WMS Related Services Update

September 26, 2013
Midwest WMS Users Group Community Meeting

Jeff Hastings
OCLC Library Services Consultant
Agenda

• WorldShare ILL
• License Manager/ERM
• Analytics
  • Collection Evaluation
  • Report Authoring
• CONTENTdm
• Discovery work going on
WorldShare ILL is available now, with 30% of the community already actively using it.
✓ **April 14, 2014** – end of new request creation in WorldCat Resource Sharing

✓ **May 19, 2014** – End of access to WorldCat Resource Sharing
WorldShare ILL Roadmap?

http://oc.lc/illfuture
March 2013 – May 2014: Libraries transition to WorldShare Interlibrary Loan

April 14, 2014: End of new requests in WorldCat Resource Sharing

May 19, 2014: End of access to WorldCat Resource Sharing

Release schedule:

- May 12
- June 16
- Aug 18
- Sept 22
- Nov 3
Upcoming informational webinars

- **September 26**: WorldShare Interlibrary Loan: Update and Chat with the WorldShare ILL team
- **October 9**: ILLiad Best Practices: Variable lender aging
- **October 10**: WorldShare ILL Best Practices: Variable lender aging
- **November 14**: Completing your WorldShare ILL transition

View list of all upcoming events and register:

Recent workflow enhancements

• Link to lender OPAC
• Transfer of bibliographic and holdings data into review requests
• Edit produced requests
• Record purchases within borrowing workflow
• Hot-linked request ID in confirmation notification
Recent enhancements

• Custom holdings:
  In OCLC Service Configuration, custom holding groups searchable by an individual library symbol

• Constant data:
  New rules determine when constant data is applied to records

• Support for Internet Explorer version 10
Recent printing enhancements

- Addition of pick-up location to borrower bookstraps
- Two-per-page request printing with additional data
- Bill-to address added to full request printing
- “Print now” from request screen
- Revised 1-per-page and 2-per-page request print layout

Details in August & September 2013 WorldShare ILL Release Notes

http://oc.lc/releasenotes
Planned printing enhancements

To be released through November

• Book stickers for lenders
• Customized bookstrap printing

Learn more:  http://oc.lc/illprint
September enhancements

- Add and delete custom holding groups by symbol in OCLC Service Configuration
- Lenders can edit a produced request
Coming soon

- Links to freely available (open access) materials
- “Enter My Symbol Twice”
  - WorldShare ILL will look up the “days to respond” in Policies Directory
  - If 2 symbols in the same in a lender string, the system will NOT skip the 2\textsuperscript{nd} symbol (will work as now)
  - ILLiad’s EMST tables no longer used
    - Must be on version 8.4.1 or delete EMST libraries via Customization Manger
- Workflow enhancements for ILL referral centers
- ...and more...
# Policies Directory - Days to respond

## OCLC, Online Computer Library Center (OCLC)

**Profile**

<table>
<thead>
<tr>
<th>Tab</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections</td>
<td></td>
</tr>
<tr>
<td>Policies (22)</td>
<td></td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>Contacts</td>
<td></td>
</tr>
</tbody>
</table>

**Last updated Thursday, February 28, 2013 3:20:36 PM EST**

### Summary

<table>
<thead>
<tr>
<th><strong>Name (Symbol):</strong></th>
<th>OCLC, Online Computer Library Center (OCLC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Also Called:</strong></td>
<td>test institution</td>
</tr>
<tr>
<td><strong>Location:</strong></td>
<td>Columbus, OH 43217-3306 US</td>
</tr>
<tr>
<td><strong>Shipping Address:</strong></td>
<td>New test shipping address</td>
</tr>
</tbody>
</table>
|                    | Test OCLC Shipping Address  
|                    | 3566 Franzi Rd  
|                    | Dublin, OH 43217 US                      |
| **Institution Type:** | Other                                     |
| **OCLC Supplier:** | Yes                                       |

#### Days To Respond

- **Days To Respond:** 8 days

**Non-Circulating:**

- newsprint, unbound journals, computer files, audio-visual (except within state), console games, reference - Ebooks are not loaned. Testing 3/20/2012

**Periods:**

- **Loan Period:** 3 Week(s) - 45 Day(s)
- **Renew Period:** 0 Day(s) - 6 Week(s)

**Fees:**

- **Copies:** 2.00 GBP  
  0.00 - 16.00 USD [More...]
- **Loans:** 0.00 - 50.00 USD  
  1600.00 - 1750.00 TZS [More...]
Useful URLs

http://oc.lc/start
http://oc.lc/ill
http://oc.lc/releasenotes
http://oc.lc/known
http://oc.lc/instructor
http://oc.lc/easyschedule
http://oc.lc/illtraining

Subscribe to OCLC-SHARING-L listserv
License Manager

• The OCLC WorldShare™ License Manager service consolidates link resolution, subscriptions, access, licenses, and vendor and rights management to enable Webscale management, discovery and delivery of licensed and electronic resources.

