

WorldCat Local Task Force  
Report to LAMP

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## Introduction and Recommendations

There are a variety of single search options available to libraries today. Options include enhanced catalog interfaces with Web 2.0 features that also search local digital collections, federated search systems, and new “resource discovery systems” that combine elements of both. Our analysis provides a brief description of these services, describes what we see as strengths and weaknesses of WorldCat Local (WCL), and compares the features of WCL with three other existing resource discovery products including: OSU’s LibraryFind™, Serials Solutions’ Summon, and Innovative Interfaces’ Encore. The focus of our report is WCL. We discuss how WCL would interact with existing and future library services. Finally, we provide cost information and a timeline for implementation.

In June 2008, OSU Libraries determined that it would purchase and implement WorldCat Local in FY09. However, having had the opportunity to examine WCL, its development and its relationship with existing library services more closely since that time, we do not recommend taking this action in FY09. We agree that WCL has tremendous potential but believe that delaying a decision to purchase and implement WCL until FY10 would serve two purposes. First, OCLC would have time to develop WCL’s capacity based on the feedback and experience of early adopters. Secondly, OSU Libraries would be positioned to make a more intentional decision about what our discovery product of choice ought to be. We recommend that the task force undertake the following activities:

- Continue to monitor resource discovery solutions and collaborate with other libraries to share information and findings;
- Focus attention on WCL because of its potential importance as a development project within the Orbis-Cascade Alliance;
- While continuing to scrutinize WCL, investigate other vendors’ products, specifically Serials Solutions’ Summon, the recently announced federated index discovery system; Ebsco’s Integrated Search; and Innovative Interfaces’ Encore product, so that a more detailed comparison can be done.
- We also recommend the investigation of Innovative Interfaces’ XQuery product which may allow for the higher degree of customizations that we require in order to interface our catalog holdings with LibraryFind™, Library à la Carte™, Oregon Explorer and other library-developed services of the future;
- By March 2010, communicate to LAMP whether WCL or another discovery service is the optimal purchase for OSU Libraries.

## Analysis

In 2007, a University of Michigan Libraries task force reported the following strengths of WCL<sup>1</sup>:

- The networked, shared interface means that little to no development, maintenance, or support for the interface would be required locally.
- Use of the WorldCat database allows users to easily find nearby libraries’ holdings in addition to their own.
- WCL provides some desirable Web 2.0 features, such as:

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<sup>1</sup> University of Michigan Libraries World Cat Local Task Force Report to Executive Council. December 14, 2007.

- Single search box in simple search;
- Faceted browsing;
- Easy integration with social bookmarking sites; and
- Content enrichment features.
- WCL has a relatively low cost.

In addition, our task force would add the following strengths, each described in further detail in the paragraphs below:

- One-stop fulfillment options include consortial requesting and interlibrary loan requesting and OpenURL article requesting;
- High quality relevancy ranking of results;
- FRBRized search results that bring work versions, formats and editions together;
- Integration with other web services including book reviews and covers from Amazon.com, links to full text via Google Books and other large-scale digitization efforts;
- Currently includes over 57 million article citations;
- Federated indexing instead of federated searching;
- Citation creation, management and export.

Currently, OSU Libraries uses LibraryFind™, our locally developed open source search tool, for federated searching of the local catalog, selected subscription databases and digital collections. It offers tight OpenURL integration, with single-click access to full text. It does not currently search bibliographic data from Summit, the ORBIS Casacade Alliance consortia catalog. LibraryFind™ also serves as the search tool for the libraries' Oregon Explorer natural resources digital library and Library à la Carte™ course pages. The libraries' online catalog was recently enhanced with a move to Innovative Interfaces' WebPac Pro and a number of local customizations.

We want our users to be able to do a single search of our local catalog, subscription databases and digital collections – what LibraryFind™ currently offers. We want users to be able to search Summit and other OCLC member library holdings and to be able to easily request items not already available full text from within the same interface. This is what WCL can provide that no other existing service provides. We want as many Web 2.0 value-added features (book reviews, book covers, links to available full text, citation management, etc.) as possible. Ideally, we also want for the product to serve as a platform that can be adopted for other existing library services such as search, presentation and integration of results within library portals such as Oregon Explorer, search of librarian selected catalogs, databases and digital collections within library course pages, and future services that can be built on top of the platform such as iPhone applications, Google widgets, etc.

