Manage your library, not your technology

Dr. Annette Dortmund, OCLC
Product Manager WMS EMEA

&

Rene Steunenberg, OCLC
Sales Manager Benelux and Northern Europe
A deeper look at Web-scale Management

• Web-scale Management Services
• The OCLC Cooperative Platform
• Statements from Early Adopters
• Web-scale Management Service for Library Cooperatives and Service Providers
Changing the Game for libraries

Helping libraries improve back office management
Today’s environment
The vision - Web scale Management Services

Applications

Services

Data

Community

Print

Electronic

Digital
Defining the future – Web-scale Management Services

- Unified collection management (p, e, d)
- Efficient, adaptable workflows
- Sharable data & services
- Innovative and enabling technology
- Global collaborative community
Changing the Game for libraries

Moving from local systems to web scale services
Changing demand
Changing Collections
• Libraries are doing more than ever
• Libraries are changing rapidly
• Cost & time requirements are exploding
• Budgets & Staffing levels are under pressure
• Managing local IT becomes a burden
• Visibility on the Web is a MUST
What if...
OCLC was founded because of “what if?”
Library Cooperation

• Libraries have been building cooperative services for 40 years (cataloging, resource sharing, online reference...)

• Focus was very much on data sharing

• Shared library operations could bring the power of library cooperation to core library services

• Moving to the web (the cloud) will facilitate this
  • Easier to publish and share information
  • Broader access to audience

• Access information anywhere

• Lower cost
The vision - Web scale Management Services

Community

Data

Applications

Services

Print

Electronic

Digital

Shared Tools / Applications

Shared Services

Shared Data

OCLC

The world's libraries. Connected.
Web scale works!
Web-scale Management Services

By sharing and re-using infrastructure, data, business processes, and applications, libraries will be freed to focus on innovation.
Changing the Game for libraries

Web scale management services
Library Management Apps at Web scale

Applications

Discovery & Delivery
WorldCat Local

Configuration

Circulation & Patron Management
Print & Electronic Acquisitions
Serials & License Management

Metadata Management

Cooperative Intelligence

Workflow Engine

WorldCat

OCLC
The world’s libraries. Connected.
# Circulation

## Account Overview

<table>
<thead>
<tr>
<th>Description</th>
<th>Count</th>
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<tbody>
<tr>
<td>Items checked out</td>
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</tr>
<tr>
<td>Items overdue</td>
<td>0</td>
</tr>
<tr>
<td>Requested items ready to pick up</td>
<td>0</td>
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<tr>
<td>Requested items not yet available</td>
<td>3</td>
</tr>
<tr>
<td>Claimed returned</td>
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<td>Current fine balance</td>
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## Enter barcode

- Enter barcode: [Enter barcode field]
- Search: [Search field]
- Everything: [Everything field]
- Theresa Brown: [Theresa Brown field]

## Check In

- Discover Items
- Reports

## Title Details

<table>
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<th>Title</th>
<th>Piece Designation</th>
<th>Checked Out Date</th>
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<th>Renewal Count</th>
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<td>69743001740150877</td>
<td>02/24/2011 00:33:13 am</td>
<td>03/25/2011 12:00:00 am</td>
<td>1</td>
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<tr>
<td>A concordance to Beowulf</td>
<td>75094075088943</td>
<td>02/24/2011 03:09:17 pm</td>
<td>03/25/2011 12:00:00 am</td>
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<td>The systems librarian: designing roles, defining skills</td>
<td>311196001506254</td>
<td>02/24/2011 02:09:32 pm</td>
<td>03/25/2011 12:00:00 am</td>
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Vendor Management

OCLC Web-scale Management Service beta

- Discover Items
- Order
- Receive
- Invoice
- Manage Budgets

Manage Vendors
- New Vendor
  - Keyword
  - Baker
  - Search

Baker & Taylor
- General
- Addresses

Active | Inactive

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<tr>
<th>Default</th>
<th>Name</th>
<th>Address Name</th>
<th>Address Role</th>
<th>Street</th>
<th>P.O. Box</th>
<th>Postal Code</th>
<th>Place</th>
<th>State / Country</th>
<th>Active</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Main Office</td>
<td>Show options</td>
<td>2650 West Tyrola Road Suite 300</td>
<td></td>
<td>28217</td>
<td>Charlotte</td>
<td>US United States</td>
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New Addresses

Contacts

Identifiers

Customer/Account Numbers

Notification Settings

Notes
## Acquisitions

### Invoice: Sam 16

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<th>Vendor</th>
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<th>Status</th>
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<tr>
<td>Sam 16</td>
<td>2011-01-26</td>
<td>Baker &amp; Taylor</td>
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**Comments**

