Estes Park, 28th April 2016

OCLC Update

Katie Birch

Executive Director, Global Product Management

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STATISTICS

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Stats.oclc.org

- 29 reports today (20 individual library + 9 group)
  - IFM Program borrower
  - Borrower activity overview
  - Borrower resource sharing stats report

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Level 1 Reports: Basic reports

- Basic reports available for all WorldShare ILL users
- Similar to what's available today
- Selected reports migrated from www.stats.oclc.org

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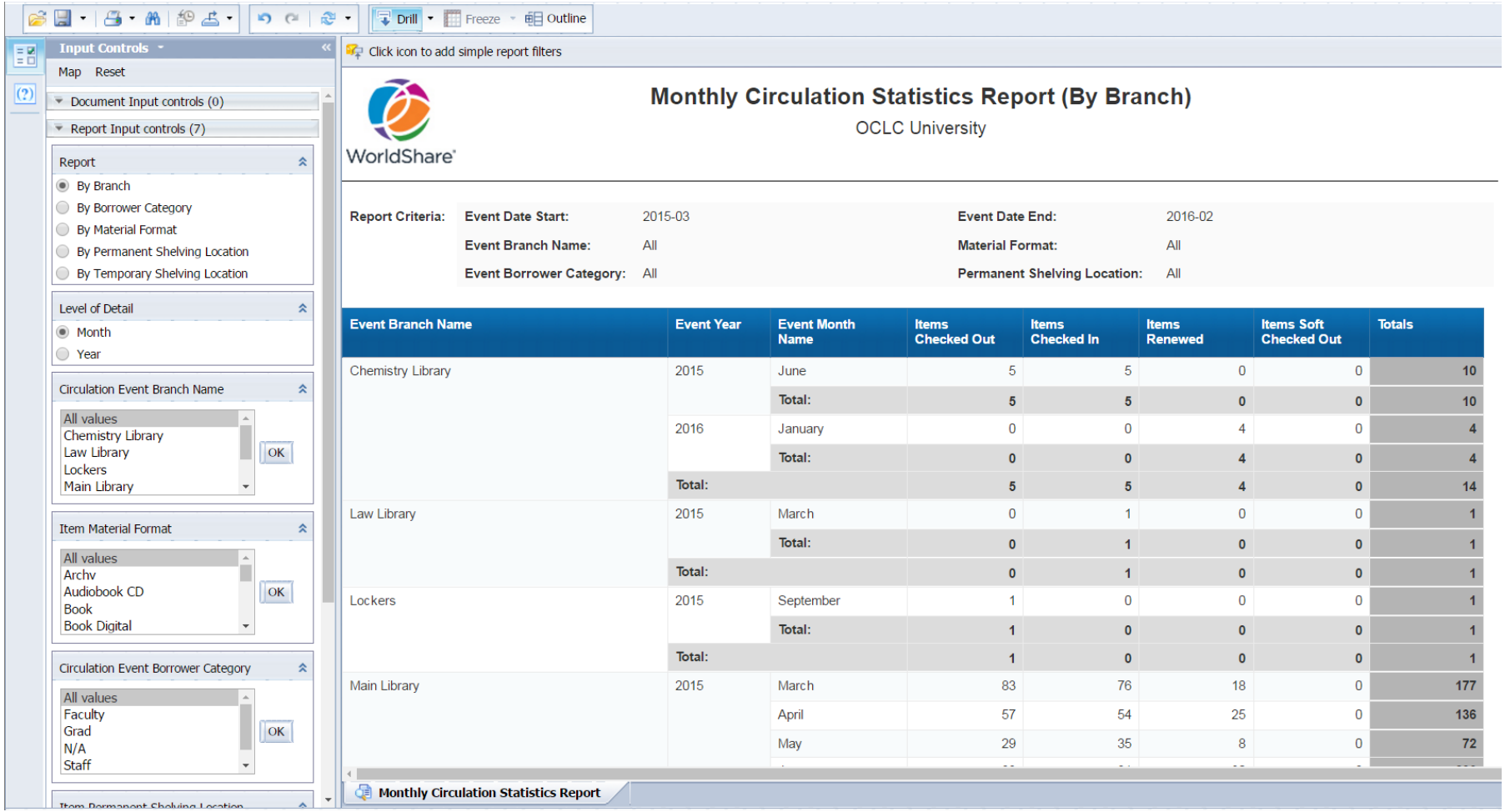

Event Branch Name	Event Year	Event Month Name	Items Checked Out	Items Checked In	Items Renewed	Items Soft Checked Out	Totals
Chemistry Library	2015	June	5	5	0	0	10
		Total:	**5**	**5**	**0**	**0**	10
	2016	January	0	0	4	0	4
		Total:	**0**	**0**	**4**	**0**	4
	Total:		**5**	**5**	**4**	**0**	14
Law Library	2015	March	0	1	0	0	1
		Total:	**0**	**1**	**0**	**0**	1
	Total:		**0**	**1**	**0**	**0**	1
Lockers	2015	September	1	0	0	0	1
		Total:	**1**	**0**	**0**	**0**	1
	Total:		**1**	**0**	**0**	**0**	1
Main Library	2015	March	83	76	18	0	177
		April	57	54	25	0	136
		May	29	35	8	0	72

Level 2 Reports: Report Designer

- Fully customizable reports
- No need to know/write SQL queries
- Will include graphics, charts, etc.
  - Simpler to see trends
    - Example: What's our trend on in-state copies? Loans?

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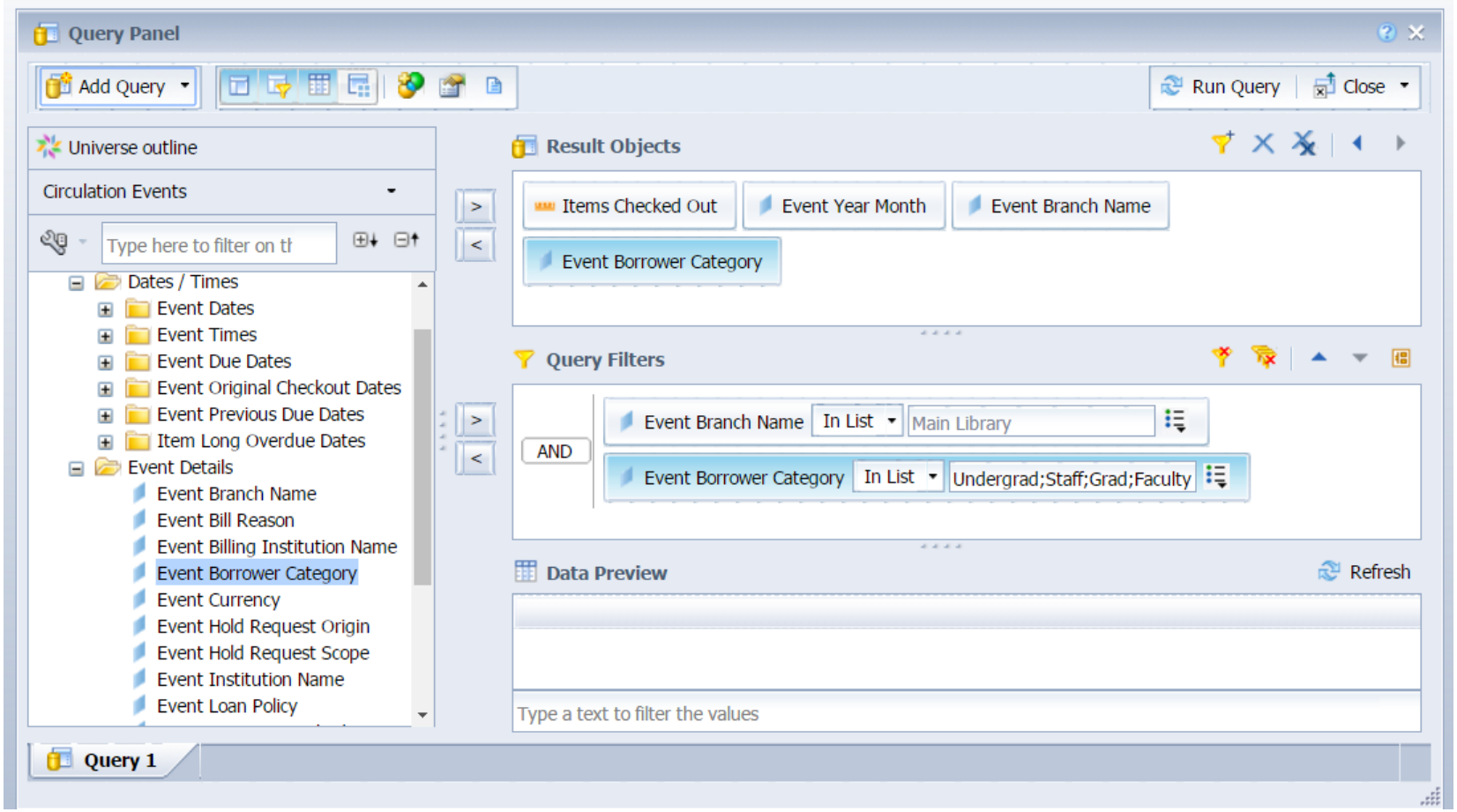

