Moving Your Library to the Cloud

Carrie Rampp
Bucknell University, carrierampp@gmail.com

Jennifer Clarke
Bucknell University

Bill Burkholder
Bucknell University

Moving Your Library to the Cloud

Carrie Rampp, Director of Library Services & Instructional Technology
Jennifer Clarke, Assistant Director for Collection Development & Access Services
Bill Burkholder, Library Technology Manager

Background

In the fall of 2010, Bucknell University began evaluating OCLC's Web-scale Management Services solution (WMS). The solution had only recently been announced but we were intrigued by the unique possibilities a cloud-based solution offered to libraries. In early 2011 Bucknell University signed on as an early adopter and began plans to migrate, and went live on the new system in June 2011.

Moving from a more traditional, locally administered library system to a cloud-based system is a unique experience but one which we believe will bring new opportunities to our library and our users. While early adoption of any solution brings particular challenges and requires a good deal of flexibility and patience on the part of staff in particular, we wholeheartedly believe this was a worthwhile decision and represents a path towards a different future for libraries.

What Is the Cloud?

Cloud computing is typically characterized as hardware, software, storage or other technology-related services delivered from a remote provider rather than locally provisioned, supported and configured. In the case of OCLC's WMS, all of the infrastructure and software is provided by OCLC rather than locally through a traditional integrated library system (ILS).By moving to the cloud, Bucknell University has been able to shut down entirely our long-time locally administered library system, Sirsi.

How Did You Make This Decision? Why Not Open Source?

Bucknell University did not make this decision based on any particular dissatisfaction with our existing ILS. However, for quite some time we have been watching the ILS marketplace with a growing sense that the long-term future for libraries was likely not going to be linked to those systems. We have been, also, moderately disappointed with the limited amount of innovation happening here, and finding an ever-increasing need to layer or integrate ever-more sophisticated systems atop our ILS to get the functionality we desired. In Spring 2010 we implemented Summon as an integrated discovery layer to overcome the shortcomings of discovery through the traditional OPAC. We have long-relied on WorldCAT and spent precious resources adding information to and taking information from this service. In addition, many other aspects of acquisitions have been happening for quite some time outside of the ILS with other required integration points as a result. So while not dissatisfied, we felt library futures would likely lie elsewhere particularly given the sea-changes happening with services such as email, file storage, search and so forth.

We have been closely monitoring the open source movement, imagining that our next move might indeed be to an open source platform. The idea of disconnecting from a vendor relationship seems really liberating and we could foresee how interesting it might be to contribute to the development of library systems that better matched the needs of libraries today, not driven on profit models. Unfortunately, those developments seem to be coming along very slowly. And while the appeal remained, we realized that in all likelihood, our willingness to devote precious resources, in particular extremely limited programming resources, to the development of a library system was doubtful. Moving to open source would more likely mean accepting the product largely as is, and perhaps tethering ourselves to a third-party provider for the enhancements or fixes we need, which would not be dramatically different from the work today as we would still be locally hosting and maintaining the system, attempting to integrate it with other systems, and paying for vendor services, albeit perhaps at a slightly better cost.

At the same time we have been monitoring OS developments, we have begun increasingly to consider our library system much more of a commodity service, meaning one where the needed

functionality and basic features are fairly well-defined. And while discovery may indeed be a service where we desire increasing innovation, even here the needed functionality is fairly well-defined if not yet fully realized by any particular vendor or offering. Ultimately, if we were to devote programming resources to an open source project, we believe one that directly benefits teaching and learning, classroom innovation or faculty research would be a far more deserving project than one that at its heart is primarily a commodity, and one that is largely support for transactional data--acquiring, describing, tracking and so forth.

For all of the reasons described above, we did not undertake our evaluation of OCLC's WMS as a traditional ILS evaluation where we examined and compared multiple product offerings looking for the system offering the most features. In fact, we knew heading into the project that as a new offering and as early adopters, OCLC's WMS would absolutely not have all of the features one would find in a library system that has been in the marketplace for decades. Instead, we focused on understanding the core philosophy of the offering, the long-term investment by OCLC and associated viability, and the vision or imagined trajectory for the offering. We also carefully considered just what would be available on day one, and would we be able to continue operating and offering a good level of service to our patrons while the product continued to mature. While answering all of these questions to our satisfaction took some time, the longest and most complex aspect of making this decision was reaching agreement on the contract and license terms and as well the privacy and security considerations. We worked extensively with University Legal Counsel to answer these questions to Bucknell's satisfaction.

The Migration
Moving to a cloud-based system is quite different from implementing a locally hosted system. Probably the hardest piece to get beyond is the lack of some of the usual milestones that show progress. In a traditional deployment, you would mark the moment the hardware arrived, when it was set up and configured, the moment you could see a scant amount of test data in the environment and so forth as mile markers along your path to implementation.

Moving to the cloud, the system is often already available and in production for other clients. Your work is largely consumed with extracting and validating your data and then awaiting word from the vendor that your data is now loaded, and then again validating and correcting, and ironing out all of the aspects of automation with campus systems, particularly for patron data.

Benefits
Moving to OCLC's WMS has had a number of immediate benefits which are mentioned here in brief format:

- Positive feedback from users on World-CAT local interface for discovery
- Cost savings
- Improved integration of inter-library loan and patron-driven acquisition function with WorldCAT as discovery platform
- Staff time savings, thus the opportunity to perform new, more interesting work
- Elimination of local system maintenance for technical staff and elimination of reconciliation of local system with WorldCAT for cataloging staff
- Better discovery platform than a traditional OPAC

Challenges
We would characterize virtually all of the challenges as expected as most are derived from the system being new to the marketplace and functionality still developing. We are somewhat loathe to even commit to paper precise limitations as the product is evolving so rapidly and the roadmap is detailed with many new and improved features arriving quarterly. But with that in mind, we would note the following general challenges.

One general challenge for those moving to a cloud service is adapting to being part of a collective. While libraries are very used to participating in collectives, we have typically run our own systems which has allowed for a good deal more local modification or development of local practices within the confines of the vendor's system. With

a shared system such as OCLC's WMS certain aspects of the system are determined by the collective. This can require a bit of a mindset change about your library system, however over time we see the product evolving to allow more local control but ultimately some aspects will surely remain shared. It seems developing these collective practices will ultimately benefit libraries, however adjusting to this new reality takes time, as does modifying your data and practices to work within those constraints.

The two areas where the system is least developed at present are in the circulation area and in availability of canned and custom reporting. We feel both of these areas are improving, and the product road map forecasts more improvements coming every quarter. But unfortunately, at present both have limitations that make certain transactions or data gathering tasks harder or impossible in the short term. We look forward to improvements.

Summary

In conclusion, OCLC's Web-scale Management Solution was a good choice for Bucknell University. Knowing what we know now, we would make the same decision again. But beyond this local conclusion, we strongly believe the future of library systems is with the cloud and expect to see more institutions moving in this direction and the offerings improving. We have seen real money and time-savings as a result of this move. Also, we believe we are offering a good discovery solution and set of services online to our patrons and just as important, we believe we are on the right trajectory for offering improved services in the future.