Smarter Libraries through Technology

Balance in Library Tech News

By Marshall Breeding

One of the biggest challenges in selecting and developing news stories for *Smart Libraries Newsletter* lies in providing balanced coverage of the library technology industry. It is important to ensure that each story covers the events and companies objectively and to select stories that reflect the overall state of the industry.

Objective coverage means that each story must be based on information and data from reliable sources. In this newsletter, sources can include announcements from vendors, email or verbal interviews with company executives or librarians, and observable data such as product implementation statistics. I maintain extensive data related to the technology products used by libraries in Library Technology Guides, which are often referenced in news articles.

In order to reflect the future trends of any given company, we give those involved the benefit of the doubt. When it comes to product announcements, it is important to be able to lay out a forward-looking vision or roadmap even in the early stages of development. Waiting until the product has been completed and implemented would not be helpful either to the company or to libraries that may be interested in knowing what technology options may be brewing though not yet available.

We also attempt to take a positive tone regarding the technologies covered. News articles will often lay out the developer's vision and intentions of a new product in advance of knowing whether it will ultimately be delivered with those characteristics. Once these products are deployed and implemented, follow-up articles can reflect how they are received by the library community.

This newsletter also aims not to favor any given vendor or development model. We cover both proprietary and open source technologies, hopefully in proportion to their position in the industry. Proprietary products currently far outnumber open source options in most categories. Balanced coverage of vendors means giving proportional treatment of newsworthy events and accomplishments. Occasionally important events may need to be deferred to later issues due to space limitations. Proportional coverage also means giving more coverage to the vendors or projects with more accomplishments. Large companies with a higher churn of new products and major implementations will generate more news articles than those with less activity.

Business transitions play an important role in the overall shape of the library technology industry. The current slate of vendors and product options comes as a result of a succession of mergers, acquisitions, and capital investments. Articles covering these events aim to provide both the higher-level view of its impact on the library community as well as detailed information relating to the transaction and the organizations involved. The corporate background and history of the companies helps readers understand the antecedent events and organizations. *Smart Libraries*

Newsletter has chronicled the mergers and acquisition of the industry since 2003.

Another aspect of balance relates to the public relations strategies of the organizations involved. Some companies have a more prolific media presence than others. While some companies issue press releases for every product sale made, others make announcements only for their largest deals. While a high velocity of news releases may be challenging for large companies, having more publicly available data regarding product sales and deployments helps provide proportional coverage. Likewise, some vendors may prefer not to make announcements about new products until released for implementation while others begin public discussions at the design and development stage. While press releases continue to be the main vehicle for industry announcements, other channels such as blog posts and Twitter are often favored by newer players.

This newsletter also strives to inform readers about the trajectory of existing products as well as the development of new technologies. While it is especially interesting to write about emerging technologies, most of the economic impact relates to established products. We provide coverage of key products throughout their lifespan. As new products are announced, an initial news article will dig into its conceptual vision, its underlying technologies, and anticipated audience. Successive articles will document its progress in development and in its eventual adoption patterns.

This issue of *Smart Libraries Newsletter* includes an update on Ex Libris Alma. As a product launched in 2012, Alma is well beyond its development phase and well into its cycle of adoption. It's ongoing penetration into the academic library sector has become so steady that individual implementations may not seem especially newsworthy. Yet, its success among the largest academic library systems and consortia translates into contracts with high economic value. Some of these individual contracts may exceed the entire annual revenue of some of the smaller companies in the industry. We also note progress on some up-and-coming products including OCLC Wise and Innovative's new Inspire Discovery.

Update on Ex Libris Alma

The Alma library services platform (LSP) from Ex Libris, now part of ProQuest, continues to make gains in the academic and research library sector. The product's steady stream of product releases deployed monthly and new implementations by library have become routine. The dominance of Alma in this sector must be seen as the backdrop or context for other events that spark interest but tend to have smaller impact. Alma has seen strong and steady adoption since its initial implementations in 2012, including some of the largest university library systems and regional or national consortia.

Alma, for example, holds a strong lead among the members of the Association of Research Libraries (ARL). Currently, 65 out of the 125 ARL members have selected or implemented Alma. Another 14 remain on Voyager and 6 on Aleph. Across these three products, Ex Libris resource management products are used by 85 ARL members or 68 percent of these institutions.