**Items Qty: 3**

### Items

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<th>Srv Chgs</th>
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**Grand Total: 224.31 USD**

**Pay by:**

**Pay to:**
Manage E-Resources
### Manage E-Resources

#### Collection with "*", My Library Holdings Only

<table>
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<th>Status</th>
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</thead>
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<tr>
<td>Adis Journal Legacy Archive</td>
<td>Titles in Collection: 77</td>
</tr>
<tr>
<td>Provider: Ovid</td>
<td>Deselect All Titles</td>
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<tr>
<td>African Journal Archive</td>
<td>Titles in Collection: 750</td>
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<tr>
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<tr>
<td>American Journal of Acupuncture</td>
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<tr>
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<tr>
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<td>Deselect All Titles</td>
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**Refresh** Results 1-10 of 26
### Manage E-Resources

#### Collection: Ads Journal Legacy Archive

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<tbody>
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<td>Fulltext: 2002</td>
<td>ISSN: 0364-199X</td>
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<td>American Journal of Cancer</td>
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<tr>
<td>American Journal of Cardiovascular Drugs</td>
<td>Fulltext: 2001 - 2005</td>
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<td>Website</td>
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<tr>
<td>American Journal of Clinical Dermatology</td>
<td>Fulltext: 2000-01 - 2005</td>
<td>ISSN: 1175-6581</td>
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<td>Website</td>
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<td>Indexed: 2001 - 2005</td>
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<td></td>
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<td>ISSN: 1175-5652</td>
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<td></td>
<td>Indexed: 2004 - 2005</td>
<td>Website</td>
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<td>Biolinguistics</td>
<td>Fulltext: 1997 - 2005</td>
<td>ISSN: 1173-8894</td>
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<td></td>
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<td>Website</td>
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</table>

**Refresh** | Results 1-10 of 44

- **Collection with My Library Holdings Only**: My Library Holdings Only
- **Collection**: Ads Journal Legacy Archive
Availability WMS

- Availability for US Pilots: before mid 2010
- Availability for US Early Adopters: mid 2010 (limited)
- General Availability in the US: mid 2011

Europe
- BIBSYS consortium, Norway: Go Live by end 2012
- Phased approach depending on country / market segment / localisation requirements / individual needs
WMS in production today

- Sites in production:
  - Samuel Roberts Noble Foundation
  - Washington State University (Spokane Campus)
  - Pepperdine University
  - CPC Regional Library System (public)
  - Boundary Public Library
  - Simpson University
  - More going live in March 2011 and continuously from there
Changing the Game for libraries

Listening to members

OCLC™ The world’s libraries. Connected.
Member driven

The Web-scale Management Service has been:

• Asked for by member libraries (public and academic)
• Developed with member libraries
• Piloted by member libraries
Librarians speak...

• “With WMS, system costs will drop significantly. Like ‘getting another FTE’ significantly. We’re going to save a lot of staff time.”  
  
  Michael Dula, Pepperdine University

• “Consolidating systems will drastically reduce overhead. And the technical and financial model is one that allows you to realistically migrate.”  

Kyle Banerjee, Orbis Cascade Alliance
Librarians speak ...

• “Multitype collaboration and affordability are also key. Moving all functionality to one location makes sense. In a town with 20,000 people, you don’t have a lot of IT people looking for work.”
  Gina Persichini, Idaho Commission for Libraries

• “The back-end processes smooth things out to a degree that it really is very different than any other system.”
  Jason Griffey, University of Tennessee at Chattanooga
Video
Changing the Game
for libraries

Web scale management services
and the cooperative platform
Web Scale for libraries

Community

Data

Services

Applications

Shared Data

Shared Services

Shared Tools / Applications
Web Scale for libraries

- Applications
- Services
- Data
- Community
Data at Web scale

- Data
- Bibliographic and item
- Serial publications patterns
- Vendor
- Usage
- Knowledge base
- Patrons in consortia

Applications
Services
Data
Community
Business Workflows at Web scale

Community

Data

Applications

Services

Business and Workflow Services

Circulation Services
Acquisition Services
Licence Manager Services
...

OCLC
The world's libraries. Connected.
Library Management Apps at Web scale

An accessible, extendable Platform for custom applications

OCLC applications & components
Apps created by Libraries and Library Networks
Apps created by 3rd party institutions, vendors, ...
The OCLC cooperative platform

A cooperative platform that lets anyone develop new applications on the platform:

• Libraries
• Groups and consortia
• Research teams
• Publishers
• Software vendors
• Entrepreneurs
Example: Vendor platform based ordering
Example: Vendor platform based ordering

The Omnivore's Dilemma: A Natural History of Four Meals [Paperback]
Michael Pollan (Author)

List Price: $16.99
Price: $8.86

In Stock.
Ships from and sold by Amazon.com. Gift-wrap available.

