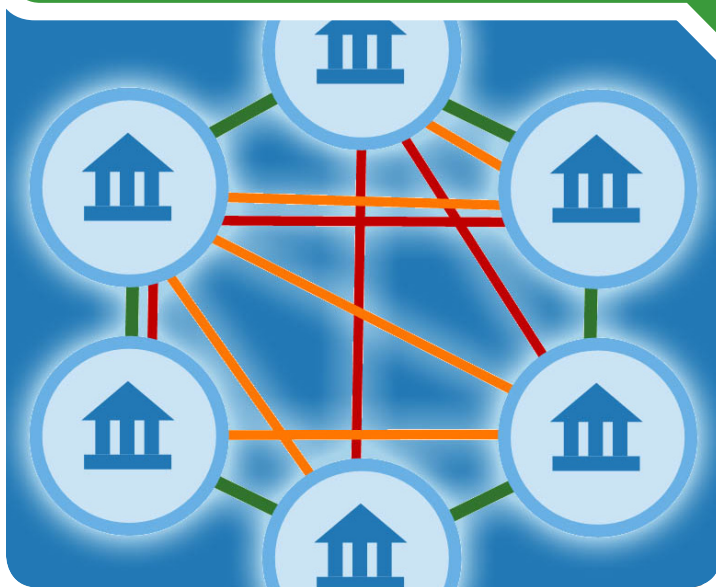
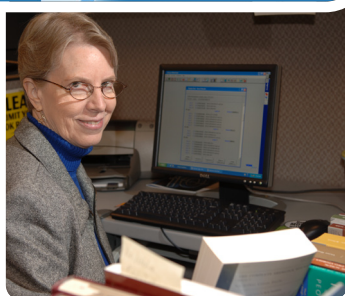


# The Future of OCLC Cataloging, Discovery and Interlibrary Loan Services

## Transforming for Webscale



Using Webscale to deliver library resources, services and expertise at the point of need, within user workflows and in a manner that users want and understand



*OCLC's Cataloging, FirstSearch and WorldCat Resource Sharing services will undergo major change during the next few years to support the evolving needs of libraries. This transformation will provide new and expanded functionality to OCLC members. It will also advance OCLC's strategy to collaboratively build Webscale with libraries.*

The functionality that OCLC® member librarians need to serve their users in the future requires OCLC to move its cataloging, discovery and interlibrary loan services to a more robust, integrated platform. This transformation will take a few years to fully implement, and it will unfold in a carefully planned manner that incorporates input from member task forces and testing groups.

The new services will build on relationships that exist among the current services to deliver added integration. The emerging Webscale environment—made possible by the OCLC WorldShare™ Platform—will increase this integration and provide opportunities to make library workflows more streamlined and seamless.

***As OCLC implements the elements of this transformation, library staff and users will gain easier and faster ways to get things done.***

- New metadata tools for managing collections of electronic materials and later, tools to describe unique items, combined with new Web services for developers, will provide complete metadata management for licensed, digital and physical resources.
- A single discovery interface, with separate views for users and staff, will provide precision searching and expanded record views for staff while maintaining a meaningful, user-friendly experience for information seekers.
- OCLC's new interlibrary loan service will transform traditional interlibrary loan into a broader fulfillment service that will support evolving workflow changes.

## Cataloging

The move to Webscale for OCLC Cataloging is underway. In August 2012, OCLC introduced OCLC WorldShare™ Metadata Collection Manager. This gives libraries automatic delivery of WorldCat® MARC records for collections of electronic materials, and continually updates the metadata and access URLs for these materials automatically. User access improves, and library staff gain time for other priorities.

Coming during the next few years:

- **Record Manager features will complement Collection Manager.** These new functions will provide catalogers with tools to more efficiently describe one-of-a-kind items, including licensed, digital and physical materials.
- **New Web services for developers in the cataloging community.** These services will provide support for adding new WorldCat master records and enriching those that already exist. They will also support WorldCat holdings maintenance, local holdings records and customized local bibliographic data.

These new and future capabilities will provide complete metadata management for resources across multiple formats. The functionality will be available to all OCLC Cataloging subscribers and will be integrated with OCLC WorldShare™ Management Services components, including acquisitions and circulation.

In addition, this new WorldShare™ Metadata functionality will work well with traditional integrated library systems.

Stay current: [www.oclc.org/worldshare-metadata.en.html](http://www.oclc.org/worldshare-metadata.en.html)

## Discovery

OCLC's discovery services will combine the precision searching of FirstSearch with the reach of WorldCat.org™ and its user-friendly features. This new discovery experience will replace the current FirstSearch® service. Active unlimited subscriptions to the current FirstSearch service will transfer automatically to the new discovery service.

The new unified and contemporary search experience will meet users' expectations for simple content discovery and maintain expert capabilities for library staff.

- Staff gain precision searching and expanded record views to accurately search and find items.
- Users see only what is meaningful to them to find and get library content.
- Functionality planned for the new experience includes:
  - Comprehensive view of library holdings from WorldCat
  - Consistent relevancy rankings across search experiences
  - No requirement for end-user authentication.

