OCLC Update

Katie Birch
Executive Director, Global Product Management
STATISTICS
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
# Monthly Circulation Statistics Report (By Branch)

## OCLC University

### Report Criteria:
- **Event Date Start:** 2015-03
- **Event Date End:** 2016-02
- **Event Branch Name:** All
- **Material Format:** All
- **Permanent Shelving Location:** All

### Event Branch Name

<table>
<thead>
<tr>
<th>Event Branch Name</th>
<th>Event Year</th>
<th>Event Month Name</th>
<th>Items Checked Out</th>
<th>Items Checked In</th>
<th>Items Renewed</th>
<th>Items Soft Checked Out</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemistry Library</td>
<td>2015</td>
<td>June</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>2016</td>
<td>January</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>0</td>
<td>14</td>
</tr>
<tr>
<td>Law Library</td>
<td>2015</td>
<td>March</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Lockers</td>
<td>2015</td>
<td>September</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Main Library</td>
<td>2015</td>
<td>March</td>
<td>83</td>
<td>76</td>
<td>18</td>
<td>0</td>
<td>177</td>
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<tr>
<td></td>
<td>April</td>
<td></td>
<td>57</td>
<td>54</td>
<td>25</td>
<td>0</td>
<td>136</td>
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<tr>
<td></td>
<td>May</td>
<td></td>
<td>29</td>
<td>35</td>
<td>8</td>
<td>0</td>
<td>72</td>
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</table>
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?
Main Library Circulation by Borrower Type

- Faculty
- Grad
- Staff
- Undergrad

Available Objects:
- New Document
  - Event Branch Name
  - Event Year Month
  - Patron Borrower Category
  - Items Checked Out
  - Variables
Want to be involved?

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

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
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<td>12</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>132</td>
<td>125</td>
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<tr>
<td>4</td>
<td>5000</td>
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<td>702</td>
<td>477</td>
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<td>26</td>
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## Loans

<table>
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<td>23</td>
<td>16</td>
</tr>
<tr>
<td>20</td>
<td>27</td>
<td>24</td>
</tr>
</tbody>
</table>
BOOK CLUBS
### Book clubs

#### Borrowing Requests: Linked Requests (16)

- Sailing alone around the r...
- Reconstruction: America's...
- 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

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Lender</th>
<th>Date Requested</th>
<th>Referral Date</th>
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<tbody>
<tr>
<td>165028750</td>
<td>Received/in Use</td>
<td></td>
<td>Too many ponies</td>
<td></td>
<td>NDT7P</td>
<td>03/09/2016</td>
<td>04/05/2016</td>
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<td>165028749</td>
<td>Received?</td>
<td></td>
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<td>Too many ponies</td>
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<td>165028731</td>
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<td>Too many ponies</td>
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<td>NDT7P</td>
<td>03/09/2016</td>
<td>03/13/2016</td>
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</table>

Results 1 - 5 of 5

Rows: 10
IFM
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
You will refund 7.77 USD to NDCLV. This action can not be undone.
### Request History

#### ILL Fee Management (IFM) History

<table>
<thead>
<tr>
<th>Date</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-02-12</td>
<td>IFM Payment - 7.77 USD</td>
</tr>
<tr>
<td>2016-02-12</td>
<td>IFM Refund - Pending</td>
</tr>
</tbody>
</table>

Confidential. Not
<table>
<thead>
<tr>
<th>Date</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-02-12</td>
<td>IFM Payment - 7.77 USD</td>
</tr>
<tr>
<td>2016-02-12</td>
<td>IFM Refund - 7.77 USD</td>
</tr>
</tbody>
</table>
Borrower history

ILL Fee Management (IFM) History

<table>
<thead>
<tr>
<th>Date</th>
<th>Supplier</th>
<th>Transaction</th>
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</thead>
<tbody>
<tr>
<td>2016-02-12</td>
<td>NDT7P</td>
<td>IFM Payment - 7.77 USD</td>
</tr>
<tr>
<td>2016-02-12</td>
<td>NDT7P</td>
<td>IFM Refund - 7.77 USD</td>
</tr>
</tbody>
</table>

Circulation

Item Barcode

Circulation History

<table>
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<tr>
<th>Date</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>2016-02-12</td>
<td>Temporary item record (barcode not supplied)</td>
</tr>
<tr>
<td></td>
<td>successfully created</td>
</tr>
</tbody>
</table>
SHARED PRINT
Review reconsider renew

Access

Discovery

Weed? Preserve?

