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Open Source ILS Gains Ground with Academic Libraries

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Open Source ILS Gains Ground with Academic Libraries

Interest in open source alternatives to the commercial offerings of integrated library system (ILS) vendors has been a dominant trend in the past year. Until now, the open source ILS implementations have taken place primarily in public libraries with no large academic libraries in the United States or Canada making the leap. That situation recently changed, with a consortium of U.S. academic libraries and a major Canadian academic library making official commitments to implement open source library automation systems.

Where's WALDO?

Westchester Academic Library Directors Organization (WALDO), a New York based consortium, has contracted with LibLime to implement Koha ZOOM for 17 member libraries—thirteen of the libraries are now sharing a common consorital system, one other operates a standalone system, and the remaining three are Florida based libraries moving from yet another consortial system. WALDO's associate and limited members, libraries of different types throughout New York, Connecticut, New Jersey, Massachusetts, Pennsylvania, New Hampshire, and Vermont, can also elect to use the contract negotiated with LibLime to gain access to the same pricing, discounts, terms, and conditions.

Key to WALDO's approach to the open source environment is a preliminary pilot implementation during the Summer of 2008 at St John's University, Queens, New York, the largest member of the group. This pilot is seen by WALDO as a replacement for the traditional RFP approach to vendor selection. The pilot will implement a number of enhancements to the current Koha ZOOM release that were identified in a scoping study performed jointly by LibLime and WALDO in the Spring of 2007. Successful completion of the pilot project will activate migration for the remaining New York libraries in the Summer of 2009.

The fourteen New York academic libraries that have signed contracts to implement Koha ZOOM through WALDO include libraries at the College of Mount Saint Vincent, the College of Westchester, Concordia College in Bronxville, NY, the Manhattan College Libraries, Marymount Manhattan College, Mercy College, Monroe College, New York Academy of Medicine, Nyack College and Alliance Theological Seminary, Sarah Lawrence College, Saint John's University, Saint Thomas Aquinas College, the Seminary of the Immaculate Conception, and Wagner College.

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> **The commitment of these academic libraries to implement open source automation systems warrants attention, because it appears to be the beginning of a trend.**

Thirteen of the libraries have been using their current system since 2005, implemented as a remotely hosted service by the vendor. Previously, the consortium libraries used PALS, a system created and maintained by libraries in Minnesota. In some ways, PALS can be considered a precursor to the current open source ILS movement in that it was software developed by libraries outside the ownership of a commercial company.

As WALDO passed the mid-point of its current five-year commercial system contract, it faced uncertainty regarding the state of the commercial library automation marketplace due to the spate of consolidations and private equity acquisitions. WALDO representatives could not discern significant differences among the offerings of the remaining commercial vendors. Rather than initiate a procurement process through an RFP, WALDO investigated the open source alternatives, eventually determining that Koha ZOOM with support from LibLime is their preferred alternative.

Koha has not been previously implemented in large academic libraries. As a result, it lacks essential functionality for an academic library, such as course reserves. The contract with LibLime includes custom development to provide the new functionality designed to meet WALDO's specifications, which, consistent with the open source model, will be available to other libraries that use Koha ZOOM. The WALDO libraries will share an implementation of Koha hosted by LibLime, following the same Software as a Service model that they currently have in place with their vendor.

An Evergreen Grows in Canada

Laurentian University, located in Sudbury, Ontario, announced that it intends to implement the Evergreen automation system, initially developed for the PINES consortium in Georgia. The press release confirms the University's commitment to contribute to the development of Evergreen and that it intends to migrate from its current SirsiDynix Unicorn system to Evergreen at an unspecified time in the future.

The commitment of these academic libraries to implement open source automation systems warrants attention, because it appears to be the beginning of a trend. In the larger context, the companies offering proprietary systems continue to prosper and attract new library customers. Polaris Library Systems, for example, has recently been selected by both the Phoenix Public Library and the Dallas Public Library. While open source ILS seems to be gaining momentum, the majority of libraries continue to use commercially developed systems. The degree to which open source gains ground in the overall ILS landscape depends very much on the success of these early adopters.

—Marshall Breeding

More Info. @:

WALDO Website:
http://www.waldolib.org/

LibLime Website:
http://liblime.com/

Laurentian University Press Release:
http://laurentian.ca/Laurentian/Home/News/Evergreen+library+system+08jan08.htm

Youniquely4U From Checkpoint

The December 2007 issue of *Smart Libraries Newsletter* covered the new business relationship between Checkpoint Systems and 3M, where 3M will assume marketing and support for Checkpoint's RFID and security products targeting libraries. Checkpoint continues in the library arena by offering a new service called Youniquely4U, designed to help libraries market their services and promote targeted resources to their patrons. Youniquely4U is the flagship product of the Patron Services Division of Checkpoint Systems, Inc.

