



Smart Libraries™

Formerly Library Systems Newsletter™

50 East Huron Street, Chicago, Illinois 60611-2795, USA



Smarter Libraries through Technology

by Marshall Breeding

Librarians in Sweden make Smart use of Technology

I've just returned from an interesting and productive trip to Sweden. It was great to have a chance to meet librarians from all parts of the country. While I was there primarily to give presentations on trends in various aspects of library technology, I was also able to expand my understanding of libraries in Sweden and see a glimpse of the differences in the ways that they use technology in contrast to other parts of the world. I was fortunate to have an opportunity to visit a number of libraries and have many conversations regarding technology trends and automation strategies.

The academic libraries in Sweden engage in a variety of collaborative automation projects. The research and academic libraries have long participated in a shared union catalog, called Libris. Implemented by the National Library, Libris

serves and is governed collectively by all participating libraries. Recent conversations concerning Libris deal with extending its use to serve as the local catalog for each of the libraries, in addition to its longstanding role as the collective union catalog.

Another area of interest involves finding ways to extend the scope of Libris to also include articles, digital collections, and other resources beyond books. Libris is not a shared ILS—each of the libraries involved operates their own automation system. It was interesting to meet with the personnel at the National Library responsible for the implementation and operation of Libris and to hear about their plans for future developments.

Sweden is a relatively small country and its collaborative models may not necessarily transfer to larger countries or regions, but it demonstrates the many benefits that libraries gain in working together instead of in isolation. It's clear that the Swedish academic libraries greatly enhance their value to their respective institutions in the way that they have established infrastructure to facilitate streamlined operations and resource sharing. Users can easily search and request materials from any of the academic libraries throughout the country.

Although the impetus for my visit primarily involved academic libraries, I'm also keenly interested in what's happening in the public library arena. In preparation for my visit, I systematically reviewed all of the public libraries in Sweden for my libweb-cats directory and noted the ILS used in each. This study of the public libraries in Sweden revealed some striking trends.

IN THIS ISSUE

Librarians in Sweden make Smart use of Technology
PAGE 1

New Management at Innovative Interfaces
PAGE 3

OCLC Web-scale Management Services enters Adoption Cycle
PAGE 4

LIS News in Brief
PAGE 6



Receive *Smart Libraries* via e-mail

Subscribers that would like an e-mailed version of the newsletter each month should forward one e-mail address and all of the mailing label information printed on page 8 of the newsletter to moneill@ala.org. Type "e-mail my Smart Libraries" into the subject line. In addition to your monthly printed newsletter, you will receive an electronic copy via e-mail (to one address per paid subscription) at no extra charge each month.



First and foremost, all public libraries in Sweden are automated through a reasonably up-to-date integrated library system. Most countries in Europe, including Sweden, have mandates for local governments to provide a library service that meets a specified set of standards. Each county or municipality operates an integrated library system which is used by the affiliated community libraries, and often by school libraries as well. This situation unfortunately contrasts with what I see in the public libraries in the United States where no mandates for library service prevail and where hundreds of public libraries—especially in small towns and rural areas—lack basic automation or get by with outdated PC-based systems.

Another reality of public library automation in Sweden involves the dominance of products provided by a single company—Axiell Bibliotek AB, a division of Axiell Group. While not well known in North America, Axiell ranks as the leading company supplying technology products to libraries in Scandinavia, with operating units in Sweden, Denmark, Finland, and

Most countries in Europe, including Sweden, have mandates for local governments to provide a library service that meets a specified set of standards. Each country or municipality operates an integrated library system which is used by the affiliated community libraries, an often by school libraries as well.

the United Kingdom. While Axiell offers different ILS products in each of these countries, it has developed a portal product, called Axiell Arena, which operates with each. Arena is not just an online catalog replacement, but offers a broad suite of functionality that can effectively replace the library's entire Web site.

