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Connections

Merrimack Valley Library Consortium, Inc.



Amesbury/Andover/Billerica/Boxford/Burlington/Carlisle/Chelmsford/Dracut/Dunstable/Essex/Georgetown/Groveland/Hamilton-Wenham/Haverhill/Ipswich/Lawrence/Littleton/Lowell/Manchester-by-the-Sea/Merrimac/Methuen/Middleton/Newbury/Newburyport North Andover/North Reading/Rockport/Rowley/Salisbury/Tewksbury/Topsfield/Tyngsborough/West Newbury/Westford/Wilmington

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Open Source Info Sessions Spread the Word

During the last two weeks of October MVLC staff teamed up with staff from C/WMARS and NOBLE to present Open Source Information Sessions at the Palmer Public Library and at the MVLC Central Site. There were about 45 in attendance in Palmer and about 115 in North Andover. To provide as many people as possible with this information the following is a summary of those workshops. Also, the PowerPoint's for the presentations will soon be available on the MassLNC.org and MVLCSTAFF.org web sites.

Fine Restaurant or Potluck?

The first session used an analogy to describe Proprietary Integrated Library Systems (ILS) and Open Source Library Systems (OSLS) and to focus on three key areas/questions for each: **Features** (What do we start with?), **Development** (How do we improve things?), and **Support** (Who fixes things?)

An ILS is like a Fine Restaurant

Features

It has a physical place, an onsite, fulltime staff, and a set menu. It can be difficult to deviate from the menu unless you are willing to pay for custom cooking.

Development

It may be difficult for a vegetarian (special user) to get what they need if there is not a vegetarian option already on the menu. Often an ILS will be slow to implement enhancements and will offer "work-arounds" (such as three bowls of peas for the main course) instead.

Support

If something happens to the system, the ILS often has staff onsite and ready to clean things up. You are paying to have this staff on-call whether you need them or not.

An OSLS is a Potluck

Features

It can happen anywhere and has a staff and menu that depends on the available talent and resources. A structure for planning and communication is needed to create a menu that meets the needs of the customers.

Development

A vegetarian can be served by the OSLS more easily because the OSLS can rely on the talents and creativity of the open source community to find a solution.

Support

The OSLS has the choice to have onsite help, help from a private company, or a mixture of both. They can choose how to spend their resources.

Open Source Software

Open source software is free to download, free to view, free to share, and free to modify. This “free” is the “freedom to choose” how you use the software rather than the pure “it will never cost you anything” free. You do not have the upfront licensing costs, but you will have costs for development and support...but how much cost is your choice.

Some of the main principles in open source software is that

- Nothing hidden: no secrets or surprises
- No artificial limits on what you can do
- No license fees or limits on sharing

The development of the Internet radically pushed the growth of open source software because it provided a stable and fertile place for cooperative and participatory discussion and debate. A business model developed where instead of charging for software, people would charge for services.

“If everyone can edit the software and share their new versions, doesn't the software get messy?”

The participatory nature of development can quickly become messy. However, versioning and tracking software helps to provide control of the software. In addition, the open source community has established a tight hierarchy of key developers, release managers, and committers to maintain the integrity of the core program.

Many companies and organizations run a combination of open source and proprietary software. For example: Amazon, Ticketmaster, Google, U.S.Navy, Government of Canada, NASA, and New York Times. Many of these same institutions (and others) continue to develop new code and freely give it to the development community.

The Massachusetts Open Source Project

About a year ago the network administrators began discussing the possibility of using an open source library system. All nine automated networks invited to participate and C/W MARS, MVLC and NOBLE opted in. This group was awarded a joint, two-year, \$412, 000 LSTA grant to investigate, develop, and implement an open source ILS for Massachusetts

Wouldn't it be great if ...

- all of the networks were on the same ILS platform for both *collaborative staff training* purposes and *patron ease of use*?
- ... all the networks were on the same ILS platform so that *resource sharing* could be more *efficient* across artificial network boundaries?
- ... we were able to *focus our tremendous combined resources* (finances and staff) on creating a superior ILS product for our member libraries and their patrons?

- ... In light of serious state budget situation we now turn around and provide a *clear strategic plan* for more efficiently utilizing state and local taxes for library automation and resource sharing?
- ... instead of sending hundreds of thousands of maintenance dollars to California, Utah and Alabama, with little to show in return, we keep that money here in Massachusetts to *support our own staff and development*?
- ... we combined our staff expertise and software development money to support the Evergreen Integrated Library system?

An Open Source ILS is a viable option now because of the proven success of *open-source* as a business model, the progress made on *open-source* ILS products, as well as the success, security, stability, and scalability of open source programs in general.

The Developers seem to have asked the right questions during the development of the ILS. Most practical is “Is the data driving the procedure, or is the procedure driving the data?” Do these processes REALLY make any sense, or are we just doing this because it is what we’ve always done? Librarians are great at making up workarounds that then get grandfathered into procedure. Open source is allowing us to make the software support practical procedures and well thought out policies.

The Selection Process

There are two OSLS products which have been considered as viable candidates for our project: Koha and Evergreen. Both of these products are stable and have a strong support network.

