

Estes Park, 28<sup>th</sup> 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

# 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](http://www.stats.oclc.org)



# 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?

## Query Panel

Add Query

Run Query

Close

### Universe outline

Circulation Events



Type here to filter on the



- 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

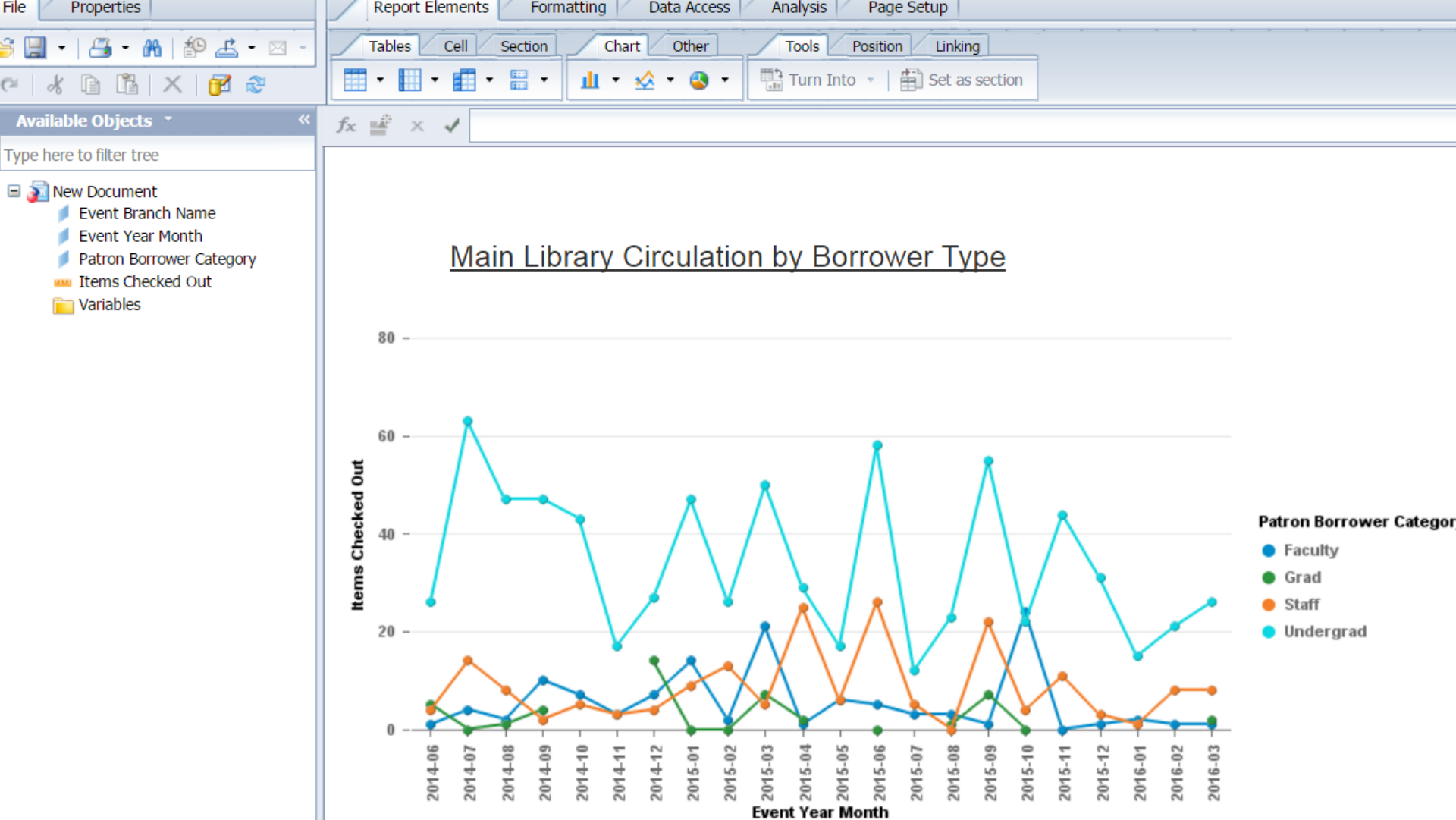
Undergrad;Staff;Grad;Faculty

### Data Preview

Refresh

Type a text to filter the values

Query 1





# Want to be involved?

- Interested in working with OCLC on statistics, data and assessment for ILL?
- Contact Tony Melvyn [melvynt@oclc.org](mailto: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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# 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
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
<a href="#">165028750</a>	Received/In Use		<a href="#">Too many ponies</a>		NDT7P	03/09/2016	04/05/2016
<a href="#">165028749</a>	Received?		<a href="#">Too many ponies</a>		NDT7P	03/09/2016	03/29/2016
<a href="#">165028748</a>	Received?		<a href="#">Too many ponies</a>		NDT7P	03/09/2016	03/29/2016
<a href="#">165028741</a>	Received?		<a href="#">Too many ponies</a>		NDT7P	03/09/2016	03/23/2016
<a href="#">165028731</a>	Received/In Use		<a href="#">Too many ponies</a>		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

79475246: The wind in the willows

Recall item

Request Details (Request ID 79475246)

Status In Transit  
Type Loan  
Source WSILL  
OCLC 4475794  
Lenders \*NDT7P  
AE Alert  [OCLC Article E](#)

Title The wind in the willows  
Author Grahame, Kenneth; Shepard, Ernest H  
Publisher New York : Scribner, ©1961.  
Series The Scribner Library books for young readers.  
Format Book  
Language English  
Preferred edition Any edition  
Verification WorldCat (4475794) Physical Description: x, 259 pages : illustrations ; 21 cm.

NDT7P Reg ID: 116419

Previous Request

Next Request

Actions

Save

Refund

Email

Print Now



Borrowing Information (NDCLV)

Ship to

Attention Mr. IFM  
