

## News From OCLC

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### General News

#### **OCLC Files Motion to Dismiss Case**

OCLC has filed a motion in the United States District Court for the Southern District of Ohio to dismiss a lawsuit filed by SkyRiver Technology Solutions and Innovative Interfaces, Inc. against OCLC alleging anticompetitive practices. Jay Jordan, OCLC President and CEO, provided the following update to OCLC members:

"On July 28, 2010, SkyRiver Technology Solutions and Innovative Interfaces, Inc. filed suit against OCLC alleging anticompetitive practices. We at OCLC believe the lawsuit is without merit. We believe this action is an attempt by SkyRiver and Innovative Interfaces to distract the Cooperative from advancing services and programs vital to our public purpose. We have not been, nor will we be distracted from our efforts to maintain and enhance our existing services, pursue an ambitious agenda in library research and advocacy, and introduce new Web-scale services for our members. Unfortunately, the legal action initiated by SkyRiver and Innovative Interfaces may prove to be a very lengthy and highly technical legal process. We want to update you on the important steps we are taking to bring this regrettable action to a swift conclusion. Our legal counsel is managing the litigation under the timelines set forth by the courts. Be assured that we also are doing everything we can to minimize the cost associated with defending the Cooperative against this action. We filed a motion to change the venue of the lawsuit from California to Ohio where the cost of litigation would be substantially less expensive for the Cooperative. The motion was granted to move the case to the United States District Court for the Southern District of Ohio on October 28. Today, under the calendar set out by the Southern District of Ohio Court, we are filing a motion to dismiss the complaint by SkyRiver and Innovative Interfaces in its entirety. A motion to dismiss a claim in an antitrust litigation must be argued on the legal merits, and must accept as if true, the specific allegations of the case. OCLC will ask the court to dismiss the litigation because SkyRiver and Innovative Interfaces have failed to meet the legal threshold requirements necessary to proceed with an antitrust case. While OCLC firmly asserts that the accusations against the Cooperative are not accurate, a motion to dismiss looks only at the allegations made by SkyRiver and Innovative Interfaces without questioning whether those allegations are true. As required by the rules of legal procedure, OCLC will address all six claims and will assert that "even if" the false allegations brought forth by SkyRiver and Innovative Interfaces were true, the claims themselves are insufficient to meet the legal requirements established by the U.S. courts for bringing an antitrust claim. It is important to bear these requirements in mind as you review the brief and its discussion of the accusations. The brief is available for members to review on the OCLC Web site. We anticipate that this motion will be considered by the court in February 2011. We will continue to keep you up to date. And as always, OCLC's public purposes of furthering access to the world's information and reducing the rate of rise of library costs remain our focus." -- Jay Jordan, OCLC President and CEO

#### **OCLC Releases *Perceptions of Libraries, 2010: Context and Community***

Americans are using libraries a lot more as the economic downturn has affected lives, careers, and incomes. Americans see increased value in libraries and the value that libraries provide to their communities, and report even stronger appreciation of the value librarians bring to the information search experience, according to a new membership report by OCLC. *Perceptions of Libraries, 2010: Context and Community* is a follow-up to the 2005 *Perceptions of Libraries and Information Resources*. The new report provides updated information and new insights into information consumers and their online information habits, preferences, and perceptions. Particular attention was paid to how the current economic downturn has affected information-seeking behaviors and how those changes are reflected in the use and perception of libraries. The OCLC membership report explores: technological and economic shifts since 2005; lifestyle changes Americans have made during the recession, including increased use of the library and other online resources; how a negative change to employment status affects use and perceptions of the library; how Americans use online resources and libraries in 2010; perceptions of libraries and information resources based on life stage, from teens, to college students, to senior Americans. The membership report is based on U.S. data from an online survey conducted by Harris Interactive on behalf of OCLC. OCLC analyzed and summarized the results to produce *Perceptions of Libraries, 2010: Context and Community*, which is available for download on the OCLC Web site free of charge at <http://www.oclc.org/us/en/reports/2010perceptions.htm>. Print copies of the report are available for a nominal fee to cover the cost of printing and shipping.

#### **OCLC Launches YouTube Channels**

The OCLC Video Channel and the OCLC Research Channel provide another avenue for you to keep up-to-date about the activities of your library cooperative. The OCLC Video Channel (<http://www.youtube.com/OCLCvideo>) presents streaming video of recent OCLC events, programs, and symposia that feature some of the cooperative's current work in advocacy, service development, and thought leadership. The OCLC Research Channel (<http://www.youtube.com/user/OCLCResearch>) highlights projects OCLC researchers are working on to help shape new scholarly services and make operational processes more efficient.