Output to Local System

Register retention commitments

Input Local Data

Define the group or entity

Analyze collection data

Decision support

Allocate retention commitments

Decision support

Allocate retention commitments

Register retention commitments

Output to Local System

Define the group or entity

Analyze collection data

Decision support

Allocate retention commitments

Register retention commitments

Output to Local System

Review reconsider renew

Access

Discovery

Weed? Preserve?

Output to Local System

Register retention commitments

Input Local Data

Confidential. Not for distribution.
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
OCLC Community Center

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

Communities

- CONTENTdm
- EZproxy
- WorldShare Acquisitions
- WorldShare Circulation
- WorldShare Collection Manager
- WorldShare Interlibrary Loan
- WorldShare License Manager
- WorldShare Record Manager
- WorldCat Discovery
Interlibrary Loan

Frequently used links
- IFLA Voucher Order Form
- Release Notes
- Documentation
- Known Issues
- Member Stories

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 workforms.

- Documentation: OCLC WorldShare Interlibrary Loan: Constant Data.

www.oclc.org/community
Start and contribute to discussions

Discussions

Receive notifications
Subscribe

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'

Locating old copy / article borrowing request info

BillDough posted Feb 23 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

branches and ILL

MirandaNovak posted Feb 15 2016, 11:50 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
Share enhancement ideas

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:
MEMBER FORUMS
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”
Key themes from the feedback

- Workflow: 18
- Analytics: 10
- Discovery: 8
- Holdings: 7
- Education: 7
- E-Resources: 4
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
WORLDCAT DISCOVERY AND FIRSTSEARCH TODAY
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.
FirstSearch today
FirstSearch Passion

“they want WorldCat to still be ‘the other place you find books that aren't available in our library’”

“WorldCat is our Bible.”

“Rich, transparent, and authoritative”

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

“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

<table>
<thead>
<tr>
<th>Designed For</th>
<th>FirstSearch</th>
<th>WorldCat Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Primarily Experts</td>
<td>• Primarily Non Experts</td>
<td>• Primarily Non Experts</td>
</tr>
<tr>
<td>• Some Non Experts</td>
<td>• Some Experts</td>
<td>• Some Experts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Problems</th>
<th>What do other libraries have?</th>
<th>What does my library have?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Support for library</td>
<td>• Support for library workflows</td>
<td>• Support for research assignments</td>
</tr>
<tr>
<td>workflows (reference,</td>
<td>(reference, ILL, collection dev)</td>
<td></td>
</tr>
<tr>
<td>ILL, collection dev)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools to solve Problems</th>
<th>WorldCat</th>
<th>Detailed meta-data on results</th>
<th>Pre-search refinement</th>
<th>WorldCat + central index (articles)</th>
<th>De-cluttered interface</th>
<th>Post-search refinement (facets)</th>
</tr>
</thead>
</table>

Tools used by ILL staffs

- WorldShare ILL/Discover Items: 75%
- FirstSearch: 41%
- Other tools: 24%
- ILLiad: 21%
- WorldCat Discovery: 17%

Most-mentioned other tools:
- Google/Google Scholar
- WorldCat.org
- Amazon
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
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)

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

Worth Noting: OCLC is aligned with U.S. Security compliance for Federal Information Security Management Act (NIST SP 800-53)
Together we make breakthroughs possible.
Advisory council and early adopters
Katie Birch
birchk@oclc.org

Stats.oclc.org
melvynt@oclc.org

Shared Print
valentin@oclc.org

Because what is known must be shared.