Query Panel
Add Query
Run Query
Close
Universe outline
Circulation Events
Type here to filter on th
Dates / Times
Event Dates
Event Times
Event Due Dates
Event Original Checkout Dates
Event Previous Due Dates
Item Long Overdue Dates
Event Details
Event Branch Name
Event Bill Reason
Event Billing Institution Name
Event Borrower Category
Event Currency
Event Hold Request Origin
Event Hold Request Scope
Event Institution Name
Event Loan Policy
Result Objects
Items Checked Out
Event Year Month
Event Branch Name
Event Borrower Category
Query Filters
AND
Event Branch Name
In List
Main Library
Event Borrower Category
In List
Undergrad;Staff;Grad;Faculty
Data Preview
Refresh
Type a text to filter the values
Query 1

File | Properties

Report Elements | Formatting | Data Access | Analysis | Page Setup

Tables | Cell | Section | Chart | Other | Tools | Position | Linking

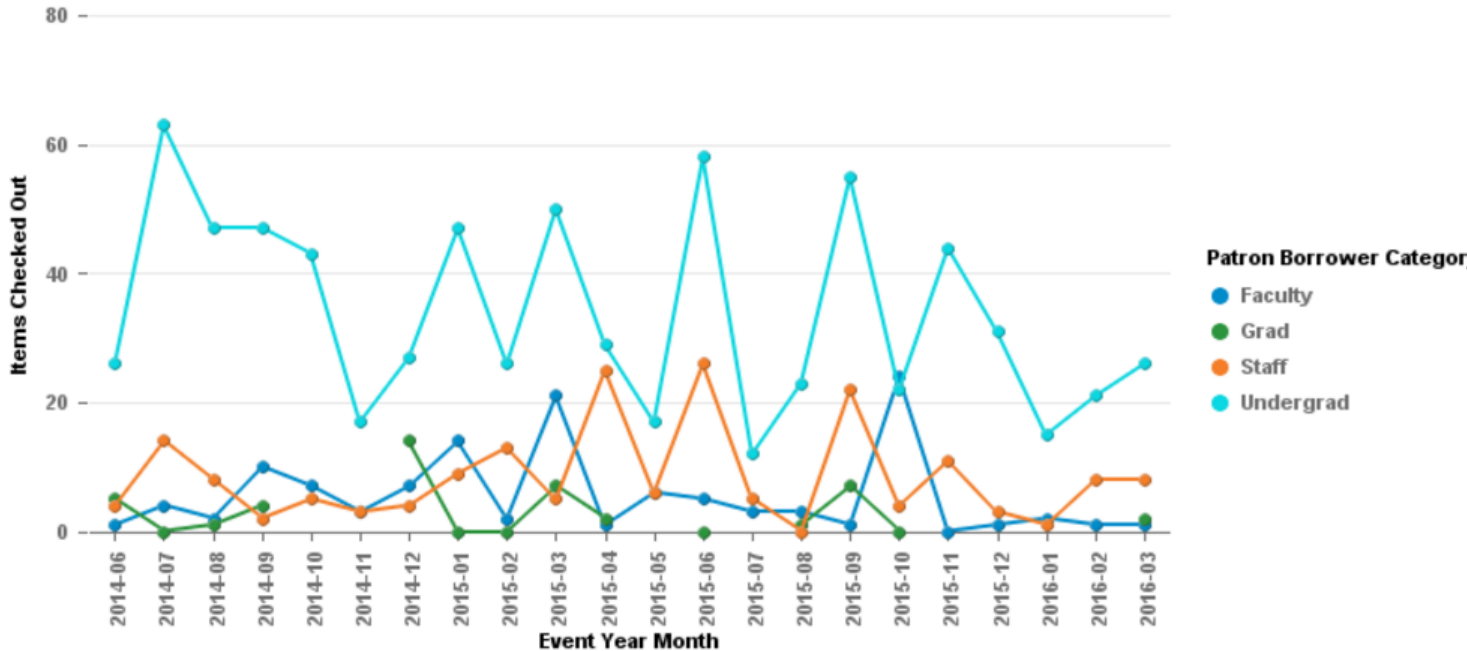
Turn Into | Set as section

Available Objects

Type here to filter tree

- New Document
  - Event Branch Name
  - Event Year Month
  - Patron Borrower Category
  - Items Checked Out
  - Variables

Main Library Circulation by Borrower Type



Want to be involved?

- Interested in working with OCLC on statistics, data and assessment for ILL?
- Contact Tony Melvyn melvynt@oclc.org

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DAYS TO RESPOND

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Copies

	TOTAL	USA
1	12	1
2	132	125
4	5000	5000
8	702	477
12	49	39
16	24	17
20	26	22

Loans

	TOTAL	USA
1	6	6
2	96	94
4	5000	5000
8	714	482
12	52	40
16	23	16
20	27	24

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BOOK CLUBS

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OCLC

Book clubs

NDCLV Reg ID: 114960

Borrowing Requests: Linked Requests (16)

Renewal requested for request 165028750 with a desired due date of 05/19/2016

Sailing alone around the r… | Reconstruction : America'… | Labor relations in the Net… | National geographic. | Too many ponies | The tale of Despereaux : b…

Harry Potter and the priso… | To kill a mockingbird | The collected poems | Wild cats : past & present | Joyful noise : poems for t… | Cosmos | The hello, goodbye window

Ordinary grace : a novel | Kitten's first full moon | Orphan train : a novel

Results 1 - 5 of 5 Rows 10

ID	Status	Media Type	Title	Patron	Lender	Date Requested	Referral Date
165028750	Received/In Use		Too many ponies		NDT7P	03/09/2016	04/05/2016
165028749	Received?		Too many ponies		NDT7P	03/09/2016	03/29/2016
165028748	Received?		Too many ponies		NDT7P	03/09/2016	03/29/2016
165028741	Received?		Too many ponies		NDT7P	03/09/2016	03/23/2016
165028731	Received/In Use		Too many ponies		NDT7P	03/09/2016	03/13/2016

Results 1 - 5 of 5 Rows 10

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IFM

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Rules of Engagement

- Lender can refund any request that has been shipped and charged for with IFM
- Only the full charge amount can be refunded
- Once a charge or refund has occurred, no further charges or refunds can be actioned on a given request

