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

OCLC CONTACTDAG

Blijvend ontwikkelen

Innovatie voorbij de hype

Welkom

#OCLCNL23

OCLC

Paul Jansen

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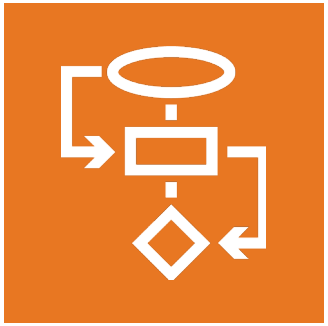
Senior Product Manager

Themes

Empowering Librarians



Transforming Workflows

Interoperable Platform

User Engagement

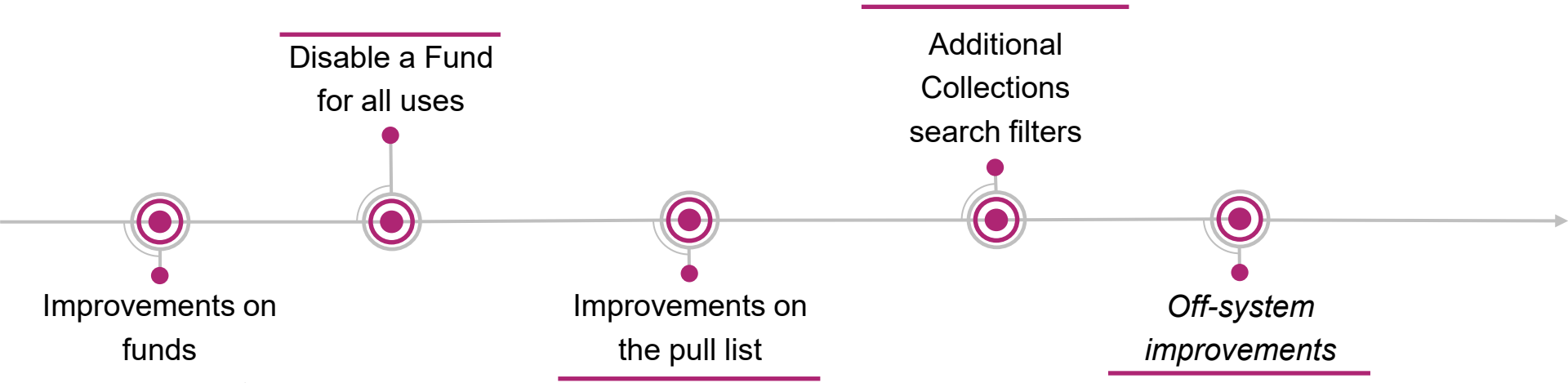
Community Center

Empowering Librarians …

… to do things better

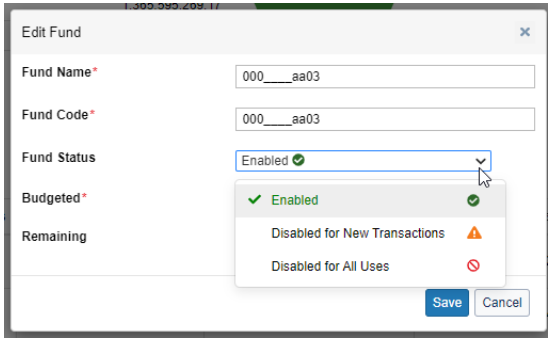
EMPOWERING LIBRARIANS

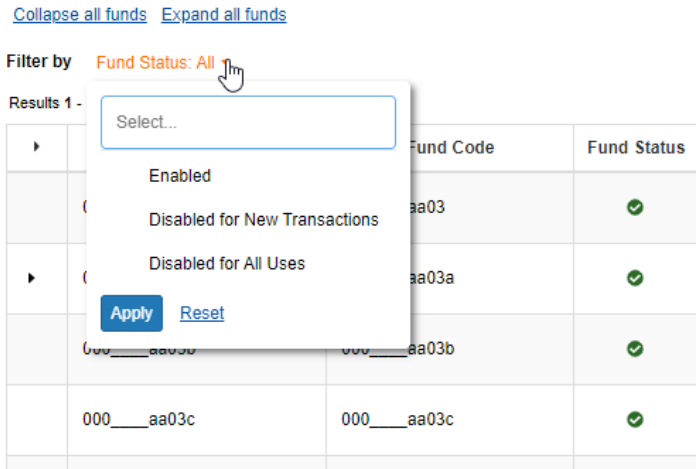
Recently delivered



Improvements on the Budget/Funds Management

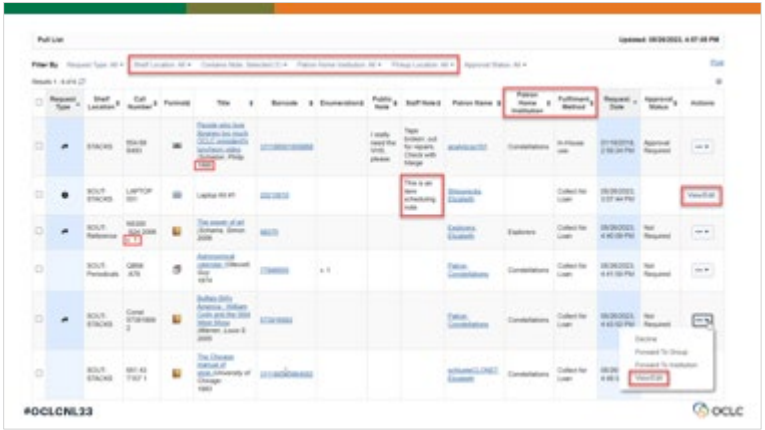
- Additional status on the funds
  - Hard/soft disabling of funds
- Additional filter in the budget
  - Status of the fund





Improvements of the Pull-list

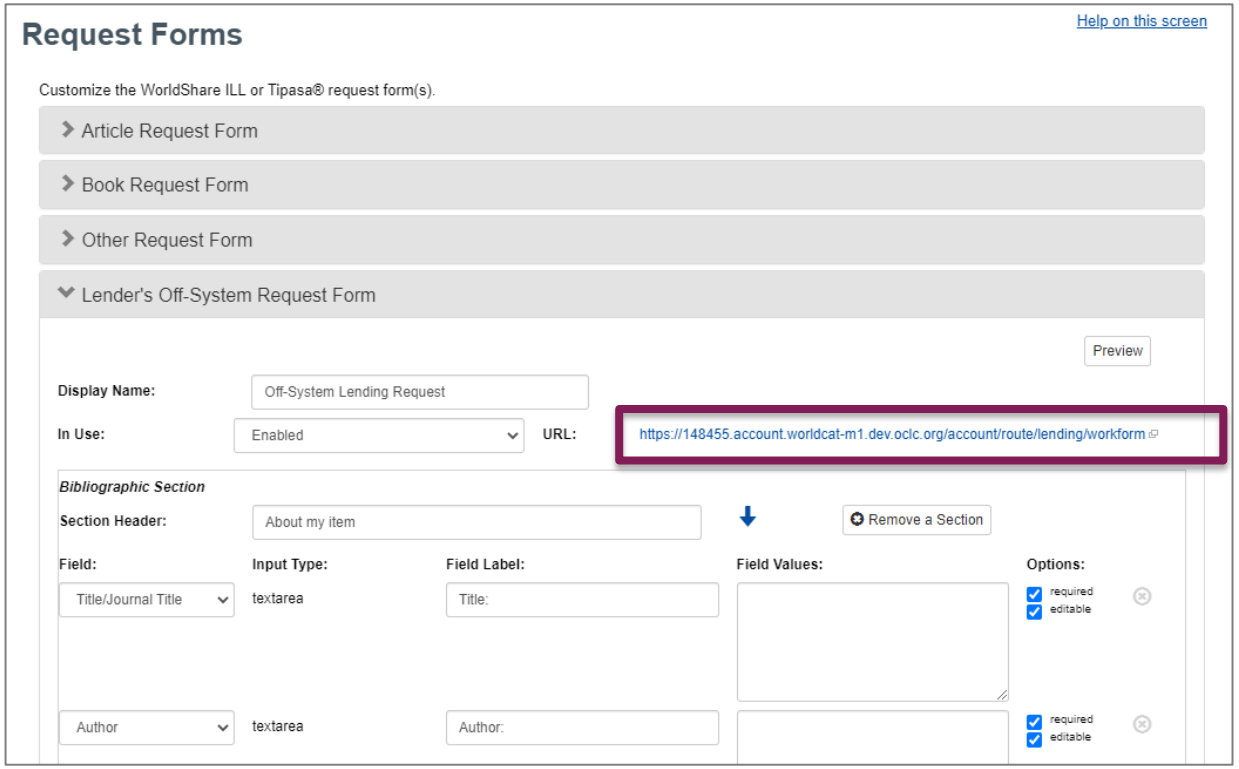
- Pull list usability improvements
  - More data: edition; publication year; requesting patron's home institution
  - New filters: pickup location; item shelving location; patron's institution; presence of notes