• Two Main Areas of Focus for FY14:
  • Standards-compliant import and export (ONIX-PL, ERMI)
  • Usage Statistics with Cost per Use
## ERMI-Compliant Terms of Use

<table>
<thead>
<tr>
<th>Documentation</th>
<th>Responsibilities</th>
<th>User Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Citation Requirement</td>
<td>• Confidentiality of Agreement</td>
<td>• Accessibility / Disability Compliant Provider</td>
</tr>
<tr>
<td>• Term Note</td>
<td>• Cure Period for Breach</td>
<td>• Authorized User</td>
</tr>
<tr>
<td>Maintenance</td>
<td>• Guaranteed Complete Electronic Content</td>
<td>• Concurrent Users</td>
</tr>
<tr>
<td>• Archival Copy Provided</td>
<td>• Guaranteed Content Quality and/or Quantity</td>
<td>• Copying and Sharing</td>
</tr>
<tr>
<td>• License Delivery Instruction</td>
<td>• Guaranteed Electronic Currency</td>
<td>• Course Materials</td>
</tr>
<tr>
<td>• Maintenance Window</td>
<td>• Guaranteed Non-Infringing Content</td>
<td>• Distance Education</td>
</tr>
<tr>
<td>• Performance Warranty</td>
<td>• Licensee Indemnity</td>
<td>• Electronic Linking</td>
</tr>
<tr>
<td>Rights</td>
<td>• Licensor Indemnity</td>
<td>• Interlibrary Loan</td>
</tr>
<tr>
<td>• Applicable Copyright Law</td>
<td>• Governing Jurisdiction</td>
<td>• Post-Cancellation Access</td>
</tr>
<tr>
<td>• Clickwrap Override</td>
<td>• Licensee Termination Right</td>
<td>• Remote Access</td>
</tr>
<tr>
<td>• Database Protection Override Clause</td>
<td>• Licensor Reserves All Rights</td>
<td>• Third-Party User Confidentiality Ensured</td>
</tr>
<tr>
<td>• Fair Use Affirmed</td>
<td>• Licensor Termination Right</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Termination Right</td>
<td></td>
</tr>
</tbody>
</table>

OCLC  The world's libraries. Connected.
### Harvesting Usage Statistics

#### Harvest History for <Vendor Name>

<table>
<thead>
<tr>
<th>Date and Time</th>
<th>Status</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fri 19 Oct 2012 02:15:50 PM PDT</td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td>Fri 19 Sept 2012 02:15:50 PM PDT</td>
<td>Failed</td>
<td>View Errors,</td>
</tr>
<tr>
<td>Fri 19 Aug 2012 02:15:50 PM PDT</td>
<td>Completed</td>
<td>View Report</td>
</tr>
<tr>
<td>Fri 19 Jul 2012 02:15:50 PM PDT</td>
<td>Completed</td>
<td>View Report</td>
</tr>
</tbody>
</table>
Analytics

• Areas of Focus for FY14:
  • Data Warehouse of Statistics
  • Product Reports
    • Circ, Acquisitions, Metadata, License Manager, etc.
  • Data Dashboard
  • User Authored Reports using the Data Warehouse
Data Warehouse

Figure 1. Business intelligence framework. The BI framework includes two primary activities, getting data in and getting data out.
## Transit Report