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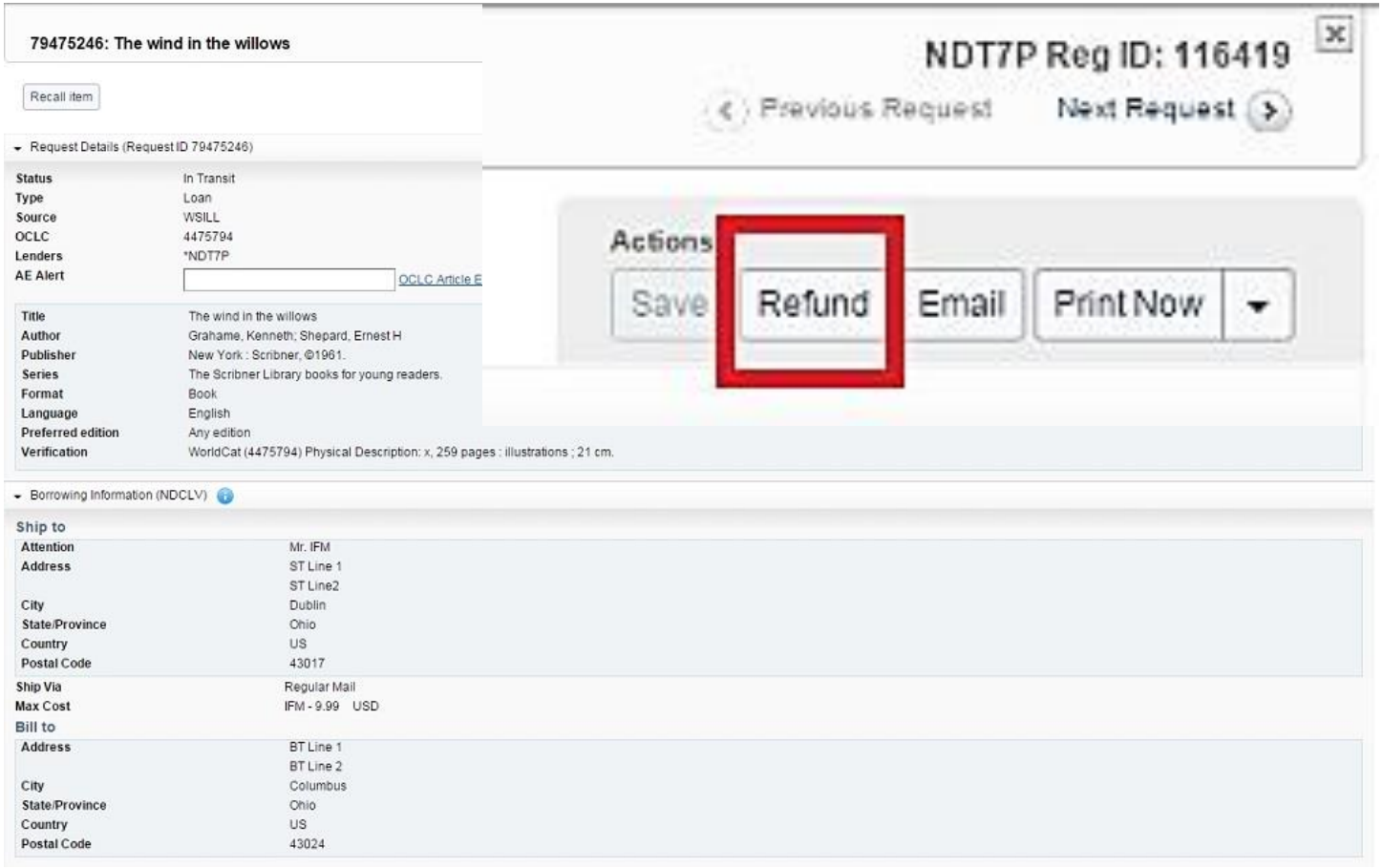

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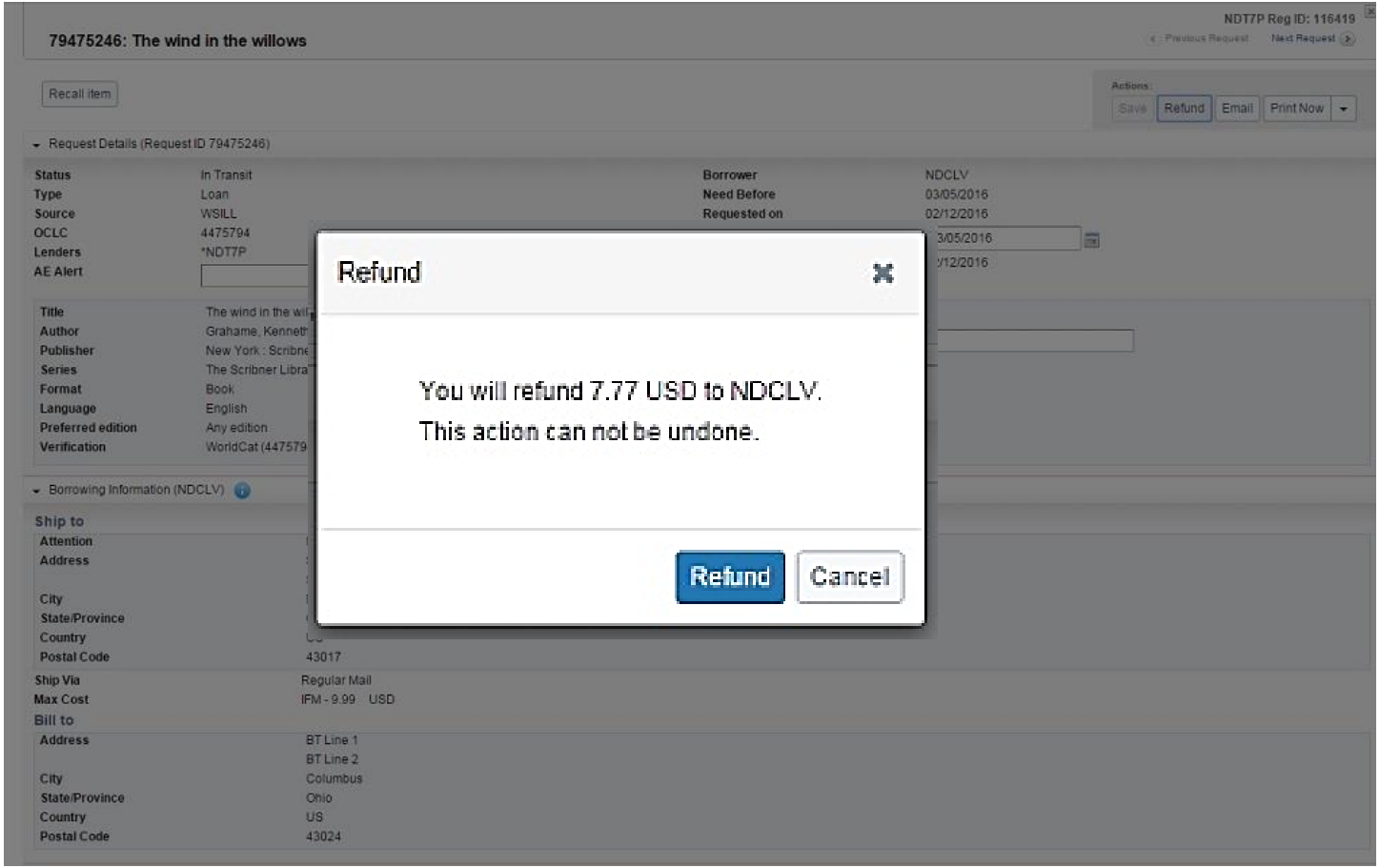

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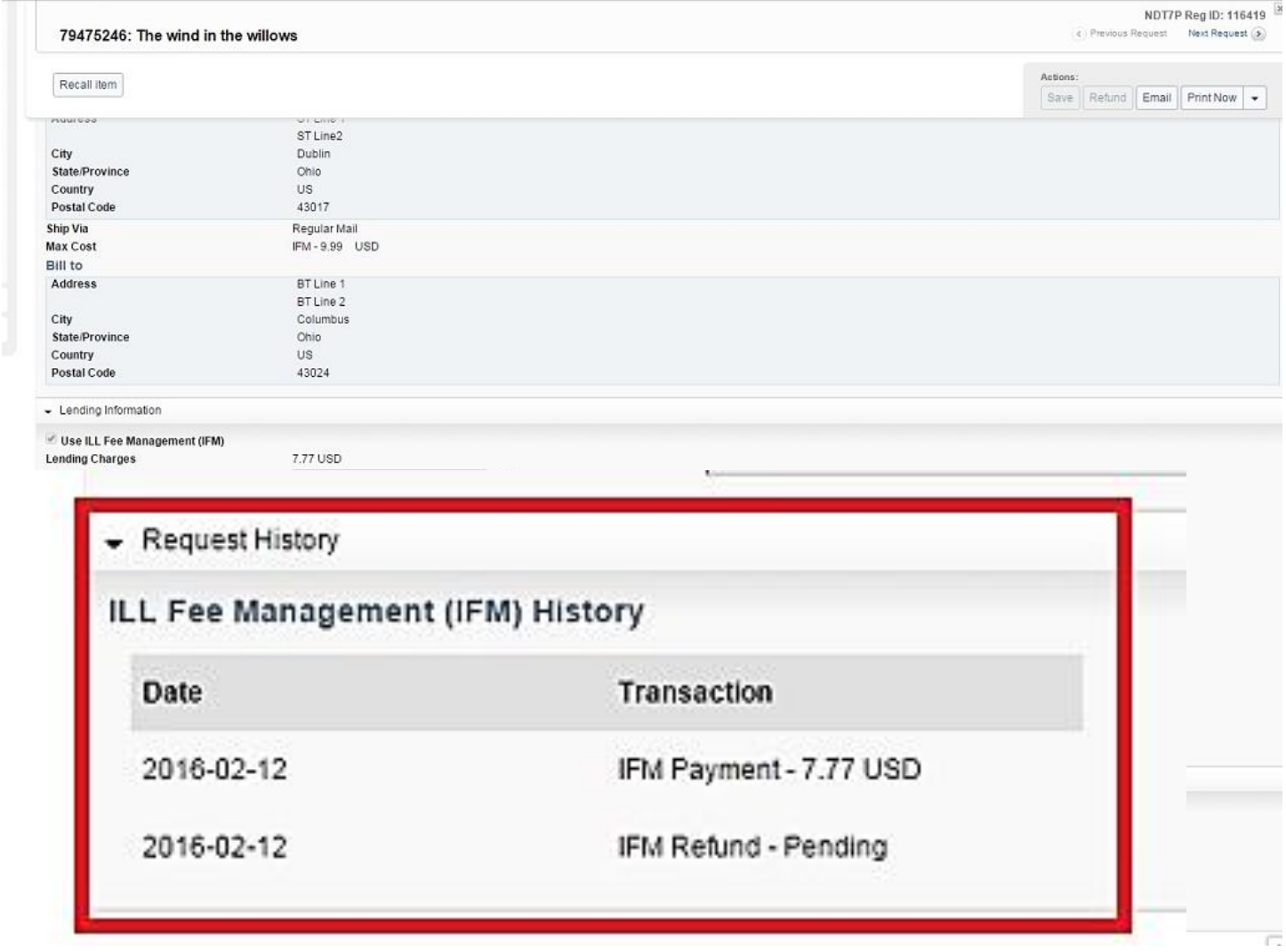
Lender history