Checkpoint formed its Patron Services Division in 2006 under the leadership of Michael Jermyn, who joined the company that year.

One important concern for librarians today involves the need to offer personalized services to library patrons. Checkpoint designed Youniquely4U as a new product to assist libraries in this quest to deliver content tailored to each patron's interests and needs, and to promote library programs and services. The product works in conjunction with the check-out transaction at the circulation desk, determining categories of the patrons' interest based on the classification of the library materials being checked out. Based on this information, the system channels patrons to related activities and content, both in-person and through the Web.

When a patron checks out library materials, color printers create the return receipt for the materials along with information promoting the Youniquely4U service, branded as the "VIP Patron Program" and the URL for the library's own Web site. The receipt also includes a category code that can be entered on the Youniquely4U Web site to direct the patron to focused content and advertising.

The categories currently programmed into the service include: family, young adult, small business, smart money, personal technology, health care, home improvement, pet care, hobbies, fitness and wellness, cultural offerings, local offerings, and fiction. When a patron initially registers on the Youniquely4U site, the system activates categories based on the codes entered. The patron can also manually select or deselect categories.

Once signed in to the Youniquely4U Web site, library patrons can select any category from the menu. When invoked, each of the top-level menus will display sub-menus of additional sub-categories. Advertisements appear in selected categories, usually with a button inviting the patron to receive a coupon or special offer. The primary content of the system consists of resource links that connect the user to content from the library's electronic subscriptions, selected Web sites, or commercial destinations. The Youniquely4U Web site carries its own prominent branding, though it also sports the logo of the library associated with the patron.

As with other targeted advertising environments, the counter-balance involves protections against intruding into personal privacy. The category code generated by Youniquely4U is tied to the items borrowed and not to demographic information about the patron, thus diminishing concerns about patron privacy. The service does not read any personal data related to the patron's transaction, so it sees neither the title nor the name of the person checking out the resources.

The business model for Youniquely4U involves annual subscription fees paid by libraries to Checkpoint to license the service, as well as revenue derived from the targeted advertising on the Youniquely4U Web site. Checkpoint scales the cost of the software according to the size of the library and the number of active registered borrowers.

Businesses pay advertising fees to have their coupons distributed by the library through the Youniquely4U service. The library can receive a portion of the revenue stream generated from the advertising, depending on the deal constructed with the partner. The library also can offer free promotions to local businesses. By year-end 2007, about 50 libraries had subscribed to Youniquely4U. Subscribing libraries include the East Brunswick Public Library and the Wayne Public Library in New Jersey, Terrebonne Parish Library and Ouachita Parish Public Library in Louisiana, and the Frisco Public Library in Texas. According to public documents, in February 2007 the Rangeview Library District in Adams County, Colorado, serving a population of about 250,000, approved spending up to $41,000 to fund their implementation of Youniquely4U.

Checkpoint created Youniquely4U in partnership with Blue Iceberg, which created the interactive Web-based infrastructure for the product.

—Marshall Breeding

More Info. @:

Youniquely4U Web Site:
http://www.youniquely4u.com/

Checkpoint Systems' Information about Youniquely4U:
http://www.checkpointsystems.com/default.aspx?page=youniquelyu

Rangeview Library District Document:
http://www.northglenn.org/WEB-PDF/rangeview_library_agenda.pdf

Blue Iceberg's Web Page about Youniquely4U:
http://www.blue-iceberg.com/featureyouniquely4u.html

Compendia of Knowledge: Google's Grassy Knol

The purpose of a compendium of knowledge is to pull together what is already known on various topics into a cohesive, coherent form that is both usable by and useful to seekers of already-known-knowledge. (The value and usefulness of compendia of knowledge to seekers of new knowledge is an interesting side-topic.) Dictionaries perform this service for words, their meanings, and their origins. Encyclopedias do this for topics. Here and now in the early 21st century, attempts to devise new ways to codify and diffuse knowledge have reached levels of effort and inventiveness not seen since the 18th century, the golden age of the development of the modern encyclopedia.

