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OCLC's WorldShare Management: *Early adopter experience at a small liberal arts institution on the Web*

GENTRY HOLBERT



"If at first, the idea is not absurd, there is no hope for it." – Albert Einstein

The idea of migrating a library's integrated library system (ILS) to one that changes both the user and administrative interface and workflow may appear to be somewhat absurd. It is certainly a monumental feat, but one for which there is much hope, to quote Einstein. Spring Hill College, a small, liberal arts Jesuit institution, decided to completely change the heart of their library in December 2010, becoming early adopters of OCLC's WorldShare™ Management system in an attempt to improve the user experience and streamline internal operations. This article follows the process through the decision, implementation, and future plans, and discusses the lessons learned.

Spring Hill College is a private, non-profit located on the Gulf Coast in Mobile, Alabama with an FTE of 1,393, mostly undergraduates, and a Carnegie classification of Masters (smaller programs). There are five librarians: a director, two public services librarians, and two technical services librarians.

Established in 1830, Spring Hill College is the oldest Catholic college in the Southeast. In 2004, we were fortunate

to open the new Marnie and John Burke Memorial Library, a 71,000-square-foot, modern facility housing library collections, administrative offices, computer labs and classrooms, faculty development, a tutoring/writing center, and numerous group study rooms. The Burke Memorial Library, located near the center of campus, is truly a hub of academic life at the College.

The Technical Services staff is comprised of a librarian in the role of Head of Technical Services, an Emerging Technologies Librarian, an Acquisitions & Accounts Manager, and a Serials Support Specialist. While library staff members are multi-talented in both public and technical services, there is no systems librarian position. Library & Informational Resources (LIRS) is semi-merged organizationally with campus IT services, with library staff including IT Help Desk support, instructional technologists, and information support specialists that do IT training. ITS (Information Technology Services) is a separate department

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within the building that manages technology infrastructure and supports administrative functions of the College. ITS and LIRS have separate budgets and reporting structures.

Spring Hill College's Burke Library had been a SirsiDynix library since 1995, with hosting moved to SirsiDynix in 2005. The SirsiDynix Symphony system was implemented in 2007. Upon librarian review of the SirsiDynix contract and services in 2010, many areas of frustration were voiced. At 20% of the Burke Library's budget (without salaries), the system was expensive. The cost was rising each year and librarians' dissatisfaction with the system included a feeling of lack of customer service and response, lack of reporting functionality, modules that were unusable, an unwieldy workflow, and frustration with an inability to make embedded location changes. For example, in 2004, the library moved from the old Byrne Library into a new building known as Burke Library. The Byrne name was embedded in the coding at a level the library staff could not change. SirsiDynix would not do it without expensive additional costs.

Decision to Switch to OCLC

After librarian review and discussion, an effort was made in 2010 to resolve issues with SirsiDynix, but improvements were not made and amid continued high frustration we began the search for a new library management system. We had a strong need for an integrated, single interface with access to multiple resources (traditional cataloged materials, e-books, e-journals, subscription databases, and archival collections) with consolidated subject indexing and metadata. But we quickly discovered the world of available ILS, discovery layers, and online catalogs is constantly shifting in both ownership and functionality.

An informal process was started by making a list of wants and needs within a new ILS. For Spring Hill College's Burke Library, these included the ability to push out our electronic resources (e-books, full text journals, and databases), streamline our acquisitions and ordering process, produce meaningful reports, and a desire to work with a known company, not someone new to the library or ILS business. Also, as a small, liberal arts institution, we were highly limited by cost.

The librarians felt a need to maximize use of our library subscriptions, especially electronic content. Roughly 51% of the Burke Library's budget is spent on electronic resources and an updated collection development policy put even more emphasis on purchase and selection of electronic resources. The librarians felt that valuable content was not being effectively accessed by users through the SirsiDynix catalog.

After many internal discussions, OCLC webinars, extensive discussions with OCLC staff, discussions with other early adopter libraries, and consideration of both price and features, a decision was made to switch to OCLC's WorldShare Management system (WMS). This decision had buy-in from Spring Hill College's five librarians. OCLC was very clear that being an early adopter meant the agreement was a two-way arrangement. Spring Hill College was expected to be an active participant in the process, give feedback, and help shape the direction and timeline of new features for WMS. This was an exciting prospect.