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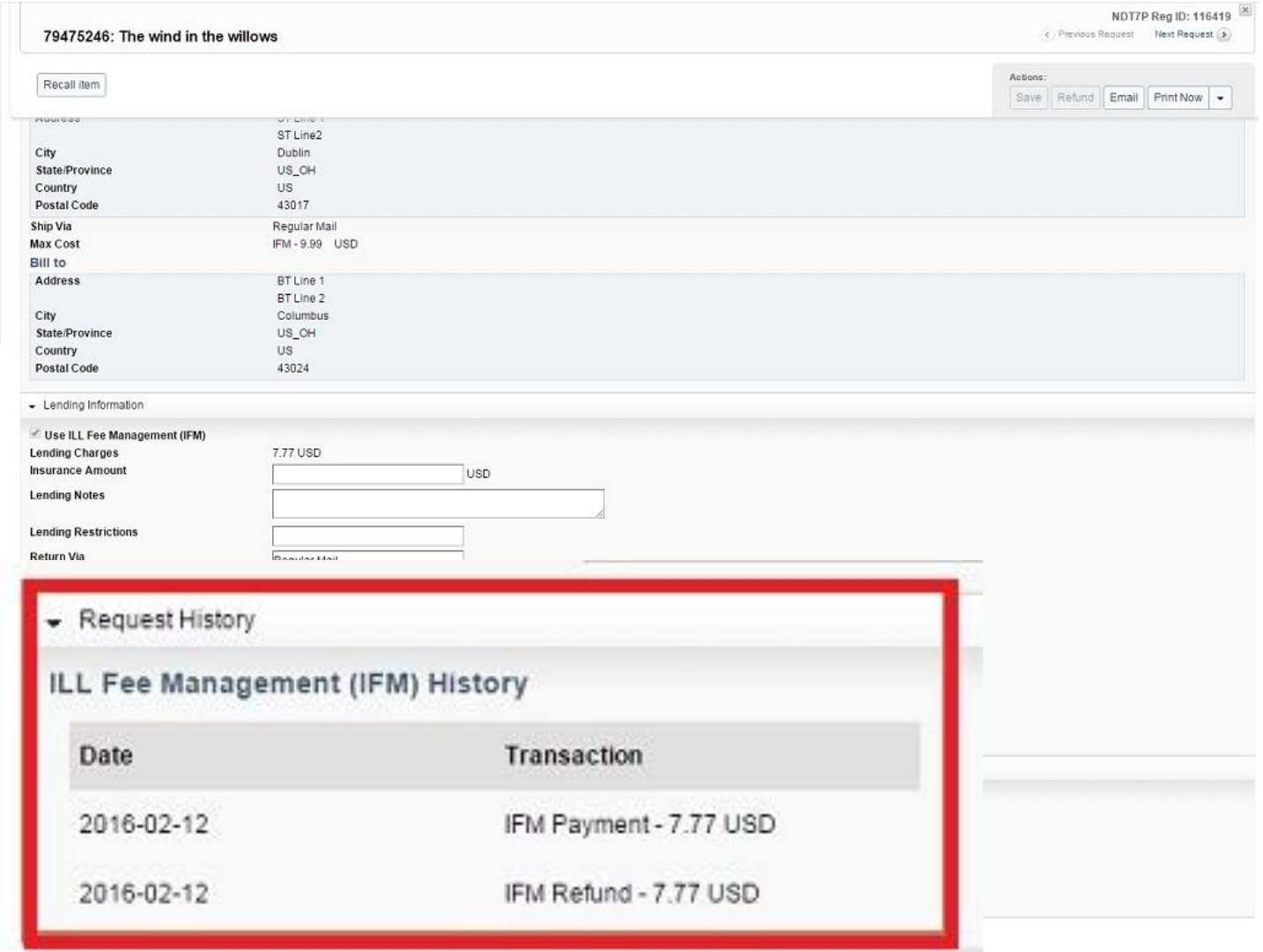
Lender history



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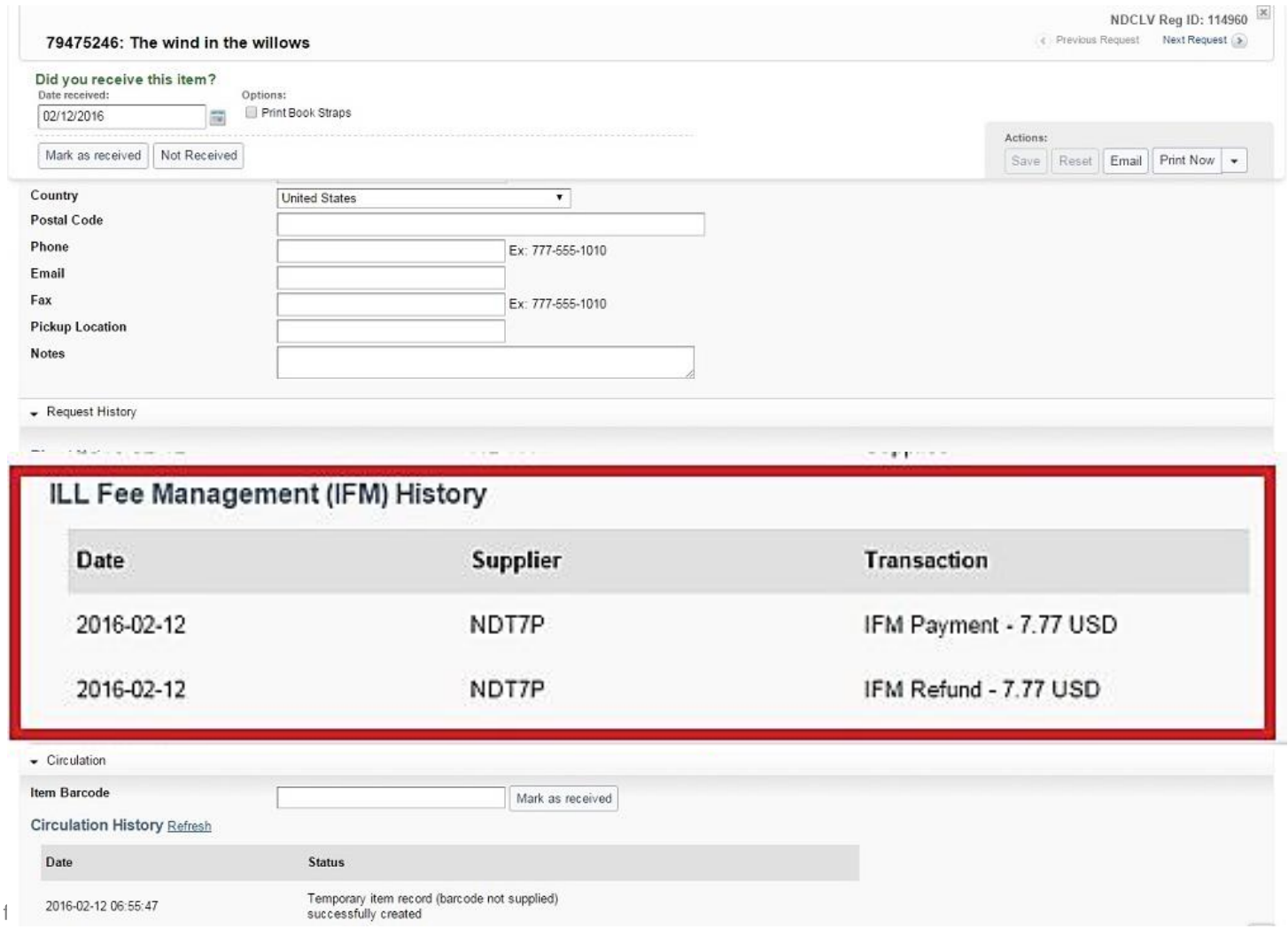
Borrower history



