public Library was the first public library in the U.S. to adopt Koha as its production automation system, replacing its existing Spydus system. In January 2005, several of the staff involved in the implementation, enhancement, and support of Koha at Nelsonville left the library to start LibLime. LibLime's business model involves contracting with libraries to provide services and support related to Koha and other open-source library-automation software.

In mid-2006, LibLime partnered with Index Data, also a company involved with open-source software, to enhance Koha through the integration of the Zebra search engine. The Zebra technology provides additional performance and

features to Koha, giving it the ability to support much larger libraries and collections. This new version, dubbed "Koha ZOOM," was put into production use in the Nelsonville libraries in November 2006 and was adopted by the Crawford County Federated Library System in December 2006 as well as at four more libraries.

This expansion makes LibLime more geographically diverse. With a division in New Zealand, the company has increased capacity to offer 24-hour support. To date, over 300 libraries worldwide have implemented Koha. About 30 have implemented Koha with support from LibLime.

LibLime is owned by the holding company MetaVore, Inc., which is wholly owned by the four principles of

LibLime. The company operates at this time without outside financial support. Although still a very small company in a field of giants, the acquisition of the Koha division gives LibLime stronger standing as the definitive source of support for Koha. With interest in open-source ILS alternatives ever growing, LibLime is well positioned to foster this movement and increase its business prospects. ■

#### More Info. @:

"LibLime to Acquire Katipo Communications' Koha Division," <http://liblime.com/news-items/press-releases/liblime-to-acquire-katipo/>

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## iriver Spills into the E-Book Device Market

Every age seems to have a design challenge that captures the imagination and creative energies of the product-design community. In the early 20th century the idea of designing and building a perpetual-motion machine captured the collective imagination of designers and entrepreneurs everywhere. The quest for a better mousetrap has become legendary.

In the very late 20th century and the very early 21st century, the portable e-book reading device seems to have supplanted the perpetual-motion machine as the intriguing, alluring, and perhaps ultimately unattainable product-design challenge. Sales of early entrants have been universally disappointing, but that fact seems to goad, rather than deter, the pack of designers and entrepreneurs.

In January at the Consumer Electronics Show in Las Vegas the electronics company iriver, better known for its portable music players, unveiled its concept for a personal portable

"dedicated" e-book reading device.

Although a dedicated e-book reading device would be designed primarily for the visual reading of texts, it could include music and video-playing capabilities as well. The iriver device has dual touchscreens using electronic ink. According to iriver, the prototype device is powered by triple-A batteries and should provide up to six months of normal use.

Whereas the design challenges for the perpetual-motion machine and the better mousetrap (just catch, catch-and-kill, or catch-and-release?) are fairly straightforward, there does not seem to be consensus yet about many of the key design features included in an e-book reader. Everyone wants a lightweight device with a high-resolution screen and long battery life, but whether the perfect device would have one screen or two screens, touchscreen or not, and color or not remains open to debate. Even the overall size remains hotly contested. Some

people look to the mass market paperback as the size ideal for a dedicated e-book reader, while others look to the clipboard.

As librarians and readers, we should be flattered that the perfect portable e-book reading device has become an enduring design challenge—but don't forget the fate of the perpetual-motion machine. —Tom Peters

#### More Info. @:

Engadget, "iriver's E-Book Reader," January 8, 2007, [www.engadget.com/2007/01/08/irivers-e-book-reader/](http://www.engadget.com/2007/01/08/irivers-e-book-reader/)

Teleread: Bring the E-Books Home, "iriver's Horseless E-Book Reader: Wow—Two Screens!" [www.teleread.org/blog/?p=6041](http://www.teleread.org/blog/?p=6041)  
Wikipedia entry (English) on perpetual-motion machines, [http://en.wikipedia.org/wiki/History\\_of\\_perpetual\\_motion\\_machines](http://en.wikipedia.org/wiki/History_of_perpetual_motion_machines)

# WEBJUNCTION'S LIVE SPACE WEB-CONFERENCING SERVICE

*Full Disclosure: I am the Coordinator of OPAL (Online Programming for All Libraries—And All Library Users), one of the library-focused Web-conferencing services mentioned in this article.*

Earlier this year, WebJunction announced the launch of a new Web-conferencing service for libraries and library-related organizations. The new service is deemed “Live Space” and runs on Horizon Wimba’s Live Classroom Web-conferencing platform.

