THE OPEN SOURCE ILS
WHY SO MANY ARE CHOOSING KOHA OR EVERGREEN AND HOW TO INCLUDE THEM IN YOUR NEXT ILS PROCUREMENT

Moderator: Lori Bowen Ayre (The Galecia Group)
CLA Annual Conference, Pasadena
November 13, 2011
Agenda

- Overview of ILS Marketplace
- Reasons for Moving to Open Source ILS
- Benefits and Challenges
- Open Source and Sustainability
- Thoughts on ILS Procurement
- Discussion/Q&A
Meet the Panelists

- Henry Bankhead, Los Gatos Public Library
- Kevin Pischke, William Jessup University
- Scott Hines, Palo Alto University
- Deborah Lipoma, Santa Cruz Public Library
1. Open source ILSs are gaining momentum
## ILS Choices 2010/2011

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<tr>
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<th>2010</th>
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<tbody>
<tr>
<td>Evergreen</td>
<td>198*</td>
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<td>Koha</td>
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<td>171*</td>
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<td>AgentVerso</td>
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<td>Library.Solution</td>
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<td>CARL</td>
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<td>Polaris</td>
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Source: http://www.librarytechnology.org/
## ILSs Abandoned in 2010/2011

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Source: [http://www.librarytechnology.org/](http://www.librarytechnology.org/)
Koha Libraries in California

- Arcadia Public Library
- California Institute of Integral Studies
- Harrison Library (Carmel)
- Jung Institute
- Los Gatos Public Library
- New Haven School District
- Trinity County Library
- Plumas County Library

- Orland Library
- Del Norte County Library
- Pacifica Graduate Institute
- Palo Alto University
- Salinas Public Library
- Samuel Merritt College
- San Benito County Library
- Wright Institute
Evergreen Libraries in California

- William Jessup University
- Santa Cruz Public Library
1. Open source ILSs are gaining momentum
2. Alternatives to the “ILS” are emerging
Web-scale Management Services

The first cooperative management service for libraries

- Discovery & Delivery
  - WorldCat
  - WorldCat Local
- Circulation & Patron Management
- Metadata Management
- Print & Electronic Acquisitions and Serials
- License Management
- Cooperative Intelligence
  - Workflow Engine

Listen as members of the user community share their experiences [10 minutes]

watch video
1. Open source ILSs are gaining momentum
2. Alternatives to the “ILS” are emerging
3. Traditional ILS vendors are responding to the need for “open” systems
Innovative's Sierra Services Platform

- Lucene index and PostgreSQL database
- APIs and web services for data manipulation

President's Message
Our President Neil Block provides a quick overview of Sierra
LEARN MORE ->

Technology Update
Take a quick technical tour of the Sierra Services Platform
LEARN MORE ->

Developer's Connection
Tools and apps to enhance your library's system
COMING SOON!

FREEDOM
IMAGINE WHAT YOU ALWAYS WANTED YOUR LIBRARY TO BE
Why did you Switch?

Motivations for moving to an Open Source ILS
Benefits and Challenges

The Benefits and Challenges of Moving to an Open Source ILS
Benefit: Community

01:45  bankhead | i see
01:45  root
01:45  chris  | sudo chown -R koha /home/koha/koha-dev/
01:45  bankhead | am I toast?
01:45  chris_n | you probably need to do 'chown -R koha:koha /home/koha/koha-dev'
01:45  chris  | *snip*
01:46  chris_n | chris: snap
01:46  bankhead | ok
01:46  chris_n | wow
01:46  | they say great minds get stuck in the same rut ;)
01:46  chris  | heh
01:47  bankhead | chris_n: chown -R koha:koha /home/koha/koha-dev ?
01:47  chris_n | either way will be the same thing
01:48  chris_n | that probably explains why the daemon did not start as well
01:48  chris  | only root can do chown ...so you will need sudo
01:49  chris_n | yup, sorry
01:49  bankhead | got it
01:49  chris_n | bankhead: try starting the zebra daemon again for kicks
01:49  | ok
01:50  | ls -l /home/koha/koha-dev/var/lock/zebradb
01:50  | and it is koha now
01:50  chris_n | cool
01:50  bankhead | the shell or the command line /usr/bin/zebrarsv -f /home/koha/koha-dev/etc/koha-conf.xml
01:51  chris  | try the shell
01:51  | it might just work now, the permissions could well be what was stopping it
01:52  bankhead | ps aux | grep zebrarsv ?
01:52  chris_n | yup
01:53  bankhead | my god it worked
01:53  chris  | ;}
Challenge: Change is Hard

Bringing the staff along with you
Benefit: Excellent & Timely Service

- User-centered experiences
- Modern OPAC
- Time & money for other needed services (OpenURL, Research Databases, ILL...)