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SHARED PRINT

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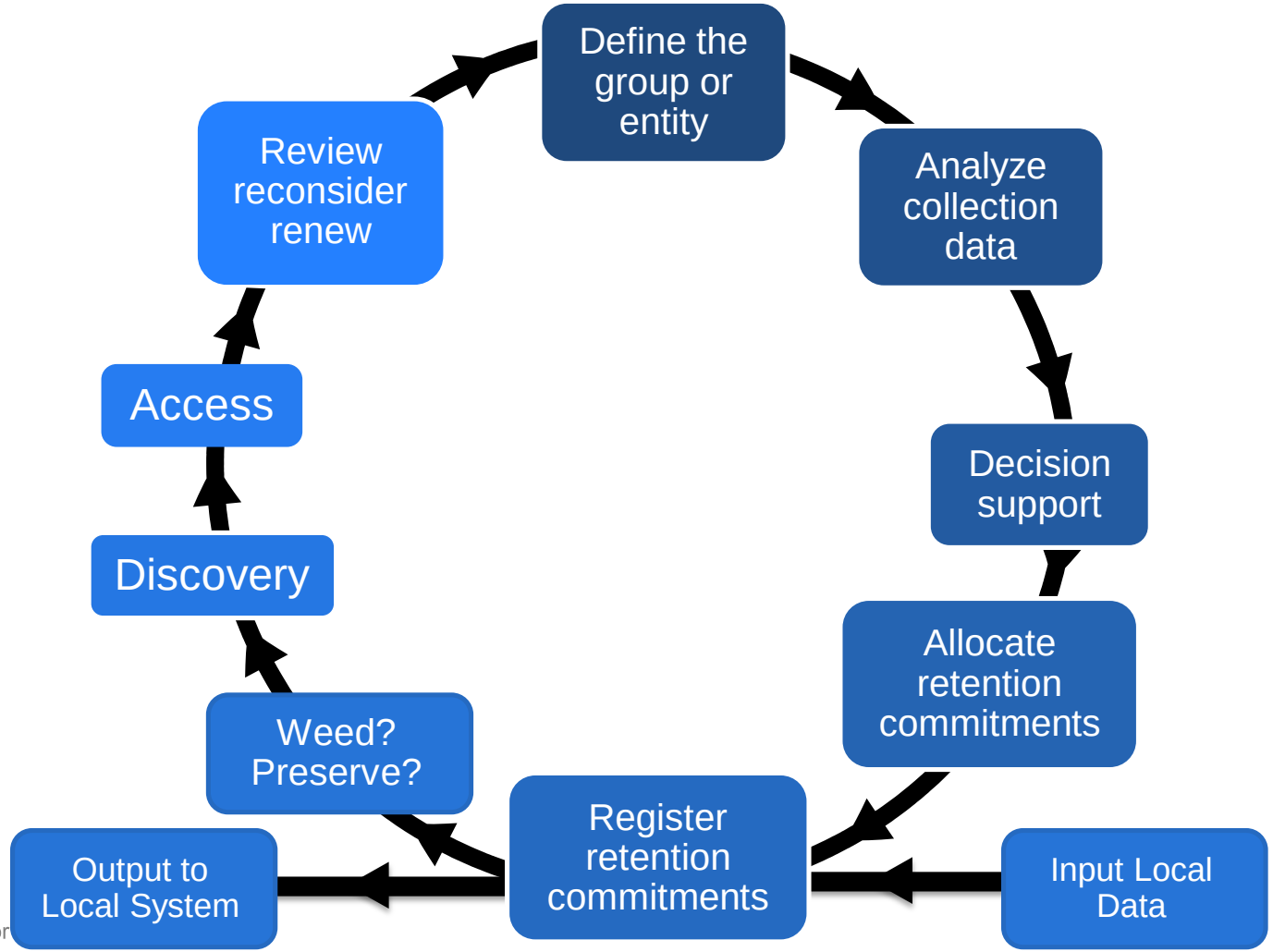

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Automated registration of retention commitments

- Create shared print LHRs for specified OCLC (bib) record numbers
- *If not already set,* set holdings on the WorldCat bib record
- Set the **“shared print” holdings type** flag in the WorldCat bib record
- Create **consistently formatted data** in LHRs (e.g. dates, “linking” record numbers)
- Expand options for outputting the library’s local holdings data (for load into local ILS, other shared print registries, etc.)
- Eliminate the need for a second OCLC symbol for “**shared print in place**” collections

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Shared Print and ILL workflows?

- Interested in working with OCLC to develop and validate ILL requirements?
- Contact Nick Valentini valentin@oclc.org

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MEMBER ENGAGEMENT

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COMMUNITY CENTER

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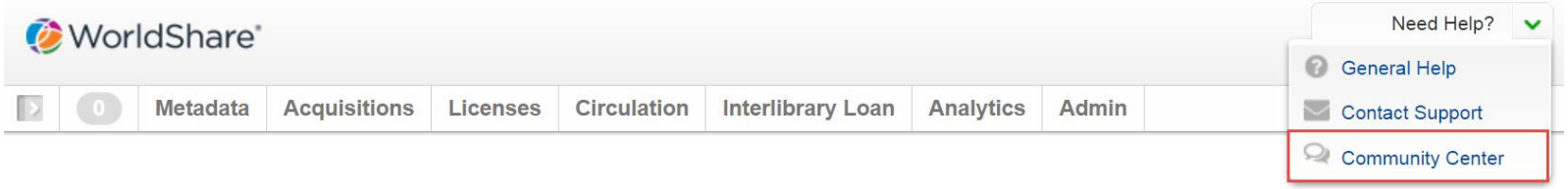
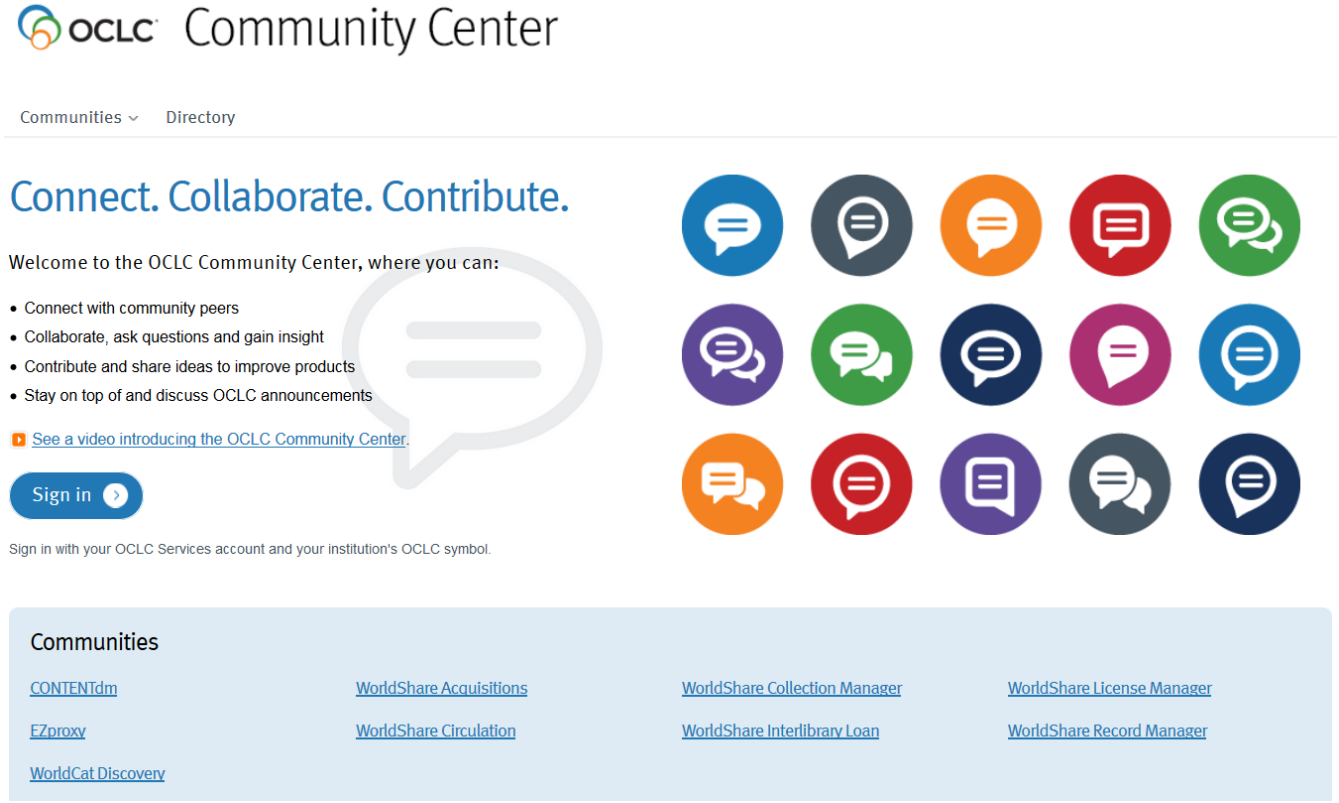
OCLC