No existing product accomplishes everything. The systems that appear to have the greatest potential include WCL, Serials Solutions' Summon, Ebsco's Integrated Search and LibraryFind™. Each has, or will likely have, federated searching or federated indexing of content from different providers. All will search digital collections (local and otherwise). Summon will only search content that can be harvested (federated indexing) and is readily available to users. Integrated Search also intends to offer integrated federated indexing. WCL, which already provides federated indexing of all member bibliographic records in addition to several abstracting and indexing (A & I) databases and digital content, will also offer federated searching, possibly as soon as April 2009. Encore is essentially an enhanced catalog interface that also offers access to selected local digital collections and can provide pass-through search linkages

to federated search products. The advantage of federated, or integrated, indexing over federated searching is that the former has the potential to provide a more powerful and sophisticated search efficiently without having to query and incorporate content from multiple databases simultaneously and separately.

As its name implies, WCL is a localized version of OCLC's WorldCat.org. It includes all of the bibliographic holdings of the world's OCLC member libraries as well as article citations from an increasing number of article citation databases including ERIC, Medline, GPO, ArticleFirst and the British Library. Beginning July 1, 2009, OCLC will incorporate other FirstSearch databases into the Worldcat.org platform, and thereby into WCL. When OCLC incorporates federated searching into WCL at no additional charge, library users will be able to access, via WCL, other non-FirstSearch resources to which the libraries subscribe. OCLC will add the necessary connectors to enable this access. Because this federated searching capability is not yet available, we were not able to analyze its scope or performance. We could not adequately assess its potential but we recognize that it will be a key element in our decision to move to WCL.

WCL offers a single search box, relevancy ranked results, and FRBRized search results by which all versions and editions of a title are presented together. It offers faceted browsing, a high level of integration with other web services such as book reviews and covers from Amazon.com, links to full text via Google Books and other large-scale digitization projects, and a number of other features such as social bookmarking, tagging, citation exporting in multiple formats, and the option to purchase books.

At present, WCL works with, and requires, the local catalog to retrieve holdings information including location and availability status and local URLs; maintenance of a local catalog would remain necessary, although less attention would need to be devoted to customization of the catalog. All results are displayed in a single result list and ranked by relevancy according to three tiers. It displays results that match the home library's holdings most prominently, then other Summit library holdings and finally the holdings of other OCLC member institutions around the world. Each tier of results are presented in a single result list but ranked for relevancy within each tier.

WCL allows for almost no customization. This has advantages and disadvantages. On one hand, it is extremely easy to implement and appears to take virtually no time to maintain the interface or web design. However, we would need to investigate a number of cataloging related issues that could result in a large amount of work. For example, the Libraries would need to ensure that local URLs display correctly and that OCLC numbers are loaded for brief electronic journal records if that were deemed necessary. Also, librarians will need to get used to intermittent and occasionally unannounced changes to the interface that have impact on instructional and reference staff. The consistent branding across institutions and consortia means that, *if Worldcat.org* is increasingly seen and used as *the* search interface for library resources on the web, patrons would experience the same interface regardless of affiliation. A consistent interface is something that has disappeared, for better and/or worse, since local OPACs replaced card catalogs in the 1980s.

The University of Michigan task force reported the following shortcomings of WCL:

- The Worldcat database is not a comprehensive representation of the University of Michigan collection with significant portions of holdings missing.
- Many of the features that patrons depend on are not available in WCL, or function in less than optimal ways. The system appears especially weak as a tool for scholarly research.

- WCL has limited ability to integrate with other systems and services that they provide to their users.

The first shortcoming listed by the University of Michigan does not apply as much to OSU. Over the last several months, OSU has engaged in large scale batch loading, adding hundreds of thousands of holdings to Worldcat that weren't previously represented there. At the conclusion of the holdings batch loading, there will remain several thousand unmatched holdings, but this represents a small percentage of the Libraries' collections and can be handled with a project. We believe that OCLC's batch load matching algorithms have improved since the time of the Michigan report, and aside from the relatively small number of unmatched records, our records are well represented in Worldcat. Historically, OSU Libraries has not done a lot of local record editing that was not also added to the Worldcat database. Our holdings are now represented in Worldcat for a very large percentage of the records in record sets that we own. The only substantial bibliographic data that would be lost with a move to WCL is local call numbers. Indeed, many of the records in Worldcat will be of higher quality, and more recently enhanced, than records in our local catalog.