Address ST Line 1  
ST Line2  
City Dublin  
State/Province Ohio  
Country US  
Postal Code 43017

Ship Via Regular Mail  
Max Cost IFM - 9.99 USD

Bill to

Address BT Line 1  
BT Line 2  
City Columbus  
State/Province Ohio  
Country US  
Postal Code 43024



79475246: The wind in the willows

NDT7P Reg ID: 116419

Previous RequestNext Request

Recall item

Actions: SaveRefundEmailPrint Now

Request Details (Request ID 79475246)

Status	In Transit	Borrower	NDCLV
Type	Loan	Need Before	03/05/2016
Source	WSILL	Requested on	02/12/2016
OCLC	4475794		3/05/2016
Lenders	*NDT7P		7/12/2016
AE Alert			

TitleThe wind in the willows

AuthorGrahame, Kenneth

PublisherNew York : Scribner

SeriesThe Scribner Library

FormatBook

LanguageEnglish

Preferred editionAny edition

VerificationWorldCat (4475794)

Borrowing information (NDCLV)

Ship to

Attention

Address

City

State/Province

Country

Postal Code

Ship Via

Max Cost

Bill to

Address

City

State/Province

Country

Postal Code

43017

Regular Mail

IFM - 9.99 USD

BT Line 1

BT Line 2

Columbus

Ohio

US

43024

Refund

You will refund 7.77 USD to NDCLV.  
This action can not be undone.

RefundCancel

79475246: The wind in the willows



IFM refund has been queued for processing

Recall item



Request Details (Request ID 79475246)

NDT7P Reg ID: 116419

Previous Request Next Request

Actions:

Save

Refund

Email

Print Now



NDCLV

03/05/2016

02/12/2016

03/05/2016

02/12/2016

Ship to

Attention

Address

City

State/Province

Country

Postal Code

Mr. IFM

ST Line 1

ST Line2

Dublin

Ohio

US

43017

Ship Via

Max Cost

Bill to

Address

City

State/Province

Country

Postal Code

Regular Mail

IFM - 9.99 USD

BT Line 1

BT Line 2

Columbus

Ohio

US

43024

# Lender history

79475246: The wind in the willows

NDT7P Reg ID: 116419

Previous RequestNext Request

Recall Item

Actions:  
SaveRefundEmailPrint Now

Address	ST Line1 ST Line2
City	Dublin
State/Province	Ohio
Country	US
Postal Code	43017
Ship Via	Regular Mail
Max Cost	IFM - 9.99 USD
Bill to	
Address	BT Line 1 BT Line 2
City	Columbus
State/Province	Ohio
Country	US
Postal Code	43024

