

03.10.2023

Amersfoort



OCLC CONTACTDAG
Blijvend ontwikkelen
Innovatie voorbij de hype

WMS: Altijd in ontwikkeling

Paul Jansen

Senior Product Analyst

Maximilien Sangoi

Senior Product Manager

#OCLCNL23



OCLC CONTACTDAG

Blijvend ontwikkelen

Innovatie voorbij de hype

Welkom



Paul Jansen

Senior Product Analyst



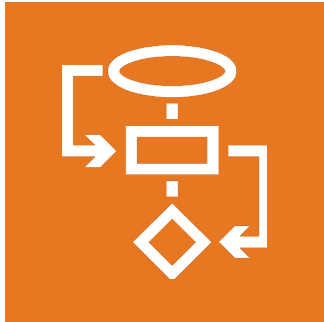
Maximilien Sangoi

Senior Product Manager

Themes



**Empowering
Librarians**



**Transforming
Workflows**



**Interoperable
Platform**



**User
Engagement**



**Community
Center**

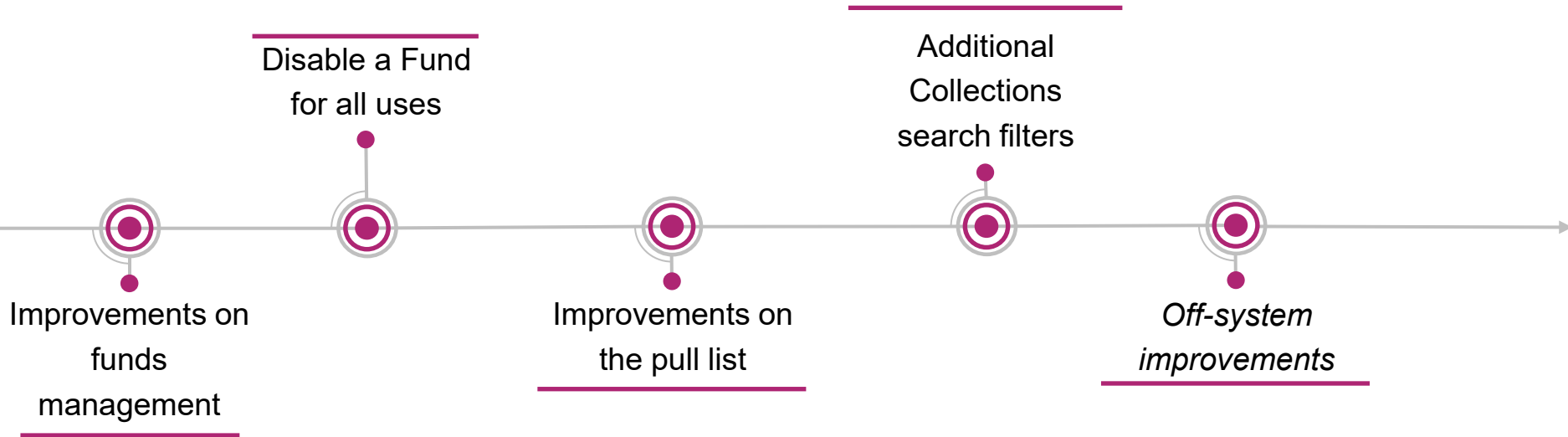


Empowering Librarians to do things better



EMPOWERING LIBRARIANS

Recently delivered





Improvements on the Budget/Funds Management

- Additional status on the funds
 - Hard/soft disabling of funds
- Additional filter in the budget
 - Status of the fund

Edit Fund

Fund Name* 000__aa03

Fund Code* 000__aa03

Fund Status Enabled

Budgeted* Enabled

Remaining

Save Cancel

[Collapse all funds](#) [Expand all funds](#)

Filter by Fund Status: All

Results 1 -

	Fund Code	Fund Status
	000__aa03	Enabled
	000__aa03a	Enabled
	000__aa03b	Enabled
	000__aa03c	Enabled



Off-system improvements

- Automation can include off-system partner in the lender string (Tipasa only)
- A new off-system notification can be automatically or manually sent to the off-system partner (Tipasa only)
- Improved partner table performance:
 - The partner table in service configuration will load faster, even with a lot of partners.
 - The limit of active partners will be **increased to 8,000 from 1,000**.
- Off-system lending form (Tipasa only)

Configure/enable lending form



Request Forms [Help on this screen](#)

Customize the WorldShare ILL or Tipasa® request form(s).

- ▶ Article Request Form
- ▶ Book Request Form
- ▶ Other Request Form
- ▼ Lender's Off-System Request Form

[Preview](#)

Display Name:

In Use: **URL:** <https://148455.account.worldcat-m1.dev.oclc.org/account/route/lending/workform>

Bibliographic Section

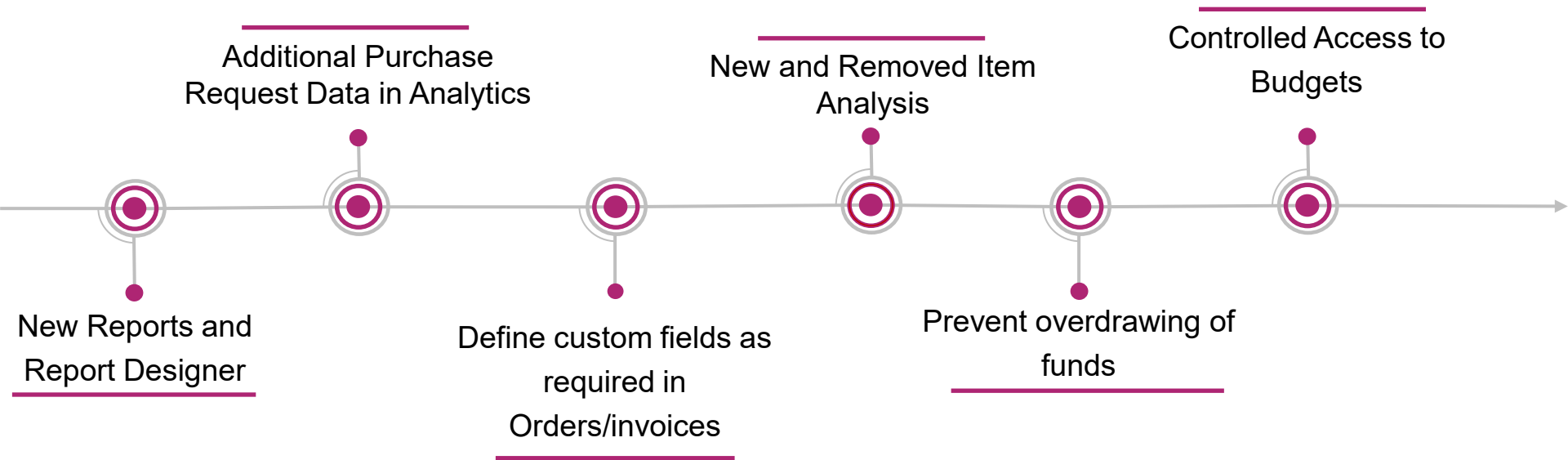
Section Header: [Remove a Section](#)