As to the second point, our task force finds it surprising that the sophisticated metadata available in the OCLC FirstSearch interface is not fully utilized for patron searching by WCL. Usability testing suggests that it can be difficult to locate known titles, and OCLC has noted that they are working to improve this in a future update. With FRBRization, it is not presently easy to identify and request specific editions and formats, especially the specific editions held by Summit libraries. OCLC plans to improve this in a future release. There is no call number searching, which is probably only a minor point, but the advanced searching in general is extremely limited. OCLC has also said that it plans to expose additional metadata for field searching over the next few years; this should improve advanced searching for research purposes. OCLC engages in a great deal of usability testing of their own and makes changes to the system only based on thorough testing and assurance that changes will be conducive to all Worldcat users. There are clear advantages and disadvantages to this one-size-fits-all approach. On the one hand, any changes are thoroughly tested prior to implementation. On the other hand, with this approach, features that academic and research libraries want that are less conducive to the general public will not be implemented. OCLC did recently establish an Alliance user interface work group so there is now at least an avenue for Alliance members to suggest user interface enhancements to Worldcat.org, the group catalog and WCL.

One area addressed by the University of Michigan report that still merits significant scrutiny when considering WCL is issues related to interoperability with other services currently offered by OSU Libraries. It is important to remember that WCL is essentially a service that sits on top of the WorldCat.org platform. As such, for the purposes of WCL, all interoperability flows towards OCLC. At present, WCL offers no method for interacting with data made available through the WCL interface. And while OCLC is currently working to provide some API (Application Programming Interface) access to the WorldCat.org platform, the current implementation of this interface is fairly limited in scope and still very much in development. In their present state, the use of WCL/WC API would represent a step backwards for the library in terms of service integration and would likely, in the short-term, limit some of the libraries research and development opportunities. For more information regarding interoperability issues and limitations with the current WorldCat API, see Appendix D.

How do these interoperability issues affect our users and our work on LibraryFind™? OSU Libraries has invested considerable staff time, energy, and creativity in the development of LibraryFind™. Our intention in doing so was to create a single search box discovery experience for users. Our desire was to

situate ourselves to build tools such as Library à la Carte™ and provide new services for our users. It would be ideal to transfer most of the maintenance associated with such tools to a vendor. However, because of the interoperability issues, if we were to implement WCL, we would still need to maintain and develop LibraryFind™ in order to keep offering services like Library à la Carte™. Our task force does have some issues with the duplication of effort and resources that maintaining these two systems represents, but our major concerns focus on the impact that interoperability issues would have on users. Basically our users would encounter different search outcomes when executing a WCL search vs. a search in LibraryFind™.

Our task force would add the following WCL shortcomings to the University of Michigan list:

- Lack of integration with other catalog services (e.g. course reserves, materials booking, new book lists);
- Loss of local control and customization;
- Scoping difficulties;
- Unavailability of on-order records.

In 2008, a library task force installed WebPac Pro with customizations that are unique to our library. These customizations represent the work of a variety of librarians and staff that are engaged with our users in day-to-day interactions, focus groups and usability studies. As mentioned above, a move to WCL greatly reduces the ability to customize the user interface based on local needs and requirements. While we are confident that OCLC is capable of building the WCL product in a way that benefits its broad membership and, indeed, the world's users, we are concerned about the impact this type of development will have on individual libraries that are willing and desirous of producing out of the box or innovative products. Specifically, the task force is concerned that the more OSU Libraries is reliant on OCLC's "one size fits all" approach, the less knowledge we will have and the less ambitious will be our drive to change.