Off-system improvements

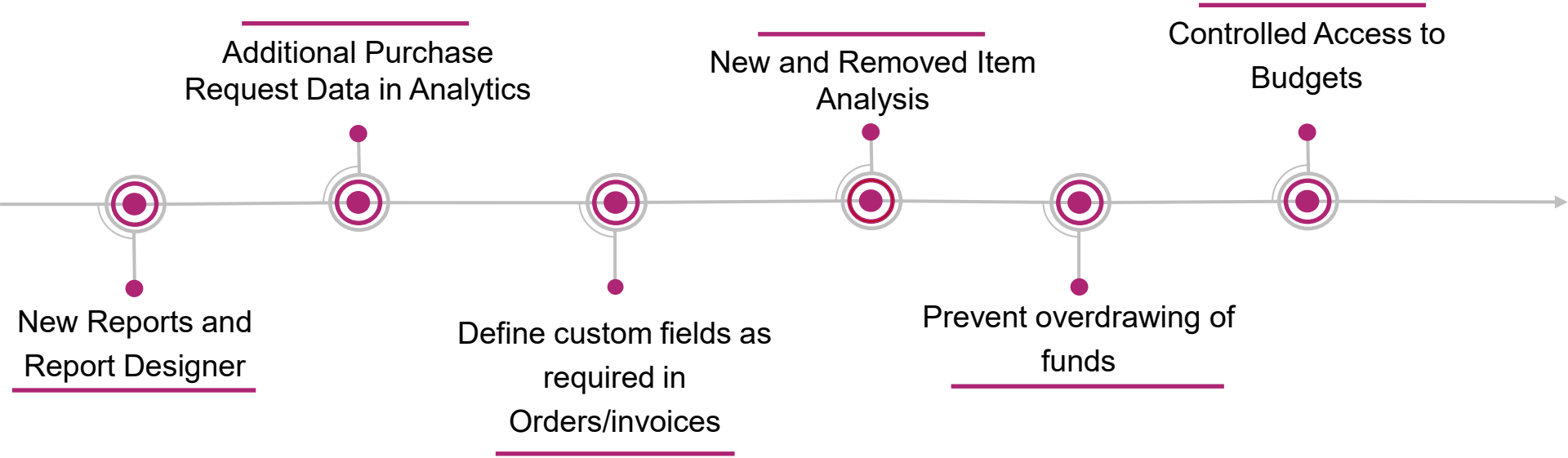
- Automation can include off-system partner in the lender string (Tipasa only)
- A new off-system notification can be automatically or manually sent to the off-system partner (Tipasa only)
- Improved partner table performance:
  - The partner table in service configuration will load faster, even with 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



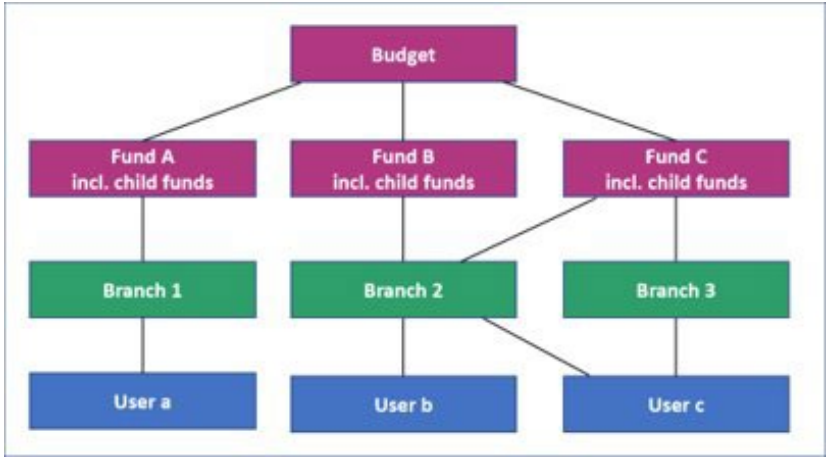
EMPOWERING LIBRARIANS

Coming next



Controlled Access to Budgets

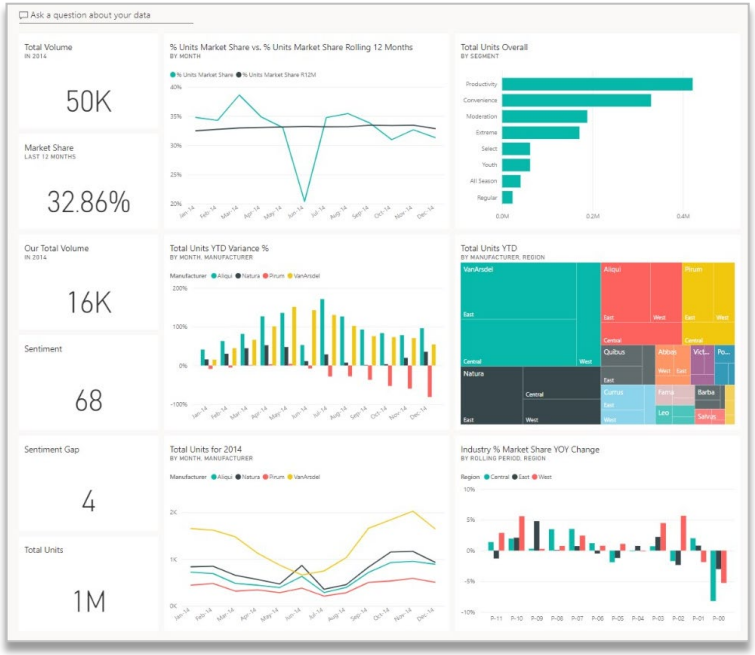
- WMS Libraries need to control the **access/visibility** and the **consumption/use** of the budget funds across the different branches of the library.