#### **National Diet Library of Japan Adds Four Million Records to WorldCat**

The National Diet Library of Japan has successfully added 4 million records to WorldCat, making these valuable research resources more visible

and accessible to scholars, students and Web searchers worldwide through the world's most comprehensive database of materials held by libraries. In June 2010, the [National Diet Library](#) and OCLC announced their agreement "to cooperate for the benefit of libraries, library patrons and end users of information services." OCLC staff from Leiden, the Netherlands, and Dublin, Ohio, USA, worked with National Diet Library staff to create a conversion program to convert JAPAN/MARC to MARC 21 records. Cataloging staff with language expertise were also critical to the successful data conversion and load into [WorldCat](#). The addition of Japan's National Diet Library records increases the number of records containing CJK (Chinese-Japanese-Korean) script data in WorldCat by nearly 33 percent. The National Diet Library has been using WorldCat for current cataloging of Western language materials since 2007. Through the new agreement with OCLC, the National Diet Library will contribute the contents of the JAPAN/MARC database, the official national bibliography of Japan, to WorldCat on a regular basis. The National Diet Library will send updates of bibliographic records about four times a year and will provide JAPAN/MARC (A) authority records. [Kinokuniya Company Ltd.](#), OCLC's distributor in Japan for 24 years, helped to facilitate this cooperative effort. The OCLC cooperative has a long tradition of working with national libraries around the world to facilitate shared cataloging, record exchange, digitization, resource sharing, and document delivery. A [map](#) displaying national libraries with records in WorldCat is on the OCLC Web site at <http://www.oclc.org/us/en/worldcat/catalog/national/default.htm>.

## **Reference and Discovery**

### **HathiTrust Digital Library and OCLC Introduce WorldCat Local Prototype**

OCLC and the HathiTrust have developed a unique WorldCat Local user interface for discovery of items accessible through the HathiTrust Digital Library. The WorldCat Local prototype (<http://hathitrust.worldcat.org>) for the HathiTrust Digital Library was designed and implemented by both organizations in close cooperation as a means to further develop a shared digital library infrastructure. The WorldCat Local interface for the HathiTrust Digital Library is based on the WorldCat database, and will run along with the current HathiTrust catalog during the prototype testing period. As a digital repository for the nation's great research libraries, the HathiTrust Digital Library brings together the massive digitized collections of partner institutions. HathiTrust offers libraries a means to archive and provide access to their digital content, whether scanned volumes, special collections, or born-digital materials. The representation of these resources in digital form offers expanded opportunities for innovative use in research, teaching and learning. OCLC and HathiTrust have been working together to increase online visibility and accessibility of the digital collections by creating WorldCat records describing the content and linking to the collections via WorldCat.org and WorldCat Local. The creation of the unique public interface through WorldCat Local is the next step to offer enhanced access to this vital collection. HathiTrust Digital Library records are discoverable through the separate WorldCat Local interface, as well as through WorldCat.org. OCLC and HathiTrust are seeking feedback from users of the new HathiTrust public interface through WorldCat Local. Feedback from the user community and usability assessments will inform future development of the HathiTrust Digital Library catalog. Launched in 2008, HathiTrust has a growing membership currently comprising 52 partners. Over the last two years, the partners have contributed more than 8 million volumes to the digital library, digitized from their library collections through various means, including Google and Internet Archive digitization and in-house initiatives. More than 2 million of the contributed volumes are in the public domain and freely available on the Web.

