

The Birth of a Community Library Automation System

By Beth Wheeler Fox

Need and opportunity. The needs of small public libraries are usually great, while opportunities are few.

A need can require significant risk to resolve. An opportunity can seem too good to be true. The positive alignment of significant needs and opportunities is rare indeed, but sometimes, they can come together fortuitously and fruitfully.

This is a story of just such a case. It's about one Texas library and a teen volunteer with some very special talents. The result was an unprecedented high-tech focus on community libraries, creating a variety of applications uniquely for them.

The Need

The library is The Westbank Community Library in Austin. As the library director since its inception in 1983, I have seen our library long pride itself on its ability to change and to adopt innovative ideas. When we first automated back in 1989, the choices among affordable systems were slim. Automation systems (or ILS) were designed for schools or for large libraries, and cost was prohibitive.

Over the years, as our growth accelerated, deficiencies in the existing automation system limited the library's ability to provide a number of desirable services as well as to use staff efficiently. Problems with corrupted data meant sending our records away for a month – a terrifying prospect.

By 2002, attempts to migrate were stymied because other automation systems could transfer only MARC records from the existing system to the new one. Critical data like patron records, fines, history, items out, reserves, etc., could only be handled by having all items returned to the library. While possible in a school, this is a nightmare for a public library.

The Opportunity

Independent of all these trials and tribulations, the 13-year-old volunteer appeared on the scene. It was summer 1994, when Xan (Alexander) Charbonnet began what would be a long relationship with Westbank. Soon, he became “the computer guy.” He solved numerous library problems, ranging from hardware to software to networking.

On two occasions, we actually phoned the high school principal to explain that the library needed Xan urgently and requested that he be excused for a few minutes. Xan's expertise became so critical that he was finally “hired” by the library for a pittance.

Xan graduated from high school, and we woefully waved goodbye as he headed off to Tulane University with a full academic scholarship. During the school year, he focused

on database manipulations, programming, and the technical Internet. However, as each summer arrived, the library beckoned anew and each time, Xan was drawn back. Armed with an array of new skills and the staff's penchant for innovation, he created solutions previously unthinkable. Staff members knew that if they could identify a problem, Xan could almost assuredly fix it.

First Steps

One of these "fix it" opportunities was that lack of data was severely limiting our effectiveness in the weeding and selection process. With his newfound database and programming capabilities, Xan took a myriad of disparate data and reports from the ILS and reconstituted the information into a useful, meaningful format. Elaine Miller, our collection development and technical services supervisor, had clearly identified a problem and Xan's expertise had provided the solution. Weeding and selection decisions were now made with timely, reliable, and accurate data.

Management of reserves had also become time consuming and increasingly frustrating as circulation staff struggled to track who was next in line for bestsellers, who had what copy out, and even trying to figure out what material was due when. Xan designed custom reports to more effectively manage the process.

In 2003, Xan graduated from Tulane and again could not resist the draw of the library. We continued to collaborate to solve irritating and labor intensive problems. He created a streamlined tracking system for ILLs, from inception to return; an online system for staff schedules; and simple online management of the public computers. With our encouragement, in 2003 Xan created a business entity to offer these services to other libraries. And so, Biblionix was founded.

The Plunge

Meanwhile, the effectiveness of Westbank's existing automation system continued to decline in the face of our skyrocketing usage. Feature requests fell on deaf ears and software bugs persisted in causing data corruption. Pondering the dead-end ILS, along with increasing confidence in Xan's work, David Montoya, our technology manager, had a flash of insight. Why not create a totally new automation system with Xan and Biblionix? With several deep breaths and all in agreement, we undertook the bold, unprecedented project.

My staff was committed to collaborate on every aspect of the new automation software, that would become Apollo. The goals were to create an easy-to-use ILS that would provide an array of new services to our users as well as automate repetitive functions, thus improving staff efficiency. Also, the resulting ILS would be a hosted solution (no server required) designed for any community library. Further, with the "dream it and it will be" notion, the entire staff contributed ideas for saving time, avoiding errors, and helping the "right thing" happen.

For 18 months, Xan and the library staff sat side by side meticulously creating the new ILS. Collection developer Elaine Miller, cataloger Leigh Cody, and the technical services team ensured all the cataloging features were there; David Montoya advised on usability and patron features; and everyone at the library examined their workflow to find out how things could be improved. You will laugh to know that we originally estimated this would take 100 hours. With a great deal of testing and poking and prodding, the complete system was validated as functional and reliable; Westbank's dream catalog was a reality and Xan's new automation system, Apollo, was born.

The more we learned about the software, the more excited we became. Xan found a way to migrate ALL of Westbank's data (MARC/holdings, history, fines, overdues, notes, patrons, reserves, items out). This completely avoided the data losses of the previous migration attempt. With a deep breath, we decided to implement the new system. Open 7 days a week, we decided to close for a day for the migration. Incredibly, the verification of the new import was so fast, that we opened in two hours. On May 6, 2006, Apollo was fully operational and we've never looked back.

Within hours library users started to express their delight with the new system. Within a month, our library was running so much more efficiently that we needed 20 fewer volunteers each week. Over the last 18 months, the collaboration has continued. We dream up a clever new feature and within a few weeks, Xan rolls out the response. And now, other customers of Apollo are contributing as well.

You can see from the following charts, some of the areas of greatest appeal. Just as Westbank took a deep breath and created library districts in Texas, we believe we've been a part of creating a wonderful new ILS system that will thrill community libraries across the country.

Onward

Biblionix has since taken Apollo to new heights, steadfast in its commitment to small- and medium-sized public libraries. With customers in 4 states, the Apollo family continues to grow.

Westbank continues its innovation, delighting library and driving double-digit circulation increases. With the existing building being used beyond capacity, a branch is being planned.

Beth Wheeler Fox is director of the Westbank Community Library.