Lending Information

☒ Use ILL Fee Management (IFM)

Lending Charges7.77 USD

Request History

ILL Fee Management (IFM) History

Date	Transaction
2016-02-12	IFM Payment - 7.77 USD
2016-02-12	IFM Refund - Pending

# Lender history

79475246: The wind in the willows

NDT7P Reg ID: 116419

Previous RequestNext Request

Recall item

Actions: SaveRefundEmailPrint Now

Address

ST Line 1  
ST Line 2  
Dublin  
US\_OH  
US  
43017

Ship Via

Regular Mail

Max Cost

IFM - 9.99 USD

Bill to

Address  
BT Line 1  
BT Line 2  
Columbus  
US\_OH  
US  
43024

Lending Information

Use ILL Fee Management (IFM)

Lending Charges7.77 USD

Insurance Amount

USD

Lending Notes

Lending Restrictions

Return ViaRegular Mail

Request History

ILL Fee Management (IFM) History

Date	Transaction
2016-02-12	IFM Payment - 7.77 USD
2016-02-12	IFM Refund - 7.77 USD

Borrower history

79475246: The wind in the willows

NDCLV Reg ID: 114960

Previous RequestNext Request

Did you receive this item?

Date received:02/12/2016

Options:☐ Print Book Straps

Mark as receivedNot Received

Actions:

SaveResetEmailPrint Now

CountryUnited States

Postal Code

PhoneEx: 777-555-1010

Email

FaxEx: 777-555-1010

Pickup Location

Notes

Request History

ILL Fee Management (IFM) History

Date	Supplier	Transaction
2016-02-12	NDT7P	IFM Payment - 7.77 USD
2016-02-12	NDT7P	IFM Refund - 7.77 USD

