Open Source Integrated Library Systems

An Introduction to What’s Out There, Who’s Using Them, and What You Need to Know about Them

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In this session you will learn

- What Open Source is, and what it is not
- Why libraries might consider an Open Source Integrated Library System
- 2 major Open Source ILS software programs in the US
- How to evaluate an Open Source ILS to decide if it’s a good fit for your library
An Integrated Library System or Library Management System (LMS) is a complex software package that automates facets of library services such as:

- Circulation
- Cataloging
- The OPAC interface (how users search your catalog on the internet)
• Most large library systems, both public and academic, use an ILS to manage and implement library services
• Small libraries and libraries in rural areas may still be using a non-automated workflow
  ◦ Still use card catalogs
  ◦ Still do “manual” checkout with checkout cards

First . . . What is an Integrated Library System (ILS)
• Libraries purchase licenses to use ILS software from Vendors
• Most popular vendors in the library world, according to the Online Dictionary of Library and Information Science:
  ◦ Ex Libris
  ◦ SirsyDynix
  ◦ Polaris Library Systems
  ◦ EOS International
• ILS software systems, maintenance, and technical support are usually the bulk of a library’s operating expenditures after salaries.
• However, as we all know, libraries are affected by budget cuts

• Budget cuts can have serious consequences on a library’s automated workflow, which will affect services and thus affect users

**ILS and the Library Budget**
• Something to consider in this age of shrinking budgets and “doing more with less”: Open Source software
• What does Open Source mean?
• What types of software are Open Source?
• What should I as a librarian need to know about Open Source?
• It may be easier to define Open Source by giving examples of software that ARE NOT Open Source
• The examples at right are all PROPRIETARY software

iTunes
• Windows OS
• Mac OS
• Microsoft Office
• Adobe Photoshop
• Camtasia
• iWork
When you purchase a proprietary software package like Microsoft Office, you are actually purchasing a license that allows you to use it. These programs are copyrighted to their creators and cannot be legally modified in any way. This is what you agree to when you accept any proprietary software license agreement.
How Open Source differs from proprietary software

- In order for a piece of software to be considered Open Source, it must meet 10 specific criteria
- Full criteria can be reviewed at http://opensource.org/docs/osd
Basic Open Source criteria

- The software must be freely distributed
  - You don’t pay for a license to use the software, you can download for free
- The source code for the software must be made completely available
  - Source code is instructions to the computer in their original form
- Derivative works must be okay
  - The software can be modified by users
• You have probably used Open Source software without knowing it was Open Source
• There are Open Source alternatives to most proprietary software programs
  ◦ Open Office for MS Office
  ◦ Linux for Windows or Mac OX
  ◦ Firefox for IE
• There are Open Source alternatives to proprietary Integrated Library Systems
• 2 main programs used in the USA are Evergreen and Koha
• Koha is a full-featured ILS
• Key features include
  ◦ Entirely web based, both administrative modules and OPAC
  ◦ Can be fully integrated into a library’s website
  ◦ Copy cataloging and z39.50
  ◦ MARC21 and UNIMARC for professional catalogers
  ◦ Acquisitions, serials, circulation, branch management and user management modules
How was Koha developed?

• Developed by Katipo Communications for the Horowhenua Library Trust in New Zealand
• It is currently maintained by a dedicated team of software providers and library technology staff from around the globe
• Koha means “gift” in Maori
• http://koha.org/showcase
• Lists a showcase of library systems using Koha for their entire automated system, including setting up the OPAC for public users
• Salinas County Library (California)
  ◦ http://salinas.kohalibrary.com/
• A world-wide community of Koha developers keep a Wiki of modifications and changes made to the software
• Library staff, if technically savvy enough, can also modify Koha based on the library’s needs
• http://wiki.koha.org/doku.php

How is Koha maintained?
What is Evergreen?

- Is open-source, consortial-quality library software to help library users find library materials and to help libraries manage, catalog, and circulate those materials
- Has a library staff client (not web-based like Koha)
• Developed by the Georgia Public Library System consortium, PINES, after their original library automation system started to fail
• They were dissatisfied with all of the off-the-shelf systems offered by vendors and decided to create their own integrated library system
• http://www.open-ils.org/dokuwiki/doku.php?id=evergreen_libraries
• Lists systems and libraries using Evergreen
• Anderson County Public Library - South Carolina

Library systems using Evergreen
• A major goal of the Evergreen ILS Project is to become a long term, sustainable, community driven development effort.

• Like Koha, Evergreen also makes its documentation freely available on its site:
Open Source sounds great . . .

• But I’m not a techie, and no one on my staff is a techie, so how would we deal with the everyday technical issues that arise, as well as the huge issues that can erupt?
Drawbacks of Open Source ILS software

- Lack of technical support
- Libraries often do not have staff members who are able to set up and maintain an open source system
- May cost more in resources to implement the Open Source software than to stay with your current vendor
- Libraries have traditionally relied upon (and paid dearly for) their vendor’s tech support

Where is my tech support?
Myths about the benefits of vendor-licensed proprietary software:

- **You will always have support**
- NO: companies may go out of business, may be bought and sold piecemeal, may lose subject expert staff over time. See the recent issues regarding SirsiDynix
  - [http://www.libraryjournal.com/article/CA6700612.html](http://www.libraryjournal.com/article/CA6700612.html)

- **Your vendor will agree to modify their software for your library or library system**
- NO: if it is not profitable or within their interests, vendors have no obligation to change anything about their software for your purposes
• There are currently 2 main companies who provide fee-based tech support for Koha and Evergreen
  ◦ Liblime - for Koha
    • http://www.liblime.com/
  ◦ Equinox - for Evergreen
    • http://www.esilibrary.com/esi/
• So even though the software is freely distributed, you may want to pay for tech support if the cost benefits you
• You assess your library’s needs
• You identify your resources - strengths and weaknesses (budget, staff, server space, etc.)
• You research which libraries similar to yours in size and community needs are using Open Source ILS software
• You evaluate the Open Source ILS programs based on these assessments
• Much like you would do if you were looking for the best proprietary ILS software for your library

How do I know if an Open Source ILS is right for my library?
Richard W. Boss’ 6 Criteria to use when considering the use of an open source ILS system

1. There is current development activity
2. At least the cataloging, circulation, and patron access catalog modules are currently available; and acquisitions and serial control are in development
3. MARC is supported
4. Current source code and documentation are available for downloading under the GNU General Public License
5. The product is currently in use in libraries
6. Scalability is not an issue – There is no risk of database size or activity levels exceeding the capacity of the software.


Open Source ILS evaluation criteria
Researchers libraries using Open Source ILS

- Library Technology Guides
  - http://www.librarytechnology.org/
- Lib-Web-Cats
  - a directory of libraries and the ILS used in these libraries throughout the world
  - http://www.librarytechnology.org/libwebcats/
• Don’t do it because it’s trendy
• Marshall Breeding, expert on Open Source ILS, considers Open Source ILS to be in a “honeymoon period”
• Always keep your resources (human and otherwise) in mind
• Always keep the needs of your users in mind

Adopting an Open Source ILS is not to be taken lightly
• Open Source ILS systems are freely available automated systems available for adoption by libraries
• Because they are freely available and Open Source, they can be modified to fit the specific needs of a library
• Technical support is available for them
• They must be evaluated and chosen using methods similar to evaluating and choosing a proprietary ILS


