Some background information

The Orbis Cascade Alliance is investigating OCLC Web-scale Management Services in the context of a larger investigation of the future of integrated library systems. The Alliance’s governing group, Council, has “identified sharing of a single bibliographic database as a goal” [Orbis Cascade Alliance Strategic Agenda, http://www.orbiscascade.org/index стратегический план].

The Alliance’s Council created the Network Library System Task Force to test WMS functionality [http://www.orbiscascade.org/index/nlstf]. Currently, the Alliance is performing pilot testing of OCLC WMS. It has worked with OCLC to create a pilot WMS instance, based upon the holdings of Washington State University’s Riverpoint Library.

Other Alliance groups have worked or are working to investigate single database options, including a Shared Library System Task Force [http://www.orbiscascade.org/index/silst] and a Shared Bibliographic Database Task Force [final report at http://www.orbiscascade.org/index/cms-filesystem-action/groups/shareddb/sbdtf_report.pdf].

Also, it’s important to note the existing role of OCLC WorldCat.org-based discovery in the Alliance. The Alliance’s core service is its Summit consortium (returnable) borrowing program, which has 36 institutional participants. This service was migrated from Innovative Interfaces INNReach to WorldCat Navigator in December 2008 [migration info at http://www.orbiscascade.org/index/vdx-implementation-team]. Since this date, the Summit catalog has been a WorldCat.org-based catalog [http://summit.worldcat.org/]. The University of Washington was a pilot adopter of WorldCat Local and nearly half of the Orbis Cascade institutions have licensed WorldCat Local to support discovery and fulfillment services [http://www.orbiscascade.org/index/wclocal]. Since WorldCat Local is the discovery interface for WMS, this makes WMS a more compelling option for the Alliance.
Why OCLC WMS is so attractive

OCLC Web-scale Management Services is in early adopter release and is scheduled to move to general release in July 2011. WMS meshes well with the Orbis Cascade Alliance’s strategic agenda, which envisions collaborative collection development and cooperative technical support activities.

At the heart of WMS is its support for shared data.

With WMS, data that are currently stored in a library management system will be stored in the cloud-based WMS system. Within WMS, there are three conceptual data types. There are private data, such as patron records and circulation transaction information, which are managed by institutions as confidential data. There are public data, including the bibliographic and holdings information displayed in the online discovery system.

Support for shared data is the key. WMS is architected to enable a library to share data with trusted partners. Technical services activities, such as knowledge base management, that are being performed at numerous libraries can be performed collaboratively using WMS. Likewise, WMS has the potential for enabling
collaborative collection development through the sharing of order data and license data with partner institutions. The WMS architecture enables these collaborative efforts with other libraries using the WMS platform, including those outside of a consortium’s shared system.

There are other benefits to WMS adoption as well. Cloud-based services are economically attractive, as illustrated by Amazon’s Elastic Compute Cloud (EC2) service, which enables individuals and companies to create and run on-demand servers in Amazon’s data centers. Overall, libraries can expect a reduced total cost of ownership with WMS, compared with locally-supported integrated library systems.

Finally, WMS has the potential for simplifying library workflows, in part because the system is designed up-front to support print and electronic formats. This contrasts with legacy integrated library systems that were designed around print collections and later extended through a series of product add-ons (including Electronic Resources Management software, OpenURL resolvers, and electronic reserves systems). Because of the early stage of WMS testing in the Orbis Cascade Alliance, I cannot comment directly on the ability to create more efficient backoffice workflows using WMS. However, librarians at two institutions migrating to WMS for production services provided some insights on this in a recent American Libraries article [http://americanlibrariesmagazine.org/news/08122010/oclcs-web-scale-management-services-released-early-adopters].

Why OCLC WMS is so challenging

There are two significant challenges to the adoption of WMS. The first is basic, data security. A library or consortium with a locally-hosted integrated library management system will have to identify and address all security issues in order to move patron data, circulation transaction data, and other sensitive information from a local system to a vendor-hosted system: in this case, to a WMS infrastructure hosted by OCLC.

The second challenge is more daunting. For OCLC WMS to function, an institution’s holdings data that are stored in the integrated library system must be added and maintained in OCLC WorldCat. Taking monographic collections as an example: this includes information such as shelving location, item barcode, and copy number, along with information on ILL and reproduction rights that’s included in MARC 008. Likewise, serials holdings maintained in a local ILS must be migrated to WorldCat. The methods currently available for migrating data from a local system to WorldCat place major demands upon a library going forward with WMS adoption.
As noted, OCLC WMS is in an early adoption period. However, it’s essential that OCLC provide libraries and library consortia interested in WMS with a realistic strategy for accomplishing this data migration.

**Ways to learn more about OCLC WMS**

I have some suggestions for learning more about OCLC Web-scale Management Services.

- Jason Griffey is describing the University of Tennessee-Chattanooga’s migration from its VTLS Virtua online catalog to OCLC WMS in his *Pattern Recognition* blog [http://jasongriffey.net/wp/](http://jasongriffey.net/wp/). His posts on WMS provide unique insights into how WMS works to support production operations in an academic library. The technical details of the UTC migration are provided on a wiki site [http://wiki.lib.utc.edu/index.php/OCLC_Web_Scale](http://wiki.lib.utc.edu/index.php/OCLC_Web_Scale).

- Attending OCLC WMS events at ALA conferences is a great way to learn more about WMS. This includes sessions for the OCLC Developers Network, in that OCLC sees this network as playing a key role in enabling the extension of WMS by its user community.

- And, of course, the OCLC Web-scale Management Services site [http://www.oclc.org/webscale/](http://www.oclc.org/webscale/).

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