Recent Alma Selections and Implementations

So far in 2019, at least 67 new organizations have selected Alma. This number includes those that have been mentioned in press releases or have been otherwise reported and should not be taken as an official sales report, which will be published in the annual Library Systems Report. Rather, this informal figure demonstrates continued strong rates of adoption beyond the larger sites mentioned in press announcements.

Here are some of the announced sales of Alma in recent months:

- University of Michigan, an ARL member with collections of about 13 million volumes, announced its selection of Alma in November 2019 and will be migrating from an Aleph system that has been in place since 2002.
- Other ARL members selecting Alma in 2019 include the University of Pittsburgh, University of Nebraska–Lincoln, the University of Texas at Austin, and Wake Forest University.
- North Rhine–Westphalia consortium in Germany, representing 43 members, announced its selection of Alma in November 2019. This implementation will be administered via Hochschulbibliothekszentrum des Landes Nordrhein-Westfalen (hbz), one of the regional library service centers in Germany. The libraries in this consortium will be migrating from eight different incumbent systems.
- University of Toronto, with the largest library in Canada and one of the largest in North America, selected Alma in 2019 and will migrate from SirsiDynix Symphony. This

library system includes 44 libraries, spans three campuses, and manages a collection of over 12 million volumes.

- The libraries of the statewide consortium of California Community Colleges selected Alma in 2018, though it was not announced until February 2019. This implementation of Alma includes 110 institutions serving a total of 2.1 million students. This project was supported via a six-million-dollar grant, though the actual value of the contract was not specified. According to the announcement from the Council of Chief Librarians, the California Community Colleges ranks as the largest educational system globally and is now the largest customer of Ex Libris.
- The Consortium of Academic and Research Libraries in Illinois, comprised of 91 institutions, selected Alma and Primo to replace its incumbent Voyager and VuFind products.[1] This implementation includes three ARL members.
- The libraries of the City University of New York, comprised of 31 libraries spanning 25 campuses, selected Alma to replace their existing Aleph systems. These libraries hold combined collections of 6.2 million volumes.
- An academic library consortium including Northern Michigan University, Lake Superior State University, Finlandia University, and Gogebic Community College announced in June 2019 their selection of Alma to replace their current Voyager integrated library system (ILS).
- In France, the University of Lille, which was recently created through the merger of three universities, announced its selection of Alma and Primo in January 2019. This consolidated institution ranks as the largest French-speaking university in the world.
- In Japan, Bukkyo University in Kyoto selected Alma to replace a locally developed system. Waseda University and Keio University, which selected Alma in 2018, placed Alma into production in October 2019.
- The libraries of the University of Hawaii, including three universities and seven community colleges, announced its selection of Alma in January 2019. The system has been using Primo since 2011.

FedRAMP Authorization

Ex Libris has achieved authorization for the Federal Risk and Authorization Management Program (FedRAMP). Its application was sponsored by the Department of Health and Human Services. FedRAMP authorization means that the product has achieved the security requirements of the U.S. Government for cloud-based services. Ex Libris Alma and Prime are currently the only library services listed on the FedRAMP marketplace (https://marketplace.fedramp.gov/) as FedRAMP Authorized. SirsiDynix EOS.Web is listed as FedRAMP in Progress.

Leganto

Ex Libris introduced Leganto in 2015, which enables instructors to manage reading materials for their courses. The product is based on the Alma technology platform and integrates with the institution's learning management system. Since its introduction, over 100 institutions have selected Leganto. A substantial portion of recent contracts for Alma also include Leganto, and many existing Alma customers are subsequently adding the product.

Some of the recently announced sales of Leganto include the University of Manchester, migrating from Talis Aspire, the University of Salford, University of Technology Sydney, and University of North Carolina at Pembroke.

Esploro

The Esploro research services application, introduced in 2018, has graduated from its development phase into early adoption. One of the product's development partners, the University of Iowa, placed Esploro into production use in July 2019. Institutions that have recently selected Esploro include the University of Montana, Washington State University, the University of the Sunshine Coast in Australia, Hochschule für Technik und Wirtschaft in Germany, and the Weizmann Institute of Science in Israel.