For many observers, the Wikipedia is the poster child of this new inventiveness. Rather than have individuals or small teams of writers and editors write each article in the encyclopedia, just about anyone can begin or edit an article. Some people—especially librarians, it seems—have rejected the Wikipedia authorial concept in principle and labeled the resource eternally and fundamentally unreliable and uncitable.

Citizendium—reported in the December 2006 issue of *Smart Libraries Newsletter*—and other web and wiki-based compendia of knowledge tried to bring some order via "gentle expert guidance" back to the incipient chaos purportedly unleashed into the staid realm of knowledge compendia by Wikipedia.

Google has become a little like Microsoft in that if often sticks its blue-blooded nose into endeavors where brave pioneers have achieved some success. In December 2007 Google announced a project called Knol with a goal to make it easier for people to share knowledge they already have acquired. Knol may tease rusticated expertise from its musty,

bucolic confines. Who knows, Knol may actually finally name with authority those shadowy figures on the grassy knoll.

Knol is still in its very early stages of development, with the user population limited to a select group by invitation only. I know of no one who has received an A-list invitation to the inaugural Knol ball. I guess that puts me squarely in the knowledge boonies.

All articles in Knol will be signed. Google is developing easy to use tools for writing and editing the content, and they have agreed to host the Knol content at no direct charge to contributors or users.

The original Google blog post about the Knol project is mysteriously silent about intellectual property issues. There will be no editorial activities or layer between what the authors choose to write and what the reader reads. Google seems loathe to plunge into the business of editing content. Knol seems like it will be more akin to the print realm and the blogosphere than a wiki. Rather than have a single article on a topic, Knol will encourage multiple articles on a topic, with competing and perhaps even contradictory information presented.

The Knol system will let each author decide whether he or she will allow advertisements to be associated with the presentation of his or her Knol article. There is an economic incentive here, however, that may prove to be irresistible to many authors: "If an author chooses to include ads, Google will provide the author with substantial revenue share from the proceeds of those ads." The readers of Knol need not be passive participants in the growth and valuation of Knol content. Readers will be empowered to rate each knoll (via the usual firmament of five stars), add comments, and even lengthy reviews of each Knol article.

So now we have at least three competing models of how knowledge should be collected and disseminated in the third millennium and beyond: Wikipedia, Citizendium, and Knol. Wikipedia is still the most innovative or radical, because it seeks to achieve new efficiencies for the seekers of knowledge. In the exclusively print era, someone who wanted to know what was known on a subject had to read various articles, books, chapters, and other documents, then synthesize the results of that reading into a sense of what in general we—humanity—currently know about that topic. Feedback from other seekers of knowledge on that topic came in the form of letters to the editors of journals, citations and discussions in subsequent documents, etc.

Blogs increase a bit the efficiency of getting a sense of the "lay of the land" in terms of current knowledge on a topic. Comments on a blog post often contain much useful information that balances out the substance of the original post. Nevertheless, for really popular and/or current topics, the lowly seeker of knowledge still has to slog through hundreds or thousands of blogs to get a sense of current knowledge and thinking on a subject. This arduous process of collecting and comparing current accounts of what is known and thought on a topic, then creating a synthesis, may hone one's intellectual skills and build character, but it's an inefficient way to diffuse knowledge among the entire population. Compare courtly love to a popular sexual revolution.

The Wikipedia may be the STD of the eternal human project to collect and diffuse knowledge. The platonic ideal of the Wikipedia, in which everyone in the world who knew something about a topic would contribute to the one article on that topic, and in which everyone

who knew little or nothing on that topic would sit on their hands, is sublime in its fearful beauty. It could create great efficiencies in the process of synthesizing and diffusing what is currently known, but it also smacks of some Orwellian world.

The troublesome child or crazy uncle of knowledge always has been opinion. Everything that purports to be a compendium of knowledge always wrestles with the issue of what to do with opinion: how to label it, how perhaps to limit its existence in the compendium, how to fairly portray radically differing opinions on a topic, etc.

In this day and age, we not only want to know, we want it now. Another key component of any compendium of knowledge is the timeliness with which new knowledge gets added to the compendium. Although in the 20th century, committees and other august bodies developed a nasty reputation for deliberating *ad nauseam* and being slow to act, when it comes to adding new knowledge to a compendium, a group effort may be much quicker than individual effort. If some Knol or Citizendium authority is working on an article, it may take days, weeks, or months for that individual or small group to whip that article into a presentable shape. Within a few days of Google's announcement of the Knol project, there was a pretty good article in Wikipedia about Knol, containing an overview of the key points of the project, comparisons with other similar and competing compendia, and links to trenchant, expert commentary on the project. An angry mob exerts its will quickly.

