



Fear and Trembling in Connecticut

(Or 'How I Learned to Stop Worrying and Love Open Source')

by **Amy Terlaga**

Hello. My name is Amy Terlaga, and I am a recovering open-source-ILS-phobe. This is my story.

My story begins in March 2007, the month that SirsiDynix notified its Horizon and classic Dynix customers that it would not be releasing Horizon 8.0 in favor of developing its Unicorn software. As vice president/president-elect of SirsiDynix's Horizon/Dynix user group, I was one of the first ones to be notified of this abrupt change in company strategy. The news sent shock waves through the SirsiDynix user community.

I am assistant director, user services, of Bibliomation, a Connecticut consortium of 48 public libraries and 20 K-12 schools. Faced with an ILS migration, this daunting inevitability became the primary focus of Bibliomation's spring 2008 strategic planning meetings. The end result of our planning process—to begin an exploration of open source ILS systems as a viable alternative to the ever-shrinking proprietary vendor marketplace to determine their feasibility for our network. In developing that strategic plan, a possible migration to an open source system

was discussed at length and embraced by everyone else on the strategic planning committee, despite my reservations. We used Leslie and Alan Burger of Library Development Solutions (www.librarydevelopment.com), a consulting firm for libraries, systems, and consortia. Leslie and Alan brought in John Blyberg, assistant director of innovation and user experience at the Darien Public Library in Connecticut to advise us on the practicality of going with an open source ILS. John's recommendation to the committee was to *not* go with an open source system if our migration timeline was a short one. These systems were too new, he advised, and the possibility of the code forking could spell disaster for our local system's sustainability.

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The committee decided to disregard John's cautionary words and forge ahead with our exploration.

Open Source Exploration: In the Beginning ...

Bibliomation's initial success with our open source exploration had to do largely with the enthusiasm, determination, and native talents of one key employee: Brendan Gallagher. Brendan single-handedly installed Koha on our first open source test server. Together, he and Melissa Lefebvre, our web services coordinator, configured Koha's OPAC to mimic some of the added functionality our libraries had with our current ILS, SirsiDynix's Horizon system, such as pathfinders to specific topics in the collection. Brendan also ran our weekly open source exploration meetings and worked with our database services team to make

sure that the MARC records were imported properly and the correct fields were displaying. Brendan made it seem so easy ... a little too easy.

After the initial testing, the next phase of our strategic plan involved migrating three small libraries in the state to Koha so that they could be our guinea pigs and test the software, along with some enhancements we had planned to commission with LibLime, the leading Koha support vendor at the time. LibLime's Josh Ferraro and Daniel Sweeney spent 2 days in the summer of 2008 with us as we picked apart the system—what it currently could do, what development was in the LibLime pipeline, and what we would still need to have developed to meet our consortial needs.

A little bit of Bibliomation's consortial history is in order here: Our idea has always been to let every library flower bloom; in other words, we've given each of our libraries the independence to have its own unique circulation parameters and policies yet still be able to reap the benefits of being part of a shared system. For instance, the bulk of our libraries' inter-library loans are satisfied from within the Bibliomation ILS's holds system.

After LibLime completed its scope of work study, it provided us a summary of the development work needed for Koha to function consortially in order to keep our many libraries happy. Along with this summary, it attached the cost for each development. The grand total was \$1.2 million. Even after we whittled down our development needs to only the most significant areas, the cost was still prohibitive for us to forge ahead with LibLime.

In the meantime, the unthinkable happened. Our star open source employee, Brendan, submitted his resignation so that he could move out to California to be with his fiancée.

Storm Clouds on the Horizon

Throughout all of this open source exploration, there was quite a bit of staff resistance and hand wringing. Koha had some really nice features such as a staff client delivered through a web browser and robust patron discovery OPAC tools. But the individualized consortial features were sorely lacking. The documentation was thin. The sticker shock over the code development wasn't helping matters. Unfortunately, I became one of the naysayers, and as we moved unsteadily forward (without Brendan there to push us), we began to flounder.

Now, I had always viewed myself as a progressive librarian. I had received the Future Librarian award while studying for my M.L.S. at Southern Connecticut State University, and I present on emerging technologies annually for our member libraries. Heck, I can Facebook with the best of them. (My hippie name is "Happy Meadow," by the way.) But with respect to Bibliomation's move to an open source system, I found myself saying things like, "It can't be done" and "This is going to be disastrous; our libraries will hate us."

In my defense, my fears were not all irrational ones. First of all, the open source migration model was a different animal than what I was used to. Since I had project-managed our 2004 migration to SirsiDynix's Horizon system, I was used to relying on the ILS vendor to guide us through the ins and outs of its system and to fix whatever was wrong with it. With an open source system, you had to take partial responsibility for its development and bug fixes. You had to pore through spotty documentation, read between the lines, and experiment. And my concerns didn't stop there.

In no particular order, here were my issues with an open source ILS:

- Lack of knowledge and support; not enough in-house staff with expertise to support it
- Timeline too short (September 2010 deadline) and open source too new
- Fear that the code would be too buggy and unstable
- Uncertain future; open source ILS landscape still very much the Wild West; fear of code forking and our system being a dead branch

The Plot Thickens

In the fall of 2008, some Bibliomation staff, including myself, attended an open source ILS presentation sponsored by the Connecticut Library Consortium (www.ctlibrarians.org). Josh Ferraro represented Koha, and Shae Tetterton, a project manager from Equinox, represented Evergreen. What we couldn't deny during Shae's presentation was how consortial-friendly Evergreen looked to us. Shae had demonstrated some of the very features that we would have had to pay LibLime to develop specifically for us.