Despite its position as the dominant provider of technology products to academic and research libraries, Ex Libris faces significant competition. OCLC's WorldShare Management Services, which was developed and launched in about the same timeframe as Alma, has also attracted many libraries in this sector and has been selected for many large-scale projects, especially in Canada and the Netherlands. The open source FOLIO may also be an increasing threat now that it has been placed into production in Chalmers University of Technology. Many libraries have deferred selection of a new system pending the completion of FOLIO, especially those inclined toward open source technologies. The next year or so will be critical for whether FOLIO will become a major factor in the market beyond those that have been involved in its development. Innovative's Inspire platform may also become a factor in the academic library marketplace, though it is in an early phase of development.

Future Prospects

No company in the library technology industry can rest on its laurels. Although Ex Libris has become well established and has a large head start on FOLIO and Inspire, it will face stronger headwinds as FOLIO matures and as Inspire comes to market. More than half of the academic libraries in the U.S. remain on legacy products. Among larger institutions, the penetration of LSPs is substantially higher. Early success by new competitors and satisfaction levels among existing Alma sites will be major factors in whether Ex Libris is able to strengthen its position even further or if it will hold steady. Barring extreme difficulties, any decline in the portions of academic libraries using Alma seems unlikely.

First U.S. Library Live on OCLC Wise

OCLC launched its strategic resource management product for public libraries in the U.S. last year, branded as OCLC Wise. This product aims to go beyond the model of a traditional ILS, to also include capabilities for community engagement. A more detailed discussion of OCLC Wise was presented in the April 2018 issue of *Smart Libraries Newsletter*.

Following its introduction, several libraries have signed on as development partners or early adopters for OCLC Wise. Among this group of early adopters, the Allen County Public Library began production use of OCLC Wise in mid-November 2019, less than a year after its selection was announced in July 2018. The library migrated from a SirsiDynix Symphony ILS. A mid-sized system, Allen County Public Library includes 14 branch facilities, serves a population of about 360,000, and circulates over 11.4 million items annually.

OCLC Wise also continues to see ongoing implementation in Europe. An earlier version of the product, known as bicatWise has been implemented by a majority of libraries in the Netherlands, where the product was originally developed. The Flemish area of Belgium selected Wise in 2017 and has been carrying a phased implementation process since mid-2018. The cultuurconnect agency managing the process recently announced that following the initial group of 88 libraries, including 57 libraries in Limburg and another 30 in East Flanders, have also completed their migration. An additional set of libraries are slated for migration later in 2019.

The group of early adopters in the U.S. not yet in production, include

- Anythink, a public library system serving Adams Country, Colorado, which is currently using SirsiDynix Horizon;
- Gwinnett County Public Library in Georgia, which is currently running Polaris from Innovative;
- Orange County Library System in Florida, which is currently running Sierra from Innovative; and
- Kokomo-Howard County Public in Indiana, which is currently running Sierra from Innovative.

Recent additions to this list include

- Greensboro Public Library in Indiana, which is currently running SirsiDynix Horizon, and
- Chesapeake Public Library in Virginia, which is currently running SirsiDynix Symphony.

This first production use of OCLC Wise in the U.S. and the libraries committed to its implementation reflect a moderate level of momentum behind this product. Public libraries in the U.S. have different expectations than those in the Netherlands and Flanders for the strategic technology platforms that they depend on for their operations and delivery of services. OCLC's work with these early adopters will help shape the product accordingly.

Smart Libraries Newsletter will continue to report on the progress of OCLC Wise as it strives to gain a larger presence among public libraries in the U.S. and other global regions.

Progress on Inspire Discovery from Innovative

Innovative interfaces announced its strategy to create its next generation set of products on a new platform, branded as Inspire. *Smart Libraries Newsletter* featured this new product in the May 2019 issue. The company recently announced that

the product has been deployed by two early adopters, Cairn University in Pennsylvania and Hillsdale college in Michigan. Neither institution has fully replaced its existing catalog or discovery services with Inspire Discovery, though they are working with their patrons to introduce this new search service.

Innovative announced in November 2019 that Southwest Tennessee Community College has also selected Inspire Discovery.