During this first year of its operation, Live Space offers an unlimited number of seats to every organizational member for \$2,000. A “seat” basically is a computer that has connected to the online room. Although most Web-conferencing systems require the download and installation of a small software client, Horizon Wimba offers a no-download option that relies on Java.

Functionality within Live Space online rooms includes VoIP (voice over IP) with an integrated telephone bridge option;

text chatting, both public and private; desktop sharing with remote-control capabilities; a sharable whiteboard; polling; quizzing; and the ability to record live online events. Live Classroom also integrates well with various course-management systems, such as Angel, Blackboard, Moodle, and WebCT.

Participants of Live Space live online events can use a variety of computer operating systems: MS Windows 2000 or higher, Mac OSX (version 10.2 or higher), or Linux; however, users of Mac OS 9 and Linux will experience limited features and functionality.

Horizon Wimba’s Live Classroom claims to be Section 508 compliant with closed captioning for hearing-impaired users and screen-reader accessibility for blind users, but one blind individual who is very knowledgeable about Web-conferencing systems reported to me that he has been unable to get his screen-reader software to work well in a Horizon Wimba online room.

Many libraries and library-related organizations are using Web-conferencing systems, and professional-development resources; SirsiDynix Institute and Learning Times, for example, are using Web-conferencing systems to deliver online professional-development information, training, and continuing-education opportunities for busy professionals with small travel allowances.

## Online Options

If your library is interested in the group leasing of Web-conferencing systems, several options exist now. In addition to WebJunction’s Live Space, OPAL (Online Programming for All Libraries—And All Library Users) has been in operation for two years. OPAL uses primarily

the system called “tcConference” from Talking Communities. OPAL also has experimented with other Web-conferencing systems, such as Elluminate and iVocalize. For an annual fee of \$500, organizational members get access to their own 25-seat rooms as well as to larger, communal online rooms.

OPAL is not as feature-rich as Live Space. For example, it offers public and private text chatting; VoIP, but no integrated telephone bridge yet; desktop sharing, but no remote-control capabilities; whiteboarding; simple polling, but no robust quizzing and surveying; and the ability to record live online events. Participants of OPAL live online events are required to download and install (usually an automatic process) a small software client. They need to be running or emulating a Microsoft Windows 98 or higher operating system. A Mac client is being developed by Talking Communities.

A third group leasing option may be available to one or more of the library consortia to which your library belongs. For example, WiLS (Wisconsin Library Services) offers its member libraries discounted live online event-based pricing for use of the Web-conferencing service called “WisLine Web.”—*Tom Peters*

## More Info. @:

Web Junction Live Space, [www.webjunction.org/do/Navigation?category=14519](http://www.webjunction.org/do/Navigation?category=14519)

Horizon Wimba, “Reach beyond the classroom,” [www.horizonwimba.com](http://www.horizonwimba.com)

Online Programming for All Libraries—And All Library Users, [www.opal-online.org](http://www.opal-online.org)

WisLine Web, [www.uwex.edu/ics/wlw/index.html](http://www.uwex.edu/ics/wlw/index.html)

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**The creepy and creeping suspicion that content may not be king much longer is unsettling on many levels. This does not mean that collections will lose all value, but merely that they may cease to be the primary cause or organizing principle of many libraries.**

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## Libraries as Conversation

In my twenty years as a librarian, I have heard and seen the phrase “content is king” crop up in professional conversations and in the literature more often than any other phrase. This phrase reinforces the idea that, although cataloging (and metadata services in general), reference (and public services in general), and other functions performed by a library may be worthwhile, collections of content have been the *raison d’être* of most, if not all, libraries. Without collections, all the other services and projects undertaken by those who work in libraries don’t make as much sense.

The computer revolution, in and of itself, and the wholesale digitization of content have not posed a threat to the idea that content is king. If anything, the importance of the phrase has strengthened during the early decades of the digital revolution.

As digital collections of content have increased in size and scope, the value of local organizational collections (e.g., the collections maintained by individual school, academic, public, or special libraries) may have declined in deference to both meta-collections (i.e., collections created and controlled by consortia, vendors, states, etc.) and micro-collections (i.e., highly focused, in-depth collections of digital information maintained on the hard drives and servers of individuals, research teams, and small groups), but the value of collections to libraries, state libraries, library consortia, and Google did not decline.