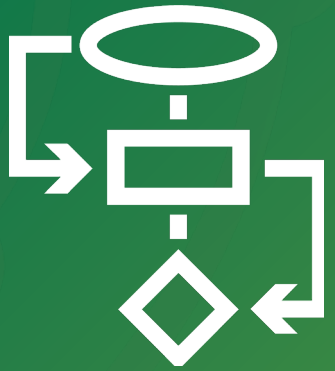


- 1 global budget and assign specific funds to specific branches.
- Assign users to one or more branches.
- A user can see and use a fund withi n the budget based on their associat ed branch or branches

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

OCLC

TRANSFORMING WORKFLOWS

Recently delivered

Title Level Licensing

Private Holdings - WHALe (Early Adopters)

Support import of EDIFACT order response messages

View and edit new Purchase Request Fields

New integration settings WMS/WS-ILL/Tipasa

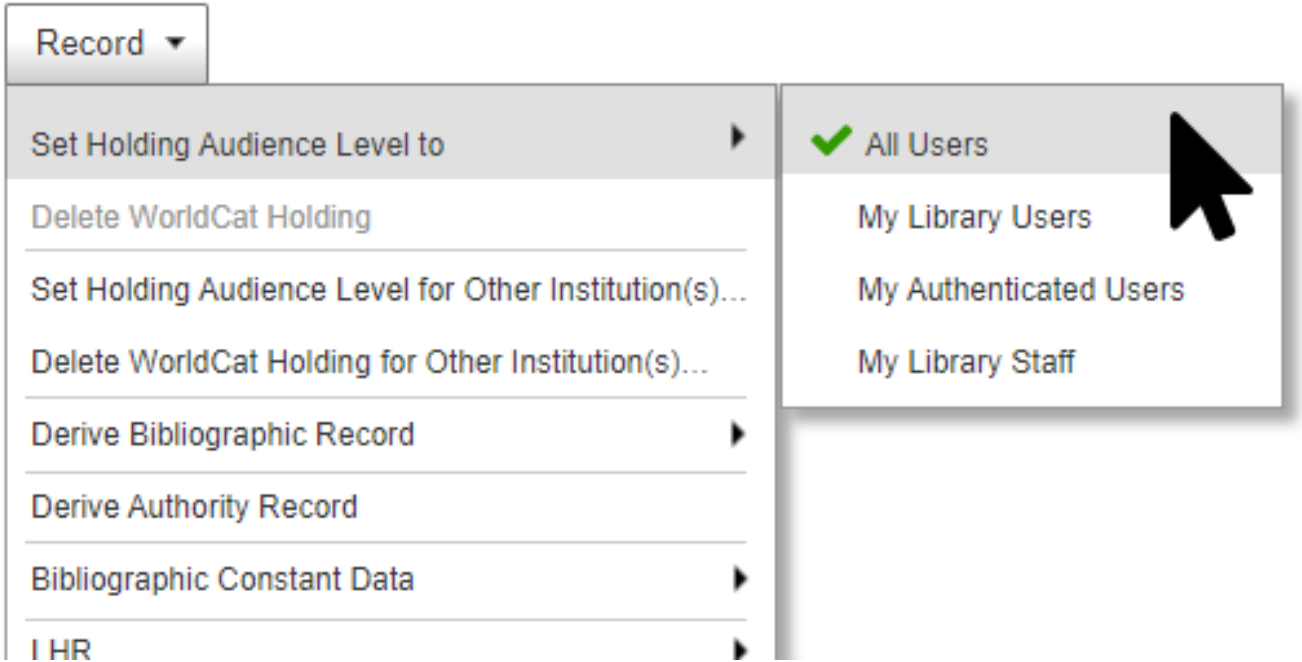
Audience-level holdings

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

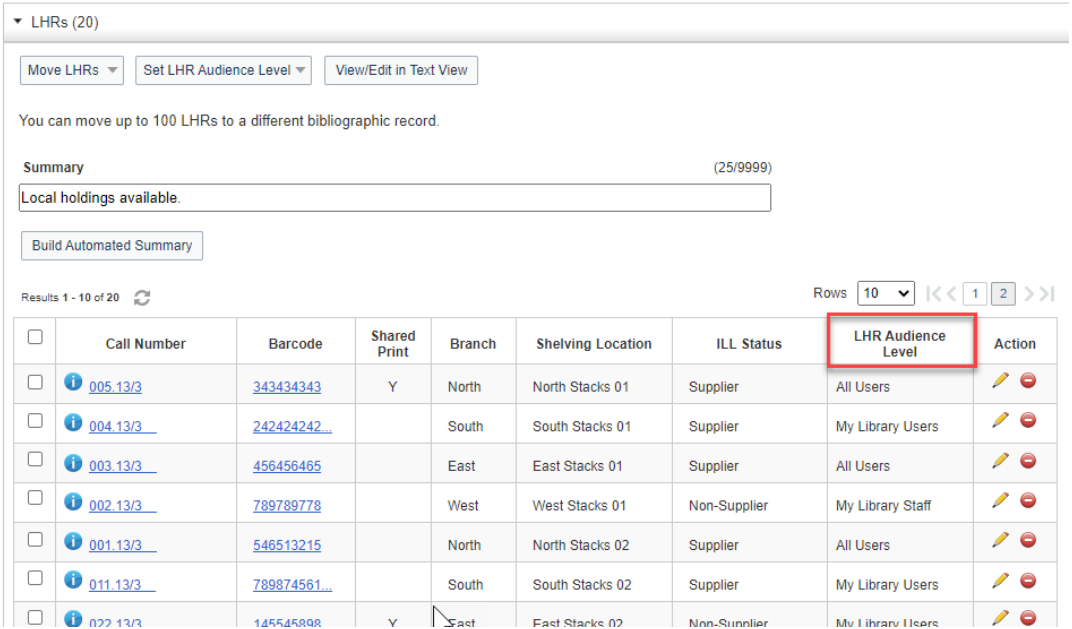
- Display to **All Users**
- Display to all **My Library Users**
- Display to **My Authenticated Users**
- Display to **My Library Staff**

