EVERY CONNECTION has a starting point.

A compelling end user environment:

OCLC’s view

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InfoTag
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Agenda

- OCLC’s End User Services definition and strategy
- Implementing the strategy
- OCLC TouchPoint elaborated
- General conclusion
OCLC’s End User Services definition and strategy
End user interface definition (1)

Inside Library (within IP range)

Inside Library (Local)

Outside Library (outside IP range)

Outside Library (Remote/Licensed)
End user interface definition (2)

Need for new end user search experience:
Aggregate multiple information resources

Libraries looking for unbundled but connected discovery solutions, since traditional ILS-OPACs and Portals do not fulfil this new need.
WorldCat.org - networked model

More than 10,000 participating libraries

Create **web-scale** by aggregation of data at the network level

On average **700,000 clickthroughs** to local library services per month

On average **13 million pages views** per month
OCLC’s corporate strategy

Grid-enabled Business Strategy

- Maximize Uptake
- Syndicate Grid services through partner programs
- Increase Efficiency
- Reduce the cost of Library Management with Grid-enabled systems and services
- Move to the Network
- Enrich the WorldCat Grid through greater service and data coverage
- Build Web-Scale
- Create Local Value
- Leverage the value of Web-Scale into end-user solutions for libraries

Provide the most compelling, Web-Scale presence for Libraries
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Global – Group – Local

• Global
  WorldCat.org

• Group, Local
  Group Catalogues, WC Local
  (deployed at the global node)

• Group, Local
  TouchPoint (deployed at the local node)
### End user services proposition

<table>
<thead>
<tr>
<th>Library Group Proposition</th>
<th>Individual Library Proposition</th>
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<tbody>
<tr>
<td><strong>Networked Model</strong></td>
<td>WorldCat Local</td>
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<td>WorldCat Local</td>
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<td><strong>Deployable Model</strong></td>
<td>TouchPoint</td>
</tr>
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<td></td>
<td>TouchPoint</td>
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</table>

Leverage the network effect
Closely linked with the Management Systems Portfolio Strategy

Develop a next generation end user service that our ILS customers can deploy

Next step will be to deal with portal offerings like ZPORTAL and Elektra
Implementing the strategy
Adoption cycle of new end user environments

**Innovators**
- Primarily higher education libraries
- 2.5%

**Early adopters**
- Higher education libraries
- Large corporate libraries
- 13.5%

**Early majority**
- Public libraries
- Special and tertiary education
- 34%

**Late majority**
- Small public and special libraries
- Tertiary education & schools
- 34%

**Last adopters**
- 16%
Current dissatisfaction with available discovery tools in the market:

- Either libraries start building solutions themselves, or
- They need to adopt new solutions at an early stage, or
- They keep using old-fashioned discovery tools.
WorldCat Local

- A localized version of WorldCat.org
  - Custom branding
  - Relevancy ranking that puts your collections first
- OCLC-hosted and supported service that interoperates with your existing ILS and fulfillment systems.
- Single-search, multilingual interface for all physical and electronic content held locally or in remote locations.
- Integrated access to the most appropriate delivery options for authorized users.
- Syndication of your holdings to major search engines including Google and Yahoo! via WorldCat.org.
TouchPoint

- Installed at customer or service provider site
- Multilingual interface for all physical and electronic content held locally or in remote locations
- Support of various search engine API’s to create flexibility (e.g. FAST)
- Interoperability with your existing ILS and fulfillment systems

My library features:
- My database preferences, my search settings, my bookshelf

Customization possibilities, e.g.:
- Configuration of multiple views in one installation
- UI completely in look & feel of your library’s corporate branding

- Social networking services
- Integration of WorldCat API - search in
OCLC TouchPoint elaborated
Search

- Basic search with one search field
- Extended/advanced search which gives the user the opportunity to specify the search fields
- Systematic search which gives the user the opportunity to navigate to a thesaurus (currently available for SunRise, not for LBS)
- Limit search to branches and media types
- Database selection when meta search is used
- The library can configure additional search restrictions shown in one tab on the search screens
- Range of API's to search engines like fast
Unlimited options to integrate widgets
... e.g. links to accession list, QuestionPoint Qwidget, etc.
Search modes

Tabs for easy and quick access to all functions ...
Searching with FAST® helps your clients to locate information

Filters to narrow your results based on the result set, linguistic features like multi-lingual dictionaries, lemmatisation of terms and spell checking (“Did you mean ...?” function)
Display

- Hitlist and full record display can be configured
- Presentation of covers are also included in the full record display and/or in the hit list (covers presented for example from Amazon)
- Google Book API is available but not active in standard distribution
- Style sheets are used so fonts, colors, logo's can be adjusted to the library's look & feel
- Sorting options depend on underlying search engine
- TouchPoint is developed according web accessibility standards based on www.w3.org
- A library can configure the presentation of several news boxes
- German, Dutch, English and French interfaces are available
- Multiple views in single installation are configurable
**Search box - everywhere**

**Automatic database extension**

**Personalized status information**
Hit list clearly arranged

Configurable FAST® filters based on the results..., ranking..., ...