Circulation

Item Barcode

Mark as received

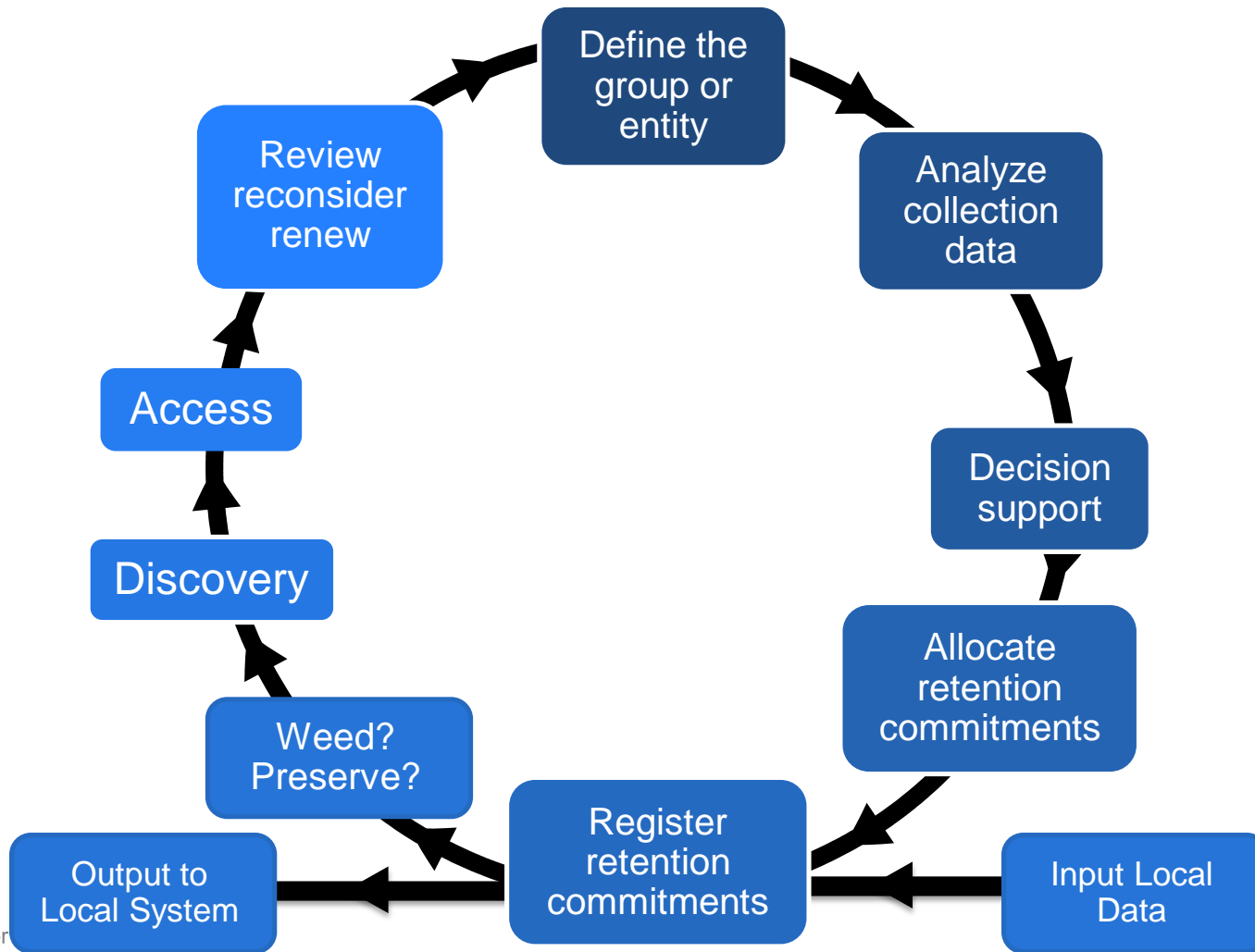
Circulation HistoryRefresh

Date	Status
2016-02-12 06:55:47	Temporary item record (barcode not supplied) successfully created

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# SHARED PRINT

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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



# Shared Print and ILL workflows?

- Interested in working with OCLC to develop and validate ILL requirements?
- Contact Nick Valentini [valentin@oclc.org](mailto:valentin@oclc.org)

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# MEMBER ENGAGEMENT

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# COMMUNITY CENTER




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# OCLC Community Center

WorldShare®

> 0 Metadata Acquisitions Licenses Circulation Interlibrary Loan Analytics Admin

Need Help? 

-  General Help
-  Contact Support
-  Community Center



# www.oclc.org/community




Communities ▾ Directory

## Connect. Collaborate. Contribute.

Welcome to the OCLC Community Center, where you can:

- Connect with community peers
- Collaborate, ask questions and gain insight
- Contribute and share ideas to improve products
- Stay on top of and discuss OCLC announcements

 [See a video introducing the OCLC Community Center.](#)

Sign in 

Sign in with your OCLC Services account and your institution's OCLC symbol.



### Communities

[CONTENTdm](#)

[WorldShare Acquisitions](#)

[WorldShare Collection Manager](#)

[WorldShare License Manager](#)

[EZproxy](#)

[WorldShare Circulation](#)

[WorldShare Interlibrary Loan](#)

[WorldShare Record Manager](#)

[WorldCat Discovery](#)

# Interlibrary Loan

[Community Home](#)[Discussions](#)[News](#)[Events](#)[Enhancements](#)[Support & Training](#)

## Frequently used links

- [IFLA Voucher Order Form](#)
- [Release Notes](#)
- [Documentation](#)
- [Known Issues](#)
- [Member Stories](#)

[ILL-L listserv](#)

## Effective December 1: Interlibrary Loan Fee Management Changes

On 1 December at 12:01 am US Eastern time, IFM payments began to be triggered when the lender marks the request as Shipped.