In WMS, and WS-ILL

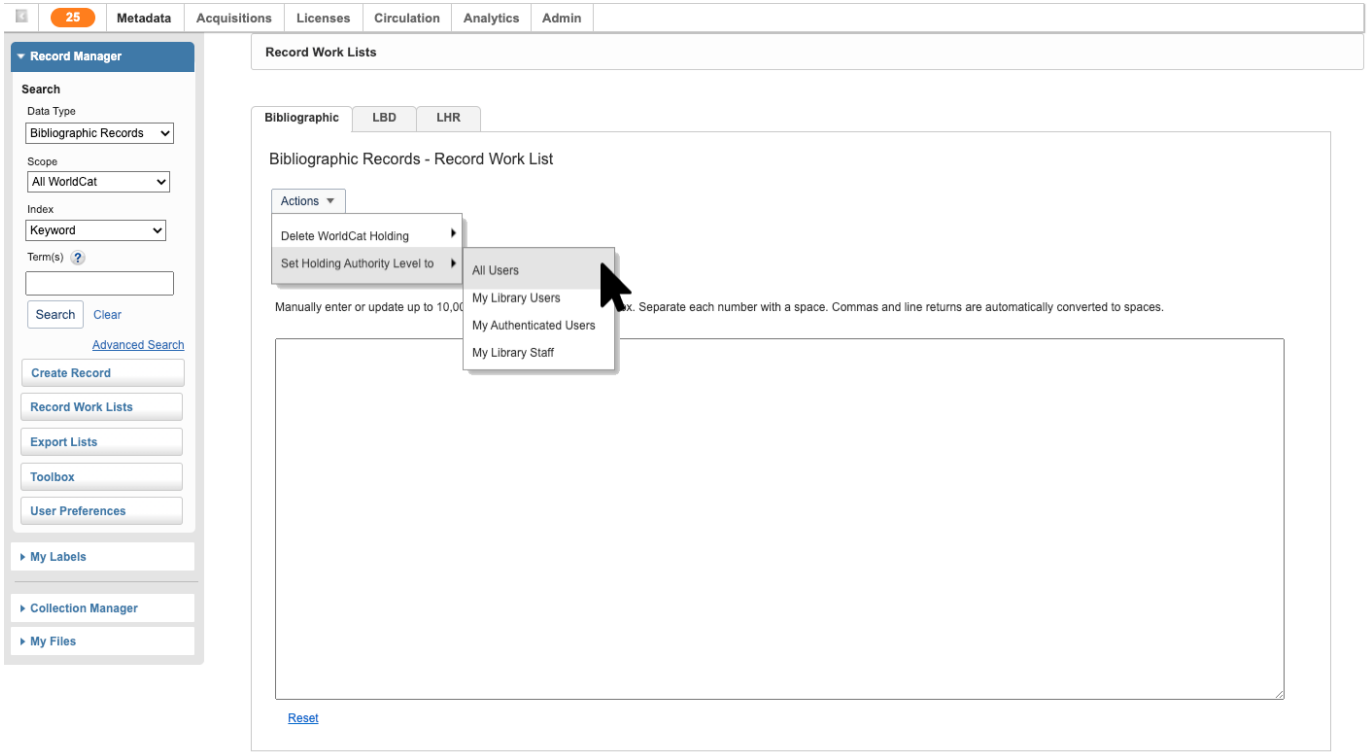
Workflow: select audience level



Workflow: update audience level at copy level

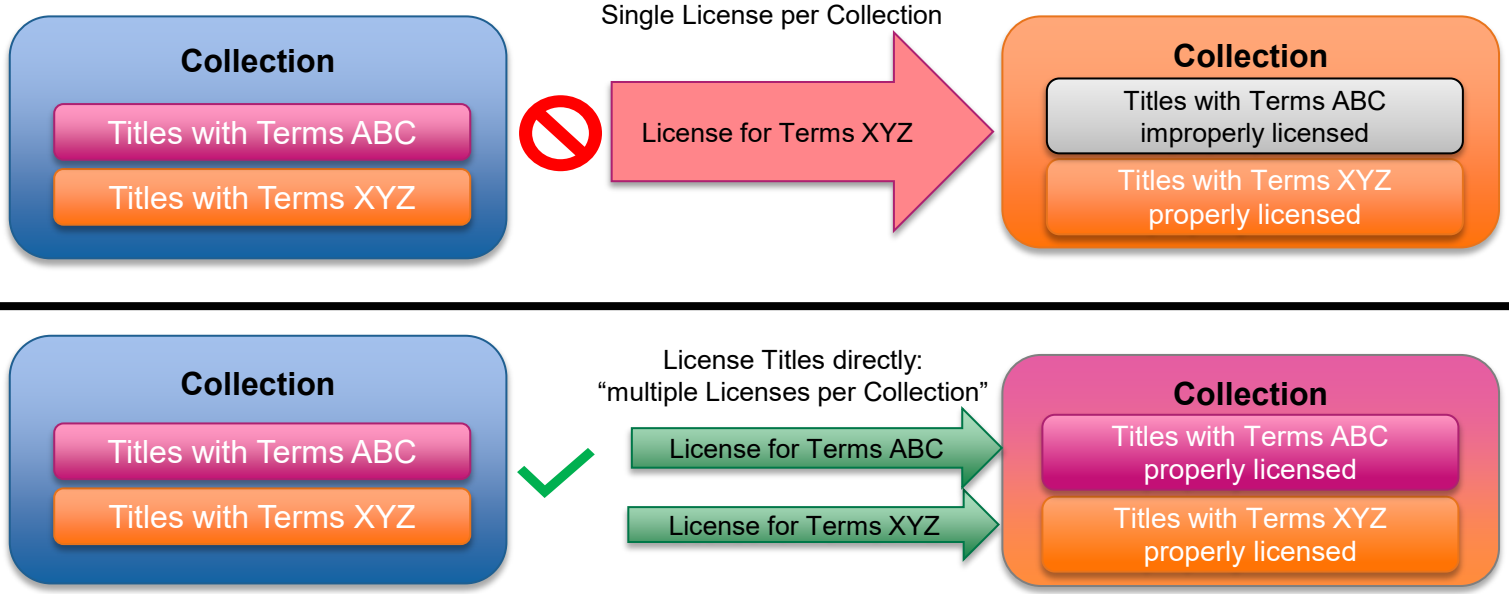


Workflow: bulk edit audience level

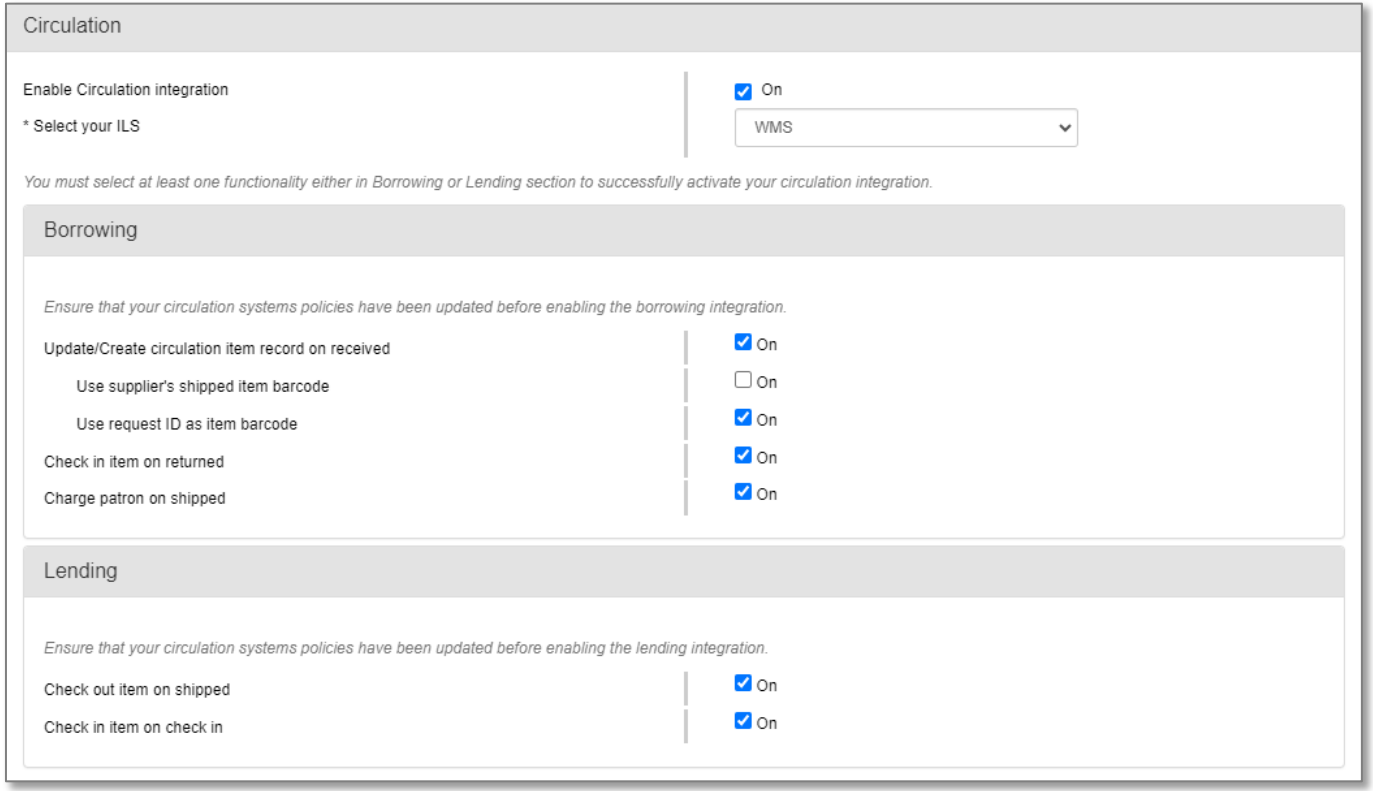


Title-Level Licensing