OCLC Community Center



www.oclc.org/community



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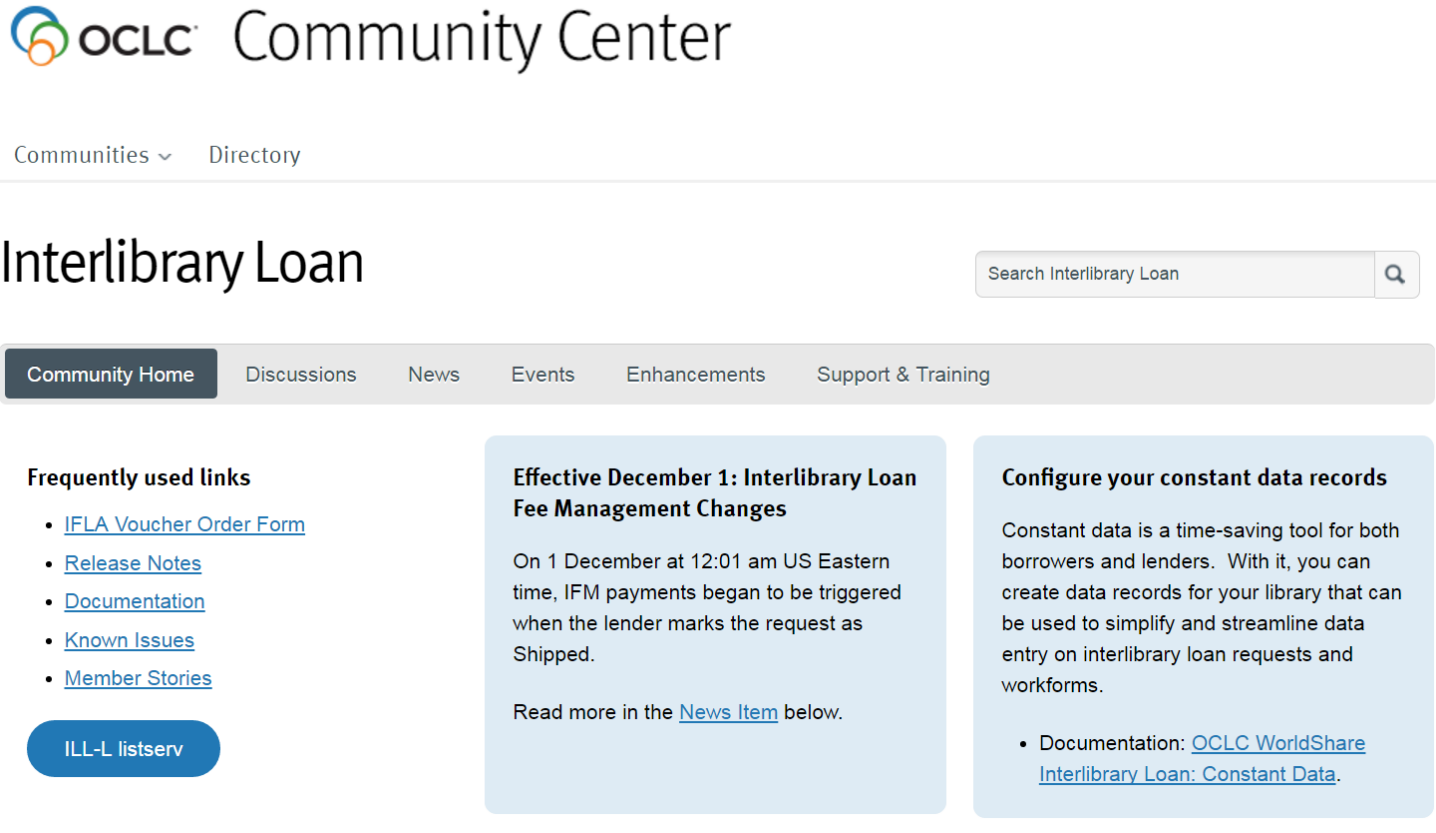

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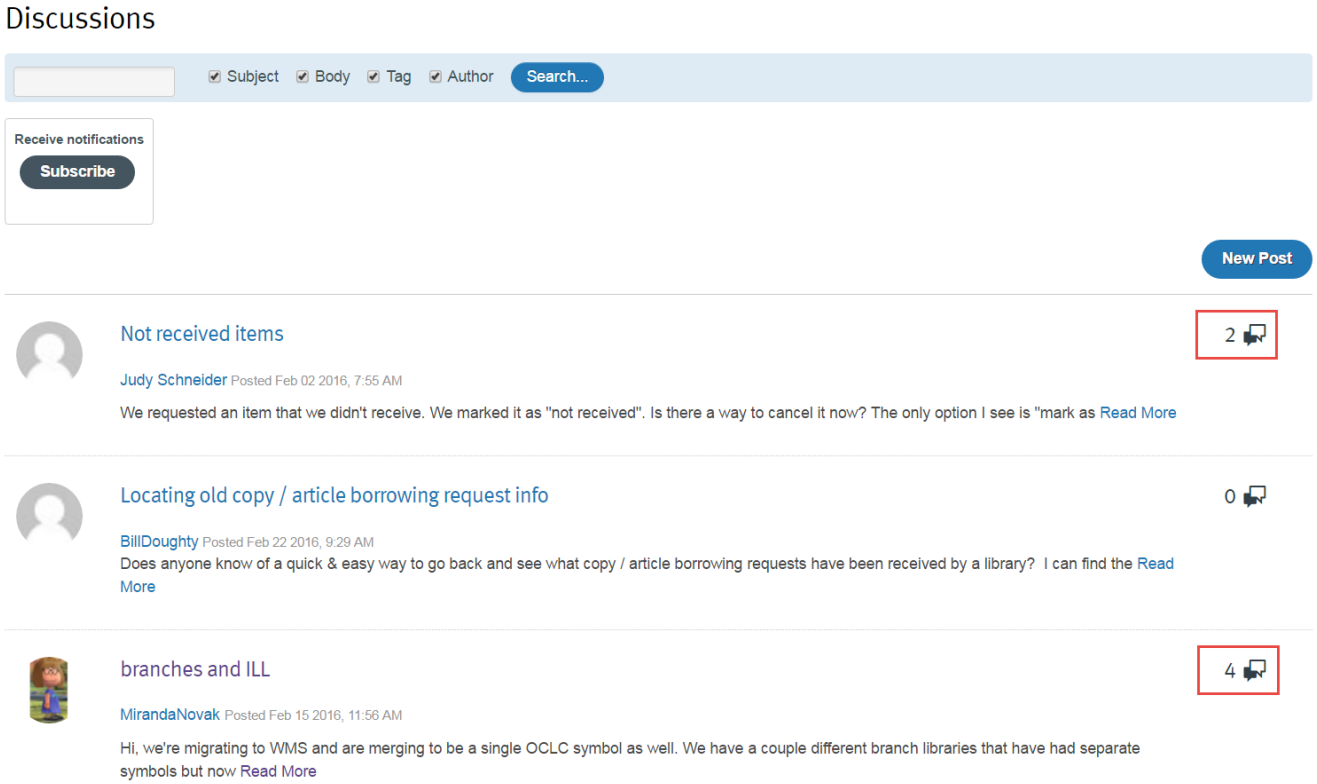
Start and contribute to discussions



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Share enhancement ideas

Product team update: (12 January 2016)

We are constantly working on improving integration between Circulation and Interlibrary Loan. This suggestion has many merits and has been added to the list for future consideration. Please continue to add your comments and ratings below.

Enhancement Request:

The ability to manually pre-set unique due dates in circulation for individual ILL Items *

Requested by: *Fiona Paisley*

Circulation | Interlibrary Loan

Requested: 01 October 2015 **Last Modified:** 12 January 2016

Description of Enhancement

This enhancement request pertains to the WorldShare ILL and WorldShare circulation Integration.