Read more in the [News Item](#) below.

## Configure your constant data records

Constant data is a time-saving tool for both borrowers and lenders. With it, you can create data records for your library that can be used to simplify and streamline data entry on interlibrary loan requests and workflows.

- Documentation: [OCLC WorldShare Interlibrary Loan: Constant Data](#).


# www.oclc.org/community

# Start and contribute to discussions

## Discussions

☒ Subject ☒ Body ☒ Tag ☒ Author


Receive notifications



### Not received items

[Judy Schneider](#) Posted Feb 02 2016, 7:55 AM

We requested an item that we didn't receive. We marked it as "not received". Is there a way to cancel it now? The only option I see is "mark as [Read More](#)

2 




### Locating old copy / article borrowing request info

[BillDoughty](#) Posted Feb 22 2016, 9:29 AM

Does anyone know of a quick & easy way to go back and see what copy / article borrowing requests have been received by a library? I can find the [Read More](#)


0 




### branches and ILL

[MirandaNovak](#) Posted Feb 15 2016, 11:56 AM

Hi, we're migrating to WMS and are merging to be a single OCLC symbol as well. We have a couple different branch libraries that have had separate symbols but now [Read More](#)

4 

# 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



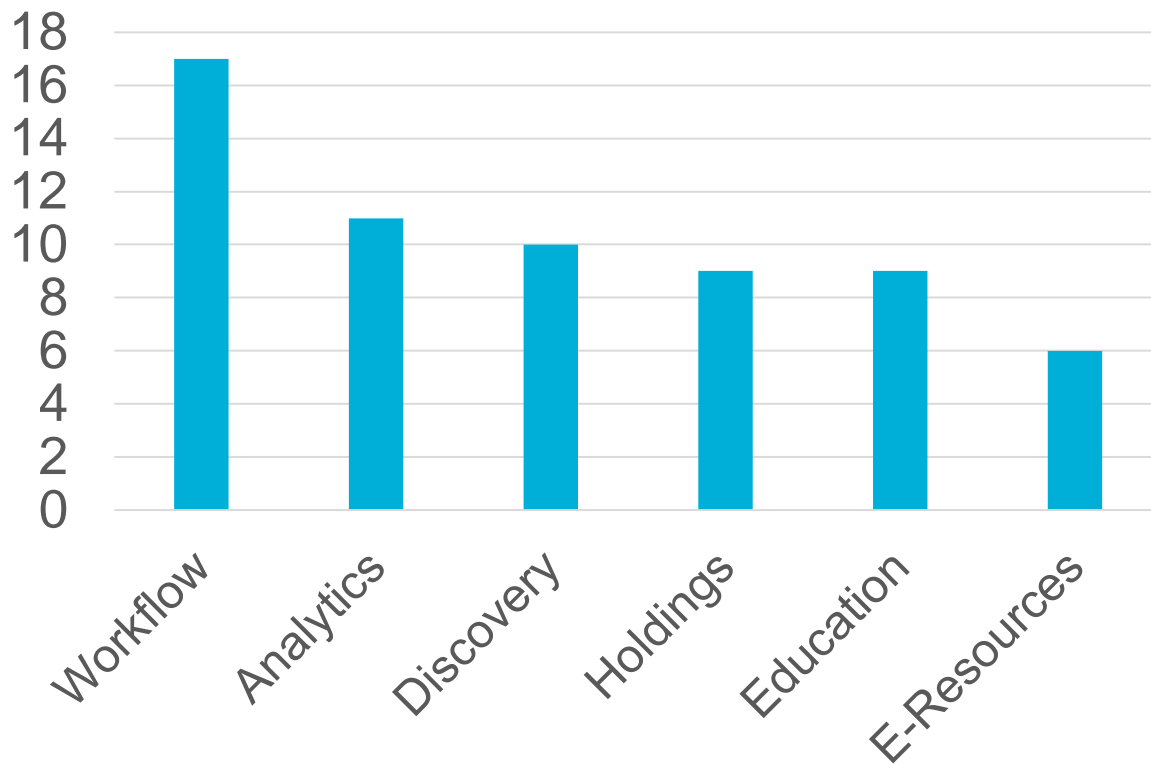
# Resource sharing session

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



OCLC  
Member Forums

# Key themes from the feedback



# 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

# 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<sup>®</sup> 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.