<table>
<thead>
<tr>
<th>Institution</th>
<th>ORM</th>
<th>Routing Reason</th>
<th>Destination</th>
<th>Shelving</th>
<th>Title</th>
<th>Call #</th>
<th>OCLC #</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>CENT</td>
<td>CENT</td>
<td>RESHELVE</td>
<td>CENT-STAKES</td>
<td>Library journal</td>
<td>22 39 44 55</td>
<td>2351098</td>
<td>111</td>
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<td>EAST</td>
<td>EAST</td>
<td>RESHELVE</td>
<td>EAST-STAKES</td>
<td>60 minute guide to Java</td>
<td>626 369</td>
<td>3407667</td>
<td>62696000</td>
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<tr>
<td>MAIN</td>
<td>MAIN</td>
<td>RESHELVE</td>
<td>MAIN-STAKES</td>
<td>No easy way : the story of Ted Williams and the last 400 season</td>
<td>798.387092 BOWEN</td>
<td>326521691</td>
<td>3110000696764</td>
<td></td>
</tr>
<tr>
<td>MAIN</td>
<td>MAIN-Periodicals</td>
<td>RESHELVE</td>
<td>Nature.</td>
<td>Per Shelves</td>
<td>1590310</td>
<td></td>
<td></td>
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<tr>
<td>WEST</td>
<td>WEST</td>
<td>RESHELVE</td>
<td>WEST-Periodicals</td>
<td>testmfw</td>
<td></td>
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<tr>
<td>SOUT</td>
<td>SOUT</td>
<td>RESHELVE</td>
<td>SOUT-STAKES</td>
<td>Let it snow : three holiday romances</td>
<td>F3226G G32 2005</td>
<td>210536501</td>
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<tr>
<td>EAST</td>
<td>EAST</td>
<td>RESHELVE</td>
<td>EAST-STAKES</td>
<td>Don Quikote</td>
<td>P7500 Z2 2002b</td>
<td>61940384</td>
<td>00030</td>
<td></td>
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<tr>
<td>NORT</td>
<td>NORT</td>
<td>HOLD</td>
<td>SOUT-STAKES</td>
<td>Making the most of RFID in libraries</td>
<td>137513879</td>
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<td>73086</td>
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<tr>
<td>MAIN</td>
<td>MAIN-STACKS</td>
<td>RESHELVE</td>
<td>Amulet</td>
<td>Stacks</td>
<td>PN8728 S749 K53 2008</td>
<td>158817910</td>
<td>10191</td>
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<tr>
<td>NORT</td>
<td>STACKS</td>
<td>HOLD</td>
<td>NORT</td>
<td>A little Java, a few patterns</td>
<td>897.9 S112</td>
<td>37851436</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NORT</td>
<td>STACKS</td>
<td>RESHELVE</td>
<td>NORT</td>
<td>The elements of e-mail style : communicate effectively via electronic mail</td>
<td>862.66 H269</td>
<td>29853046</td>
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<tr>
<td>STACKS</td>
<td>EAST</td>
<td>RESHELVE</td>
<td>STACKS</td>
<td>Building Internet firewalls</td>
<td>886.40 V883</td>
<td>33212964</td>
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<tr>
<td>MAIN</td>
<td>STACKS</td>
<td>RESHELVE</td>
<td>EAST-STAKES</td>
<td>James Bond : the secret world of 007</td>
<td>823.9 S114</td>
<td>43750660</td>
<td>6540464</td>
<td></td>
</tr>
</tbody>
</table>

Report Date: 2013-04-25 10:25 Thu
Reporting Support: Authoring

Drag & Drop Report Creation

Advanced Options Available

Multiple Report Styles Available
Connect more users to more content from your digital special collections via CONTENTdm
A complete software solution

Stores, manages and provides access for all your digital collections

- Your digital collections reside on a CONTENTdm Server, either installed locally or on an OCLC-hosted server

Showcases a wide range of media types

- Photos and documents to audio and video files

For organizations of all types and sizes

- Academic libraries, public libraries, historical societies, museums, state libraries, special and others

Offers open architecture; standards-based for staff efficiencies and cost effectiveness

- Dublin Core, JPEG2000, OAI Harvesting, PHP API and more
CONTENTdm

Libraries’ digitized assets.

End Users. Via CONTENTdm Web site.
- Search & Find & Use
- Comments, tags…
- *(Can integrate with other html pages.)*

Staff. Build / manage CONTENTdm → cataloging, configuring.
- Catalog / metadata with digital items
- Database indexing
- Web pages – configuration, customize if needed

Wider distribution / use.
- OCLC WorldCat
- WorldShare Management Services
- WorldCat Local
- “Google search”
## Representing the collective collection