One way to think about knowledge is as two points with a line connecting them. One point is the author (the person or group of people who know something). The author may be the individual or group that actually generated the new knowledge. The other point is the knowledge seeker (the person or group of people who want to know something that they suspect is already known by someone else). The line between is all the other people and systems (editors, librarians, systems engineers, etc.) who help authors and knowledge seekers connect. These newfangled knowledge compendium systems seem to try to get from Point A to Point B as quickly and easily as possible.

Another key concept for knowledge compendia is authority. All purveyors of knowledge claim to know something, but there are many sham-authorities out there. A compendium of knowledge must be able to differentiate and tag true authority from sham authority. It is a never ending process of approximation and culling. Sometimes all humanity is duped. Something we thought for a long time was true knowledge is later proven to have been sham knowledge.

What are the roles for libraries and librarians in the dawning new age of knowledge compendia? Well, one way to think about a library is as a type of knowledge compendium in its own right. A carefully selected collection of information objects on a wide variety of topics constitutes a sort of compendium. Libraries were into knols before knols were cool.

—*Tom Peters*

More Info. @:

December 13, 2007 Google Blog Post about Knol:
http://googleblog.blogspot.com/2007/12/encouraging-people-to-contribute.html

Wikipedia article on Google's Knol Project:
http://en.wikipedia.org/wiki/Knol

American Schoolyard Fight: Intel and One Laptop Per Child Part Ways

For better or worse, the opportunities and experiences of libraries and library users in this digital information age often are influenced by competition between information technology organizations. Sometimes the competition results in better products, services, and prices, but sometimes the competition devolves into a grudge match. For example, the ongoing acrimony between Microsoft and Apple has had a major dampening effect on the growing cluster of library services related to downloadable audio books and digital media. OverDrive and NetLibrary both have been using the Windows Media Audio (WMA) file format for their downloadable digital audio book services, but the WMA file format developed by Microsoft will not play on the iPod family of portable MP3 players from Apple, which by far is the most popular product line in that category of consumer electronics.

Inexpensive and broadly diffused laptops for students worldwide offer tremendous potential to revolutionize and improve education and information seeking and use. The One Laptop Per Child initiative, also known as the $100 laptop project, has been a leader in this effort to enhance student access to networked computers and all the digital information that is available. Unfortunately, the grudge match between Intel and AMD, major manufacturers of computer chips, may retard this effort.

Intel representatives initially were critical of the One Laptop Per Child initiative, perhaps because AMD chips were planned to be used in these inexpensive laptops. Then in the summer of 2007 Intel reached an agreement with OLPC to have an Intel executive serve on the OLPC Board of Directors. An era of détente seemed to have dawned.

It was followed soon in January 2008 with a winter of discontent. Intel abruptly withdrew from the OLPC project, which was experiencing disappointments in other areas, too. The initial orders to several developing nations have not actually developed into firm sales followed by shipments of millions of laptops to poor children. For a fortnight in November 2007 OLPC offered to sell one of these laptops to Americans for $399. For each sale, another laptop would be shipped to a developing nation. That promotional effort yielded disappointing results, too, with only about 81,000 units sold in the U.S. Production cost increases have made the idea of a truly $100 laptop a fading dream.

In early January 2008 OLPC officials announced a new OLPC America program that would bring laptops to needy children in the United States. OLPC America plans to work through state governments to get these inexpensive laptops to needy school children. Perhaps American libraries will finally assume some useful role in the OLPC initiative.

—*Tom Peters*

More Info. @:

One Laptop Per Child Web Site:
   http://www.laptop.org/

Spartan Kindles

Late in 2007 the Kindle ebook device from Amazon.com launched to mixed reviews. As of January 8, 2008, the average rating of the 1,381 customer reviews was 3.4 stars out of five. The distribution at that time was 514 five-star ratings, 235 four-stars, 183 three-stars, 150 two-stars, and 299 one-stars.

Although the Kindle design, sales, and content management system clearly are targeting the end-user market, a few libraries have begun offering Kindles as ciculatable items. In mid-December 2007,

for example, the Sparta Public Library in New Jersey began circulating two Kindle ebook readers they had purchased. During the first month of the service, patron interest was high, early feedback was positive, and there were few procedural glitches in offering Kindles as part of a public library's circulating collection.