### **MacArthur Foundation Funds "Reference Extract"**

The John D. and Catherine T. MacArthur Foundation has awarded \$350,000 to fund researchers and developers from OCLC, the information schools of Syracuse University and the University of Washington, and Zepheira LLC to continue work creating a more credible Web search experience based on the unique expertise, services, and input from librarians worldwide. The goal of the Reference Extract project is to make it easy to find credible information in the digital age. Researchers and developers are expected to have initial practical analysis and models of this "credibility engine" to share with the community in early 2011. Details of this work can be found through the Reference Extract home page at <http://www.referenceextract.org/>. Reference Extract is designed to capture Web site URLs and references that librarians and other experts use in answering questions. This information, including data used to determine the most credible resources, is harvested, processed, and then made available through a variety of Web environments. For example, Reference Extract will use a Web-based architecture that allows information to be embedded into existing and new Web sites and applications. The Reference Extract system links the questions of users to Web sites referenced by librarians and other experts as well as to the resources used to answer the questions. This approach varies from traditional Web search engines that represent only a single type of relationship—a Web page that points to another Web page. Reference Extract adds another relationship—linking to resources that librarians and experts point to and use. Zepheira, a professional services organization with extensive expertise in Semantic Web standards, Linked Data principles, Web architecture, and collaborative solutions, is working with OCLC, Syracuse, and Washington to create the piece of Internet architecture that will make it easy to embed credible information in Web-based experiences. Reference Extract leaders say the project will work best if the entire library community gets involved to create a Web-scale effort to support this cooperative innovation.

QuestionPoint, the OCLC virtual reference service supported by a global network of cooperating libraries and an infrastructure of software tools and communications, offers a starting point for building the service. QuestionPoint has more than 6 million reference transactions collected in a central knowledge resource and more than 10,000 librarians worldwide participating collaboratively to test the principles and impact of such a dynamic utility. In November 2008, the planning and research phase of Reference Extract began through a \$100,000 grant from the MacArthur Foundation. The MacArthur Foundation has continued to fund the project for the pilot development phase. Reference Extract work follows on previous credibility work supported by the MacArthur Foundation, most notably the Credibility Commons.

### **OCLC Adds More Content Accessible Through WorldCat Local**

Library users can now find more than 700 million items through the WorldCat Local service as the OCLC cooperative expands agreements with content providers to make more content in a variety of formats accessible to users. In addition to the 200 million records contributed by OCLC member libraries worldwide, 500 million items from leading publishers, aggregators, and mass digitization efforts are also now accessible through

WorldCat Local. OCLC has recently added content to WorldCat Local from EBSCO; Gale, part of Cengage Learning; Modern Language Association; ProQuest; and the U.S. Department of Energy. There are now more than 400 million articles, 170 million books, 10 million e-books, and 1,100 databases accessible through the WorldCat Local service. Additional agreements have been signed with ABC-CLIO, American Psychological Association, Association for Computing Machinery, BioMed Central, BioOne, Cambridge University Press, Emerald, IGI Global, Sabinet, Sage, Taylor & Francis, and World Bank Publications. OCLC has added databases accessible through the WorldCat Local central index, which delivers an enhanced user experience because searches will immediately retrieve records indexed within the WorldCat Local service. Other databases are accessible through a quick, remote WorldCat Local single search that is integrated into a single set of results. Recent additions to the WorldCat Local central index include:

- Gale: Academic OneFile, Expanded Academic ASAP, General One File.
- Modern Language Association: MLA International Bibliography.
- ProQuest: Early English Books MARC Records.
- U.S. Department of Energy: Energy Citations Database.

Recently added remote-access databases searchable through the WorldCat Local single search include:

- Gale: Health & Wellness Center with Alternative Health; Health Reference Center Academic, and Literature Resource Center.
- EBSCO: Computer Source; Economia y Negocios; Fuente Academica; GreenFILE; MedicLatina; Primary Search; Professional Development Collection; Psychology & Behavioral Sciences Collection; Science & Technology Collection; World History Collection; Teacher Reference Center; Texas Reference Center; TOPICSearch; Vocational & Career Collection.

OCLC is working on behalf of libraries and along with libraries, leading publishers, aggregators, and mass digitization efforts to make the full range of library resources accessible through WorldCat Local, providing an integrated discovery and delivery service for libraries' physical, licensed and locally produced electronic collections. WorldCat Local expands a library's collections by combining items from the library, relevant groups or consortia, and libraries around the world through a single search and result set. Built on the foundation of WorldCat, the comprehensive source for discovery of items held by libraries, WorldCat Local allows users to discover unique, locally available resources as well as materials in other libraries around the world. In addition to new content, OCLC continues to add new features and functionality to WorldCat Local. OCLC recently added direct links to full-text articles and open access objects from the brief results in WorldCat Local and WorldCat.org. This new feature is enhanced by the new WorldCat knowledge base functionality that combines data about libraries' electronic content with linking features that enable access to the content. A new mobile view in beta form is now available for both WorldCat Local and "quick start" libraries. The new mobile view for WorldCat Local is optimized for the Apple iOS and Android platforms, but any smartphone browser, including Windows 7 Mobile and Blackberry is supported.