goodreads



WIKIPEDIA  
*The Free Encyclopedia*

Google



# FirstSearch today

FirstSearch

WorldCat Advanced Search

- Enter search terms in one or more boxes and click on Search.
- [Refine your search results: 2,180](#) ([Show me how](#))

Home

Databases

Searching

Results

Patron Resource Sharing

Basic Search

Advanced Search

Expert Search

Previous Searches

Subjects

News

Help

Current database: WorldCat

Search

Clear

Search in database:

WorldCat <sup>1</sup> (Updated: 2015-06-16)  
OCLC catalog of books and other materials in libraries worldwide

Search for:

cable cars

Keyword

and

Keyword

and

Keyword

Limit to:

Year

(format: YYYY-YYYY)

Language

No Limit

[show all languages...](#)

Number of Libraries

All

Limit type to:

match any of the following

☐ Books

☐ Serial Publications

☐ Articles

☐ Visual Materials

☐ Sound Recordings

☐ Musical Scores

☐ Computer Files

☐ Archival Materials

☐ Maps

☐ Internet Resources

☐ Continually Updated Resources

Subtype limits

Any Audience

Any Content

Any Format

Limit availability to:

match any of the following

☐ Items in my library (OCC, OCLC Library)

☐ Items in CENTRAL OHIO PUBLIC LIBRARIES

Library Code

BEXLEY PUB LIBR

[Find codes...](#)

Rank by:

Number of Libraries

Search

Clear

Confidential. Not for distribution.

OCLC

# 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.”*

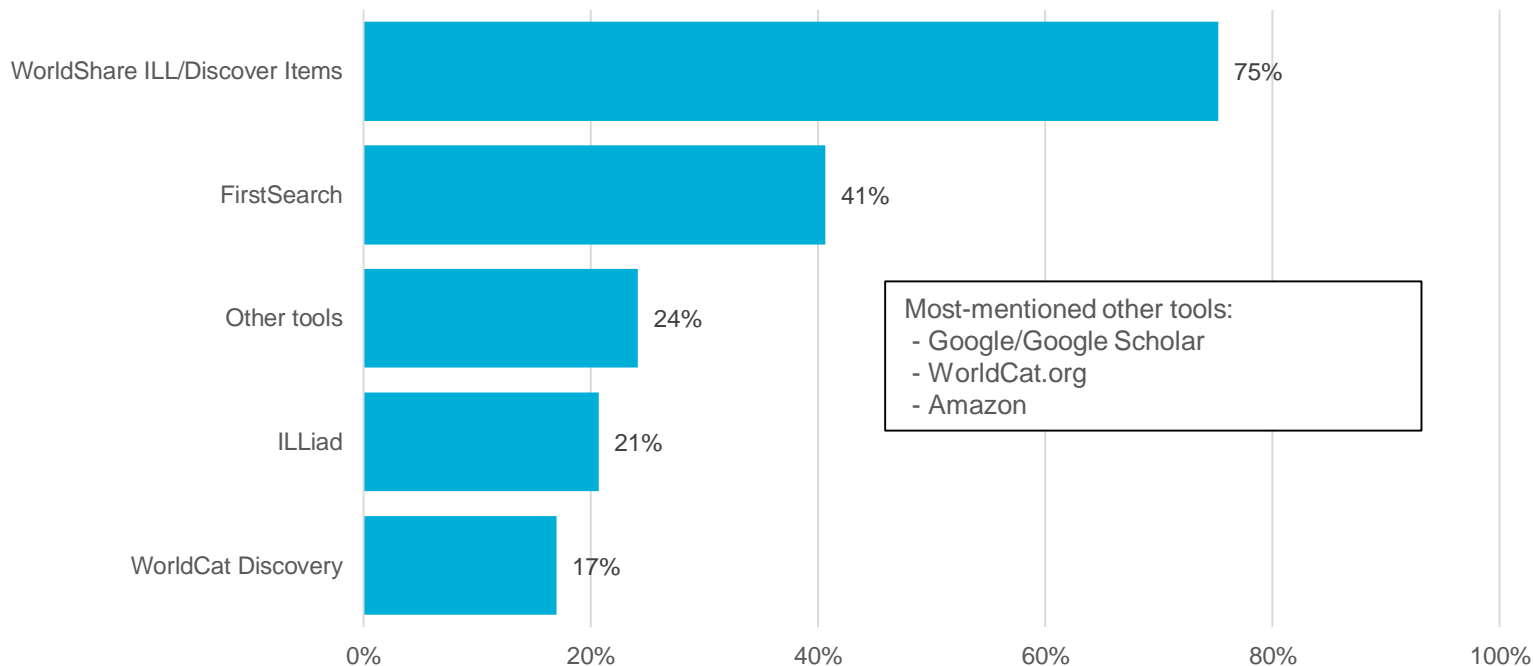
*“Rich, transparent, and authoritative”*