WMS is a web-based unified system meant to replace a traditional ILS while streamlining cataloging, acquisitions, circulation, and license management. It operates in conjunction with WorldCat® Local, which offers Google-type searching and the ability to create and share bibliographic lists, as well as to create tags and reviews similar to Amazon's website. It is also a discovery tool—not just for the library's electronic resources, but also connecting with WorldCat Local, the WorldCat knowledge base, local holdings records, vendor and publisher information, and authority records.

The decision to migrate to OCLC was based on the reputation of the company itself, not just on price and features. The librarians were comfortable that OCLC was a trusted, known company in the library world. Burke Library already used their services for cataloging and ILL, OCLC already held much of the library's data, and OCLC was viewed as a stable organization. SirsiDynix had been hosting the Burke Library's data, so the librarians were comfortable with the idea of cloud computing and offsite hosting.

A negative for both Spring Hill College and OCLC was Burke Library's intense timeline. OCLC was hesitant to accept an early adopter institution under such constraints. However, the Burke Library needed to move forward and have implementation complete before the SirsiDynix contract ended in April 2011. A contract was signed with OCLC in late December 2010. It was a tight timeline, and in retrospect, a somewhat absurd aspiration to migrate to a complete new system in four months.

Implementation

An important success factor in switching software vendors and systems is project management. The scope of the project for Spring Hill College's Burke Library was defined as the migration of data from SirsiDynix to WMS, configuring WMS to enable circulation of materials, and transitioning users to WorldCat Local as our catalog.

Strategic reasons—cost, general frustration with ability to make embedded location changes, need to streamline and improve workflows, and dissatisfaction with existing vendor customer service—allowed the Burke Library staff to quickly accept this change. Change management was not an issue. However, as mentioned, the short timeframe was one of our major challenges.

Other challenges were communication with SirsiDynix over ownership of data and developing work-a-rounds. SirsiDynix was extremely considerate in giving us access to our data past the contract date; however, they wanted to charge for upgraded “exit services” and were not as accommodating as we would have liked in providing the data. In the end, SirsiDynix sent us a raw .dmp file of all of our data without charge. Using extended access to the SirsiDynix host site, we also extracted our own files to migrate as guided by OCLC’s *Data Migration Questionnaire* and *Data Translation Table*. A large part of the anxiety of implementing a new system is deciding what data to clean up and what data input can wait. Once the implementation process began, we realized cleaning up data and processing new materials would have to wait. At the time, Spring Hill College was going through major budget cuts, so there were not many new materials to process.

Beginning in February 2011, OCLC set up a three month, WMS cohort syllabus to guide eight early adopter institutions through the implementation process. Sessions were done through webinars and included peer presentations. Topics included testing, implementation, service configuration, data migration, training, and customer support. Information and training on modules such as serials and acquisitions were given before a system was implemented. As an early adopter, our expectations of change and two-way communication were clearly defined, and we participated in all of the cohort syllabus events and provided presentations of our progress.

While the cohort syllabus information exchange was helpful and the sense of moving through the process with a group reassuring, the fact that cohort institutions were migrating from different systems caused a lack of cohesion. Others in the cohort were migrating from systems such as Ex Libris Voyager, SirsiDynix Horizon, and SirsiDynix Symphony. When the initial and main issue of executing a new system is migration of data, discussing change management with libraries utilizing a myriad of systems is not useful. Given our short timeframe, our ability to bond with other cohort institutions was limited. It was more useful for us to go out of the cohort and speak to institutions with similar migration issues.

As early adopters of WMS with a tight schedule, we had to develop our own work breakdown structure to help stay on track. An internal project worksheet and timeline was created with tasks (see sidebar), dates, staff involvement, and completion.

It was quickly realized we did not have the time to formalize this project worksheet. For example, we lacked basic project management tools such as a probability impact matrix, and a Gantt chart. In the end, the tasks on the project worksheet were completed, but not through formally following a process. More guidance in this area would have been beneficial.