ByWater Expands Support Offerings to Include Aspen Discovery

ByWater Solutions, a company involved in providing services surrounding open source software, has recently expanded its portfolio to include Aspen Discovery. This open source discovery interface based on VuFind was originally developed by Mark Noble. His business, Turning Leaf Technologies, has been acquired by ByWater solutions and Noble now serves as Aspen Discovery Team Lead.

Noble had also worked with the Marmot Library Network in Colorado in the development of the Pika open source discovery layer, also based on VuFind. Pika continues to be developed and supported by the Marmot Library Network.

Some of the libraries implementing Aspen Discovery include Pueblo City-County Library District; Basin Libraries Systems in Utah, including Uintah County Library and Duchesne County Library System; and the Harold and Mary Ellen Deets Library of Southwestern College in Kansas.

Although ByWater Solutions is known primarily for its support for the open source Koha ILS, it also provides services for the Coral electronic resource management system, FOLIO, and Libki, an open source PC reservation and time management system. The addition of Aspen Discovery fits well into the company's portfolio of open source library products.

Kevin Sayer Joins Kanopy as Chief Executive Officer

Kanopy, a company providing a streaming video service to libraries, has named Kevin Sayer as its new Chief Executive Officer (CEO). The company's founder and long-time CEO Olivia Humphrey will remain involved with the company as its Executive Chairman of its Board of Directors. Kanopy was founded in 2008 in Australia and has since expanded into New Zealand, Hong Kong, Singapore, and the United States. The company is now headquartered in San Francisco.

The company was acquired by L Squared Capital Partners in July 2018. Since that investment, the company has recruited new executives, including Dave Barney as Chief Technology Officer and Chase Rigby as Chief Product Officer. Barney and Rigby both previously held positions at Google. Canopy has established a new engineering and development facility in Orange County, CA and a new office in Denver.

Kevin Sayer previously served in several roles at ProQuest, including as Senior Vice President and General Manager for ProQuest Books. His portfolio expanded into technology and software as he also gained responsibility for ProQuest Workflow Solutions. Sayer and Christopher Warnock co-founded e-book supplier ebrary in 1999, which was acquired by ProQuest in 2011.

Kanopy has become a major player in the video streaming arena for academic and public libraries. The company licenses video content from studios and distributors and makes it available on its streaming platform. Patrons of libraries that subscribe to Kanopy can view the content for free, with costs paid by the library. Public libraries pay a fee for each viewing, while academic libraries purchase subscriptions to titles through a demand-based acquisitions model. This free-to-view business model has proven popular for library patrons, though it has been challenging for library budgets. New York Public Library, for example, cancelled its subscription this year due to its unsustainable costs.[2] To address these concerns, Kanopy has introduced a subscription model that enables libraries to set a cap on their annual costs.

Sayer takes the reigns of Kanopy at a time when Kanopy has become well established as a content provider for libraries at a time of ever-increasing interest in video. The company has built an extensive catalog of titles and has agreements with over 1,300 libraries. With this new leadership and capital investment, it will be interesting to see how the next phase of Kanopy's business trajectory plays out in the library arena.

Smart Libraries Q&A

When moving to a new ILS, what recommendations do you have to prepare collection data for migration?

Switching to a new system is a complex process, including many related tasks such as the migration data, configuration of branches and shelving locations, setting up circulation rules, and configurations of financial processes for materials acquisitions. It's important to have a set of collection records that accurately represent the library's collection. When a library moves to a new ILS or LSP, it can consider several strategies related to the migration of its collection data.

In advance of moving to a new system, many libraries work hard to identify and address any problems or inconsistencies in their bibliographic database. A clean and accurate database, in most cases, will facilitate the migration process and lead to a more satisfying result. Even in libraries with the most careful cataloging processes, errors are inevitable. Given that libraries tend to keep the same ILS for a decade or more, the accumulation of problems over that period can be significant. It is common for libraries to take advantage of a system migration to address these issues.

