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Open Tools and Public Libraries

Introduction

I have worked in the same public library system for almost fifteen years. I've seen the ways new technologies have shaped the way we conduct business and provide necessary services. These new tools have been, for the most part, beneficial. Rollout after rollout of each new OPAC, database, and interface has been met with the usual consternation, then acceptance among both library staff and customers. Within the last year, however, we were introduced to a brand new commercial ILS as well as OPAC. The response to both was frustration all around, but there was something very different about this particular grumbling to which those of us who have been in the system long enough have been accustomed. Simply put, not only did staff and patrons feel that these new products were far inferior to previous iterations – they continued to feel this way over one year later. In other words, there was no period of acceptance, and we continue to reject the ILS's and OPAC's features religiously. We constantly wish we could change this or that about the ILS. Many staff have asked why we did not simply purchase one of several better products, to which administration answered: "We needed the bargain product."

The injustice here, of course, is that during the course of this difficult year of usability for both our ILS and OPAC, the open movement was continually improving a host of technologies that both rivaled commercial ILSs and OPACs in functionality and power and were far more cost-efficient (better bargains). A cheaply maintained and highly customizable ILS like Koha would have been the answer to our usability prayers while the free-to-use Wordpress-based Scriblio OPAC would have made a far more attractive alternative to our more expensive one.

This tale of woe is not uncommon to many public library systems, but it does illustrate the tremendous possibilities and advantages of the open movement to public librarianship. There is clearly a void that open source products can effectively fill, especially in times of great budgetary uncertainty, rapid technological advancement, and changing community demographics.

This paper will briefly discuss the various benefits of openness in public libraries using examples of free and open products and outlining their potential advantages.

Integrated Library Systems

As Lori Ayre (2008) and others have pointed out, traditional integrated library systems have had their fair share of usability problems. Often their lack of intuitive features especially regarding some of the major aspects of patron and item records result in no small degree of frustration for staff (and subsequently patrons). Indeed, in my own experience with a commercial ILS the problems staff have encountered include: an unusually difficult ordering module with a learning curve that took over six months to complete; incongruous syncing with MARC records that result in odd title searches (for ISBN searches you don't search the ISBN field, but a "general keyword" search); the inability to flag patron records with fine waivers. For the many benefits of commercial ILSs, the need for tweaking systems in order to better fit different libraries' operational needs tend to outweigh them. As Ayre states: "It's ridiculous that libraries are stuck with the systems they've got without options to determine what changes get made or even the access or privileges that would allow them to make the changes for themselves" (ibid.).

An open source ILS solution like Koha, however, can solve these problems. Koha is a fully featured open source ILS that is freely available to libraries and can be supported in any manner a library chooses, whether through an in-house or external service like the popular Liblime. The benefits of easing the use and adaptability of an open ILS like Koha are well known. John Brice (2008) calls Koha the “ILS that keeps on giving” (“koha” itself is a Maori word for “gift”) and discusses the almost infinite amount of ways the ILS can be tweaked and adjusted to staff needs, all because of its open source nature. When librarians were first envisioning a new ILS (Evergreen) for the Georgia Public Library they were told “Pretend it’s magic, and describe what you’d like library software to do” (Schneider, 2008).

This unprecedented adaptability that open ILSs offers to public libraries has the added benefit of long-term cost-savings. Budgets continue to be slashed for public libraries across the U.S. The task of finding economical ways of providing service against the looming specter of shrinking funds is never-ending. Because they are free to use, open ILSs are a highly attractive alternative to expensive commercial versions, but some point to added costs involved with supporting and maintaining them. However, as LibLime’s Joshua Ferraro explains in Casey Bisson’s (2007) report on library OSS:

[The] difference with OSS is that the software is ultimately free. You don’t pay someone to license it to you. What you pay for is the service of creating, and of delivering it. The long term effect is that the overall cost is reduced, because the creation process is only paid for once. Additionally, it typically results in a purely services-based support model, which means competition forms around the best value added services, rather than around the software itself.

Library Websites

Another type of open software product that has been of tremendous benefit to public libraries is the popular blogging publishing tool Wordpress. Rather than rely on HTML coding expertise to fashion a public library's website, staff can simply login to a Wordpress account and create and edit a library website. There are several important reasons a free blogging site is so attractive.

Simplicity is probably the main reason for the success of the blog, since users do not need to have any technological knowledge to have their own Web pages. Many librarians have also realized that a blog could be a good media to communicate with their patrons and promote their services (Wan, 2006).

Wordpress can also address staffing concerns, as described by Cindy Murdock in an interview with Casey Bisson (2007):

By switching to WordPress our librarians could create their own Web content without having to know HTML, and it freed my time for other pursuits. Most of our librarians have taken to managing their content rather well. I can't say that I've had any regrets; I've been pretty happy with the decision to use WordPress. Our on-staff programmer has even created a plugin for it so the librarians can update their library hours without my help.