Field:	Input Type:	Field Label:	Field Values:	Options:
<input type="text" value="Title/Journal Title"/>	textarea	<input type="text" value="Title:"/>	<input type="text"/>	<input checked="" type="checkbox"/> required <input checked="" type="checkbox"/> editable
<input type="text" value="Author"/>	textarea	<input type="text" value="Author:"/>	<input type="text"/>	<input checked="" type="checkbox"/> required <input checked="" type="checkbox"/> editable



EMPOWERING LIBRARIANS

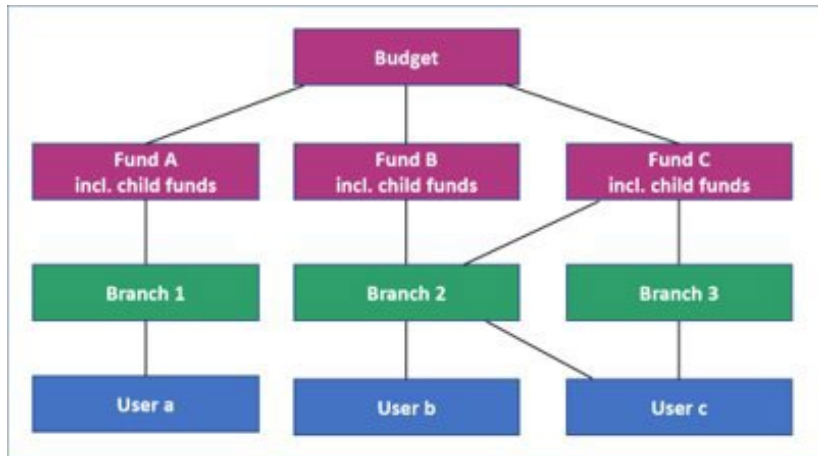
Coming next





Controlled Access to Budgets

- WMS Libraries need to control the **access/visibility** and the **consumption/use** of the budget funds across the different branches of the library.

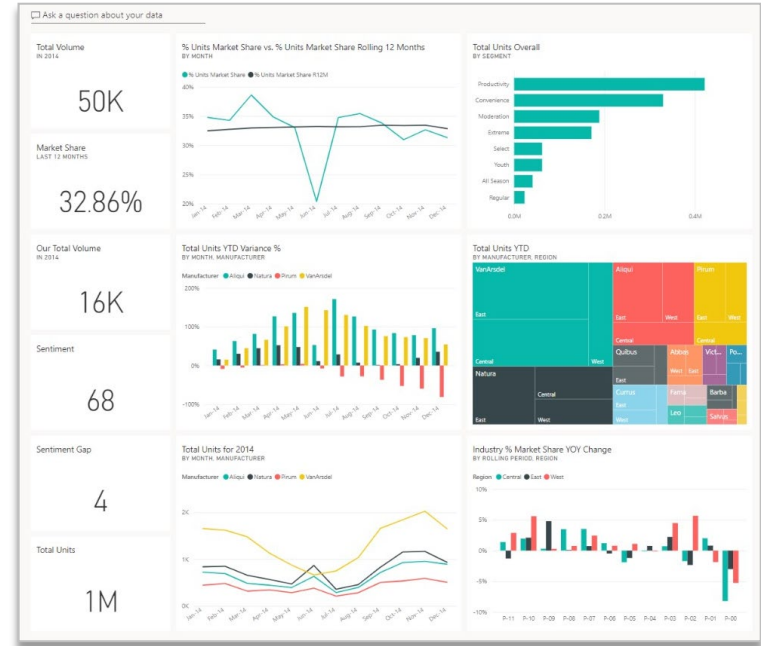


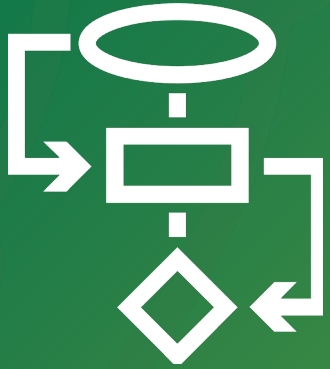
- 1 global budget and assign specific funds to specific branches.
- Assign users to one or more branches.
- A user can see and use a fund within the budget based on their associated branch or branches



New Reports and Report Designer

- Data access
- Easy export as .xls or .ppt
- Linked, shareable reports
- AI report assist
- Visualizations, dashboards