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

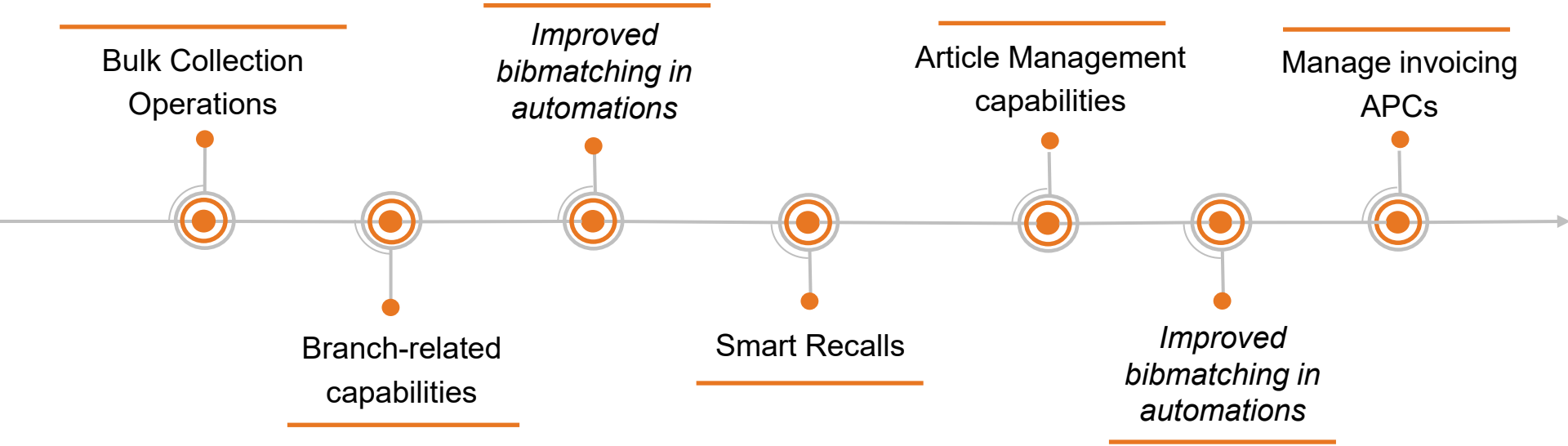


New integration settings: WMS/Tipasa/WS-ILL



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

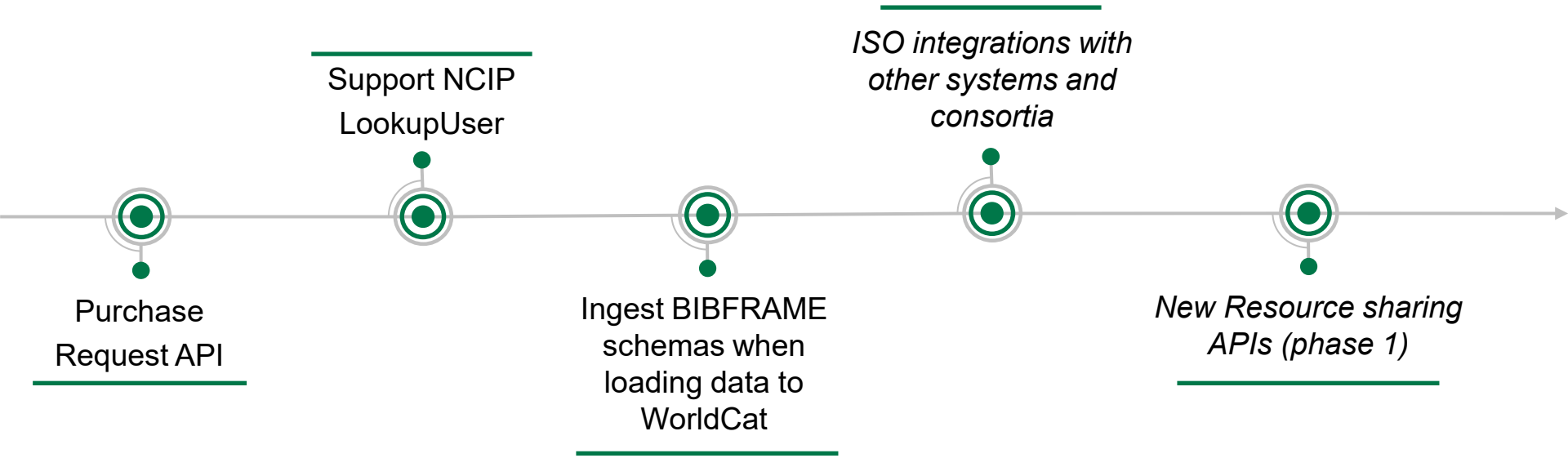
Interoperable platform:

places the library system in the campus ecosystem

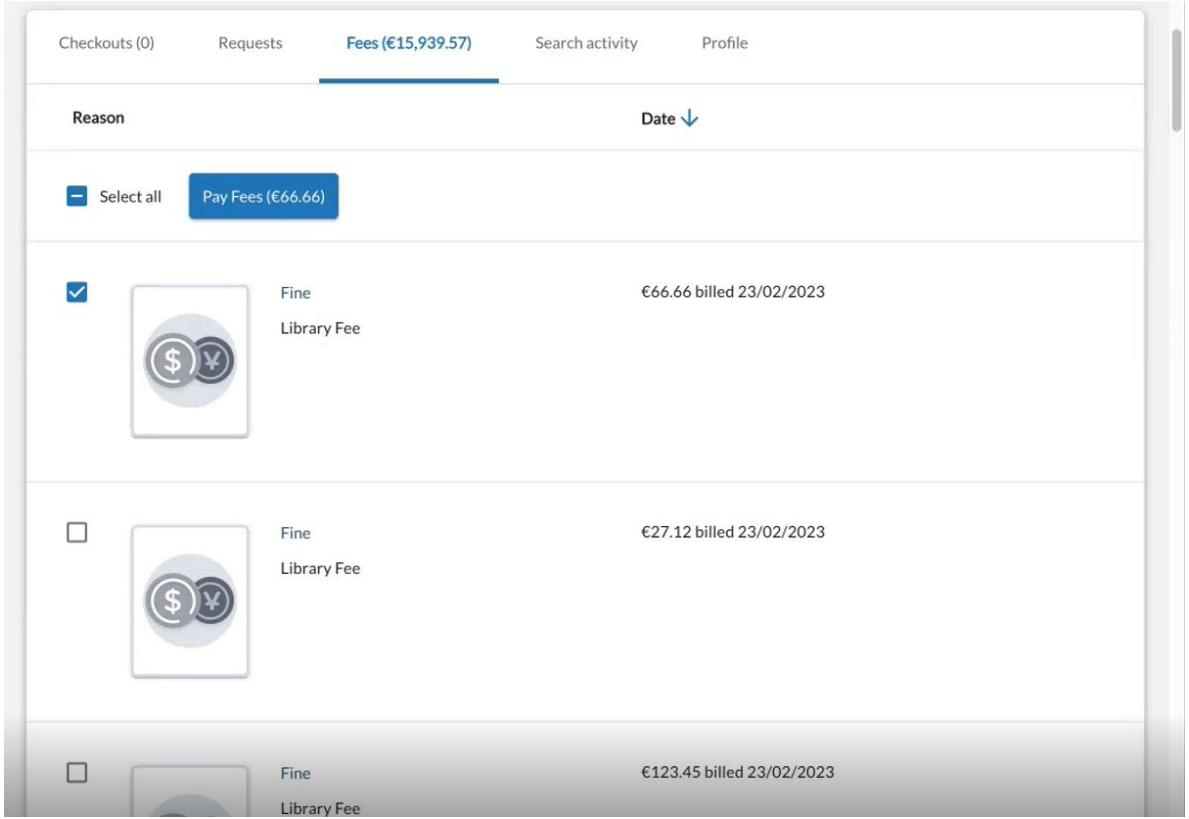
OCLC

INTEROPERABLE PLATFORM

Recently delivered



Integration with Worldline-Ingenico



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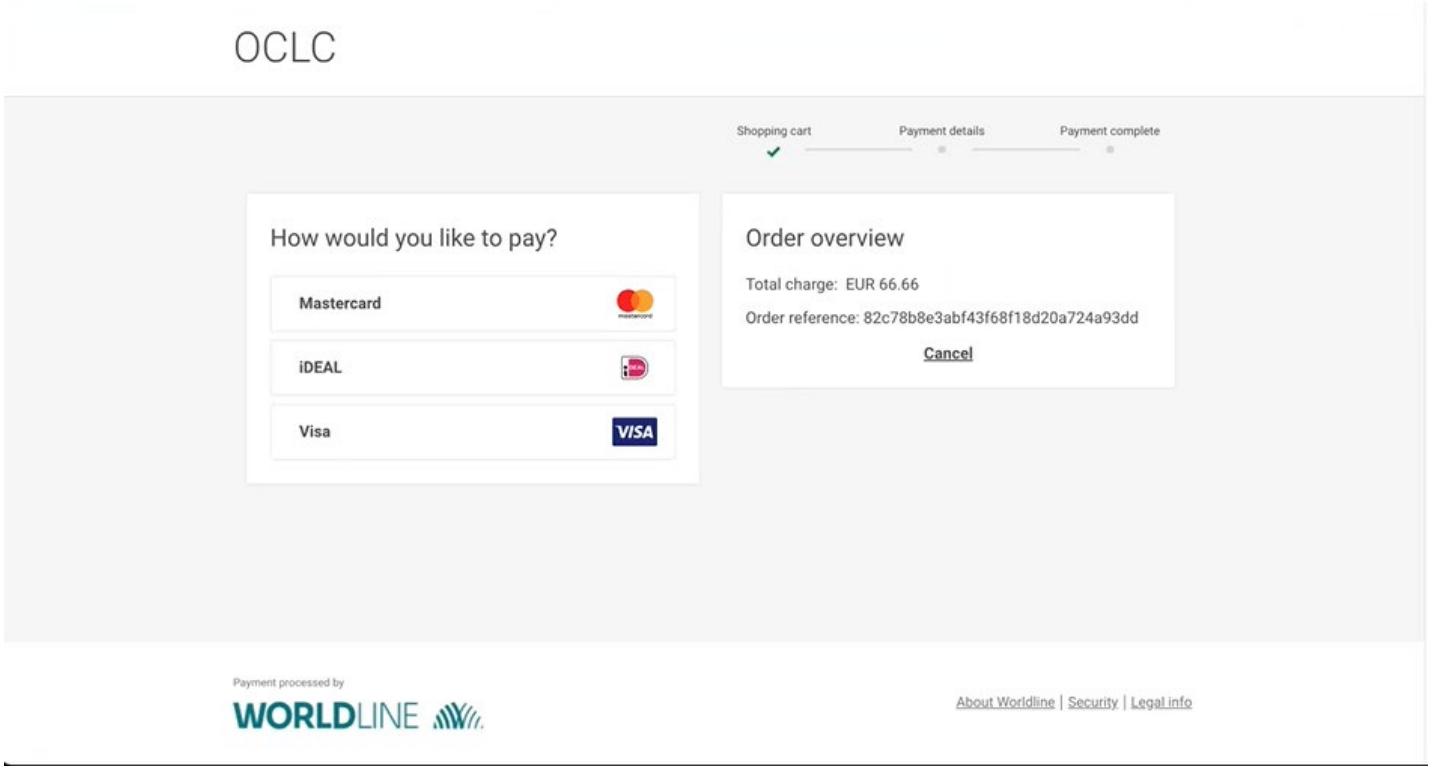

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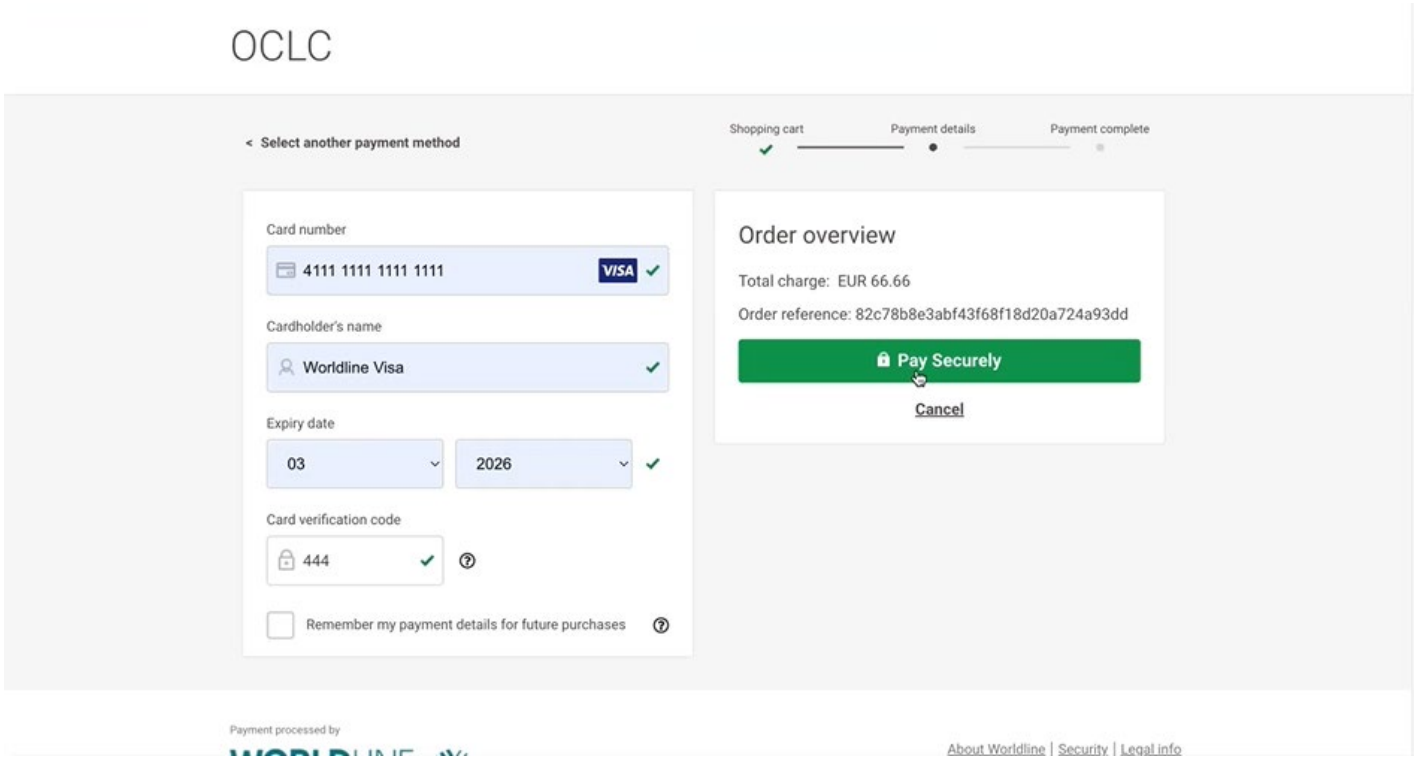