TASKS INCLUDED IN THE WORK BREAKDOWN STRUCTURE INCLUDED:

✓ SIRSIDYNIX TO WMS TRANSITION

Interim check-out procedures, go live date, web link changes, marketing, resolving browser issues

✓ BATCH LOAD OF RECORDS

Error/missing record check

✓ CIRCULATION

Patron records load, policies & procedures, staff permissions, begin check-out, patron login/password

✓ ACQUISITIONS

Staff permissions, policies & procedures, request procedures

✓ CATALOGING

Staff permissions, staff training, handling of government document records

✓ SERIALS

On hold due to migration issues

✓ EDUCATION

Training staff on new system, LibGuide about new catalog, educating faculty and students, WorldCat lists





We are a two-library system (Burke Library and Teacher Education Library) and user policies between the two differ. Our map is very long which makes it difficult to change, and it takes time to develop an understanding of a new system. Communication with WMS support staff was critical, and calls were frequent when mapping our circulation policies.

Bibliographic data was exported in March of 2011. Our monographic bibliographic data migrated with only minor difficulties. When we developed our WMS translation table for holdings we did not realize we would lose item information if the location did not migrate.

Our serial data was sent in a separate file for migration and we did not anticipate issues. However, one title had over forty items associated with it, but after migration there were only three items associated with the title. One of our major problems with the serial data was that the titles migrated but the items associated with the title did not migrate. We received error files but we have been unable to determine what caused the items to be directed to the error file. We had numerous conversations with OCLC support about this. It has been suggested that perhaps our serial data could be reloaded from the original file, but this would erase any changes that we have made since that time. Our serial data continues to be problematic in that some titles have no call numbers, locations, or items associated with them. The only solution appears to be by creating local holdings records for these serial titles, which is a very time consuming process. We should, perhaps, have anticipated such risks associated with switching systems.

Our patron data could not be migrated from SirsiDynix so we relied on Excel spreadsheets and manual labor to preserve and transfer this data.

Configuring our circulation policy proved to be a lengthy process as several attempts were required. The WMS map centers around material format as defined in the MARC record. We are a two-library system (Burke Library and Teacher Education Library) and user policies between the two differ. Our map is very long which makes it difficult to change, and it takes time to develop an understanding of a new system. Communication with WMS support staff was critical, and calls were frequent when mapping our circulation policies. More up-front guidance and hand holding from OCLC would have been helpful.

The WMS approach to branding was quick and easy. It would have been favorable to have more public relations events on campus, such as naming the new catalog, but our short timeframe did not permit this. Our patrons were pleased with the look of WorldCat Local. Our patrons appreciate the inclusion of articles and electronic resources. A LibGuide was created with tutorials and lists of benefits and features. We are still tailoring our bibliographic instruction to maximize our patrons' use of the new catalog.

At the start of the 2011 fall semester, we provided training for faculty. The majority of the feedback was positive, with comments such as, "I love the new catalog, and look forward to making some lists," and, "I may have the students in my philosophy and gender course make a list as part of their projects drafting stage—supporting their development in information literacy and in research and scholarship."

Negative feedback focused on the two separate logins required for deeper involvement in WorldCat Local. There is one login for WorldCat Local, which allows users to create personalized lists and searches, and there is a separate login for patrons to access their Burke Library account and make holds or renew materials. Our campus IT department employs lightweight directory access protocol (LDAP) to keep multiple logins and passwords to a minimum

for users. LDAP would be advantageous to eliminate the double login, but it is not available through WMS at this time.

The new catalog did look better to users, searched a broader swath of materials, including electronic resources, and provided more information in a “one stop shopping” approach to initial research. However, the new system was not exactly a discovery layer, link resolver, or A to Z list of resources, so education was necessary as was keeping some subscriptions from other vendors such as Serials Solutions and EBSCO. Within our budget constraints, there is not one system that does it all and piecemeal applications will still have to be acquired.

Future

WMS offers the ability to develop API or web service keys. OCLC has a developer network in place where information is shared on topics ranging from streamlining workflows to going mobile. These are features that we have not yet explored due to staffing and time constraints, but may consider in the future.

Our WMS acquisitions and ordering features have not been implemented due to an inability to work with our CARS and Jenzabar systems for tracking and approving expenditures. We are currently using old workflows and bypassing the WMS acquisitions module. We believe there is potential to more fully integrate these and hope to do so in the near future.

We are participating in a study of ROI pre- and post-WMS by examining circulation statistics, usage of e-resources, interlibrary loan, and patron/staff satisfaction with OCLC. Since implementing WMS, all of our interlibrary borrowing and lending has decreased. We believe this is due to an increase in online fulfillment; our students and faculty are more likely to find what they need in our increasingly richer and more varied electronic databases. WMS has helped connect our patrons to these resources.