*“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.”*

# Services meet different user needs

	FirstSearch	WorldCat Discovery
Designed For	<ul style="list-style-type: none"><li>• Primarily Experts</li><li>• Some Non Experts</li></ul>	<ul style="list-style-type: none"><li>• Primarily Non Experts</li><li>• Some Experts</li></ul>
Problems	<ul style="list-style-type: none"><li>• What do <b>other</b> libraries have?</li><li>• Support for library workflows (reference, ILL, collection dev)</li></ul>	<ul style="list-style-type: none"><li>• What does <b>my</b> library have?</li><li>• Support for research assignments</li></ul>
Tools to solve Problems	<ul style="list-style-type: none"><li>• WorldCat</li><li>• Detailed meta-data on results</li><li>• <b>Pre</b>-search refinement</li></ul>	<ul style="list-style-type: none"><li>• WorldCat + central index (articles)</li><li>• De-cluttered interface</li><li>• <b>Post</b>-search refinement (facets)</li></ul>

# Tools used by ILL staffs



# Survey results

800+ responses

42% of respondents still use FirstSearch  
overwhelmingly like to refine searches upfront.

# New transition path

## Current Products

FirstSearch



WorldCat Local



## Future Products

FirstSearch

WorldCat Discovery

# IFLA vouchers

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

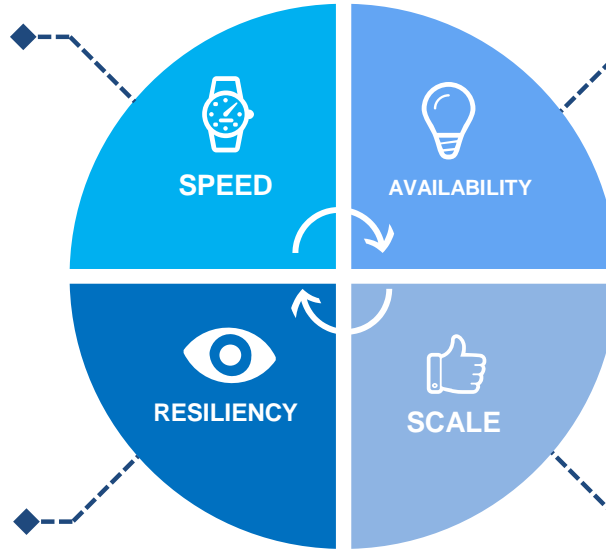
# OCLC's TECHNOLOGIES: UNPRECEDENTED IN OUR INDUSTRY

## 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.**

Advisory council and early adopters

Katie Birch

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Shared Print

[valentin@oclc.org](mailto:valentin@oclc.org)

**Because  
what is  
known must  
be shared.<sup>SM</sup>**