On January 8, 2008 I phoned Carol Boutilier, the Director of the Sparta Public Library, to learn how their Kindle service was faring. She said early responses from the initial users have been quite

positive. One of the very first users, a woman with multiple sclerosis who experiences difficulties holding and turning the pages of printed books, reported back that the Kindle was very easy to hold and advance from one page to the next. Another early user, a middle-aged male educator, loved the device and the experience, but commented that he would wait for the $399 MSRP to drop before he seriously considers purchasing one.

When the Sparta Public Library launched their service, twenty-two

patrons immediately signed up to try out the device. Some of the patrons had already heard or read about the Kindle, while others learned about it for the first time at their local public library. Now that several one-week circulation periods have passed, Boutilier reports that they still have a waiting list of twenty-two, so the library decided to remove the sign announcing the new service until they work down the waiting list. There are no plans to purchase additional devices at this time.

The Sparta Public Library currently is offering its circulatable Kindle service only to adult patrons. Boutilier detects no demographic patterns in the patrons who have signed up to try the device. Women and men of all phases of adulthood seem interested. Now that the service is settling into a routine, two things they wish for is a purchasing system that is password protected and a dual screen display.

The Library has a history of purchasing new reading and information technological devices to let their patrons try them, perhaps before they buy them as individual consumers. For example, they offer a similar service based on iPod Shuffles, but Boutilier reports that that device has not succeeded as well in a library circulation situation. Various aspects of the form factor, such as the small screen and the controls, have not been well-received by patrons at this library.

Libraries can provide a vital public service by letting patrons try a new technology in an extended, private, supportive manner. Checking out a Kindle from your local public library and using it at home, at work, and on the go for a week sure beats trying to understand a new technology and trying to imagine how well it would fit into your personal information lifestyle while looking at digital images and specifications for the device online or holding a tethered floor sample in your hand at your local computer electronics store while fending off the sales staff. The library service model in this instance is Best Buy Made Better.

When the Kindles at the Sparta Public Library circulate, they are placed in their leatherish cover, which Boutilier reports significantly increases the usability of the device, if not also the aesthetics. Many blogger pundits have commented that the device is plug ugly, reminiscent of something designed in East Germany during the Cold War era. The device and the charger cable are then packed into their original box, placed in a library tote bag, and the patron is out the door

Because purchasing content for the Kindle is easy and can be done almost anywhere in a matter of a few minutes, the Sparta Public Library decided to allow each patron to select and purchase one Kindle book during each one-week circulation period. Boutilier reported no problems with this honor system, patron-driven collection development policy. It's unclear whether the software will alert the person to a potential duplication of content if a patron attempts to purchase and download a title that already has been purchased and downloaded onto that particular device.

The collection on each Kindle grows with each circulation. For example, the fifth person to check out one of the Kindles will have access not only to the ebook he or she selects, but also the ebooks the four previous users selected. Boutilier reported that she knows of no way to determine which ebooks on the device receive the most use. Some patrons have downloaded some free content samples onto the devices, which is fine with the library.

Newspaper and magazine subscriptions also can be initiated on a Kindle, so the library has to warn patrons not to make these ongoing financial commitments. The Kindle device also is capable of playing back digital audio books, but Boutilier reported that library staff experienced problems acquiring audio books for the Kindle. The download process is not as easy and seamless, involving a transfer of content from a computer, so patrons are discouraged from downloading audio books as well.

Boulitier chafed a bit at criticisms from some bloggers that only a public library in an affluent community would seriously consider investing nearly $800 in two portable reading appliances, rather than spending that money directly on much-needed library materials. She said the Sparta Public Library has a long-term strategy of investing as much of its financial resources as possible into library materials and service. They have a small but dedicated staff, and their library building is relatively small. They focus on content and services. In 2007 their service population of 18,000 checked out 400,000 items.

The Sparta Public Library has not set an ending date for its Kindle service. So far, the devices themselves are showing no signs of wear and tear. Once the novelty factor wears off and the waiting list dwindles, Boulitier reports that they may use their Kindles as one way to satisfy interlibrary loan book requests. For example, they may offer two options to patrons who use ILL: either you can wait while we find and obtain a printed copy of the book you want from another library or other source, or we can download the title you need onto one of our Kindles in a matter of minutes.

Boulitier observed that, while the future of reading technology remains unclear, she thinks print technologies will not be a major player moving forward. Although the iPod Shuffle and the Kindle may be far from the ideal digital reading experience and system, better technologies of reading almost certainly will emerge.

—*Tom Peters*

More Info. @:
Sparta Public Library website:
http://www.spartalibrary.com/