Instead of manually setting the due date when an ILL item is checked out to a patron, ILL staff could set the due date of an ILL item when the item is a fulfilled hold for the patron, before the item is checked out by the patron.

Issues Enhancement Will Resolve

Student workers/Circulation desk workers do not have the permissions to change the due date for items they check out to patrons. With the integration of WorldShare circulation and ILL every ILL item will be checked out a patron's account. Because Circulation staff cannot change the due date when they check the item out the standard configuration due date is applied to the ILL temporary record.

This causes confusion for our patrons because the due date associated with the ILL item in their circulation account is not the correct due date for the item.

Current Workaround

We have taken two steps to work around this issue:

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MEMBER FORUMS

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45 U.S. States

6 Canadian Provinces

25 Cities in United States and Canada

1442 attendees from over **900** unique institutions

98+ OCLC Staff Attendance

Resource sharing session

- 30-45 minute interactive discussions
- 160+ Resource Sharing professionals
- 143 feedback items
- 69 unique “problems”

OCLC Member Forums

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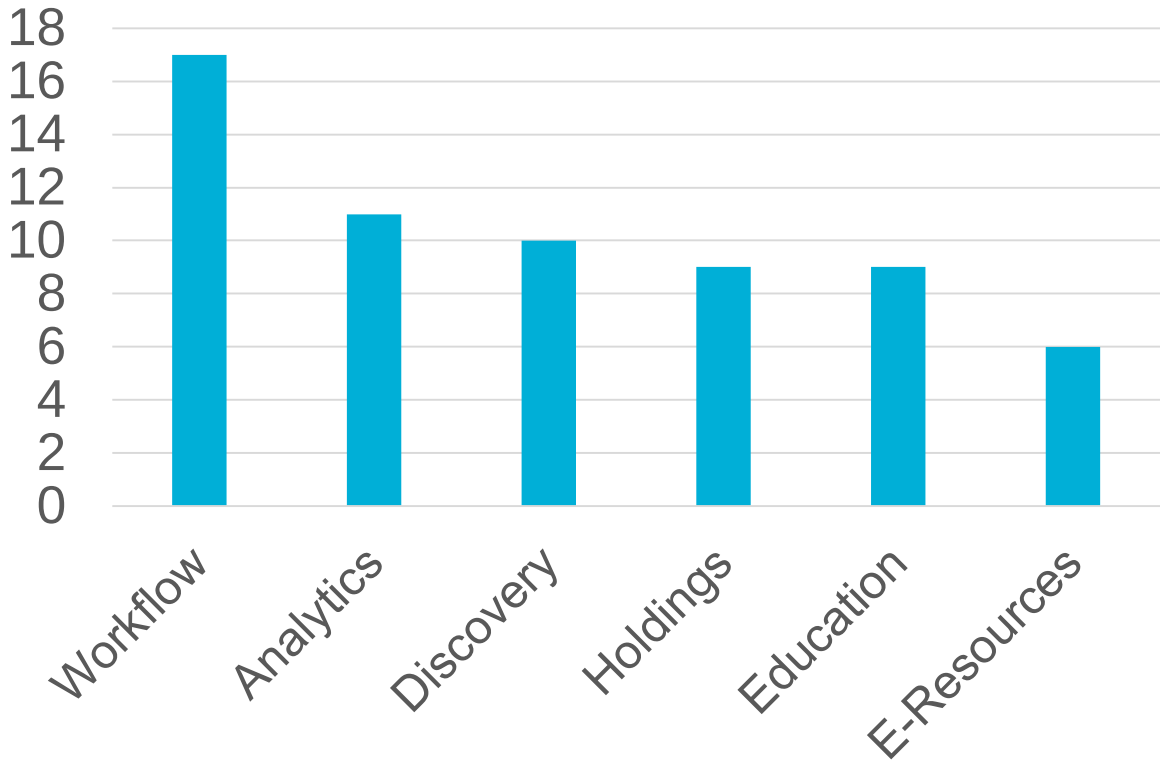
Key themes from the feedback



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Examples

- **Workflow**: address formatting, mobile devices, patron information, international requests, determining policies
- **Analytics**: comparing turnaround times, tracking requests for specific item, branch data, better sorting
- **Discovery**: deciphering requests, search capabilities
- **Holdings**: accuracy, determining format
- **Education**: stats, ILL trends, knowledge base, LHRs
- **E-Resources**: available to lend?, large files, technology limits, deflections

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How we're using the feedback

- Themes and problems are already guiding selection of product enhancements, as well as longer term decisions
- Awareness and education opportunities have been shared with Marketing and Training colleagues
- Experience from the 2015 program is being used in developing the agenda for 2016 OCLC Member Forums

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WORLDCAT DISCOVERY AND FIRSTSEARCH TODAY

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WorldCat® Discovery Services

Help users find and get resources

from your library

+

libraries worldwide

through a single search of WorldCat and familiar, authoritative e-content collections. It makes your collections visible on the Web.

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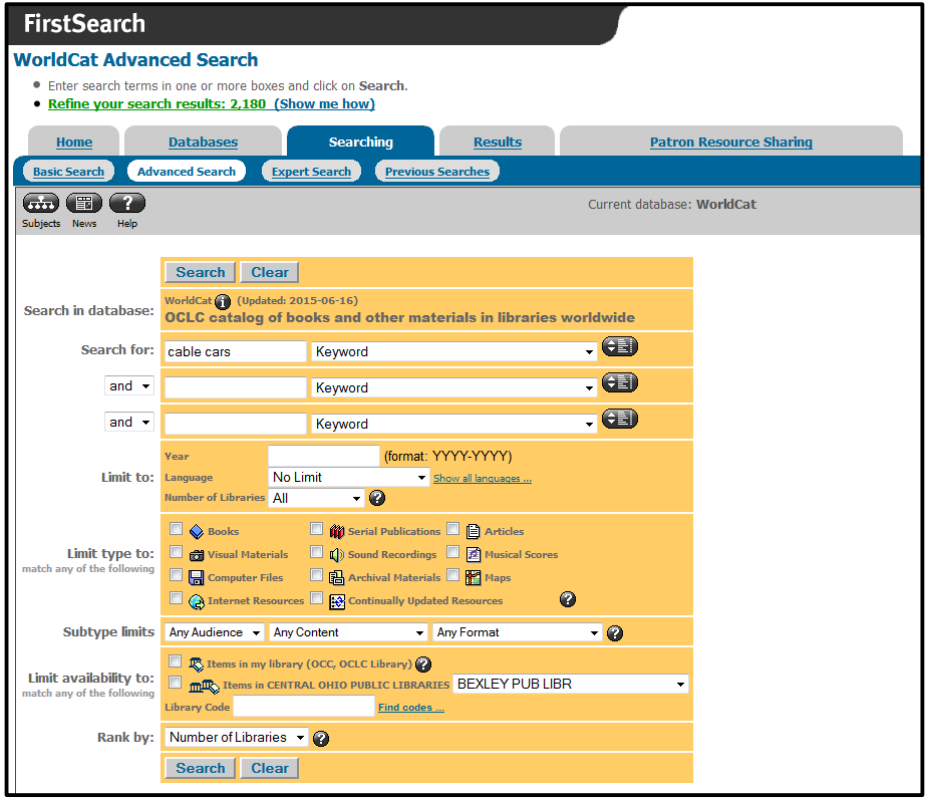
FirstSearch today



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FirstSearch Passion

*"they want **WorldCat** to still be 'the other place you find books **that aren't available in our library**'"*

*"Rare books people are **beside themselves** at the thought of having to use a discovery tool rather than FirstSearch."*

"WorldCat is our Bible."