OSU Libraries has developed a number of local services and systems that meet our users' needs such as the LibraryFind™ metasearch engine, the Library Ala Carte class portal system and the Oregon Explorer natural resources digital library. Each of these implementations has involved library faculty and staff in decisions concerning access and use of library resources. LibraryFind™, for example, allows us to think about how our users seek and use information and to act on that knowledge to better the interface. If LibraryFind™ were effectively replaced by WCL, giving up search and retrieval to OCLC might have the unintended consequence of taking us out of the search and retrieval equation. Once again, our role will largely be teaching users how to use the system and cataloging materials for that system. Just when we've become accustomed to that playing role in changing the search and retrieval equation, we would no longer be positioned to do so except through an enhancement process.

Another current weakness of WCL is the inability to easily restrict searches to holdings in a particular branch and/or location. Currently our catalog offers a search of the holdings of two institutions – OSU Cascades and Central Oregon Community College – that share a library. It is not clear whether this can be accommodated with WCL. The University of Washington is currently working with OCLC to enable scoping to single institution branch locations. This involves batch loading item holdings information to OCLC's Local Holdings Record (LHR) system. This would be extremely time-intensive for our library and it is not yet clear how a scoped view and search of holdings would work as there is not yet an example of this among WCL libraries. Finally, our on-order records would not be available in WCL. This lack of availability would have the most impact on the work of subject librarians and perhaps interlibrary loan

and will likely confuse our users about the availability of current titles. It may also have impact on the ability to implement collection services like patron-driven acquisitions though the exact impact is not clear.

### Current Generation User Interface Functionality

We list here some of the search and retrieval, content and other features that might be expected from a resource discovery system and which of the four systems (WCL, Encore, Summon, LibraryFind™) provide that functionality.

<b><u>Search and Retrieval</u></b>	<b>WorldCat Local</b>	<b>Encore</b>	<b>Summon</b>	<b>LibraryFind™</b>
Relevancy ranking	X	X	X	X
Visualization	O	X	O	O
Faceted Browsing	X	X	X	X
Single search box	X	X	X	X
FRBRized results	X	O	O	O
Spell check	O	X	?	X
RSS notification	X	X	?	X
Book – consortial fulfillment	X	O	O	O
Books – ILL fulfillment	X	O	O	O
Google Books	X	?	?	X
Article fulfillment	X	O	O	X
<b><u>Content</u></b>				
Articles	X	O	X	X
Unique local digitized resources	X (possible)	X (possible)	X	X
Finding aids	X (possible)	X (possible)	X	X
Consortial holdings	X	O	O	O*
Other library holdings	X	O	O	O*
				*LibraryFind does provide a search of WorldCat (and thus, provides a query that does search the world's Library holdings) , however the ability to specifically surface holdings information of a given library is currently problematic due to limitations in the WorldCat API.
<b><u>Added features</u></b>				
Book covers	X	X	X	X
Book reviews	X	X	?	X*
User-contributed reviews	X	?	?	O
User tagging	X	X	?	O**
Recommendations	X	?	?	O

Option to purchase	X	?	?	X*
Citation management	X	?	?	X
				*Both of these features are functional but not yet implemented pending additional usability studies and staff input. ** Tags from other sources like LibraryThing could actually be implemented into LibraryFind – however, usability analysis would need to be done given the current workflow.

### Usability Results

The Libraries’ Usability Team (Uteam) was asked to test and compare the University of Washington installation of WCL with the OSU Libraries Catalog. Uteam members held an open house and invited faculty, graduate students and undergraduate students and library staff to complete 2 demographic questions, 4 tasks and 5 evaluative questions. The questionnaire was also made available to faculty, students and staff via SurveyMonkey. See Appendix A for results.

Survey respondents and usability participants included 40 undergraduate students, 16 graduate students, 24 library employees, 4 instructors and 18 faculty from other departments. This section only includes the responses of non-library staff. Library staff responses were considered by Team 200 as part of their recommendation.

Known title searching was found to be more effective in the OSU Libraries Catalog, although respondents deemed the catalogs virtually equal for known title searching. WCL was deemed more effective for topical searches. Respondents prefer WCL overall. The most often mentioned reason is the ability to search and retrieve materials easily from other institutions in WCL and the ability to find articles. Several respondents also mentioned a preference for the multiple search boxes available on the OSU Libraries Catalog front page, although that was not a majority opinion.