Challenge: You get what you pay for

- Training, development, features & support
- Vanilla experience
- User documentation
- Active Directory (users account integration)
- Z39.50 and Navigator
- New server
Benefit: Support & Hosting

- Migration, hosting and upgrades
- Service Providers
- DIY
- DIY Plus
- Pay for what you need
- Choice
Benefit: Culture Change
Challenge: Culture Change

You get in this room for just a few seconds & they change the whole world outside.
Future Economic Viability

How an OS ILS Affects the Sustainability of the Library
Engage in Development

- Co-sponsoring developments
- Key development opportunities during initial migration as “cost of entry”
- Reach out to vendors for development (EBSCO, 3M)
- Cross ILS OS developments (fulfillment)
  OS = Glue
Changing the Library Culture

- Key is flexibility and change, but also accountability and attention to details.
- Libraries look for new tools, innovations, solutions, and sometimes find new uses for the tried and true.
- Fast to Fail, taking responsibility for failure, risk-taking.
Culture of Contribution
Portability – Pick up and Move!
Discovery Culture instead of ILS Culture
Thoughts on ILS Procurement

It’s not your Momma’s ILS Procurement
New Paradigm

- Apples $\neq$ Oranges $=$ Sole Source
- Serfdom vs. Partnership
- What OCLC **should** be, Open Source **is**
Great job --

Now when you're ready -- we can try and tackle getting the zebraserver running -- when you're interested in that. (or maybe you've already got it running)

Also I would recommend (now that you've done it once) to set up koha using git. That is a great code management system and will allow you to update that version a lot easier. Another advantage of git is that you can see the development branch and see all the new developments since the 3.00.02 release (there have been loads of new features).

Also let me point you here -->  http://koha.org/documentation you'll find some good things in there that will help you understand some more of the admin side of things.

Congrats, and Welcome to the Community !!!

-Brendan
Do and Don’t

- Do spend more time on services contracts, development opportunities and making friends in the community
- Don’t be sad/mad/glad if you don’t have it right the first time...you have portability and openness. And a new culture of TRY.
Let’s discuss

Q&A and Group Discussion
New! You can control your privacy settings: Login to your account and look for the “My Privacy” tab on the left. Our new catalog gives two options:

You can choose:

- **Forever**: Keep my reading history without limit. This is the option for users who want to keep track of what they are reading.
- **Never**: Delete my reading history immediately. This will delete all record of any item you check out once you return it.

Please note that information on any book still checked-out must be kept by the library no matter which privacy option you choose. Please also note that the library staff can’t update these values for you: it’s your privacy!

Welcome to Los Gatos Library’s new online catalog - Koha!

Some great new items at the library. Click on the image to read more!

Search tips

Begin your search in the text box at the top of this page, or click Advanced Search for additional search options.

Your Account

You can Log in to your account in the upper right or by clicking on the My Account tab at the top. Enter your Los Gatos Library Barcode (for example: 23518000...) and PIN. By logging into your account, you can view the materials you have borrowed, find out if they are due, create book lists, place holds, and so much more!
Santa Cruz Public Library

Results 1 - 10 of about 273  (page 1 of 28)  Start « »

Surfing in Santa Cruz
Hickenbottom, Thomas.
2009 Arcadia Pub. | print 127 p. : ill. ; 24 cm.
Live Oak - 797.3209 HIC - Nonfiction (Available)
La Selva Beach - 797.3209 HIC - Nonfiction (Available)
Aptos - 797.3209 HIC - Nonfiction (Available)
Downtown - 797.3209 HIC - Nonfiction (Checked out)
... more copies listed in full record

Surfing and social theory : experience, embodiment and narrative ...
Ford, Nick.
2006 Routledge | print viii, 204 p. : ill. ; 24 cm.
Downtown - 797.32 FOR - Nonfiction (Available)

Surf
Chapman, Gary.
2002 Chelsea House Publishers | print 32 p. : col. ill. ; 29 cm
Live Oak - J 797.32 CHA - Kids Nonfiction (Available)
Aptos - J 797.32 CHA - Kids Nonfiction (Available)

Surfing, surfing, surfing
Schiffer, Nancy.
1998 Schiffer Pub. | print 160 p. : ill. (some col.) ; 23 x 29 cm
Downtown - CALIFORNIANA 797.3209 SCH - California (Available)
Downtown - OVERSIZE 797.3209 SCH - Nonfiction (Available)

Surfs up
Mayo, Harry.
[194u-196u] [Harry Mayo] | videorecording videocassette 1 videocassette (ca. 12 min.) : sd., col. & b&w : 1/2 in.
Downtown - ARCHIVAL VC 797.32 SURFS - Reference (Available)

Surfs up
Brannon, Ash.
1. **Deliberative democracy and human rights** [electronic resource]
   - Koh, Harold Hongju, Slye, Ronald. ebrary, Inc.
   - Online Resources: 
     - Click here for online access to the full text from ebrary.
   - Type: Book; Format: electronic; Literary form: not fiction
   - Availability: Copies available for loan: MAIN[Electronic] (1).
   - Actions: Place Hold, Add to Cart

2. **What's wrong with democracy? from Athenian practice to American worship** / [electronic resource]
   - Samons, Loren J. ebrary, Inc.
   - Online Resources: 
     - Click here for online access to the full text from ebrary.
   - Type: Book; Format: electronic; Literary form: not fiction
   - Availability: Copies available for loan: MAIN[Electronic] (1).
   - Actions: Place Hold, Add to Cart

3. **Hungary, the politics of transition** [electronic resource]
   - Cox, Terry ; Furlong, Andy. ebrary, Inc.
   - Online Resources: 
     - Click here for online access to the full text from ebrary.
   - Type: Book; Format: electronic; Literary form: not fiction
   - Availability: Copies available for loan: MAIN[Electronic] (1).
   - Actions: Place Hold, Add to Cart

4. **Representation and democratic theory** [electronic resource]
   - Laycock, David H. ebrary, Inc.
   - Online Resources: 
     - Click here for online access to the full text from ebrary.
   - Type: Book; Format: electronic; Literary form: essay
   - Publisher: Vancouver : UBC Press, c2004.
   - Availability: Copies available for loan: MAIN[Electronic] (1).
   - Actions: Place Hold, Add to Cart