Beta testing for the new discovery experience is underway for WorldCat and other OCLC-licensed databases, with WorldCat® Local functionality to be added in the future. Release of the new service to FirstSearch users is planned for mid-2013.

Stay current:

[www.oclc.org/content/go/en/firstsearch-migration.html](http://www.oclc.org/content/go/en/firstsearch-migration.html)

## Interlibrary loan

The new OCLC WorldShare™ Interlibrary Loan service will replace the current WorldCat® Resource Sharing service in a phased migration that will end when WorldCat Resource Sharing access ends December 31, 2013.

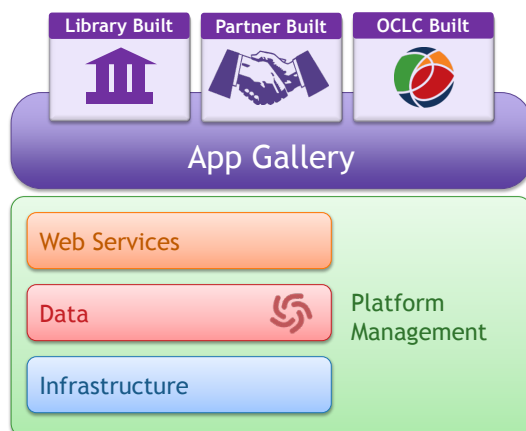
The new service will transform traditional interlibrary loan into a broader fulfillment service that supports evolving workflow changes such as purchasing needed items instead of borrowing them. This will position interlibrary loan as one of many options a library can offer to suit library policies and user needs.

An 18-month phased migration to WorldShare™ Interlibrary Loan began in July 2012. Looking ahead:

- Libraries in the United States began to use the new service in March 2013.
- Libraries with user-initiated interlibrary loan can begin to migrate in mid-2013 when the new discovery service interface becomes available.
- Libraries outside the US can migrate in the June – September 2013 timeframe.

The WorldShare™ Platform will support new delivery features that will interoperate with other applications. These include display of lender costs from the OCLC Policies Directory and display of item availability in a library's integrated library system.

Stay current: [www.oclc.org/migrate-worldshare-ill.en.html/](http://www.oclc.org/migrate-worldshare-ill.en.html/)



- **Applications:** Provide a single integrated set of management services for libraries to improve visibility and efficiency, including services from OCLC, partners and libraries
- **Web services:** Make library data available to libraries and partners to build and share new services and applications, creating new value for libraries and their users
- **Data:** Expand the range and types of library data represented and "connected" through the WorldCat data hub
- **Infrastructure:** Enable libraries to benefit from the efficiencies and flexibility of cloud, mobile and social technologies through a single global infrastructure

The OCLC WorldShare Platform provides a neutral integration environment so that library-built, partner-built and OCLC-built applications can work together to provide customized functionality for an individual and still take advantage of the cooperative nature of OCLC services.

## IMPLEMENTATION TIMELINES FOR OCLC CATALOGING, DISCOVERY AND INTERLIBRARY LOAN SERVICES

The timelines illustrate the current schedules for the phased implementations of OCLC's WorldShare Metadata, discovery and WorldShare Interlibrary Loan services. Register for updates at <https://www3.oclc.org/app/listserv>.

2012

### Cataloging



#### **FEBRUARY–AUGUST 2012**

WorldShare Metadata Collection Manager beta testing

#### **AUGUST–DECEMBER 2012**

WorldShare Metadata Collection Manager general release

### Discovery



#### **JUNE–DECEMBER 2012**

Advisory Group tests the new Discovery solution interface

### Interlibrary Loan



#### **JANUARY–JUNE 2012**

Beta testing of WorldShare Interlibrary Loan

#### **JULY 2012–FEBRUARY 2013**

Managed migration phases of WorldShare Interlibrary Loan

2013



#### **2013**

WorldShare Metadata Collection Manager ongoing enhancements

#### **JANUARY–JUNE 2013**

WorldShare Metadata Record Manager and platform services beta testing

#### **MID-2013**

WorldShare Metadata Record Manager and platform services initial release and ongoing enhancements



#### **JANUARY 2013**

Ongoing user testing and enhancements

#### **JULY 2013**

Open migration to new Discovery solution begins

#### **FEBRUARY–JUNE 2013**

Beta testing of the new Discovery solution



#### **MARCH–DECEMBER 2013**

Open migration to WorldShare Interlibrary Loan in the U.S.

#### **JUNE–SEPTEMBER 2013**

Non-US WorldCat Resource Sharing subscribers migrate to WorldShare Interlibrary Loan

#### **NOVEMBER 2013**

End of new requests in WorldCat Resource Sharing

#### **JULY–DECEMBER 2013**

Libraries with user-initiated ILL migrate to WorldShare

#### **DECEMBER 2013**

End of access to WorldCat Resource Sharing



**For more information, visit the OCLC website at [www.oclc.org](http://www.oclc.org).**

For more information about OCLC cataloging, discovery and interlibrary loan services, please contact your nearest OCLC office (see list at [www.oclc.org/contacts.en.html](http://www.oclc.org/contacts.en.html)) or regional distributor (see list at [www.oclc.org/contacts/distributors.en.html](http://www.oclc.org/contacts/distributors.en.html)).