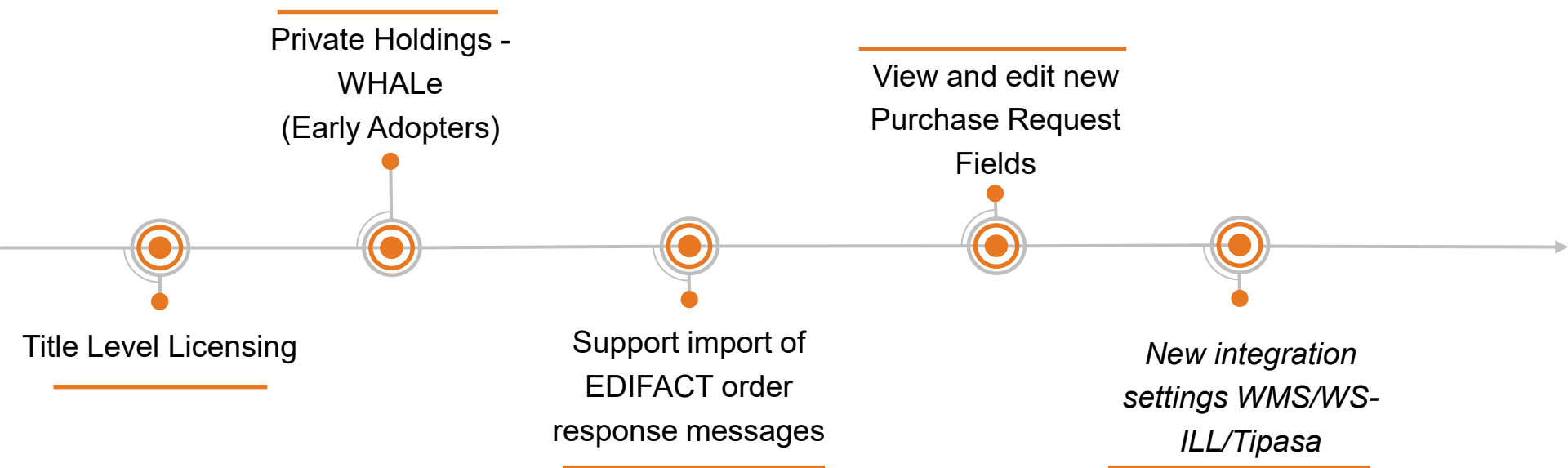


Transforming Workflows for electronic resources



TRANSFORMING WORKFLOWS

Recently delivered





Audience-level holdings

Set audience levels at bibliographic record or copy (Local holdings record) level:

- Display to **All Users**
- Display to all **My Library Users**
- Display to **My Authenticated Users**
- Display to **My Library Staff**




In WMS, and WS-ILL



Workflow: select audience level

Record ▾

- Set Holding Audience Level to ▸
 - ✓ All Users 
 - My Library Users
 - My Authenticated Users
 - My Library Staff
- Delete WorldCat Holding
- Set Holding Audience Level for Other Institution(s)...
- Delete WorldCat Holding for Other Institution(s)...
- Derive Bibliographic Record ▸
- Derive Authority Record
- Bibliographic Constant Data ▸
- I HR ▸

Workflow: update audience level at copy level



▼ LHRs (20)

Move LHRs ▼ Set LHR Audience Level ▼ View/Edit in Text View

You can move up to 100 LHRs to a different bibliographic record.

Summary (25/9999)

Local holdings available.

Build Automated Summary

Results 1 - 10 of 20 Rows 10 << 1 2 >>

<input type="checkbox"/>	Call Number	Barcode	Shared Print	Branch	Shelving Location	ILL Status	LHR Audience Level	Action
<input type="checkbox"/>	005.13/3	343434343	Y	North	North Stacks 01	Supplier	All Users	
<input type="checkbox"/>	004.13/3	242424242...		South	South Stacks 01	Supplier	My Library Users	
<input type="checkbox"/>	003.13/3	456456465		East	East Stacks 01	Supplier	All Users	
<input type="checkbox"/>	002.13/3	789789778		West	West Stacks 01	Non-Supplier	My Library Staff	
<input type="checkbox"/>	001.13/3	546513215		North	North Stacks 02	Supplier	All Users	
<input type="checkbox"/>	011.13/3	789874561...		South	South Stacks 02	Supplier	My Library Users	
<input type="checkbox"/>	022.13/3	145545898	Y	East	East Stacks 02	Non-Supplier	My Library Users	

Workflow: bulk edit audience level



25 Metadata Acquisitions Licenses Circulation Analytics Admin

Record Manager

Search

Data Type
Bibliographic Records

Scope
All WorldCat

Index
Keyword

Term(s) ?

Search Clear

[Advanced Search](#)

Create Record

Record Work Lists

Export Lists

Toolbox

User Preferences

My Labels

Collection Manager

My Files

Record Work Lists

Bibliographic LBD LHR

Bibliographic Records - Record Work List

Actions

- Delete WorldCat Holding
- Set Holding Authority Level to
 - All Users
 - My Library Users
 - My Authenticated Users
 - My Library Staff

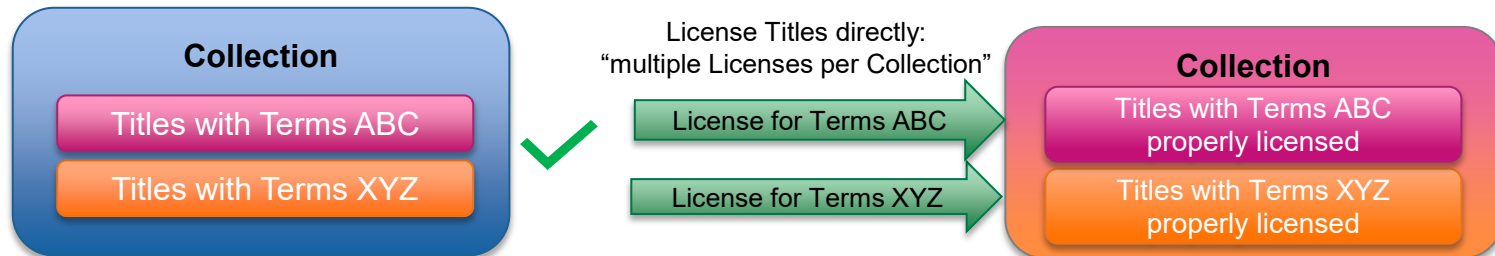
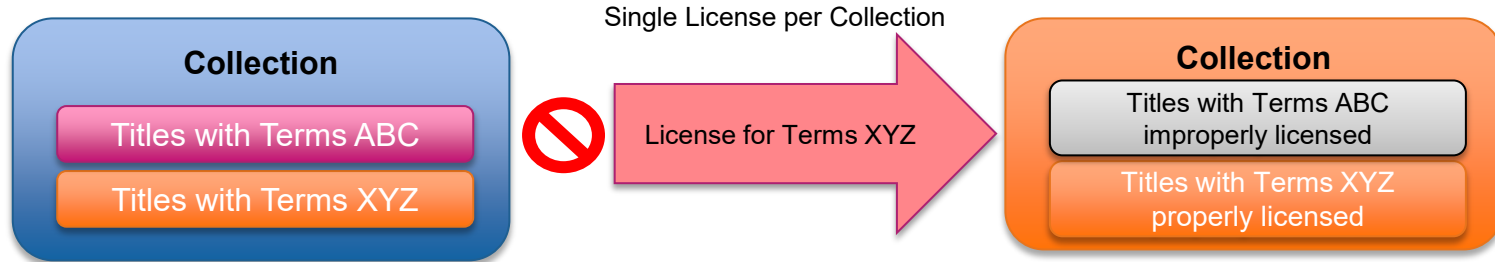
Manually enter or update up to 10,000 records. Separate each number with a space. Commas and line returns are automatically converted to spaces.