Evergreen

- Evergreen, supported by Equinox and others
- 186 libraries, 523 facilities in lib-web-cats
- Public libraries: 164
- Academic libraries: 7
- School libraries: 2
- 0 libraries have migrated away from this system.
- Largest databases:
- “over 2 million” (Project Conifer, Ontario, Canada) – academic network
- Interview users: Evergreen Indiana; SITKA (B.C); King County (WA); Michigan Evergreen

Koha

- Koha, supported by LibLime and others
- 296 libraries, 438 facilities in lib-web-cats
- Public libraries: 153
- Academic libraries: 45
- School libraries: 33
- 28 libraries have migrated away from Liblime: 21 still Koha, 7 Evergreen (all to Evergreen Indiana).
- Largest databases:
- 826,000 bibliographic records (South Central Library System, Wisconsin)
- Interview users: MassCat; SCLS (WI); WALDO

During the summer the committee began talking with the current users of these systems. Telephone interviews were set up, and many questions were asked. At the same time both systems were loaded onto local servers so that we could “kick the tires” and really get a look inside the systems.

There were three initial criteria that we believed were most important for selecting a system: **Multiness, Extendability, and Scalability**. After some interviews, the make up of the **Current Customer Base** was informally added as a fourth criterion.

Multiness: The “have it your way” option. The ability to support multiple sets of circulation parameters and network transfer rules

Extendability: The ability to “play nice” with other software libraries use and incorporate software not native to the system.

Scalability: How well a system can handle the load a large customer places on it.

Current Customer Base: Having a system with a current user base which resembles us and has some of the same issues and needs as us (C/W MARS 1,926,056; MVLC 921,769; NOBLE 1,302,954)

During the selection process we found that both run on Linux, Apache, (my)SQL, Perl; have mature circulation and cataloging; have immature serials and acquisitions; and have the ability to program missing or new features and functionality.

The Evergreen structure has a flexible hierarchy which allows for levels such as consortia, system, library, or branch; rules and parameters are associated with hierarchy; cluster-friendly architecture allows for load balancing, failover; and allows for ad-hoc addition of servers when needed.

The Koha structure has separate loan rules for each branch; most other settings are single system-wide (Funds, Notice templates, Calendars, Borrower mandatory fields, Ceiling due date). The Hierarchy structure is purported to be coming in 3.2

The winner was Evergreen. Only Evergreen can provide the scalability and complexity required by our networks. The Evergreen user list most resembles our networks, which will help to guide and support our future development. It was unanimously selected by C/W MARS, MVLC and NOBLE representatives.

Next Steps

There are two major “next steps” in this project. The first is to obtain a positive vote from each network to proceed. The MBLC has stated that for a project this big and costly it is important to have buy-in from the very beginning. In fact, the grant money for this project is tied to the vote by each network. The second step is to organize and begin the work of the **Massachusetts Library Networks Cooperative (MassLNC)**. A coordinator will be hired, and this will be the central coordinating entity for the project. Here is the general outline of the MassLNC duties:

MassLNC team duties during first year:

- Get training on Open-Source ILS platform
- Establish detailed ILS functional requirements for each participating network
- Track development of ILS software
- Develop HelpDesk and Intranet support infrastructure and procedures
- Develop database migration tools and procedures

MassLNC team duties during second year:

- Help migrate first volunteer network
- Help migrate second and third volunteer networks
- Help migrate new volunteer network
- Provide ILS “vendor” support services to migrated networks

Over the next couple of months users in each network will be asked to start thinking about what is needed in a new system. Discussions will be scheduled during regular committee meetings, among library staff, and through email. It will be important to not only look at the “failings” of the current system but to brainstorm the “perfect” system with which you would like to work. We have the chance to develop a system that supports our policies and true needs...if we build it right!

It is expected that the first network will go live on Evergreen during the second quarter of calendar 2011 with the other two networks soon to follow.



November Training

Cataloging Training

Register for the Cataloging sessions by contacting Laurie Kulik (978-557-8204, lkulik@mvlc.org)

MARC Cataloging - For all new Catalogers and for those who need a refresher: Learn the terminology of a MARC record and how to input a brief workform (Bib Record) for on order books and paperbacks as well as items in hand. Then learn how to create and add item records for each Bib. Example adult and juvenile books will be supplied. *Thursday, Nov. 12th, 9:30 AM* Limited to 8 attendees per session.

Periodicals and Item Records - Periodicals and Item records will focus on how to search magazine titles, identify the correct current record and add

the item with proper coding (iType, Location, Collection, and Item Status). Learn how to identify title and frequency changes and when to notify MVLC of these updates. *Thursday, Nov. 19th, 9:30 AM*. Limited to 8 attendees per session.

Authorities - New & Updated - Authorities Control has been totally revamped with the implementation of the Backstage Authorities project. Backstage will also do quarterly maintenance so it is more important to use existing Authorities and create new ones carefully. Examples will include what 'tags' are specifically Authorities and how to identify them. *Wednesday, Nov. 24th, 9:30 AM*. Limited to 8 attendees per session. **PREREQUISITE: MARC Cataloging**

MVLC CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
<p>9</p> <p>Key Users MVLC Central Site 10:00 AM</p>	<p>10</p> <p>Technical Services Committee North Andover 10:00 AM</p>	<p>11</p> <div style="text-align: center;">  <p>Veterans Day</p> </div>	<p>12</p> <p>MARC Cataloging MVLC – 9:30 AM NMRLS Annual Meeting Nevins Library - Methuen - 11:30 AM</p>	<p>13</p>
<p>16</p>	<p>17</p> <p>Executive Committee Central Site - 12:00 PM Membership Committee 2:00 PM</p>	<p>18</p> <p>Circulation Committee MVLC Central Site 10:00 AM</p>	<p>19</p> <p>Periodicals MVLC – 9:30 AM Personnel/Customer Services Westford 10:00 AM</p>	<p>20</p>
<p>23</p>	<p>24</p> <p>Authorities Central Site - 9:30 AM</p>	<p>25</p>	<p>26</p> <div style="text-align: center;">  </div>	<p>27</p> <p style="text-align: center;">Central Site Closed</p>
<p>30</p>				