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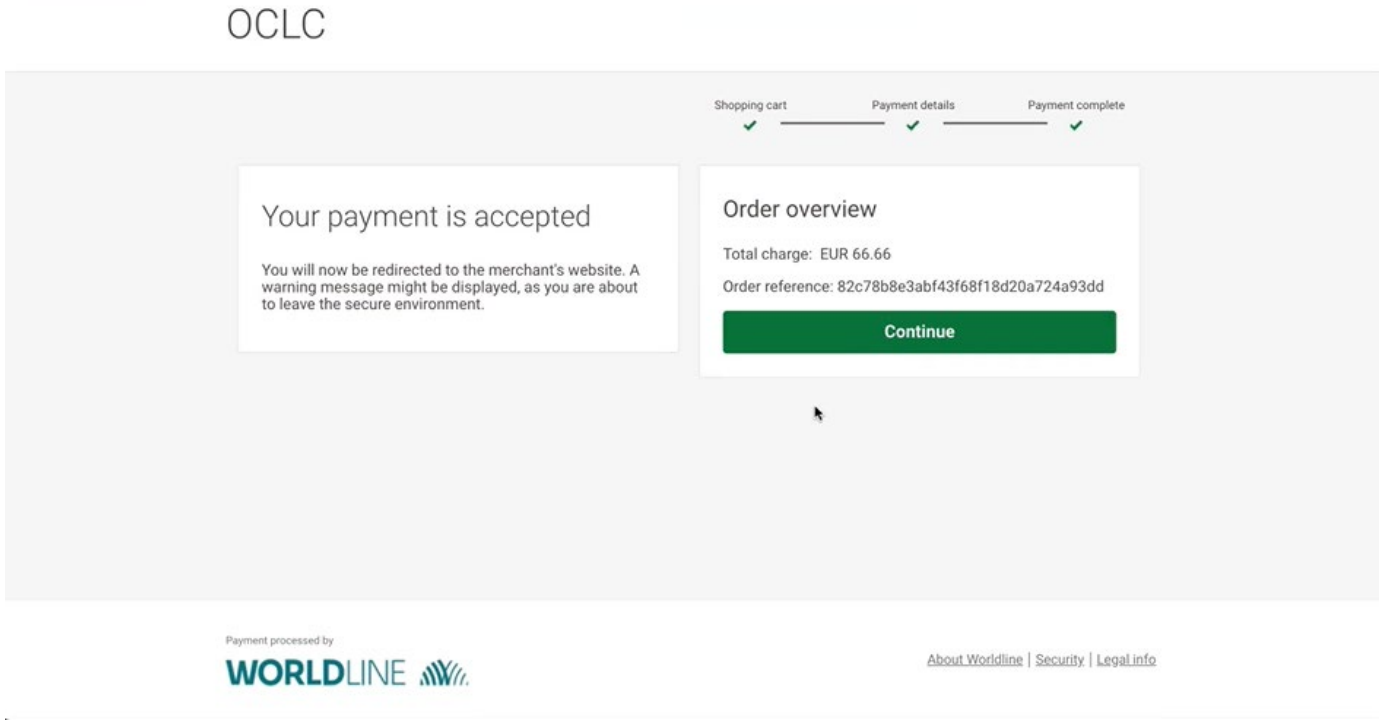
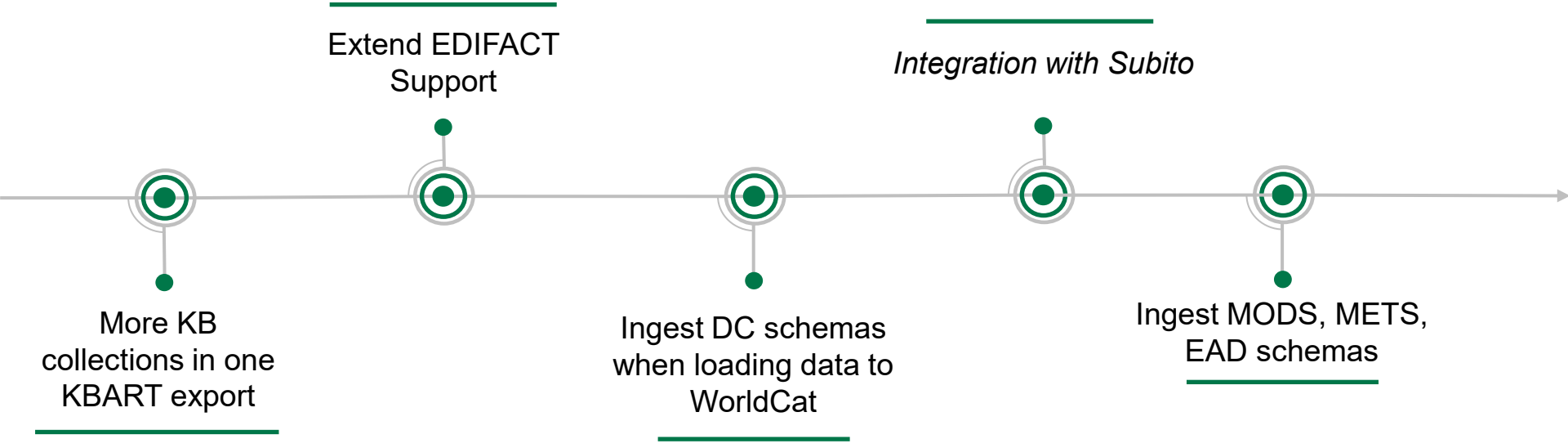
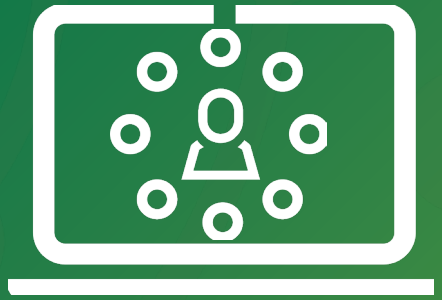


INTEROPERABLE PLATFORM

Coming next





User Engagement:

Student and faculty at the center

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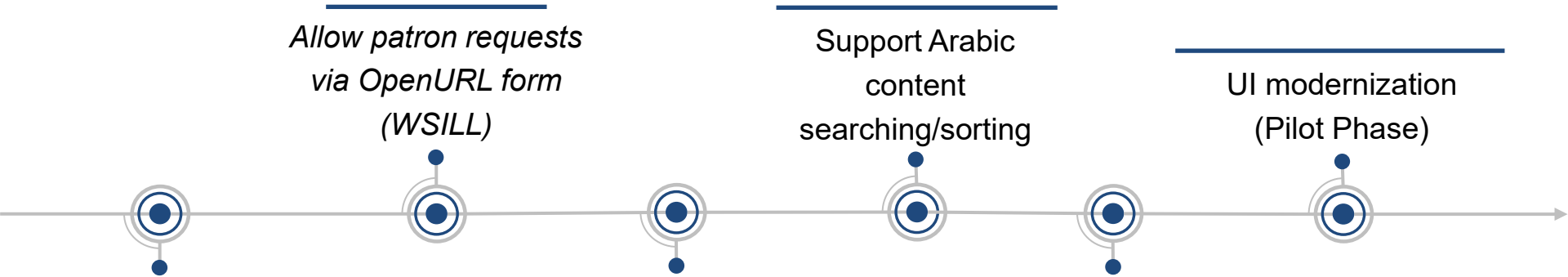
USER ENGAGEMENT