<table>
<thead>
<tr>
<th>Bibliographic information in WorldCat</th>
<th>Licensed digital content/articles in library collections</th>
<th>Digitized local library content</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>304+ million</strong> bibliographic records</td>
<td><strong>994 million</strong> records</td>
<td><strong>38 million</strong> items</td>
</tr>
<tr>
<td><strong>2.1+ billion</strong> holdings</td>
<td><strong>1,879</strong> databases</td>
<td><em>(Institutional repositories, Google, HathiTrust, OAIster)</em></td>
</tr>
<tr>
<td></td>
<td><strong>91,495</strong> journals</td>
<td></td>
</tr>
</tbody>
</table>

As of 27 August 2013
Licensed Electronic Content and eBooks

**Goal:** Faster access with single results set

**How:** Partner with publishers and content providers

**Status:** 1,879 databases
16 million eBooks
Gale and OCLC

• Gale Virtual Reference Library
• InContext
ProQuest and OCLC

ProQuest

OCLC WorldCat®

OCLC WorldShare™ Platform
EBSCO, Gale & ProQuest

OCLC is the only organization that provides discovery for EBSCO, ProQuest and Gale databases/collections

- EBSCO: 23 databases
- Gale: 22 databases in the Gale Scholarly Collections and up to 90 additional Gale collections
- ProQuest Central: 25 top-selling ProQuest full text databases and more than 90% of the content from an additional 40 more specialized ProQuest databases. Content is aggregated from more than 12,000 journals (9,000 in full text), more than 900 full-text newspapers, industry reports, company profiles and over 30,000 academic dissertations.
- New agreements with ProQuest & Gale will add >500 m items
Partnerships bring Web users to you
Go to a page with *Find in a Library*
The Evolution of Physics: From Early Concepts to Relativity and Quanta
by Albert Einstein, Leopold Infeld

4.13 rating details 324 ratings 25 reviews

For the alternate cover edition by Simon & Schuster, see here

Clear and concise explanations of the development of theories explaining physical phenomena.

Paperback, 330 pages
Published October 30th 1967 by Touchstone (first published 1938)

Get a copy: Barnes & Noble online stores Libraries

Libraries link goes to WorldCat
The Evolution of Physics

The Evolution of Physics: From Early Concept to Relativity and Quanta is a textbook about quantum physics by Albert Einstein and Leopold Infeld. It was originally published in 1938 by Cambridge University Press. It was a popular success,[1] and was featured in a cover story of Time magazine.

Contents
1 Background of collaboration
2 Book's point of view
3 Contents

Spectator v. 161 (Aug. 20 1938).
Springfield Republican (July 3 1938).
Survey Graphic v. 27 (Dec. 1938).
The Times Literary Supplement (Apr. 9 1938).
The Yale Review v. 27 (summer 1938).

References

The Evolution of Physics, Albert Einstein & Leopold Infeld, 1938, Edited by C.P. Snow, Cambridge University Press, ASIN: B000S52QZ4

Click to go to supplier list for an ISSN
Worldwide

- Find this book online at your local library through WorldCat
- Find this book online at your local library through WorldCat via Google
- Find this book online at your local library through WorldCat via Yahoo!

Key national libraries

- Find this book on the National Library of Australia catalogue
- Find this book on the British Copac union catalogue (Includes British Library and many Universities)
- Find this book in the Canadian union catalogue via Library and Archives Canada
- Find this book at the Karlsruher Virtueller Katalog, a European cross-library search engine
- Find this book in the Catalogue général de la Bibliothèque nationale de France, French national library
- Find this book on the United States Library of Congress catalog

Africa

South Africa

- Find this book on the National Library of South Africa catalogue
- Find this book on the University of South Africa catalogue
WorldCat Discovery

- New API (coming soon)
- Over 50 partner sites
- New User Experience for WorldCat on FirstSearch
- Over 475 million items from WorldCat and article level metadata
Advisory Group

- Columbus Metropolitan Library  Erica Cherup
- Davidson College  Susanna Boylston
- Johnson County Library System, Kansas  Kari Sime
- Metropolitan Museum of Art  Oleg Kreymer
- University of Glasgow  Wendy Walker
- University of Maryland College Park  Marlene Vikor
- University of Massachusetts Amherst
  - Leslie Horner Button
  - Christine Turner
- University of North Carolina Wilmington  Lisa Williams
- University of Washington
  - Emily Keller
  - Verletta Kern
- University of South Florida  Susan Ariewa
Consolidating interfaces

Single Discovery interface – bringing together the best of all OCLC interfaces

FirstSearch  WorldCat.org  WorldCat Local
A look at search results

Search results for "green energy":

