

OSS ILS Functionality Task Force Notes
State Library of Ohio
July 23, 2008
10:30 a.m.

Task Force members present:

Dianna Clark, SEO Library Center
Andrew Davis, Grand Valley Public Library
Bob Carterette, Cleveland Public Library
Jodi Lee, Columbus Metropolitan Library
Chet Geiger, Homer Public Library
Cecilia Swanson, Portage County Public Library
Shawn Walsh, Portage County Public Library
Don Barlow, Westerville Public Library

Jo Budler, State Library of Ohio
Karl Colon, Greene County District Library
Tyra Ealy, Warren-Trumbull Co Public Library
Eric Maynard, Holmes Co District Public Library
Michael Penrod, Wood Co District Public Library
Suzette Burlingame, Start Co District Library
Patrick Finan, McKinley Memorial Library
Morgan Paul, Ashtabula Co District Library

Welcome and Introductions

Dianna started the meeting with a welcome and introductions from the participants including their library and information about the ILS system there library is currently using.

Background “How did we get to this point”

Jo reported that back on April 4th she posted a note to the State Library blog stating that we were entering into conversations with Equinox so that we might **consider** offering a consortial opportunity to the library community based on PINES (OSS ILS). We learned a great deal from our conversations both with the Equinox staff and from the comments of members of the public library community.

She explained that there were a multitude of reasons why libraries are hesitant to migrate to OSS ILS but the one that she heard over and over was that moving to any OSS ILS meant leaving behind much of the functionality which their customers were currently enjoying. Librarians stated that they are unwilling to “take a step backward” in the services they offer to their customers. Several librarians also indicated to her that their staff utilizes modules in the operations of their libraries which are not offered in OSS ILS. This being the reason the task force has been created to identify what the public library community wants in the ‘Ideal’ ILS. There are other states that are showing interest in this process which may lead to a partnership opportunity.

There is an open source success in Ohio with KnowItNow. Staff from the State Library, Cleveland Public Library, Oregon State Library, and Multnomah County Library are collaborating and sharing the cost to develop open source virtual reference software that would accommodate the blind and physically handicapped community. The move from proprietary software to open source software will also save money in the future.

Share Documents

Dianna has gathered documents from 3 sources. These documents will be posted to the OLS Feature List Task Force group page. Each document was separated and combined by modules. The source of the sample documents includes:

- Black ink – SEO consortium RFP, March 2004 Dynix
- Red ink – City of Commerce P.L., CA, May 2006 Dynix
- Green ink – Seminole County, FL, May 2007 Dynix

It was determined that the task force will be a flexible group with additional members being invited to participate as modules are identified to require the expertise of other staff members. If at any time you have a request from additional staff to participate, please provide their email information to be invited into the group discussion. The OLS group forum will enable new members to have access to all correspondence up to the point they have joined. We want to encourage participation so please don't hesitate to share ideas and thoughts along the way. At this time the focal point will be on features desired by public libraries. The flexibility, features and local control will dictate whether libraries will want to participate. Our focus is software that will be flexible enough for standalone public libraries and/or consortia.

Eric Maynard of Holmes County District Public Library created our google group. This group will allow uploading of files. You will be able to save the document to your desktop for editing and upload the revisions. As we begin editing documents, we will use the '**tracking feature**' in MS Word and the naming convention for our revisions will be:

Module abbreviation/ Date/Editor last name with your name in the footer of document. SEO will keep a master copy of the documents. Please save documents as a (97-2003 version) to allow for the members to open the revised documents. It was mentioned that King County has an RFP for their acquisition and circulation modules publicly posted. We will provide that link to the google page.

The group decided to identify crucial module features. Below is a **sample** of what was discussed:

Modules

- Public access & services
 - *External search
 - *Federated search
- Cataloging
- Circulation
- Acquisitions
- Serials Control
- Staff:
 - *Reference
 - *Search/interface
 - *Public services
 - *Cataloging
- Booking module for:
 - *Materials
 - *Equipment
 - *Rooms
- Reporting
- Community Resources:
 - *Newspaper
 - *Indexes
 - *County information
- Outreach
 - *Bookmobiles
 - *Maintain history of customer
- Wireless & PA compatible - OPPC
- Database Architectural Issues
- Systems Architecture
- Interlibrary loan – internal/external
- 3rd party interfaces – RFID, NCIP, Z39.50, API
- RSS Feeds – Reader’s Advisory
- Reserves/holds
- Offline portable circ
- Registration – self-registration
- Fines/billing fees
- Interface and collection management
- E-commerce
- Notices – email, phone, text msg
- Ability to link customers – e.g. family members

The members decided to work on two modules at a time instead of being overwhelmed with everything. Two sub-committees were created and will begin with the 'Circulation/Public Services' and 'OPAC' modules at this time.

Timeline

The timeline will be an 8 week period. We will review the revised documents at the end of September. It will be decided whether we want to meet together or have members attend the meeting via videoconference.

Committee members for Circulation/Public Services:

Chet Geiger
Bob Carterette
Morgan Paul
Andrew Davis
Michael Penrod
Eric Maynard
Dianna Clark

Committee members for OPAC are:

Don Barlow
Karl Colon
Jodi Lee
Patrick Finan
Tyra Ealy
Cecilia Swanson
Shawn Walsh
Suzette Burlingame

For those task force members that were unable to attend the meeting can join either committee. Please let Dianna Clark know which committee you are interested in.