It's interesting to see that Arena ambitiously addresses the

full scope of a library Web site in addition to the functionality of the online catalog. This concept differs significantly from that of the next-generation catalogs or discovery interfaces popular in North America that focus on providing new end-user tools for searching library collections but do not replace all the other aspects of the library's Web site.

As a relatively new product, Arena has been adopted by only a portion of the libraries using Axiell's products, but is seeing increased adoption. I'll plan to write a more in-depth treatment of Axiell

Arena in a future issue.

I was also struck by how much libraries in Sweden make use of self-service equipment for book circulation. Every library that I visited, including both academics and publics, offered self-check stations. Some of the academic libraries based self-check on barcodes, but most of the public libraries had implemented RFID-based equipment. The book returns generally involved an automated sorting system and an interface to the ILS for discharge. I didn't do a systematic survey, but base these

observations on the libraries we visited in Stockholm, Uppsala, and Gothenburg.

I'm continually inspired by the accomplishments of libraries in all parts of the world. Every time that I visit a new region, it adds to my understanding of the different options and permutations in which technology can be applied to the challenges faced by libraries. The exchange of ideas has enormous value. I hope those of us in different regions can feed off each other's ideas and accomplishments in ways that result in positive improvements all around.

New Management at Innovative Interfaces

Innovative Interfaces, Inc. has named a new President to lead the operations of the company. Effective August 2010, Neil Block, formerly Vice President for Worldwide Sales, advances to the role of President responsible for all divisions of the company, including sales, marketing, customer service, and development. Block joined the company in 1988.

Jerry Kline, who co-founded Innovative Interfaces in 1978, owns the company and will continue to serve as its Chairman. In this move, Kline steps back from the daily operations of the company he has actively led for over 30 years, while continuing strategic oversight as Chairman. Kline recently founded SkyRiver Technology Solutions, a new company to provide cataloging and other bibliographic services. Both SkyRiver and Innovative Interfaces are currently involved in a lawsuit that challenges OCLC's position in the industry, claiming violations of the Sherman Antitrust Act.

The appointment of Block as President provided other opportunities for internal advancement. Mary Chevreau advances to Vice President, North Amer-



ican Sales. Chevreau previously assumed responsibility for sales to existing customers and now leads all aspects of sales in North America, reporting directly to Neil Block.

The promotion of Neil Block represents an important milestone in the history of Innovative. As one of the few privately owned, founder-led companies in the industry, some speculate on the future of the company once the

founder is ready to step out of daily operations. Innovative has consistently followed a pattern of promotion from within and has remained outside the grasp of venture capital or private equity involvement. This latest move reinforces that pattern. While an important step in the evolution of the company, the real message involves continuity, not abrupt change.

Serials Solutions has also seen a

major transition in its executive management. On September 12, 2010 ProQuest announced that Michael Gersch had been appointed as the General Manager of Serials Solutions and as an Executive Vice President of ProQuest. Serials Solutions operates as a business unit of ProQuest. Gersch will report to ProQuest CEO Marty Kahn. Most recently, Gersch comes to Serials Solutions from LexisNexis, where he served as Vice President and Managing Director of its Litigation Solutions division.

Rob Mercer previously served in a similar capacity as General Manager of Serials Solutions and Vice President of ProQuest. Mercer continues with the company as head of Global

Sales for Serials Solutions and as part of the senior executive team of ProQuest.

Jane Burke previously served as General Manager of Serials Solutions from June 2005-Jan 2009. Burke has since shifted to a broader role for the company as head of Strategic Initiatives of ProQuest and is part of the executive team reporting directly to Marty Kahn providing strategic support across all ProQuest business units with technology innovations. Prior to joining ProQuest, Burke served as President and CEO of Endeavor Information Systems.

—Marshall Breeding

OCLC Web-scale Management Services enters Adoption Cycle

The emergence of a new library management platform from OCLC represents a potential change of major proportions in the library automation industry. Given the size and reach of OCLC, its new entry into the field marks a major event. In recent weeks, this system has shifted from concept to practice as it begins to find production use.