[Reset](#)



Title-Level Licensing

- Add tools to allow licensing of titles, rather than entire collection.



New integration settings: WMS/Tipasa/WS-ILL



Circulation

Enable Circulation integration On

* Select your ILS

You must select at least one functionality either in Borrowing or Lending section to successfully activate your circulation integration.

Borrowing

Ensure that your circulation systems policies have been updated before enabling the borrowing integration.

Update/Create circulation item record on received	<input checked="" type="checkbox"/> On
Use supplier's shipped item barcode	<input type="checkbox"/> On
Use request ID as item barcode	<input checked="" type="checkbox"/> On
Check in item on returned	<input checked="" type="checkbox"/> On
Charge patron on shipped	<input checked="" type="checkbox"/> On

Lending

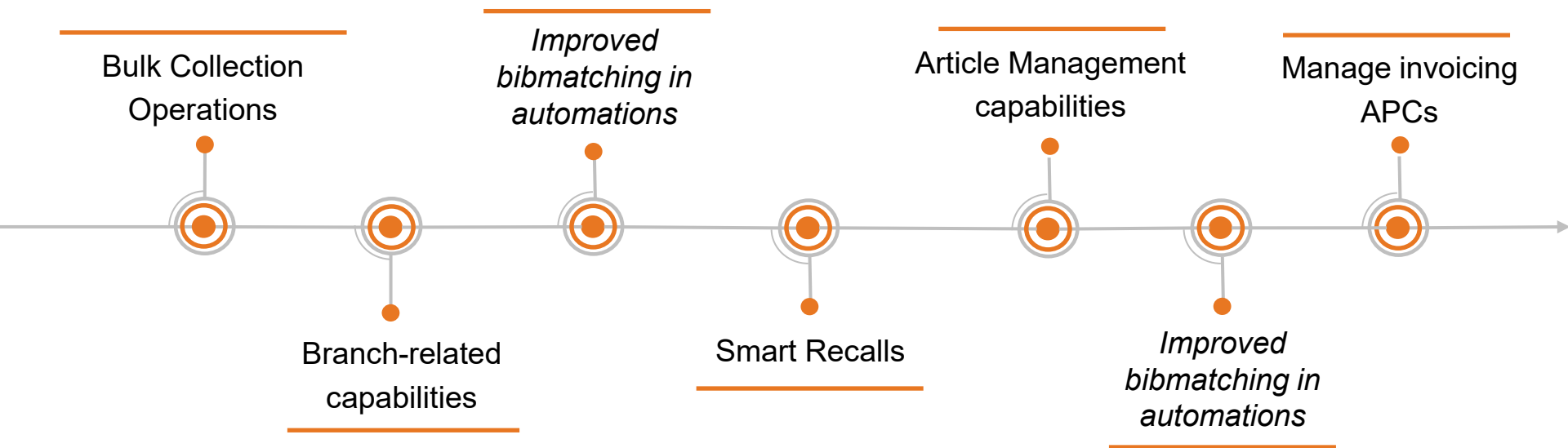
Ensure that your circulation systems policies have been updated before enabling the lending integration.

Check out item on shipped	<input checked="" type="checkbox"/> On
Check in item on check in	<input checked="" type="checkbox"/> On



TRANSFORMING WORKFLOWS

Coming next





Article Management

- Work in progress
- Support for individual article ordering
 - New resource type

- Support for funding articles
 - Per article
 - APC
 - Debits funds as any other expenditure