In the spring semester of 2012, Spring Hill College participated in the MISO (measuring information service outcomes) survey, a web-based quantitative survey designed to measure how faculty, students, and staff view library and computing services in higher education.

Our MISO survey included a direct question about the online library catalog, and results showed:

73% of our faculty found the online catalog *very important*

69% of students found the catalog *important or very important*

83% of faculty were *somewhat satisfied or satisfied* with the online catalog

92% of students were *somewhat satisfied or satisfied* with the online catalog

40% of all respondents were interested in learning more about the online catalog

This information confirmed the online library catalog is considered important by our patrons and that there is a high level of satisfaction with it. It also tells us that patrons would like more information and training in the use of the catalog. The MISO survey gives us the ability to compare our data to similar schools and see whether we fall above or below the



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mean. We will participate again in the 2013 MISO survey to have internal data to compare and monitor use, importance, and satisfaction of library and IT services.

Lessons Learned

There was a positive impact among Burke Library staff in working together to clean up data, change workflows, set new policies, and engage in the decision-making process to implement a new system and correct past errors. While this can be cumbersome and sometimes frustrating, it created a positive sense of community and working together to get it right.

There was a cost savings with moving from SirsiDynix to WMS. WMS bundles some of our former cataloging and FirstSearch costs, and the aggregated amount is less. We were fortunate in that our Friends of the Library group paid our initial WMS implementation fee, which was a one-time cost in addition to the annual subscription costs.

We were able to discontinue our Serials Solutions 360 discovery layer product, but we continued with the Serials Solutions Core A-Z List. OCLC WMS provides an A to Z journal list, but not an A to Z list of electronic resources. In theory, electronic resources should be managed through OCLC's knowledge base, which is an administrative system to manage the library's electronic resources and linking features. However, the shifting nature of electronic collections causes discrepancies between what is available through direct databases and what is available in the knowledge base. For example, ebrary's Academic Complete™ collection showed 80,000 records at one point through its own interface, while accessing it through knowledge base showed 70,000 records. This was remedied to a discrepancy of 80, after working with both OCLC and ebrary. There are still many vendors and collections not available in knowledge base, which makes us reluctant to rely on WMS as a complete discovery service. It seems to be the result of an issue with communication and allowed access between publishers and OCLC. Currently, we are considering purchasing an outside link resolver to layer over our system and allow Google Scholar to tie in.

As previously mentioned, one lesson learned is that one system cannot do it all. Our goal was to use the features of WMS as intended and train our patrons to search through the WorldCat Local portal for all electronic resources. However, we have found that outside vendors are still needed. But we believe the potential is there for WMS, and that OCLC is moving in the right direction with the product.

John Lombardi, American University professor and administrator, spoke at the Association of Research Libraries' Library Assessment Conference in the Fall of 2012 on the topic of cloud computing. Of note, he said, "You can't afford

to be first. Let the Harvards do that. You don't have the money to lose." As an early adopter, Spring Hill College was taking a risk by being first. Lombardi is correct that small institutions do not have the money to lose on untested endeavors. It may have been best to wait for other, richer institutions to test OCLC's WorldShare Management system as early adopters. However, Spring Hill was ready to take Einstein's "absurd" risk, and while difficult and not complete, the change has been more positive than negative for both patrons and staff. | IP | doi:10.3789/isqv24n4.2012.04

GENTRY HOLBERT (gholbert@shc.edu) is Associate Professor Librarian and Director of the Marnie and John Burke Memorial Library at Spring Hill College.

Janie M. Mathews, Head of Technical Services at Spring Hill College, contributed to this article.

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Burke Library Collection Development Policy

libguides.shc.edu/content.php?pid=119200&sid=2989439

Library Assessment Conference, Plenary Session

libraryassessment.org/sessions/

MISO Survey

www.misosurvey.org/

OCLC WorldShare Management Services

www.oclc.org/us/en/webscale/

Spring Hill College Burke Memorial Library

libguides.shc.edu/burkelibrary

Spring Hill College WMS LibGuide

libguides.shc.edu/content.php?pid=208688



RELEVANT
LINKS