June 2010 saw a milestone in the pilot phase of the Web-scale Management Services (WMS) from OCLC. The libraries that volunteered as pilot sites provided early input into the project to OCLC, but were not required to put the software into production. Beginning July 1, the WMS became available to libraries willing to be early adopters. These libraries would gain access to early versions of the software that could be placed into production, displacing some or all of the functionality otherwise provided by their local integrated library system.

Within this cycle of early adopters, the Lupton Library of the University of Tennessee at Chattanooga is on track to become the first library to implement OCLC's new Web-scale Management Services as its production automation system. This library opted for a fast-track implementation, with a very ambitious schedule in order to attempt to complete the migration by the beginning of the Fall 2010 academic semester.

The migration to WMS, though a major undertaking, is a relatively small project compared to the planning underway for an entirely new library for UTC. This \$48 million project is targeted for completion by Spring 2012. The library's collection totals around 500,000 volumes.

OCLC's Web-scale Management Services provides a library's core automation services through functionality deliv-

Griffey also reported that the concept of highly shared records seems like the way of the future as a data model for libraries. The concept of relying on shared bibliographic records for active use rather than downloading them into a local system appealed to the library.

ered through WorldCat, eliminating the need to operate a traditional integrated library system. WorldCat has functioned as a cataloging tool from its inception. WorldCat Local was launched in April 2007 as an interface to replace a library's online catalog, providing next-generation discovery features including access to articles and digital content. WMS extends WorldCat further, adding functionality for circulation, acquisitions and license management. *SLN* did a more detailed description of WMS in its June 2009 issue.

Lupton Library Implementation Process

The Lupton library began the process of implementing a new ILS with the selection of WMS as the library's new automation platform, announced in mid-July 2010. They aimed for an implementation date of August 20th. This date would have the new system in place by the beginning of the academic year. Not unexpectedly, some slippage resulted in the schedule, with full live circulation expected sometime in September.

According to Griffey, the transition to WMS involves two major areas of change. First, library personnel have to learn the new system and how to accomplish their work. The second, and probably more challenging change, involves the differences in how the system treats data. Moving from a model of a traditional ILS based on its own separate stores of data to the WMS approach of highly shared data brings a higher learning curve. Andrea Schurr, Web Technologies and ILS Librarian, skillfully managed the data transition processes, including extraction from Virtua and preparation for loading into WMS. The OCLC implementation team was deeply involved in the process.

Current Status. As of the first week in September 2010 the Lupton Library is quite close to full production of circulation and cataloging in WMS. The library has performed full testing of circulation, but is not yet doing live check-outs, pending a mandatory review by State auditors of financial transactions involved, such as reconciliation of fines and fees collected.

The library will continue to perform course reserves on Virtua for at least a portion of the Fall 2010 semester. This feature is not currently part of WMS, but is anticipated for release later in 2010.

The library anticipates phasing out their Virtua system by the end of 2010. The library has been able to perform all of the data extraction from Virtua without direct assistance from VTLS. Griffey commented that VTLS has been extraordinarily cooperative as they migrate to a new system and has been very flexible during the transition.

Costs

OCLC has not yet set or published pricing for WMS. The product will be offered as a subscription, at an annual cost that will be scaled according to many factors, including the size and complexity of the library and its geographic region.

Since WMS operates as a service on the WorldCat platform, the library avoids expenses related to the ownership and maintenance of local hardware and software for their ILS.

Other Early Adopters

Once OCLC has gained more experience implementing WMS, it expects for a 60-day implementation schedule to be routine. According to Andrew Pace, OCLC's Executive Director for Networked Library Services, the work done by the Lupton Library has provided valuable experience developing the processes necessary for a library to move to WMS quickly. Naturally, some libraries may require additional time for data



The product will be offered as a subscription, at an annual cost that will be scaled according to many factors, including the size and complexity of the library and its geographic region.

extraction from their current system or to navigate through internal change processes, but OCLC expects the implementation of WMS to follow a radically faster process than a traditional ILS.