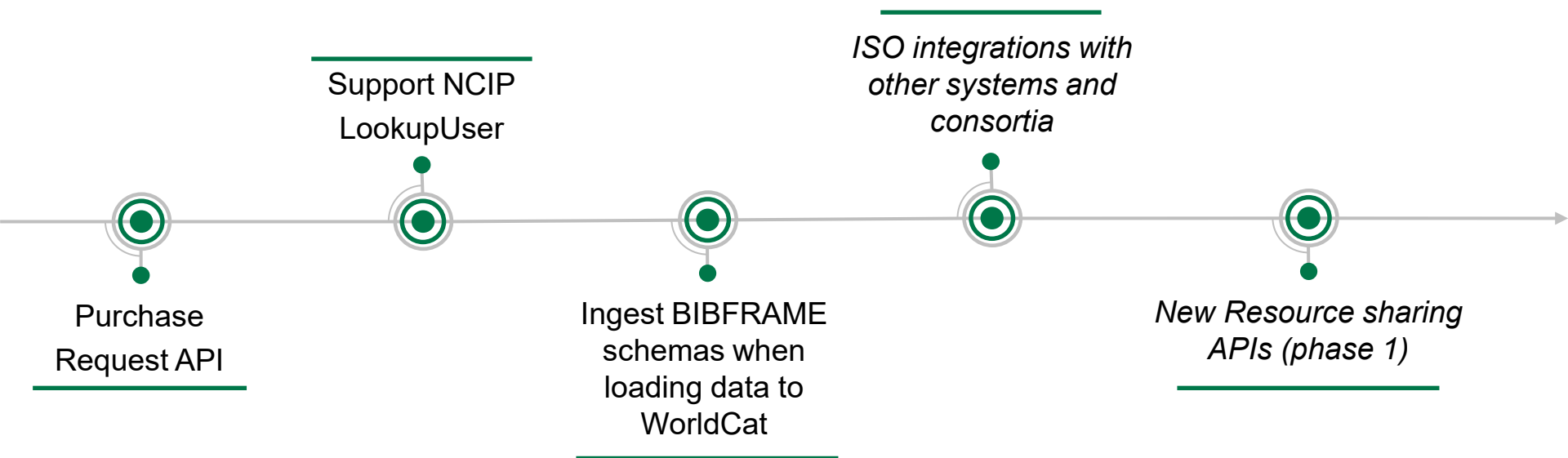


Interoperable platform:
places the library system in the
campus ecosystem






INTEROPERABLE PLATFORM

Recently delivered



Integration with Worldline-Ingénico



Checkouts (0)	Requests	Fees (€15,939.57)	Search activity	Profile
Reason			Date ↓	
<input type="checkbox"/> Select all		Pay Fees (€66.66)		
<input checked="" type="checkbox"/>		Fine Library Fee	€66.66 billed 23/02/2023	
<input type="checkbox"/>		Fine Library Fee	€27.12 billed 23/02/2023	
<input type="checkbox"/>		Fine Library Fee	€123.45 billed 23/02/2023	




Integration with Worldline-Ingencico



OCLC

Shopping cart ✓ Payment details Payment complete

How would you like to pay?


- Mastercard 
- iDEAL 
- Visa 

Order overview

Total charge: EUR 66.66

Order reference: 82c78b8e3abf43f68f18d20a724a93dd

[Cancel](#)

Payment processed by **WORLDLINE** 

[About Worldline](#) | [Security](#) | [Legal info](#)

Integration with Worldline-Ingénico



OCLC

< Select another payment method

Shopping cart ✓ | Payment details ● | Payment complete ■

Card number

4111 1111 1111 1111 VISA ✓

Cardholder's name

Worldline Visa ✓

Expiry date

03 2026 ✓

Card verification code

444 ✓ ⓘ

Remember my payment details for future purchases ⓘ

Order overview

Total charge: EUR 66.66

Order reference: 82c78b8e3abf43f68f18d20a724a93dd

Pay Securely

[Cancel](#)

Payment processed by

[About Worldline](#) | [Security](#) | [Legal info](#)

Integration with Worldline-Ingénico



OCLC

A screenshot of a payment confirmation page. At the top, a progress bar shows three steps: 'Shopping cart' (checked), 'Payment details' (checked), and 'Payment complete' (checked). Below this, there are two main white boxes. The left box contains the text 'Your payment is accepted' and a warning: 'You will now be redirected to the merchant's website. A warning message might be displayed, as you are about to leave the secure environment.' The right box is titled 'Order overview' and displays 'Total charge: EUR 66.66' and 'Order reference: 82c78b8e3abf43f68f18d20a724a93dd'. A prominent green 'Continue' button is located at the bottom of the right box. A mouse cursor is visible near the bottom center of the screenshot.

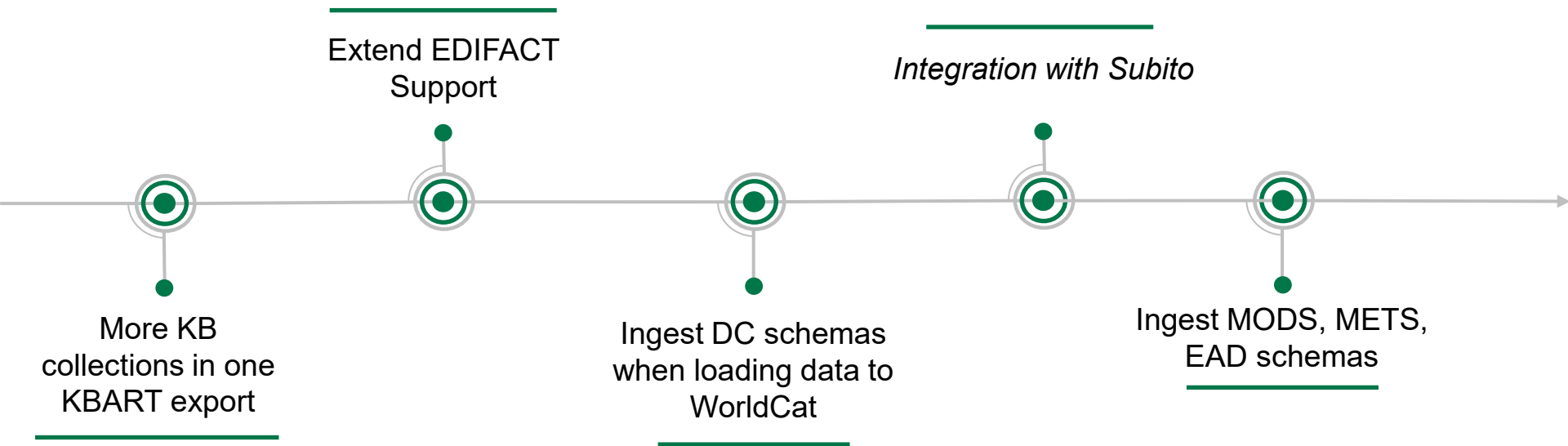
Payment processed by
WORLDLINE

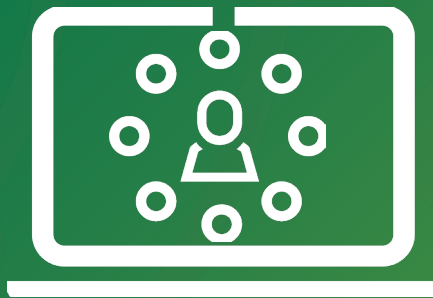
[About Worldline](#) | [Security](#) | [Legal info](#)