The late, great Ross Atkinson once made a comment during a conference talk

that pointed out, as the mass digitization projects then being planned came to fruition, the size of any individual research library’s collection (which had become almost a fetish) would become almost meaningless. He noted that would be because, in the best of all possible forthcoming worlds, everyone would have access to just about all digital documents that were not deemed top secret. Ross predicted that, in the near future, universities would need to stop bragging about how many millions of volumes they held in pulpy hostage in their research libraries and begin showing how their faculty, students, and staff made better use than other universities of the information available to everyone to create new knowledge that was meaningful and worthwhile. Atkinson predicted that the use of content, rather than the content itself, would become king. He also forecasted that quality, constructive use would be more important than just high-volume use.

### A Funny Thing Happened on the Way to the Future...

These days there are serious conversations underway in various professional circles that suggest that the library of the future may not be content-centric. The collection may cease to be the heart and soul of most libraries. There are several heirs apparent or pretenders to the throne, including exhibits, events, and conversations.

For example, in my early conversations with other librarian-avatars in Second Life, the currently popular MUVE (multi-user virtual environment), we frequently discuss the idea that, at least for libraries on the MUVE, exhibits and events may be more important than collections to libraries as organizations and the avatars that use them. The creepy and creeping suspicion that content may not be king much longer is unsettling on many levels.

This does not mean that collections will lose all value, but merely that they may cease to be the primary cause or organizing principle of many libraries.

Recently R. David Lankes, Joanne Silverstein, and Scott Nicholson from the Information Institute of Syracuse at Syracuse University’s School of Information Studies started a Web site and . . . well, conversation about “Participatory Networks: The Library as Conversation.” The Office for Information Technology Policy, via ALA’s Washington Office, commissioned the work.

On February 15, 2007, VirtualDave Legend (and perhaps also Joanne and Scott—I don’t know if their avatars were present) met with approximately 60 librarian-avatars on Info Island I in Second Life to begin a conversation about the library as conversation. In their executive summary on the Web site, the three authors note that the theoretical foundation for this model of participatory librarianship is “Conversation Theory,” which “. . . posits that individuals, organizations, and even societies build knowledge through conversation; specifically, by interacting and building commonly held agreements. Since libraries are in the knowledge business, they are also in the conversation business.” As VirtualDave noted during the in-world conversation, the idea of conversation theory was first developed by Gordon Pask.

The full 39-page report notes that brick-and-mortar libraries have facilitated conversations for years, through library-speaker series, book-discussion groups, and even through collection-development processes. “Yet online, the library has fallen far short of this ideal of conversation facilitator,” the authors note on page 3. “Key library systems, such as the catalog for example, are at best one-way conversations. Libraries have a great opportunity to provide invaluable conversational

participatory infrastructure to their communities online.”

The library as conversation, part of the great participatory network in the ether, will involve systems integration and simplification on a grand scale. As the executive summary states, “Rather than just adding blogs and photosharing, libraries should adopt the principles of participation in existing core library technologies such as the catalog.”

The concept of library as conversation may give new meaning and importance to user-centered librarianship. As the three authors conclude, one key concept of Web 2.0 is that people and their networks of relationships are the true content of a Web site—not the content as traditionally understood.

The library as conversation already shows real promise. One problem with conversations, however, is that they are so dang labor-intensive. Plus there is a large portion of “noise” for every good signal present in any conversation. For example, in the 24-page text-chat transcript of the 1-hour, 60-avatar conversation held on February 15, there are many side-conversations and abandoned avenues. As VirtualDave noted at the 18:20 mark, reference service is a good start toward the library as conversation, but it is one on one.

Predictions of the death of collections may be premature. As the Wikipedia article on Gordon Pask notes (which I visited on February 25, 2007): “A residue of the interaction [known as

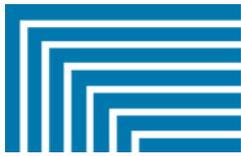
conversation] may be captured as an ‘entailment mesh,’ an organized and publicly available collection of resultant knowledge....” Organized and publicly available collections of knowledge resulting from online conversations may be the new garb of collections.

So... Librarians of the world, Unite—and Converse! You have nothing to lose but your collections, and everything to gain, including your entailment meshes.—*Tom Peters*

**More Info. @:**

“The Library as Conversation: Participatory Networks,” [http://iis.syr.edu/projects/PNOpen/Wikipedia entry \(English\) on Gordon Pask](http://iis.syr.edu/projects/PNOpen/Wikipedia%20entry%20(English)%20on%20Gordon%20Pask), [http://en.wikipedia.org/wiki/Gordon\\_Pask](http://en.wikipedia.org/wiki/Gordon_Pask)





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**A New ILS Route: SirsiDynix to Take Its Customers to Rome**

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