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The Process of Evaluating a Cloud-Based ILS

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Objective
To describe the process our library used to evaluate OCLC’s WorldShare Management Services (WMS), a new cloud-based Integrated Library System (ILS), as a potential replacement for our current system.

Methods
After forming an ILS Review Committee consisting of staff from the library’s technical services, circulation, and IT departments, we viewed multiple webinars and demonstrations given by OCLC staff. We also searched the literature for articles and case studies about WMS, and viewed several online presentations given by libraries that have already implemented WMS. We also conducted telephone interviews with librarians from two different libraries that are currently using WMS.

Results
WMS offers many advantages over our current system. WMS combines traditional catalog functions with an Electronic Resource Manager (ERM), which will eliminate the need to maintain records in two places. WorldCat Local, the discovery layer of WMS, is much more intuitive to use, which will be a tremendous benefit to our users. Our research into the experiences of other libraries was predominantly positive, and all libraries reported that they were happy with WMS.

Benefits to Users
One Stop Search: The WMS discovery layer, WorldCat Discovery, offers users a modern and efficient way to search both print and electronic formats.
Seamless Interlibrary Loan: In WorldCat Discovery, users see resources matching their needs regardless of whether our library owns the item. A user can place an interlibrary loan request via an auto-fill form, all within the item description in the discovery tool.
Save, Contribute, and Share: WMS provides social tools including user-created lists, reviews, and tags, all shareable through a widget connected to social media platforms.

Search in the current system:

<table>
<thead>
<tr>
<th>Search in the current system:</th>
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<td>Same search in WMS:</td>
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Quotes from Staff Who Have Migrated to WMS

“With our old ILS, the catalogers from each institution in our consortium had to meet frequently to figure out how to handle problems. There were a lot of problems caused by sharing the system. We don’t have those problems now, that’s the most starting difference.”
Staff Member, Doane College

“We used to talk about how, in our library, we were updating data and adding and enhancing records just for the benefit of our local library. And that probably hundreds, if not thousands, of other catalogers were probably doing the same thing at the very same time. Now when we update records, we do it for the benefit of the world. We’re really happy about that.”
Jennifer Clarke, Bucknell University

Conclusions
OCLC’s WorldShare Management Services is truly an integrated system that will allow our library to provide a more modern and seamless search experience to users. In addition, WMS will help us to streamline the processes and workflows for our technical services staff. For these reasons, our library made the decision to purchase WMS, and we anticipate going live in January 2015.

Benefits to Staff
Consistent Enhancements: OCLC’s Roadmaps for future developments allow the library to continually benefit from the latest functionality.
Streamline Workflows: WMS eliminates redundant work of inputting data in multiple platforms and systems now replaced by OCLC’s integrated tools.
Cost savings: After implementation, functions of other tools and systems will be handled in WMS and will no longer need to be purchased.
Vendor-Neutral Discovery: WMS treats all vendors equally in the discovery layer. This allows OCLC to gather more metadata for discovery than other vendors, and allows the library to customize which resources are searched first.

Quotes from Staff Who Have Migrated to WMS

“WMS was a logical choice since OCLC was a current vendor for cataloging, WorldCat Local, and Resource Sharing. It was kind of like should we kick the can down the road or should we say the future is now? Obviously, we selected the future is now approach.”
Penny Glessman, University of Massachusetts Medical School