Other libraries will soon follow the Lupton Library as early adopters of WMS. The library of the Samuel Roberts Nobel Foundation, a special library in Ardmore, OK, and the Pepperdine University Libraries are currently in the implementation process and will be live in coming months. A handful of other libraries will also implement WMS later in 2010 or early 2011. Pace indicates that he has seen a high level of interest in WMS, but that it is too early to anticipate the numbers of libraries that might eventually opt for this approach.

As 2010 we can expect a relatively small number of libraries to adopt WMS as their production library automation environment. Given reasonable success by these early adopters, we can anticipate a much larger number of libraries will shift to this approach in 2011 and beyond.

—Marshall Breeding

LIS News in Brief

The following news briefs all appear on Marshall Breeding's website, [librarytechnology.org](http://www.librarytechnology.org/news.pl?SID=20100909612915039) at <http://www.librarytechnology.org/news.pl?SID=20100909612915039>.

September 8th, 2010

Rein van Charldorp to retire, Eric van Lubeek named as next managing director of OCLC Europe, the Middle East and Africa

DUBLIN, Ohio, USA, 8 September 2010. Rein van Charldorp has announced his decision to retire as Managing Director of OCLC Europe, the Middle East and Africa (EMEA) effective December 31, 2010. Eric van Lubeek, currently Director of Sales and Operations for OCLC EMEA, will work with Dr. van Charldorp in transition and prepare to assume responsibilities as OCLC EMEA Managing Director effective January 1, 2011.

September 7th, 2010

Indiana University selects EBSCO Discovery Service

IPSWICH, Mass.—September 7, 2010—Indiana University Bloomington (IU) has selected EBSCO Discovery Service from

EBSCO Publishing to expand the purpose and functionality of its library website. The university wanted its website to provide users with the search experience they expect to find from the library—moving beyond lists of library hours and resources to actual results. The university's long relationship with EBSCO led IU librarians to be EDS beta testers and once they saw the interface, and the potential being discussed by EBSCO, they realized that EDS might be what they needed to make their website a starting place for users.

September 3, 2010

Innovative now in over 50 Countries

Emeryville, CA. Innovative announced today that the company's worldwide presence has expanded to 52 countries. The company is pleased to achieve this milestone with the addition of the following new customers: Cyprus University of Technology and Neapolis University Pafos (Cyprus); Al-Arab Medical University (Libya); and Bahrain Polytechnic (Kingdom of Bahrain).

Today, Innovative serves customers in Africa, Asia, Oceania, Europe, North America, and South America. With a growing number of international universities selecting the Millennium ILS or Encore, the company is committed to meeting the challenges libraries face with an international training and sales force and 24/7/365 support.



Smart Libraries Newsletter
American Library Association
50 East Huron Street
Chicago, IL 60611-2795 USA
Address Service Requested

NON PROFIT
US POSTAGE
PAID
PERMIT 4
HANOVER, PA

October 2010 Librarians in Sweden make Smart use of Technology

Smart Libraries Newsletter

Smart Libraries Newsletter delivers hard data and innovative insights about the world of library technology, every month.

Editor

Marshall Breeding
615-343-6094
marshall@breeding.com

Managing Editor

Dan Freeman
312-280-5413
dfreeman@ala.org

TO SUBSCRIBE

To reserve your subscription, contact the Customer Service Center at 800-545-2433, press 5 for assistance, or visit alatechsource.org.

The 2010 subscription price is \$85 in the United States and \$95 internationally.

Production and design by the American Library Association
Production Technology Unit.
Smart Libraries Newsletter is published monthly by ALA TechSource,
a unit of the publishing department of the American Library Association.
Copyright American Library Association 2010. All rights reserved.