INTEROPERABLE PLATFORM

Coming next



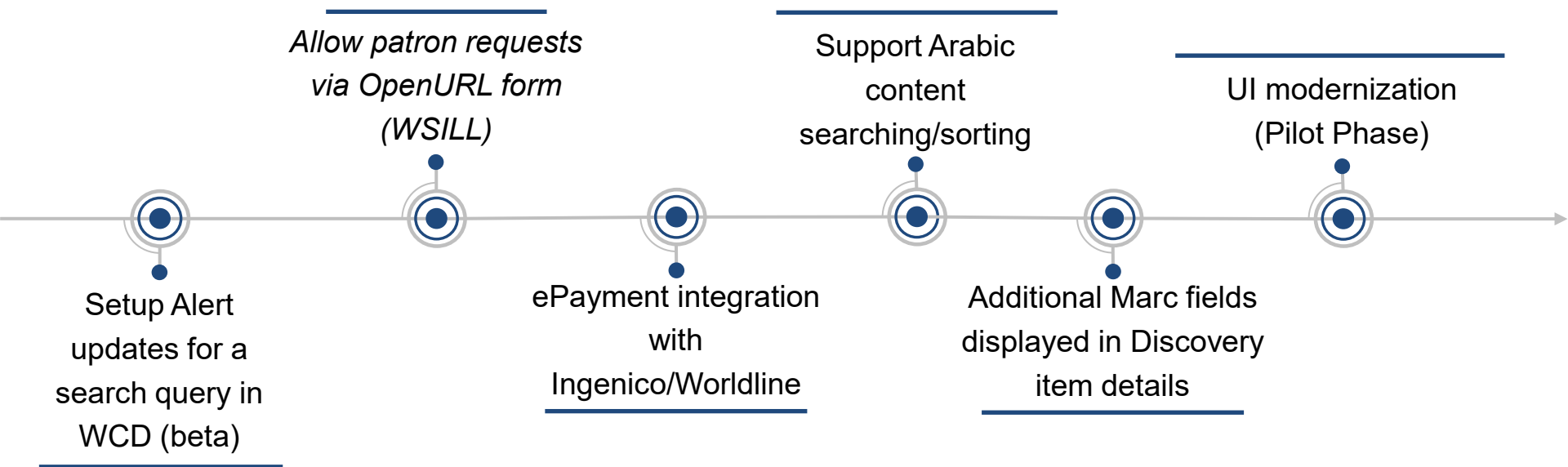


User Engagement: Student and faculty at the center



USER ENGAGEMENT

Recently delivered



WorldShare ILL request form

What's it look like?



Catalog or database

Request form

Staff interface

Find in a Library

Search: jet lag symptoms

Advanced Search Resources

Result 2 of 34

Farewell jet lag : cures from a flight attendant
Authors: Christopher Babayode (Author)
Print Book 2016
St Albans: Panoma Press, 2016.

Summary: TRAVEL TIPS & ADVICE: GENERAL. At a time when globalization and technology make the world smaller, when... fully present if you're jet-lagged. Solving the challenges of jet lag requires Show More

More Author/Title Info: Christopher Babayode.
Physical Description: 191 pages : illustrations ; 21 cm.
Subjects: Library of Congress Subject Headings: [Jet Lag Prevention](#)
[Etiology](#); [Ethnological aspects](#)
[Requiem de Vieillesse-Matinee](#)
[Vol. Aspect](#); [SibSibSout](#)

Bibliography: Includes bibliographical references (pages 182-186)
Database: WorldCat
ISBN: 9781784520786, 1784520780

Access Options
Request from Libraries Worldwide
Request Items through Interlibrary Loan

Find in a Library

Search

Advanced search Resources

Hello Clive My account

Clive Borrower

WSILL request form

*Required field
This is a change test.

Title: *
Farewell jet lag : cures from a flight attendant 48/500

Author: *
Christopher Babayode 20/500

Publisher:
Panoma Press 12/100

Place of Publication:
St Albans 12/100

Date:
2016 4/100

ISBN:
9781784520786 13/100

Volume:
0/100

Issue/Number:
0/100

Page Numbers:
0/100

Title of chapter/section/paper:
0/500

217354391: Farewell jet lag : cures from a flight attendant /

NDCLV Reg ID: 114950

Send Request Change Fulfillment Type Cancel Request Apply constant data: Actions: DEFAULT Note Mark as Reviewed Save Reset Email Print Now

Request Purchase Staff Notes

Request Details (Request ID 217354391)

Patron Summary

Source: WSILLFORM
Status: Not Reviewed

Title / Journal: Farewell jet lag : cures from a flight attendant /

Uniform Title: [Empty]

Author: Christopher Babayode

Publisher: St Albans : Panoma Press, 2016

ISBN: 9781784520786

ISSN: [Empty]

OCLC: 945399164
[View Holdings](#)

DOI: [Empty]

PMID: [Empty]

Dissertation: [Empty]

Series: [Empty]

Type: Loan

Format: Book

Language: English (eng)

Edition: Preferred edition
 Most recent edition This edition Any edition

Local ID: [Empty]

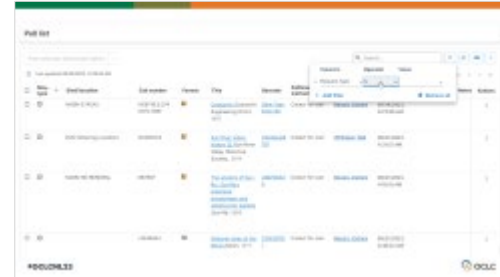
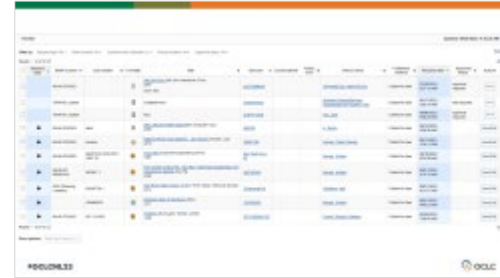
Open Access
No hits found
Apply Citation

[Search my library's online catalog](#)
[Search Google Scholar](#)
[Search Google Books](#)
[Search Google](#)



UI Modernization

- Pilot : started on July 12th
- Fresh and intuitive interface that is easier to learn and use
- Accessible experience for all
- Expanded support for globalization
- Faster delivery of new features and enhancements