Want it delivered Monday, June 21? Order it in the next 21 hours and 55 minutes, and choose One-Day Shipping at checkout. Details

109 new from $7.35  306 used from $5.63

Format: Kindle Edition  |  Amazon Price  |  New from  |  Used from
--- | --- | --- | ---
---  | ---  | ---  | ---
Library Binding  | $14.18  | $14.18  | $34.47
Paperback  | $8.86  | $7.35  | $5.63

More Buying Choices
415 used & new from $5.53
Have one to sell? Sell here

Current budget: 4,573.21  |  Remaining budget: 4,357.29
What Is the Platform?

• From a practical standpoint, the Platform offers:
  • A "toolbox" for developers that want to use OCLC services and data to build new or enhance existing applications
  • An "App Gallery", through which libraries can easily share apps created by the community
  • App Store, plug-ins, etc.
  • Support for collaboration and cooperation within the library community

The application platform will allow us to develop power tools that could really, really streamline operations for staff.

Kyle Banerjee, Digital Services Program Manager
Orbis Cascade Alliance (pilot participant)
Search the Gail Borden Public Library catalog
Web Service: General
Developer: Gail Borden Public Library
Search the Gail Borden Public Library catalog for books, movies, and more.

The Librarian's Book Revoogle
Web Service: General
Developer: Paul K.
A search engine for finding online book reviews written by librarians, staff, or library users. Library and librarian websites are included.

Montréal Library Network
Web Service: General
Developer: Jonathan Latreille
Search for book(s) in NELLIGAN catalogue from Montréal library network

Riverside Public Library
Web Service: General
A Sample Platform App

Bestseller 1.5

Description: The Bestseller widget aggregates data from online sources such as the New York Times and Oprah Bookclub lists.

Organization: 6569

Create Date: Wed Feb 23 13:28:16 EST 2011

Author: Harnish

Author Email: harnishk@oclc.org

Locales:

Categories: [General]

Features: [analytics]

Screenshot:
## The Sample App Installed

### Bestsellers

<table>
<thead>
<tr>
<th>Rank</th>
<th>Title</th>
<th>Weeks On</th>
<th>Copies</th>
<th>Holds</th>
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<td>13</td>
<td>7</td>
<td>17</td>
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<tr>
<td>2</td>
<td><em>The girl who played with fire</em></td>
<td>12</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>3</td>
<td><em>Black hills</em></td>
<td>3</td>
<td>9</td>
<td>1</td>
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<tr>
<td>4</td>
<td><em>The bourne deception</em></td>
<td>2</td>
<td>6</td>
<td>2</td>
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<tr>
<td>5</td>
<td><em>The doomsday key</em></td>
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<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td><em>Orchard valley grooms</em></td>
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<td>2</td>
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<tr>
<td>7</td>
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Results 1-10 of 20
## Managing Apps on the Platform

### Manage Apps

**Add an App to the repository (max size: 5120K)**

Filename: [Browse...]

- **Upload App**

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<td>238</td>
<td>The Librarian’s Book Revoogle</td>
<td>Approved</td>
<td></td>
</tr>
<tr>
<td>239</td>
<td>Montréal Library Network</td>
<td>Approved</td>
<td></td>
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<td>Riverside Public Library</td>
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<td>241</td>
<td>Frogger</td>
<td>Approved</td>
<td></td>
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<tr>
<td>242</td>
<td>Hamster</td>
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<tr>
<td>243</td>
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Managing Apps on the Platform

Manage Apps

Add an App to the repository (max size: 5120K)

Filename: /Users/harnishkm/3 programs/B_mexicocity.exe

<table>
<thead>
<tr>
<th>ID</th>
<th>App Name</th>
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<tbody>
<tr>
<td>237</td>
<td>Search the Gail</td>
</tr>
<tr>
<td>238</td>
<td>The Librarian's Bag</td>
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<td>239</td>
<td>Montréal Library</td>
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<td>240</td>
<td>Riverside Public</td>
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<td>242</td>
<td>Hamster</td>
</tr>
<tr>
<td>243</td>
<td>Tetrix</td>
</tr>
</tbody>
</table>

File Upload

- Devices: Macintosh HD, IDisk
- Places: Desktop, harnishkm
- Documents

XML

Name: bestseller.xml
Kind: XML document
Size: 4 KB on disk
Created: 01/25/11
Modified: 01/25/11
Last opened: 01/25/11
## Managing Apps on the Platform

### Manage Apps

**Add an App to the repository (max size: 5120K)**

Filename: /Users/harnishkmb/Docum

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<td>238</td>
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<tr>
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Managing Apps on the Platform

Manage Apps

Add an App to the repository (max size: 5120K)

Filename: /Users/harnishkmb/Docum

Upload App

Upload failed, XML file is missing required elements.
Author is required.
Title is required.
Thumbnail is required.
may not be null
may not be null
Author email is required.
may not be null
Brief description is required.