## **Web Services**

### **EasyBib.com and OCLC Collaborate to Build Library-Branded Citation Service**

OCLC and ImagineEasy Solutions, LLC are collaborating to create a customizable library version of ImagineEasy Solutions' popular EasyBib.com service, the most popular online citation site on the Web. The EasyBib Library Edition service was rolled out in a beta testing phase with select OCLC member libraries in January 2011. [EasyBib](#) is an automatic bibliography composer, used by more than 23 million unique visitors in the past year. More than 500,000 new citations are added each day during peak periods of use, such as at the end of university terms. Students simply search or enter bibliographic data of a particular source and EasyBib formats the citation, alphabetizes the works cited list and exports it to word-processing software. Students can also use EasyBib's notebook feature to dynamically organize their research information associated with their citations. EasyBib, a [WorldCat.org partner site](#), already generates a robust traffic stream to libraries through WorldCat.org, using the WorldCat Search API to power book search citations. Jointly designed by OCLC and Imagine Easy Solutions, EasyBib Library Edition will provide an opportunity for libraries to reach students where they already go for help with citation formatting. The Library Edition will offer a variety of features designed to extend library reach and usage, such as: library-branded interface, links to library home page and catalog, search box for easy discovery of additional resources at your library and beyond, integration with virtual reference services, IP redirects to your library's customized version, deep links into a library's OPAC, integration with the OpenURL Gateway. OCLC will be the exclusive provider for EasyBib Library Edition, and a provider for EasyBib School Edition, EasyBib's standard institutional service. OCLC is currently working with a set of member libraries that will serve as test sites for the beta service of Library Edition, which is expected to be available in the U.S. and Canada by spring 2011.

### **Labelo.us iPhone App Adds Links to WorldCat and Libraries**

Another mobile barcode-scanning app for iPhone, Labelo.us, (pronounced like 'Label Us') now includes links to WorldCat.org. Labelo.us, a mobile barcode scanning app developed by Nearest Island, lets you find books in libraries, see reviews and other data about books and other products. It uses 'channels' to bring in other people's perspectives on items, and includes a reputation system to help filter out information you don't want, based on ratings you give to other things. Using Labelo.us, you can scan barcodes or search for books and then connect to WorldCat.org to find the libraries who hold those items. Labelo.us is one of several mobile applications designed for users to access library information from WorldCat. In addition to comparison shopping apps such as RedLaser, pic2shop, BookBazaar, MyLibrary, and CampusBooks for iPhone, the browser-based WorldCat.org Mobile beta is also available at [worldcat.org/m](#). WorldCat.org linking or WorldCat-related APIs are available to anyone interested in creating noncommercial mash-ups or mobile apps that include library data. Commercial apps like Labelo.us link to WorldCat.org through partnership agreements. Users can download the Labelo.us app at no cost through Apple's iTunes app store.

### **Book Crawler App for iPhone and iPad Adds Visibility for Libraries**

The Book Crawler app for iPad, iPhone, and iPod Touch helps you find books you want to read and now includes listings for local libraries through

WorldCat. [Book Crawler](#) helps you remember what books you've read and help suggest new titles, and now connects to WorldCat via the [WorldCat Search API](#) and [WorldCat Registry APIs](#) to show library information. Book Crawler has been featured in the Apple iTunes App Store's "What's Hot" list every month from June through December 2010. The interface is available in English. Book Crawler provides a powerful yet easy to navigate database for the avid reader. For example, you can search for new and upcoming works by authors you like, and set up "smart collection" support with customized rules of how you'd like sorting and searches to operate. It also offers barcode scanning capabilities and the ability to upload cover artwork for titles. Users can download the Book Crawler app for US\$1.99 through Apple's [iTunes app store](#), or access a "lite" version for free.

## **Management Services and Systems**

### **OCLC and Amigos to Deliver OCLC Web-scale Management Services to Libraries**

OCLC and Amigos Library Services have entered into a new partnership to provide libraries with expanded implementation, training, and education services for OCLC's new Web-scale Management Services. Amigos and OCLC have collaborated for many years to jointly provide extensive training, consulting, and education services for OCLC's full suite of services for libraries and consortia. The new partnership program builds on this foundation to provide member libraries the support they will need as they implement the next generation of cooperative library services. The Amigos team of library service professionals will work with libraries to help them with project management, implementation, and training for OCLC's new Web-scale Management Services, the next-generation Web-based suite of library management tools for metadata management, acquisitions, circulation, and license management. The new partnership agreement will also continue the work the two organizations began in 2009 to streamline and enhance support, billing, reporting, and other administrative services that will increase efficiencies and deliver additional cost savings to members.