Wordpress provides great ease and effectiveness at no cost (other than staff maintenance) and is the reason why so many public libraries have already utilized it as a means to market themselves and better engage their patrons.

Those libraries that depend on web designers to make changes to their sites are typically restricted to an approval process as well as to the webmaster's time and availability. In other words, there can be a delay before content can be added to a webpage because of the limitations of depending on a webmaster to edit HTML. For my

library system this is the case and it has irked staff that events for their branch libraries cannot be immediately posted on the website but instead require a formal request process for the webmaster.

Searching

Public libraries, of course, heavily depend on OPACs and other search tools such as federated searching. Searching the library's physical and electronic holdings is a core function of both patrons and librarians. Along with personal interaction with a reference librarian or staff member, the online catalog is a principle point of contact in the experience of a library visitor. Therefore, the importance of their usability cannot be underestimated and it is here that open source versions of OPACs and federated searching open up great possibilities in better usability and useful features.

Although an open ILS like Koha contains its own integrated online catalog search module, open source OPACs are beginning to emerge. Scriblio, the free open source creation of Plymouth State University and based on Wordpress technology, was designed as an easy-to-use and highly customizable OPAC. It provides a very strong alternative to more costly and unwieldy commercial products such as Ibistro and offers much potential for cash-strapped and under-staffed public libraries. As with open source ILSs, open source OPACS make it easier for librarians to adjust catalog searching for users if necessary, rather than count on a commercial vendor to implement changes. This is especially helpful when it comes to rolling out a new OPAC interface which often results in an adjustment period where users must adapt to the new catalog. In my library system, each new OPAC change has meant a new round of complaints from users, and

suggestions are then made to the vendor to fix the problems. This lengthy and not always reliable method of improving the usability of OPACs has naturally become a ritualistic chore. An open source alternative such as Scriblio would quite easily solve such problems for staff by enabling them to tweak the interface and maximize usability.

Similarly, the open source LibraryFind from Oregon State University, offers a free and easily customizable alternative to federated searching. As with all other open source software alternatives for libraries, the interface is highly customizable. Among the most important benefit of something like LibraryFind is its speed. Because they claim to be constantly striving to make federated searching faster, LibraryFind developers offer a very appealing free alternative to what is traditionally a slow search-result process. In the Google era of instantaneous web search results, this endeavor benefits public libraries who are frequently negatively compared to internet searching.

Tutorials

Most public libraries offer some instruction on computer use. This encompasses basic internet and productivity software as well as library databases. In fact, many librarians feel that “there has been an increase in the need to teach the navigation of various databases because of the differences in database construction and the increase in the number of databases” (Banks & Pracht, 2008). Because of the ever-growing number of technological tools libraries have introduced, especially when it comes to the amount of databases now being offered, many patrons often find themselves at a loss as to what the technology is and how to use it. Unfortunately, budget constraints for countless public libraries across the nation have meant fewer library staff to help users understand and

navigate the myriad technological choices they face. In my experience working in a public library system, the lack of staff who can assist users has resulted in regularly frustrated patrons who cannot understand how to use the OPAC or how search a particular database. More often than not, I have seen patrons simply leave the library out of frustration and disappointment over not having had the computer assistance they needed.

One potentially good solution to this is in the open tutorials available through Animated Tutorial Sharing Project (ANTS). The idea of shared open tutorials for online resources presents exciting possibilities for patrons (and even librarians) who may be overwhelmed by all the new information technologies available to them. Tutorials tailor-made for library online resources are scarce, and with free, peer-made and openly accessible tutorials on using various online technologies available through ANTS, the benefits cannot be underestimated.

At my library there is demand from patrons as well as staff for help with our new OPAC and electronic database interface. In the past, branch staff have facilitated workshops to introduce patrons to our new electronic resources. However, recent staffing cuts have severely limited these workshops and we have resorted to helping patrons using inadequately quick tutorials on an as-needed basis. The possibilities of tutorials available through ANTS creates the desirable option of assigning a staff member to either create a tutorial using the site or seek out those already available there that relate to our databases. Staffing and time constraints can potentially be overcome with the availability of pre-made tutorials for patrons (and staff). This in turn saves money and increases productivity, and because tutorials can be created in different languages, the appeal and

benefit to English-learning patrons who tend to stay away from many of the library's online resources would be tremendous. Moreover, because these are open sources, further revisions of the tutorial facilitated by ANTS will only improve their utility.