Additional MARC fields displayed in Discovery

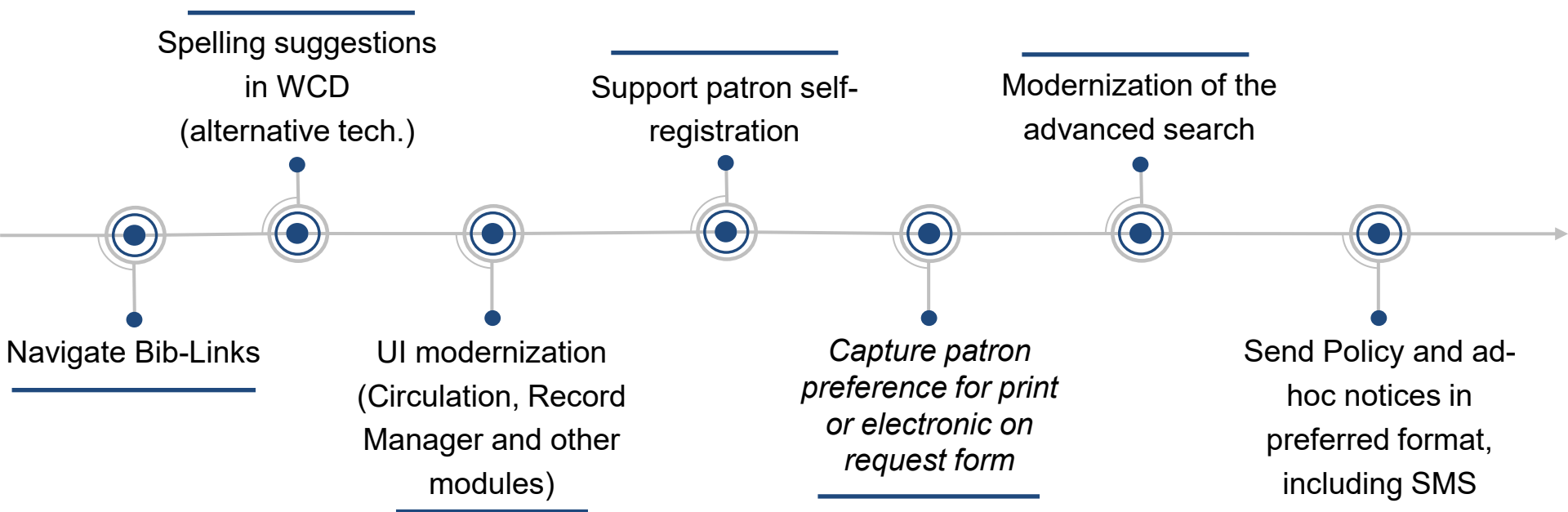


- 026 (Fingerprint Identifier),
- 340 (Physical Medium),
- 545 (Biographical or Historical Data)
- 585 (Exhibitions Note)
- Improvement on the display of the 650 (hyphens added between the subjects)



USER ENGAGEMENT

Coming next





Smart Recalls

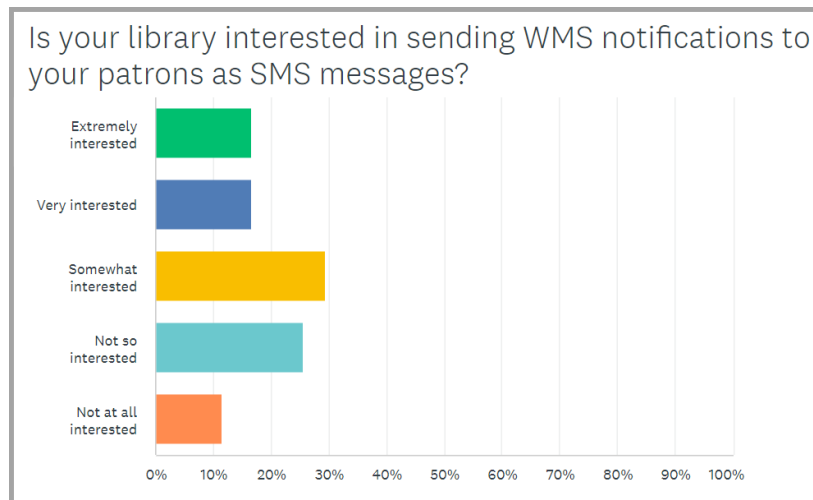
- System will automatically issue recalls when checked-out material is requested, including selecting materials
- Patrons will not need to issue specific recall request
- Staff will not need to manually identify materials and recall them
- Patron request queues will be supported
- Due dates will be adjusted automatically, with appropriate patron communications regarding loan period adjustments



Next generation notices

Long run project: 2023-2025

- Ad-hoc messages
- Account Overview export
- Notices history with re-send
- User format choice
- Template improvements
- Reply-to address
- SMS text message support
- One account





Community Center Update

New Community Center



Community

Welcome!

All community ▾

Search all content



23546 Members • 25 Online • 43158 Posts

Welcome to the OCLC Community Center!

The OCLC Community Center is your space to connect with community peers, collaborate, ask questions, gain insight, and share ideas to improve products.

WMS General Community



WMS General

All community

[OCLC Community Center](#) > [Product Communities](#) > [WMS General](#)

[Manage subscriptions](#)



Discussions

0 POSTS



News

539 POSTS



Events

9 POSTS



Recordings

39 POSTS



Ideas

0 POSTS



Past In-person Presentations

43 POSTS

Welcome to the WMS community!