Here are some of the actions that a library might perform to prepare its database in advance of a migration:

- **A physical inventory of the collection**. Libraries with smaller collections might find it worthwhile to perform a comprehensive inventory to ensure a good alignment between the item records in the ILS and the actual materials held. An even better practice might be to incorporate inventory management into routine operations, working through small sections of the collection so that a complete inventory is accomplished over a longer time frame. Libraries with extremely large collections may not find a systematic inventory to be feasible but might instead focus on areas with higher churn of circulation.
- **Authorities processing**. In the course of routine cataloging or importing of records, associations are made between selected fields in bibliographic records and authority sources. Errors that accumulate over time may

be difficult to identify and address manually. Libraries may opt to contract with an external bibliographic services firm for systematic cleanup. This type of authorities processing can update bibliographic records to use current authorized headings for controlled fields with appropriate links to records in national authority files.
- **OCLC reclamation**. For libraries that use OCLC's interlibrary loan or cataloging services, it is important to ensure that all holdings are correctly reflected in the WorldCat database. OCLC offers a "reclamation" service, which may incur fees, where the library submits its collection records for synchronization with WorldCat, removing superfluous holdings for items not held and adding holdings for those that may not have been previously set.

In addition to these tasks that involve wholesale or systematic processing of the collection, libraries may also want to carry out smaller-scale or informal work to measure the overall quality of their collection records. These tasks could include spot checks on selected portions of the collection, looking for any irregularities or errors. When performing these checks prior to migration, it would be important to determine whether any issues are specifically related to errors in the collection records or related to the functionality of the incumbent system.

Keep in mind that there are trade-offs involved in these migration strategies. While there are benefits to improving the quality of the collection database, these tasks can add to the cost and complexity of migration. These activities might be unbundled from the migration project and addressed in a different time frame. No library's collection database will ever be entirely pristine, and it is necessary to establish reasonable expectations regarding an acceptable error rate.

Another important consideration lies in whether to address collection database issues prior to the migration process or afterward. It would be reasonable to expect that the new system will come with more powerful tools for identifying and repairing problems with collection records. While the incumbent system may be more familiar, post-migration cleanup can be a good opportunity to learn and exercise the reporting, analytics, and global update capabilities of the new system. Barring systematic errors in the collection records that may impede a successful migration, some cleanup tasks may be addressed more efficiently later in the process.

Regardless of the record preparation strategy chosen, the migration process should include a phase where the library's database can be loaded into the new system in advance of the final switch to production. Most vendors will provide a test load of the database so that the library can work with their own data in the new system for training and testing. Such a preliminary load will ensure that the tools and scripts involved in the migration work correctly with the library's exported collection records. Depending on any problems encountered, the migration process may need to involve multiple iterations of the export and loading routines to ensure a successful migration.

Libraries should pay special attention to the conversion of their records for serials and periodicals. Serial records are more susceptible to problems than those for monographs, due to the complexity of describing large sets of holdings and journal issues. Library systems vary more in the way that they handle serial records those for monographs. Serials records, check-in patterns, and related data should be carefully tested in the migration process.

The library should expect differences in the way that the new system uses collection records for search, display, and processing. Despite the adherence to MARC and related standards, each resource management system may have subtle or significant differences in the way that records are handled. One of the challenges in moving to a new system involves assessing whether these differences are due to errors or are expected behavior. It is also common for inconsistencies in bibliographic records that may have not previously noticed to be more conspicuous in the new system.

If the migration involves an implementation of a broadly scoped discovery service instead of a traditional online catalog, there will be even more differences. Discovery services often involve configuration options for indexing and presentation, which may be customized according to the library preferences and the nature of the clientele it serves.

Notes

1. "Consortium of Academic and Research Libraries in Illinois Selects Ex Libris Alma and Primo," Ex Libris, press release, January 28, 2019, https://www.exlibrisgroup.com /press-release/consortium-of-academic-and-research -libraries-in-illinois-selects-ex-libris-alma-and-primo/.

2. Nancy Coleman, "New York City's Public Libraries to End Film Streaming Through Kanopy," *New York Times*, June 24, 2019, https://www.nytimes.com/2019/06/24/movies /new-york-citys-libraries-drop-kanopy-streaming.html.

Questions or suggestions for topics in future issues?

YOUR COMMENT COUNTS!

Contact Samantha Imburgia at **simburgia@ala.org**

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