<table>
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Uploading an App to the Platform

Add an App to the repository (max size: 5120K)

Filename: /Users/harnishkmb/Deskto\[Browse…

Upload Complete.

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</tr>
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<td>261</td>
<td>Super Flash Mario Bros</td>
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<td></td>
</tr>
<tr>
<td>262</td>
<td>Super Flash Mario Sisters</td>
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### Uploading an App to the Platform

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<td>Super Flash Mario Sisters</td>
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<tr>
<td>274</td>
<td>Bestseller 1.5</td>
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<td>![Publish]</td>
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</tbody>
</table>
Uploading an App to the Platform

Edit App Metadata

- App Title: Bestseller 1.5
- Contributed By: guest
- Created Date: Wed Feb 23 13:28:16 EST 2011
- Organization: 6569
- Author: Harnish
- Author Email: harnishk@oclc.org
- Brief Description: The Bestseller widget aggregates data from online sources such as the New York Times and Oprah Bookclub lists.
- Category: General
- Features: [analytics]
- Full Description:
- Thumbnail:
- Screenshot:
Finding an App on the Platform

Super Flash Mario Sisters
Web Service: General
Developer: Welee
This is a nice flash remake of the classic Super Mario Bros, with an option to play as Mario or Luigi!

Hamster 2
Web Service: General
Developer: Adam Bowman
This lively pet hamster will keep you company throughout the day.

Bestseller 1.5
Web Service: General
Developer: Harnish
The Bestseller widget aggregates data from online sources such as the New York Times and Oprah Bookclub lists.
The Cooperative Platform

- With the OCLC Cooperative Platform, libraries, library networks and 3rd party institutions can develop their own custom applications for library management activities.
- They can expose and share those applications as Web services on the platform for other libraries to use.
- Libraries and their partners can innovate collectively.
Changing the Game for libraries

Web scale management and library networks

OCLC™ The world’s libraries. Connected.
Overview

• About BIBSYS
• Requirements
• Solution
• Project approach
About BIBSYS

• Government Agency, 45 employees, in existence for 38 years
• Objective: Cost-effective and high quality information services through cooperation between Norwegian Higher Education institutions on joint solutions
• Member Organization: Libraries are members
• Serving more than 100 institutes: National Library, all 7 Universities, 29 (of 31) University Colleges, 12 Private Higher Education Institutes, 10 Hospitals, 7 museums, 17 Government Agencies, -- some more.
• Currently offering an Integrated ILS (180,000 FTE Students, 5,000,000 Bibliographic items, 15,000,000 Copies, 3,600 internal users)

Requirements

• Changing Environment: Public, IT, Members, Content, Services

• Need for replacement of current ILS

• Need for integrated services (fct, open architecture)
  
  a truly next-gen solution, still under development

• Consortium solution

• Partnership: As a strategic partner, BIBSYS would be able to inform and influence directions
Solution

- Role Change for BIBSYS:
  From Developer to Systems Integrator
- Core functionality delivered as standard product by OCLC
- **Powerful platform for Norwegian adoptions and functional extensions developed and maintained by BIBSYS for the libraries they serve**
- ”Astrology example” (Robin Murray)
Design for Collective Innovation
Project Approach

- Collaboration on development (familiar to PICA Partners)
  - Shared roadmap: WMS functionality & collaborative platform
- Parallel development OCLC (core) and BIBSYS (extensions)
- “Agile”
Agile development at 2 organizations
(drawn by BIBSYS)

Agile development of a standard WMS at OCLC

2 months

2 months

2 months

2 months

2 months

Standard WMS in operation

Norwegian extensions in operation

Project start up / initiation

Agile development of Norwegian adaptations at BIBSYS

- Release with documentation
- Detailed plan with user stories for next iteration
- Further plans for coming iterations

- Written comments to user stories/plans for next iteration
- Written comments to other plans
- Necessary extensions of services
“BIBSYS is looking forward to implementing a next-generation library system in close co-operation with our member libraries and OCLC. Our aim is to give researchers and students in Norway an excellent system to support their work. We also look forward to a library system that can be closely integrated with other administrative systems that are used in the higher education community in Norway.”

(Roy Gundersen, Director, BIBSYS)
"Because of the architecture, BIBSYS and its member libraries can develop their own custom applications for library management activities. In addition, they can expose and share those applications as Web services on the platform for other members to use.

This ability to collectively innovate will generate cost savings, greater efficiency and the ability to better leverage collected data and intelligence."

(From the press release)
Thank You!

Questions?