After that presentation, I took my concerns to Bibliomation's CEO, Mike Simonds. Mike understood what I was saying and was willing to broaden our open source investigation to include Evergreen, even if that meant delaying the migration of our three developmental partner libraries.

Evergreen Exploration: Seeing the Forest for the Trees

With Brendan gone, Melissa, our web services manager, stepped in by volunteering to bring up our first Evergreen test server. By now it was December 2008, and we decided to bring Shae Tetterton from Equinox in to spend a day

with Bibliomation HQ staff. This 1-day meeting was very beneficial. Shae answered all of our developmental needs questions and gave us hope that Evergreen was developing along the lines of what our libraries needed.

At this point, PTFS emerged as another open source support vendor. And it contracted with our former open source star, Brendan Gallagher, who had just formed his own open source support company, ByWater Solutions (<http://bywatersolutions.com>), to install and configure a remote Evergreen test server for Bibliomation staff to test, just as we had done with Koha.

Evergreen's admin setup proved to be a bit more involved than Koha's, and understandably so since there was an added layer of consortial complexity to configure. Evergreen has a number of user permissions that can be applied at the consortial or individual library/branch level. Getting these permissions set up takes some time. The documentation available was sparse, so a lot of what we learned was through trial and error.

Also lacking throughout all of this exploration was some in-house technical expertise. Melissa was doing what she could, but nobody on our staff knew much about Linux, Debian, or Perl programming. Our CEO Mike appealed to PTFS. Could it beat the bushes for us and find someone with this kind of technical know-how, preferably somebody with a library background? Through some minor miracle, Benjamin Shum, a local M.L.S. student with a computer systems administration degree, answered the ad. Ben quickly assimilated into Bibliomation's open source testing and was soon answering everyone's questions, configuring permissions, experimenting with different hierarchies, and getting specific features to work.



The BibliOak team

BibliOak
A BIBLIOMATION OPEN SOURCE PROJECT

BibliOak's logo

The Road Ahead: The Future's So Bright, I Gotta Wear Shades

When things come together well serendipitously, it is a thing of beauty to behold. We lost our network specialist in the summer of 2009, right in the middle of our Evergreen testing. Ordinarily, this would have been a blow. But from the pool of prospective hires we found a perfect match—not for the position of network specialist but for a newly created position, inspired by the interview with this person. Kate Sheehan, the Loose Cannon Librarian (<http://loosecannonlibrarian.net>) at the Darien Public Library, enthusiastically expounded on the virtues of open source during her interview. After talking it over with Melissa, Mike decided it was time to create an open source ILS team, with Melissa as manager, Ben as the software coordinator, and Kate as open source implementation coordinator. Kate would work with our now four developmental partner libraries to bring them, one by one, up on Evergreen.

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This is an exciting time in library automation.

(The project is now called BibliOak, a spinoff of the Evergreen name, which is very fitting since the oak tree is the state tree of Connecticut.) As Josh Ferraro is fond of saying, you really do need good people on staff (and you need to pay them well) to manage your open source system unless you plan to farm the whole thing out to your open source support vendor. Mike brought his plan to the Bibliomation board on Sept. 24 and convinced members that open source required a shift in thinking from spending our capital reserves on things (hardware and software) to investing in people (the team).

Yes, indeed, with both Ben and Kate on board, things were looking up. My fears were dispelled, one by one.

Conclusion

Let's review my four issues with our pending migration to an open source ILS:

- Lack of knowledge and support; not enough in-house staff with expertise to support it—Resolved by Bibliomation's hiring of two new key positions and the creation of an open source team
- Not enough time, timeline was too short; open source too new—Resolved by lengthening our timeline to Sep-

tember 2011 to give open source time to ripen (SirsiDynix has not yet announced the end of life to its Horizon system; it continues to churn out releases for it.)

- Fear that the code would be too buggy and unstable—Resolved by actually testing Evergreen and seeing how stable the releases are; few patches in between releases (To view the policy for code contributions to Evergreen from the open source community, see <http://open-ils.org/documentation/contributing.html>.)
- Uncertain future; open source like the Wild West; fear of code forking and our system being a dead branch—Resolved by our partnering with Equinox, whose corporate culture seems all about sharing the load with other open source vendors, such as Brendan's company, ByWater Solutions (Equinox has already passed along to Brendan some library migration work because its dance card is full at this writing; Brendan has also received Evergreen training from Equinox.)

Now I really look forward to partnering with other open source libraries so that the burden of development can be shared and we can learn about each

other's system needs in the process. For instance, we are sharing information with the King County Library System (www.kcls.org) in Washington state so that we don't duplicate enhancement efforts. Our next plans include doling out enhancement requests to Equinox, PTFS, and ByWater Solutions so that each vendor can share the load.

Lastly, I learned a little something about myself during this push into uncharted territory: Despite the vagaries of it all, there was enough familiarity there for me to wrap my mind and hands around it. This is an exciting time in library automation, and I am so pleased to write that I now am enjoying the ride. ☀

Amy Terlaga is assistant director, user services, at Bibliomation, Inc. She has been working at Bibliomation in various roles for more than 13 years. She manages its current library automation system, SirsiDynix's Horizon system, in addition to other library software services. She received her M.L.S. from Southern Connecticut State University in 1995 and her B.A. from the College of William & Mary in 1989. She can be reached at terlaga@biblio.org. You can read about Bibliomation's open source adventures at <http://biblio-os.blogspot.com>. You can join BibliOak, Bibliomation's open source project's Facebook group page, at www.facebook.com/group.php?gid=171935276419.

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