Open Education

Public libraries are invariably “closely linked with education, [and] society's attitude toward education is a critical factor in the library's survival” (Rubin, 2004, p. 299). Because of the importance of education to public libraries the emergence of open education resources (OER) might possibly become a watershed moment. The educational need for resource expansion, bridge-building, and altruism that drives open education's sharing of free educational resources (Centre for Educational Research and Innovation, 2007) dovetails with the public library's increasing role “in the education of its citizenry as a substitute for the deficiencies of schools” (Rubin, 2004, p. 299). Higher costs for a college education are becoming more prohibitive and students seeking help finding cheaper alternatives can turn to public libraries for help finding cheaper alternatives.

Free and open access to once academic-only materials as peer-reviewed literature and manuscripts, as well as learning objects accessible to all, present exciting possibilities to public libraries whose traditional access to such materials is via expensive electronic subscriptions and licenses. For many continuing education students and especially recently immigrated adults, the concept of free educational materials can be extremely appealing. Making OER available through library websites (an section listing OER, for instance) and/or even setting up physical sections in a public library facility designated for OER learners are some ways to make this a reality. As Wiley notes, “initiatives like

the Public Library of Science and pre-print services like Arxiv.org provide individuals from around the world with a legitimate alternative source of research findings.” As it stands, public libraries have very limited access to peer-reviewed journals and other research materials that many community and junior college students often need that are also not available at their college libraries. OER offers tremendous possibilities for filling that void for both public junior college libraries.

Productivity Software

Even in these times of cheaper technology and the ubiquity of personal computers, there remains a digital divide in many communities. Computer use in public libraries appear to be on the rise, and although internet access remains the top reason patrons use library computers, many still rely on us for their productivity software needs.

Rachel Mendez (2002) expresses this need succinctly:

...those without computers are unable to use today's powerful productivity software for word-processing, spreadsheets, and other applications. Without these tools, it is difficult to compete in today's working and academic worlds. Since these tools are now so widely used, there is an expectation that documents have a professional appearance.

It is clear that public libraries must continue to provide access to products like Microsoft Office, but it is also clear that rising costs prohibit upgrading this software suite.

In this case, the free and open office productivity tools that OpenOffice offers is a welcome alternative. Completely compatible with the popular Microsoft office formats like Word and Excel, OpenOffice in a public library is in effect a cost-free version of Office with equally free upgrades. Although not as fully-featured as Office, the same

basic functionality of each tool is comparable – certainly enough so that it has become a popular alternative to Microsoft.

Like the other open technologies described here, OpenOffice is almost a natural fit for public libraries because of its flexibility, functionality, usability, and minimal costs.

Conclusion

The open movement has changed the information landscape of the public library, but also reinforced its mission of serving all segments of society. Openness in libraries is still an emerging phenomenon, but what it already has to offer presents many potential benefits that can be, and already are, very advantageous to public libraries. Open resources such as integrated library systems, OPACs, and OER might only be the first wave of free tools available to libraries, but they already appear to be effectively changing the ways both services are provided and budgets are spent.

As attractive as these technologies appear to our profession, it is still a wonder why more public libraries have not yet embraced them despite the many advantages and very few disadvantages they offer. The big rhetorical question here is: Who wouldn't want free, powerful software that has the same functionality and scalability as commercial software but with far more flexibility and customizability? The most understandable (and maybe even obvious) answer is that many library systems – which includes my own – are part of larger municipal organizations in which bureaucratic processes are firmly in place. For these organizations, a deep-rooted conservatism as well

as an established myriad of legal considerations precludes many if not all implementations of emerging technologies.

In my experience, even the suggestion of a simple Wordpress blog for a branch library for announcing library events is treated as a highly unusual request that requires several approval processes and much time. Even the most persuasive arguments for employing open source tools as a win-win situation is invariably met with legal admonishment in these intransigent bureaucracies.

The other answer is a cynical one: many librarians perhaps are still wary of new technologies and are unable to embrace something as “radical” as openness. Perhaps openness is too good to be true, but perhaps there is an element of fear in this as well. The rapid advancement of technology is difficult to catch up to, and it is understandable that many in our profession are overwhelmed by its possibilities.

One of these possibilities, especially with regard to the open movement, is that all these free and open resources might become so sophisticated and readily available that libraries will no longer have a role in guiding the public to information, but will become obsolete. This danger is that the open movement may in fact undermine the public library then becomes part of the larger narrative that some day the digital world will take over all information needs and services.

This, of course, remains to be seen. The tools of the open movement are obviously not perfect, as any emerging technologies traditionally are. As it stands, however, the open movement is helping librarians provide needed services in a troubled economy and communities in tremendous need of finding resources that will help them overcome and find stability in dire times. On the other side, openness is helping empower

public libraries and librarians in maximizing their services while minimizing costs and burdens on staff already stretched thin. Part of our mission as public librarians is to find the best ways to maximize our services to satisfy the changing needs of every segment of our communities. Technology will be our biggest aid in this, especially technology that is free, open, and highly usable.

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