Most people do not care for the WCL inclusion of Amazon links to purchase books and several expressed a particular disdain for this feature. On the other hand, many commented positively about other added features of WCL such as book jacket displays, ratings, the ability to refine results via faceting, and the ability to export citations in multiple formats. Several respondents also liked the ability to create lists and read book reviews in WCL.

### Other Recommendations

Team 200, the libraries’ web development team, and the OPAC/EBSCO Group, the OPAC interface team, reviewed the instance of WCL at University of Washington, the usability test results and subject librarian feedback. Each group recommends that WCL be added to the Libraries’ assortment of resources with the caveat that the current Innovative Interfaces web OPAC is maintained until WCL is able to provide scopes and accommodate a scoped search and view of Central Oregon Community College and OSU Cascade’s collections.



Librarians expressed concern over the consistency of WCL's performance in terms of search results and are not happy with the lack of ability to control the interface - a lot of thought and work went into refining the Ill web OPAC interface. By switching to WCL, they feel that the Libraries would lose ground in terms of the interface. Despite those two big issues, the group appreciates having other locations and articles available in one search. There was also concern about other features that are currently provided by the local catalog that would not be provided in WCL such as an integrated booking module and reserves. See Appendix B and C for the complete recommendations of the two groups.

### **Costs (redacted in the public version)**

### **Implementation in 2009**

To enable us to take advantage of the FY09 price listed above, we would have to order and accept WCL by June 30, 2009. We can schedule the billing for June 30, 2009, or July 31, 2009 which means we could use FY09 or FY10 funds. See the Sample Implementation Timeline for more details. Although WCL could be implemented almost immediately once a decision and payment is made, the following work is expected to be necessary in order for WCL to become the primary search mechanism for library holdings:

- Scoping decisions will need to be made. If scopes are deemed necessary, LHRs will need to be generated for all library item and holdings records. This would likely take at least a year to fully implement and would require continued batch loading to OCLC.
- Electronic journals display decisions will need to be made. Serials Solutions MARC record service would have to be purchased and implemented in the local Innovative catalog in order for electronic journal holdings and URLs to display directly in WCL. There would be a significant amount of clean up required to enable this.

### **Sample Implementation Timeline**

March	OCLC works with library to complete WorldCat Local configuration
April/May	Library conducts trial/acceptance testing and OCLC makes changes
May/June	Library accepts the service and places order
June 30, or July 31, 2009	OCLC invoices library depending on whether FY09, or FY10 funds are used
July 1	Go live with Worldcat Local
July 1, 2010	COCC/Cascades, Guin and other scopes could be enabled.

### **Summary**

Based on the discussion herein, we believe it is clear that OSU Libraries could gain some advantages from implementing WCL. WCL is a compelling product that has notable and highly desired features:

simple and integrated book and article requesting and fulfillment, a single search box, relevancy ranked results, and FRBRized search results by which all versions and editions of a title are presented together. It also offers faceted browsing, provides a high level of integration with web services and next generation features like book reviews, tagging, and citation exporting. At this point, WCL supports resource sharing and ILL services better than the other discovery systems appear to ever be capable of doing.

As a whole, resource discovery systems like WCL and its competitors remain in relative infancy. This translates into a constantly evolving landscape. Though our organizational culture typically demands pushing ahead to be early adopters, in this instance, we believe we have outlined significant reasons to delay our movement to WCL until at least FY10. WCL is still undergoing development. The current version of WCL would mean that OSU Libraries would be taking a step backwards in terms of our ability to influence the development of our own discovery platform as we have been doing with LibraryFind™. We must also acknowledge that a move to WCL as the library's primary discovery service will have impact on a variety of functions: the ability to customize the system interface, to mashup data to provide patrons with information, and to scope to branch locations. It would not support interoperability among various existing (and probably future) library systems that are built on LibraryFind™. To a lesser degree we would also lose features we and our users currently benefit from such as the presence of sophisticated metadata that readily supports known-item searching and advanced search. In addition, there are many uncertainties about the future of WCL's metasearch capabilities. Though WCL has shown much promise, we believe the Libraries should compare it with other systems with great potential before a commitment is made.