... result breakdown by resource...
**ILS integration**

- **Which ILS?**
  - SunRise and LBS are supported
  - OLIB planned for next version (dependent on investigation by OLIB Product Manager)
- **Ultimate aim - support integration of 3rd party ILSs based on a generic interface**
- **Self-service options:**
  - Display of user account (loans, requests, reservations, fees)
  - User self-registration (change user data)
  - Ordering / reservation (copy and/or title) / cancel of reservations / renewals
Delivery options

- Integration with ILL services can be configured in any way, e.g. ZFL and NCC-IBL
- Deep OPAC linking
- OpenURL resolver:
  - SFX is supported
  - WCLM strongly desired for next version
- Availability search is highly configurable according to the library’s needs
Holdings with their current status + optional link to location guide
“Get it” functionality

Depending on the document type the best option to get the documents is determined by TouchPoint.
Social Networking Services

- When WorldCat Lists will be available as a web service, it will be implemented in TouchPoint asap.
- Reviews from WorldCat.org are included (read only), how to include write access in a proper way will be discussed internally on a short notice.
- Personal search preferences can be indicated by user based on a personal user id (persistent my profile):
  - Preferred language
  - Default search (simple or advanced)
  - Preferred databases
  - My list features / shopping basket (save / e-mail / print options)
  - Timeout preference
  - Max. number of results presented in the hit list
- SDI / alerting service and personal search history available based on a personal user id.
Personalized lists

Administration of lists (temporary or permanent saving)

Various output formats and options
<table>
<thead>
<tr>
<th>SDI service</th>
<th>Home</th>
<th>Search statement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>near Beijing</td>
<td></td>
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</table>

**Basic search for libraries change**

**E-mail**

**Due date**

**Valid until**

The following databases can process your SDI service:
- OCLC
- WorldCat
- EBRV
- World union catalogue

[Definition of SDI services for multiple resources]
### “My library account”

**TouchPoint Beta**

#### Account details
- **User details**
- **Search preferences**
- **SDI services**

#### Loans (3) | Requests (2) | Reservations (2) | Fees (19.50 EUR)

<table>
<thead>
<tr>
<th>No.</th>
<th>Title, Author</th>
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<tbody>
<tr>
<td>1.</td>
<td>Männerlassen lieben</td>
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<tr>
<td></td>
<td>13.10.2006 - 02.04.2007</td>
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<tr>
<td></td>
<td>Evangelische 50</td>
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<tr>
<td></td>
<td>Overdue: This item already has 2 reminder(s) Please return immediately.</td>
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<td>3.</td>
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<tr>
<td></td>
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<td></td>
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**Actions**
- **Bulk renewal**
- **Renew**
- **Save/E-mail/Print list**
- **Send**

**User account**
- Library card valid until: Dec 31, 1999
- Credit: EUR 0.00

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**Circulations, requests, orders, fees, library card validity**

**Renewal date for membership fee, ...**

**Status information and facility for immediate renewal, ...**
Shared reviews based on WorldCat.org's Social Network Services
Summary of key features of OCLC TouchPoint

- Network effects of WorldCat.org in locally deployable discovery solution
- The range of API's to search engines that are / will be supported
- Deep integration to WorldCat products like QuestionPoint, xISBN, WorldCat Link Manager
- Deep integration with ILS loan functions / self-service registration (SunRise yet available and LBS planned)
Networked or deployable

There is no difference for the end user!

But there is a difference for the library!
OCLC’s end user solutions - from discovery to delivery

- With TouchPoint and WorldCat Local OCLC provides two powerful end user solutions on top of your library system.
- The integration with WorldCat services like X-ISBN, WorldCat API, the WorldCat social network services, QuestionPoint, WorldCat Link Manager, ... deliver unique value for your end users!
Herzlichen Dank für Ihre Aufmerksamkeit!

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