1. *Hot, flat, and crowded: why we need a green revolution-- and how it can renew America*
   - by Thomas L. Friedman
   - Book 2008
   - Database: WorldCat
   - Held by The Ohio State University

2. *Product engineering eco-design, technologies and green energy*
   - by Doru. Talabă, Thomas RochPh. D., Technologies and Green Energy" Advanced Summer Institute on "Product Engineering. Eco-Design Transilvania University of Brasov (Romania))
   - eBook ©2004
   - Database: WorldCat
   - Held by The Ohio State University

3. *Careers in renewable energy: get a green energy job*
   - by Gregory McNamee
   - Book 2008
   - Database: WorldCat
   - Held by The Ohio State University

4. *Green energy basic concepts and fundamentals*
   - by Xianguo Li, SpringerLink (Online service)
   - eBook ©2011
   - Database: WorldCat
   - Held by The Ohio State University

5. *The false promise of green energy*
   - by Andrew P. Morris, William T. Bogart, Roger E. Meiners, Andrew. Dorchak
   - Database: WorldCat
   - Held by The Ohio State University
1. Hot, flat, and crowded: why we need a green revolution-- and how it can renew America
   - by Thomas L. Friedman
   - Book 2008
   - Database: WorldCat
   - Held by The Ohio State University

2. Product engineering eco-design, technologies and green energy
   - by Doru. Talabă, Thomas RochePh. D., Technologies and Green Energy
   - Advanced Summer Institute on "Product Engineering: Eco-Design" Transilvania University of Brasov (Romania)
   - eBook ©2004
   - Database: WorldCat
   - Held by The Ohio State University

**Description:**
- Publisher: Dordrecht ; Norwell, MA : Springer, c2004.
- Physical: 1 online resource (xiv, 539 p.) : ill.
- Language: English
- ISBN: 1402029322 9781402029325 9781402029332 1402029330
- OCLC Number: 262680086
- Subjects: Environmental engineering
User gets to full text
It's not easy being green - Energy management appraises the details
by Thomas A Westerkamp
Database: ArticleFirst

Hydropower Revival in Java's Tea

Publisher: Norcross, GA: Institute of Industrial Engineers, c2003
Physical Description: 5
ISSN: 1542-894X
OCLC Number: 213406464
Adaptability

One URL, many contexts
No separate sites or applications to maintain
Metadata, Discovery and Delivery Timelines

2012

**Discovery**

**JUNE–DECEMBER 2012**
Advisory group tests the new discovery solution interface

2013

**JANUARY 2013**
Ongoing user testing and enhancements

**FEBRUARY–DECEMBER 2013**
Beta testing of the new discovery solution

2014

**2014**
Beta testing and release of new WorldCat Local functionality

Group catalog enhancements

New discovery solution released (Exact date TBD)
Questions and Discussion
• Over 10,300 content collections from more than 5,400 providers
• Over 50 publishers and aggregators representing 13M eBooks including:
  
  | Books24x7            | Ingram MyiLibrary       |
  | Credo Reference      | Knovel Library          |
  | DawsonEra            | Ovid                    |
  | Ebook Library (EBL)  | Safari Books Online     |
  | EBSCO                | Springer                |
  | Ebrary               | Informa Taylor & Francis|
  | Emerald              | Wiley                   |
Current DDA workflow

1. Configure title profile with provider
2. Provider sends MARC records
3. Massage records
4. Add records to Discovery
5. User triggers purchase
6. Provider bills library
7. Locate records
8. Edit to show purchased
9. OCLC sets holdings in knowledge base
10. OCLC sends OCLC title list
11. User triggers purchase
12. Provider sends OCLC purchased titles
13. Provider sends OCLC purchased titles
14. User triggers purchase
15. Provider sends OCLC purchased titles
16. Provider bills library
17. Locate records
18. Library updates title profile with provider
19. Provider sends MARC records
20. OCLC moves from DDA to standard collection
21. Library updates title profile with provider
22. Provider sends MARC records
23. OCLC adds/deletes holdings in Discovery
24. Add new records
Two duplicate collections

One for patron driven acquisitions

One for paid acquisitions
Vendor sends 50 titles

- WMS automatically adds these titles to the DDA collection
Vendor sends 50 new titles the next cycle

- WMS automatically adds new titles to PDA collection
- WMS deletes titles that were triggered for purchase
- WMS adds those paid titles to paid collection