## Appendix A – Usability Testing Report (February 17, 2009)

Michael Boock asked the usability team to test and compare the University of Washington installation of WorldCat Local with the OSU Libraries Catalog and worked with the u-team on the questionnaire. U-team members Jane Nichols and Susan McEvoy held an open house on Thursday February 12 from 11:30-1:30. Testers were asked to complete 2 demographic questions, 4 tasks and 5 evaluative questions. See Appendix A: Survey for survey questions. The questionnaire was made available to those unable to attend using SurveyMonkey.

### Demographics

Survey respondents and usability participants include undergraduate and graduate students, faculty, instructors, and library employees:

- 40 undergraduate students

- 16 graduate students

- 24 library employees

- 4 instructors

- 18 faculty

This usability analysis reviews the responses of all but library employees, except in the comments section. Library employee survey responses will be considered separately by Team 200.

### Statistical Results of Interest

Find the call number for the book *Science, evolution, and creationism* by National Academy of Sciences, Institute of Medicine. Does the University of Washington have this book?

- 6% answered incorrectly using the OSU libraries catalog

- 17% answered incorrectly using the UW libraries catalog

Which catalog was more effective for completing the tasks?

- OSU was listed as slightly more effective for a title search (53%)

- Worldcat local was listed as more effective a for a topic search (68%)

When looking at the catalogs, which did you prefer?

- WorldCat 57%

- OSU Libraries 43%

Respondents provided 56 comments regarding why they preferred one catalog over another. Comments include:

- 12 – ability to search and get materials easily from other institutions (WCL)
- 8 – liked being able to specify keyword, title, author before searching (OSU)
- 7 – ability to find articles (WCL)
- 5 – more relevant keyword search results (WCL)
- 4 – like the simple search box (WCL)
- 3 – more relevant title search results (OSU)

Examples of other features mentioned were display of bibliographic information (2 WCL and 1 OSU), cleaner appearance (split between WCL and OSU), bookjackets (WCL), ratings (WCL), ability to easily find more related results (split between WCL and OSU), to refine results via faceting (WCL), to export citations (WCL).

### **Take-Aways**

Based on users' comments, catalog preference was influenced by different needs. More participants liked the inclusion of articles and other library holdings in a single search although some preferred to see only what is available at OSU and found the additional information confusing.

Participants slightly preferred title searching in OSU catalog and strongly preferred topic search in WorldCat Local.

Some participants expressed a preference for OSU's radio buttons, although there were a few that favored the simple search box.

Most people do not prefer Amazon links, but many commented positively about the other added features of WorldCat Local such as book jacket display, ratings, the ability to refine results via faceting (WCL), and the ability to export citations (WCL). Several also liked the ability to create lists and read book reviews (WCL).

## Appendix B – Team 200 Input on WorldCat Local

Here is the input from Team 200 that you requested on the potential switch in web OPAC to WorldCat Local (WCL). We reviewed the instance of WCL at University of Washington, the usability test results, the WebOPAC Group recommendation and comments, and subject librarian feedback. We concur with the WebOPAC's recommendation to add WCL to our assortment of resources, and agree that we must maintain the current Innovative Interfaces web OPAC until there is a solution to the inability to scope and accommodate COCCs collection for Cascades Campus.

Some librarians we have spoken to have expressed concern over the consistency of WCL's performance in terms of search results. We are not happy with the lack of ability to control the interface - a lot of thought and work went into refining the III Web OPAC interface; and by switching to WCL, we would lose ground in terms of the interface. Despite those two big issues, the benefits of having other locations and articles available in one search would be a far better experience for many of our users who have such needs.

Team 200 also has particular concerns about how WCL would integrate into our current website. We will have to reconsider how we present the various search options to users so that they can easily choose and get to the correct resource for them, whether it be WCL, the III Web OPAC, or LibraryFind™. The following are some of the issues we'll want to address, none of which will take a lot of time, but we want to make the changes thoughtfully.