"Rich, transparent, and authoritative"

*"What is great about FirstSearch is **all of that information** - lots of data - can be complicated and sometimes overwhelming but that is what gives FirstSearch its value."*

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Services meet different user needs

	FirstSearch	WorldCat Discovery
Designed For	• Primarily Experts • Some Non Experts	• Primarily Non Experts • Some Experts
Problems	• What do **other** libraries have? • Support for library workflows (reference, ILL, collection dev)	• What does **my** library have? • Support for research assignments
Tools to solve Problems	• WorldCat • Detailed meta-data on results • **Pre**-search refinement	• WorldCat + central index (articles) • De-cluttered interface • **Post-**search refinement (facets)

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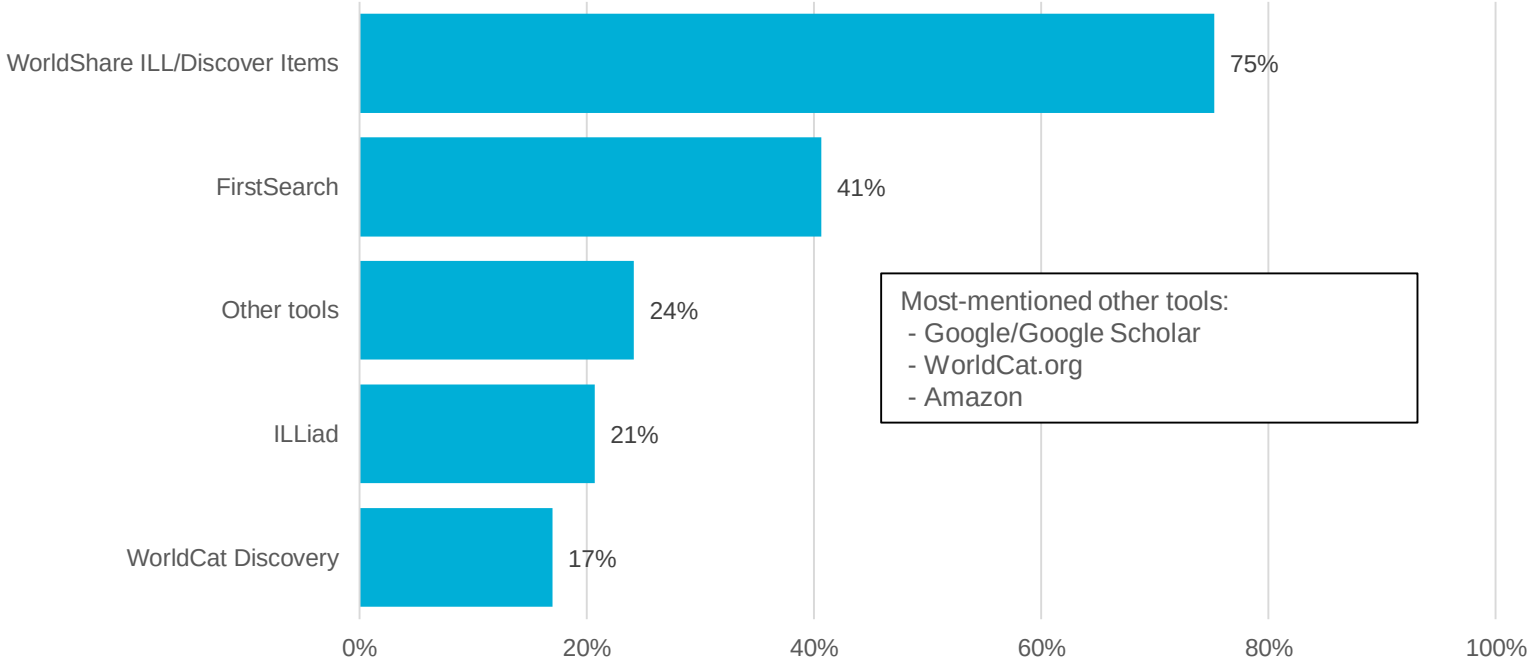
Tools used by ILL staffs



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Survey results

800+ responses

42% of respondents still use FirstSearch

overwhelmingly like to refine searches upfront.

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New transition path

Current Products		Future Products
FirstSearch	→	FirstSearch
WorldCat Local	→	WorldCat Discovery

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IFLA vouchers

- If you have them, we'd love to buy them!
- Contact Elizabeth Schlueter: schluete@oclc.org

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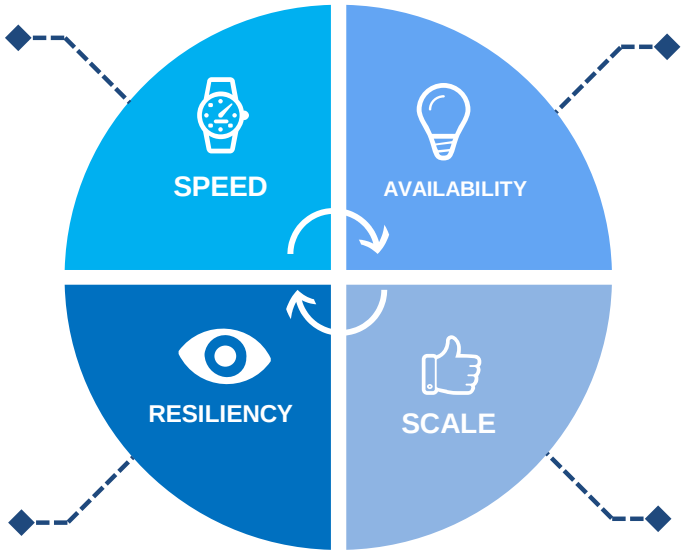
OCLC's TECHNOLOGIES: UNPRECENEDTED IN OUR INDUSTRY

SPEED

- Throughput in our new Dublin Data Center
- Software Development
- Solid Releases
- Faster features to market

STRENGTH

- ISO 27001 Certified
- High Availability
- Independent Certified Public Accountant Service Organization Audit (SSAE-16 SOC 1)



Worth Noting: OCLC is aligned with U.S. Security compliance for Federal Information Security Management Act (NIST SP 800-53)

AVAILABILITY

- Industry best technologies- fit for OCLC and our libraries
- Network, Compute, Storage
- MTRS Beyond Competitors

SCALE

- Sized Specifically fit for OCLC
- Network, Compute, Storage
- MTRS Beyond Competitors
- "Plug and Play" Growth Ready- Challenge US!
- Integrated Security

Together we make breakthroughs possible.

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Advisory council and early adopters
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Shared Print
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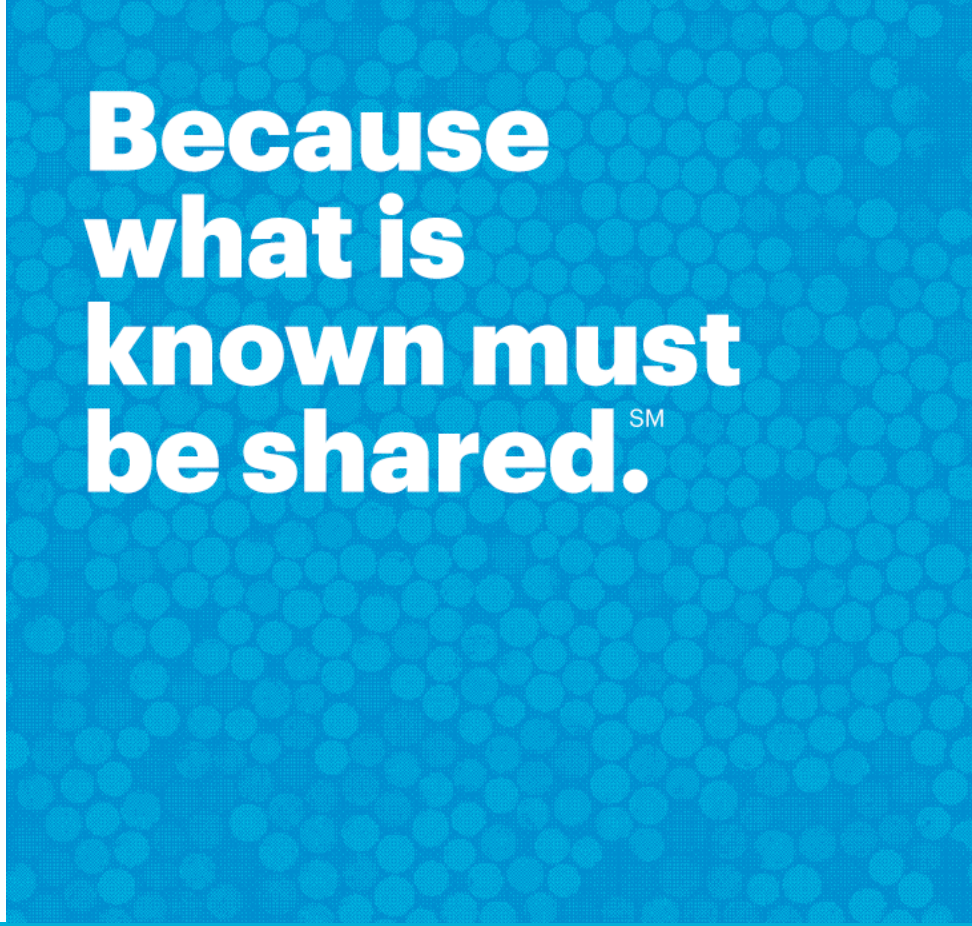

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