Activity in WMS General

Sorted by:

[Start a conversation](#)

Events

WMS Community: Subscribe



OCLC Community Center > Product Communities > WMS General

Manage subscriptions 



Discussions

0 POSTS



News

539 POSTS



Events

9 POSTS



Recordings

39 POSTS



Ideas

0 POSTS



Past In-person Presentations

43 POSTS

Community Admin

Category Admin

Subscribe

WMS Community: Subscribe All



WMS General: Subscribe [X]

All
Get notifications for all 6 boards in this category

Partial
Get notifications for only the selected boards

- WMS Discussions
- WMS News
- WMS Events
- WMS Recordings
- WMS Ideas
- WMS Past In-person Presentations

Cancel Save

OCLC Community Center > Products

Discussions
0 POSTS

News
539 POSTS

Manage subscriptions ▾

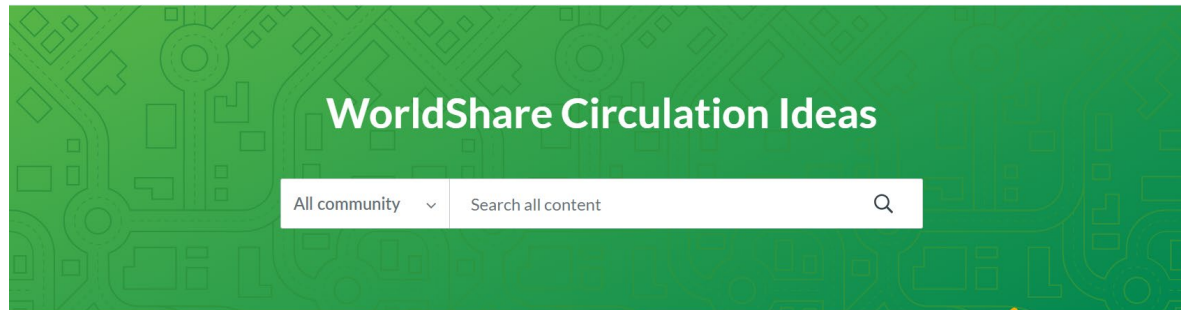
- Community Admin
- Category Admin
- Subscribe

#OCLCNL23

OCLC



Subscribe to Idea notifications



OCLC Community Center > Product Communities > WorldShare Circulation > Ideas

Options ⋮



Add Status Column to Discover Items Search Results

Status: New • Submitted by kmonti yesterday • 4 Comments (4 New)

Discover Items is a great way to look for items for patrons via the Circulation module, however, staff members are not able to view the status of items at a glance. (This applies to the regular collection and temporary items.) The current method involves clicking the item to view more details. It would simplify workflows to add a Status Colour ... View more

Communities: WorldShare Circulation



Recently Completed Ideas

Enable patrons to checkout items with a hold on us...

👍 5 Kudos

Remove "Last Issued to" in Item Record when Transa...

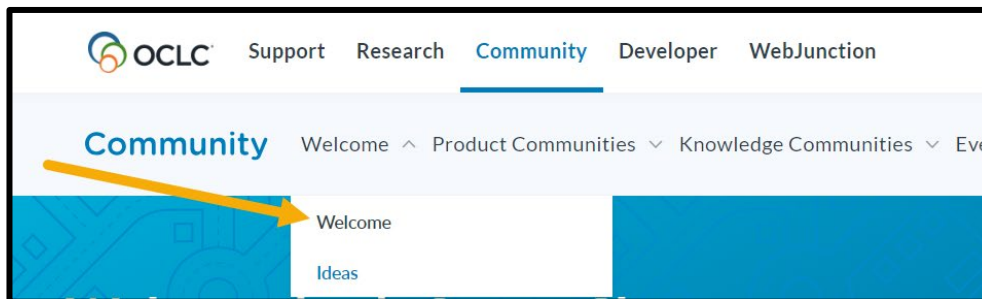
👍 2 Kudos

Add Schedule Notes to the Pull List*

Stay informed about ideas

- Subscribe to be notified of new ideas, new comments, and status updates
- Review Recently Completed Ideas on the main product idea board
- Add Kudos to support ideas
- Add comments to provide more detail
- Respond to product team requests for feedback

Welcome: Community overview



New Welcome area

- Getting started guide and other guides to making the most of new Community Center features
- Submit ideas for changes to the Community Center itself

Learn about badges in the Community Center

Badges are awarded to community members for many types of participation. This video provides a brief overview of our new community badges.

27-Aug-2023

Learn about community-submitted ideas in the new Community Center

Community enhancements are now called ideas in the Community Center. The videos in this post will help you to familiarize yourself with our new community idea boards.

27-Aug-2023

Learn about the new subscription options in the Community Center

The new Community Center offers members more flexibility when subscribing to content. The videos in this post introduce some of the new subscription options that are available.

27-Aug-2023

Learn about profile and notification settings in the Community Center

The new Community Center provides many new options to customize your profile and notification settings. These videos introduce these new settings. Below you'll find videos on the following topics: How...

27-Aug-2023

Getting started in the Community Center

Welcome to the OCLC Community Center!

27-Aug-2023

WMS Library Trends series



The changing workplace: Perspectives on working in the library environment now

Published on 22-Sep-2023 09:14 AM by AnnaJones-OCLC

The meaning of professionalism is changing. Library staff and libraries themselves have seen big changes recently. What rules of professionalism are useful, and which have become less meaningful? How do we cope with the changes and demands that are outside of our control? During this panel discussion, we'll hear from library staff members about the new meaning of professionalism and their perspectives on how things have changed.

The changing workplace: Perspectives on working in the library environment now
Date: 17 October 2023
Time: 1:00 pm - 2:00 pm EDT (UTC -4)
[Register now](#)

This virtual event will be recorded and posted in the WMS Community. All registrants will be sent a link to the recording after the event.

[Community Insights](#)

Edit Products

WMS

[View products \(1\)](#)

0 Kudos

[Comment](#)

Featured Guests

- Nicholas_Cunningham
Community Member
- Emily_Fidelman
Community Member
- Cait_Whitehead
Community Member

Starts: Tue, Oct 17, 2023 01:00 PM EDT
Ends: Tue, Oct 17, 2023 02:00 PM EDT

<https://oc.lc/register-wms-library-trends-2023>

[Add to Calendar](#)

Three-part series:

- Changing workplace – 17 October
- Staff onboarding and training – 31 October
- Advocating for your library – 8 November

View all at

<https://oc.lc/cc-wms-events>

Kennis is er om gedeeld te worden.

Paul Jansen

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jansenp@oclc.org

Maximilien Sangoi

Senior Product Manager

sangoim@oclc.org

Bedankt!