1. Will we want to include a search box for WCL?
2. If so, we will need to determine if we should still feature the LibraryFind™ Search on the main page. Having too many search boxes on a page is not the best practice in terms of usability.
3. We will need to decide what quick links to include and what language to use to describe them. (Quick Links are currently the OSU Libraries Catalog, Databases, E-journals, Course Reserves, Hours) UWLibraries had both the III and the WCL interfaces on their home page for awhile and asked users to test them.
4. The Find Books and Articles page (in the navigation menu) will need to be re-written.
5. We'll need to do some usability testing of any new configuration of the home page.

## **Appendix C -- OPAC/EBSCO Group: WorldCat Local recommendation**

Purchase only if we can continue to have the current opac available as an option. Discovery of books and articles through a single search is significant but there are too many known issues for us to feel comfortable providing this to our users without a back-up.

Concerns:

- Scoping to COCC (2 institutions at one location). Even if other scoping issues are resolved this is a unique situation.
- Loss of ability to customize the interface, to minimize information confusing to users; e.g., OCLC number is very prominent in the record, much more so than call number. This will be a problem to any user who doesn't know what a call number looks like.
- Lose redirect for confidentiality after period of inactivity
- Features such as booking module, reserves: integration with catalog has been beneficial.
- Will order information, hold information be available? This is a problem now with Summit.
- At Menucha, UW public services librarians voiced problems with inconsistent results.

## Appendix D--Integration with Other OSU Library Services

While WCL represents a positive step forward in many areas – as it is presently conceived, the project offers no avenue for interoperability with other services, save for what OCLC can integrate into the WCL service. Going forward, we find it difficult to imagine a scenario in which the WCL platform will be enhanced to enable the sharing of data between itself and other 3<sup>rd</sup> party services not hosted within the WCL interface. In part, this is due to WCL is being offered by OCLC as a service built on top of the WorldCat.org platform. As a service, WCL has been designed so that interoperability flows one way – into WCL. So, it is important to realize that the WCL service will likely never provide the capability for non-OCLC services to interact with WCL outside of the WCL interface in any meaningful ways. But what is the impact of that to users at OSU if the Libraries were to purchase WCL today? It's a good question. For many libraries, the trade-off between interoperability versus the purchase of a blackbox service is an attractive one. And for some libraries, this trade-off can make short-term sense. However, for libraries with active research and development units, WCL's service, barring a robust Application Programming Interface (API), represents a step backwards as information available through WCL becomes locked up in that interface and unavailable for integration with other library services. And in many respects, this is the position that OSU Libraries finds itself. While WCL would represent a significant improvement over the current library ILS, it would represent a significant step back words for the libraries' research and development interest. And tangibly, it would have an immediate effect on users, as interfaces currently utilizing the libraries development platform, LibraryFind™, would be unable to interact with the data made available through WCL -- meaning that patrons using WCL would have experiences and receive results that were very different from services built by the library utilize our library platform, LibraryFind™.

So how is OCLC currently dealing with the issue of interoperability with the WorldCat.org platform? Primarily, the issue of interoperability will be addressed through the development of the OCLC Grid Services. The Grid Services is an API layer built on top of the WorldCat.org platform that exists completely independent of the WCL product. The current Grid Services API provides developers the ability to search and retrieve a limited amount of bibliographic content (primarily limited to bibliographic records with holdings information attached) from the WorldCat.org platform.

Today, OCLC's Grid Services simply are not capable of providing access to the underlying data that would be served through WCL. As noted above, the present Grid Services provide access to a limited subset of information. While we certainly expect that its scope will change in the future, the current implementation of the Grid Services is very book centric – in terms of that much of the data and functionality available via the Grid Services is related to finding and locating items within physical libraries. For libraries with other OCLC subscription data like ArticleFirst, etc. – while this information will be available through the WCL service – it's not presently available through the Grid Services. The absence of this information raises additional concerns, as WCL begins offering metasearch functionality. Will that information be made available through the Grid Services or will use of that information be siloed to the WCL interface? The answer to that question will have a significant impact to OSU Libraries and its users, because of locally developed services like Library Ala Carte and Oregon Explorer. Finally, current use restrictions attached to the use of the OCLC Grid Services raise significant questions regarding the OSU Libraries' ability to serve both campus and non-campus members of its community, and while OSU's primary mission is to service the core campus, the significant role OSU Libraries plays in the development of research throughout the state and the effect these limitations could have serving OSU's extended user community.