### **EZproxy Hosted Service Now Available from OCLC**

The library community's leading authentication and access solution is now available as a cloud-based hosted service. The new hosted version of EZproxy makes it even easier for libraries to deliver eContent and make services accessible to their users wherever they are, at any time. A pilot version of the hosted service has been active with five participating libraries since April 2009. Libraries who subscribe to the EZproxy hosted service receive additional benefits such as: timely addition of new databases, reduced reliance on technical staff for initial configuration or ongoing configuration file changes, peace of mind with a secure environment and security for user information, 24/7/365 access monitoring and reporting on usage, elimination of local proxy server (or other hardware) maintenance, automatic updating for bi-annual enhancements. EZproxy hosted service is available as a yearly subscription, based on FTE or population served. All hosted implementations will run the latest release of EZproxy, currently version 5.3. Current EZproxy client users can use their existing configuration files when moving to the hosted service. New EZproxy users also receive up to ten hours of configuration time in the first year's subscription. OCLC supplies the security certificate for libraries who subscribe to the hosted service. The hosted version of EZproxy is currently available for libraries in the United States and Canada. Hosted services will be available for additional regions at a later date.

## **OCLC Research**

### ***OCLC Research and the RLG Partnership: A Five Year Overview Available***

*OCLC Research and the RLG Partnership: A Five Year Overview of Accomplishments* (<http://www.oclc.org/research/partnership/highlights/2006-2010.pdf>) highlights some of the accomplishments over the last five years that have had high impact or have changed the topography of the information landscape. The document reflects not only on the past year, but on the past five years since RLG and OCLC successfully merged. Nearly five years ago, RLG and OCLC joined to create a venue where affiliated institutions could collectively identify, analyze, prioritize, and design scalable solutions to shared information challenges. Since then, OCLC Research and the RLG Partnership have brought to fruition a powerful, globally influential program of work that has provided significant value to the library, archive, and museum communities worldwide. Together, we've accomplished an impressively large array of initiatives, publications and achievements, some of which are highlighted in this document.

### **Recording of OCLC Research TAI CHI Webinar on Merritt Now Available**

Held on 18 November 18, 2010, the TAI CHI Merritt Webinar provided an overview of Merritt, a new cost-effective curation repository service developed by the University of California Curation Center (UC3) at the California Digital Library (CDL) that empowers users to manage, archive, and share valuable digital content. Based on the pipeline metaphor, Merritt promotes an aggressive decomposition of function into a granular set of independent but highly interoperable micro-services. Since these services are small and self-contained, they are collectively easier to develop, maintain, and enhance. Although the scope of any given service is narrow, complex global behavior is nevertheless an emergent property of their strategic combination. Micro-services are purposefully designed and implemented as policy neutral and protocol and platform independent components, so they can easily be used to assemble curation environments that are not constrained to conform to an infrastructural monoculture of prepackaged repository solutions. In this webinar, Stephen Abrams, Patricia Cruse, John Kunze, and Perry Willett from UC3 provided background on the micro-services concept and the growing community of practice that is cohering around the idea, and also demonstrated the Merritt repository and its services. The repository supports flexible, low-barrier submission via human interfaces and machine APIs; persistent identifier minting, binding, and resolution; a semantically-enabled metadata catalog; and distributed storage sub-domains to facilitate wide-scale replication. Merritt is being used by UC3 to manage the diverse digital collections of the ten campus University of California system and a number of external content partners. It provides contributors and curators with direct control over their content and access to it; facilitates content sharing and reuse; and helps meet the requirements for data sustainability increasingly being required by grant funding agencies. Merritt will soon be made available under an

open source license. This was the eighth webinar in the OCLC Research Technical Advances for Innovation in Cultural Heritage Institutions (TAI CHI) Webinar Series developed to highlight specific innovative applications, often locally developed, that libraries, museums, and archives may find effective in their own environments, as well as to teach technical staff new technologies and skills. Recordings of all of these webinars are available on the OCLC Research Web site (<http://www.oclc.org/research/events/taichi.htm>) and in iTunes.