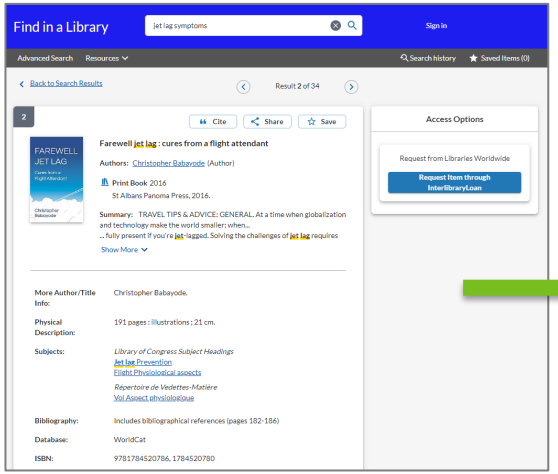
Recently delivered

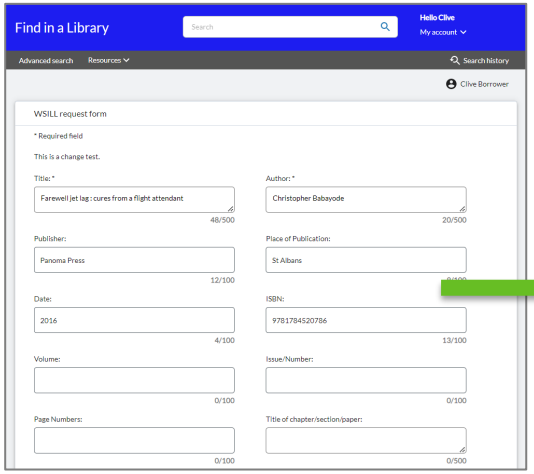


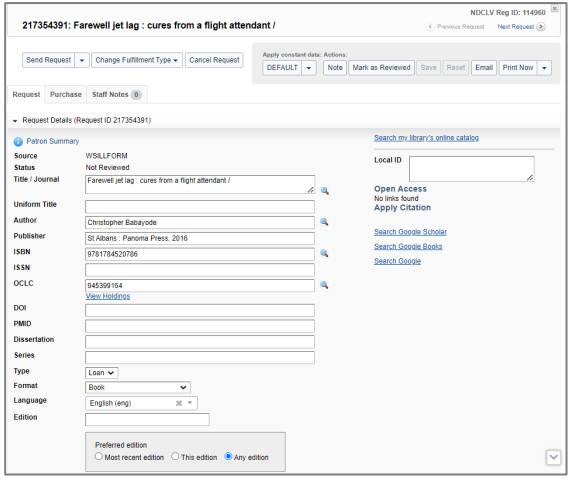
WorldShare ILL request form

What's it look like?

Catalog or database → Request form → Staff interface

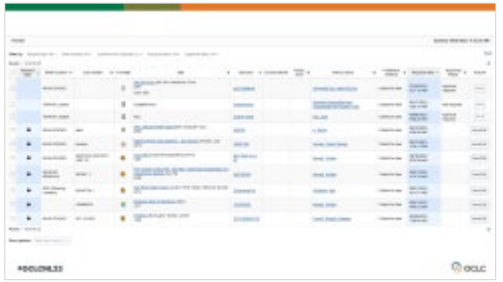


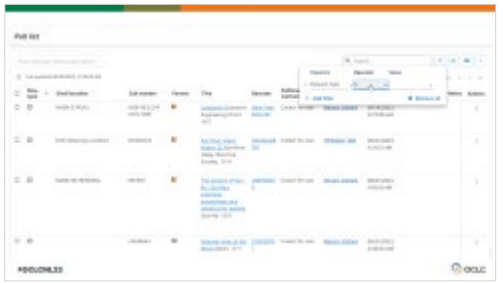




UI Modernization

- 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



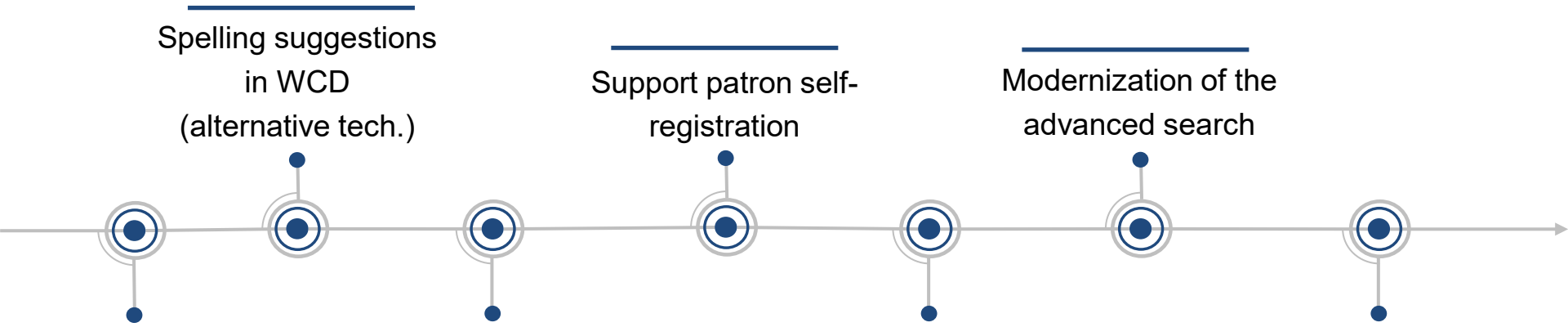


Additional MARC fields displayed in Discovery

- 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



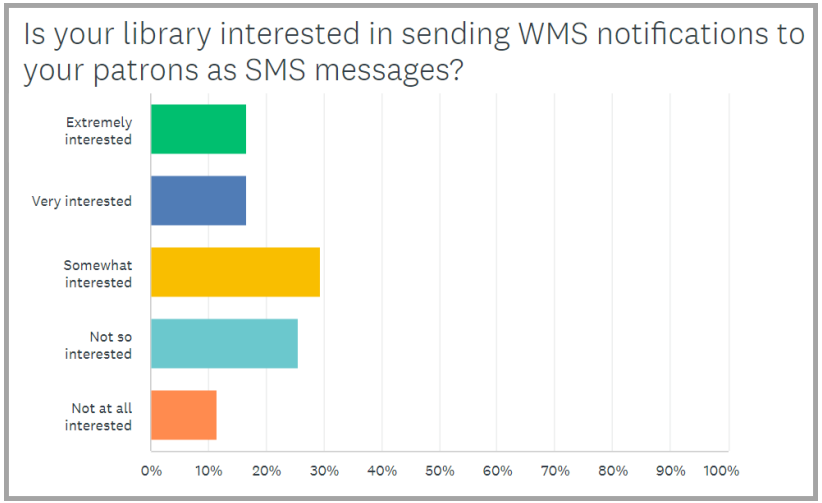
Smart Recalls

- 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

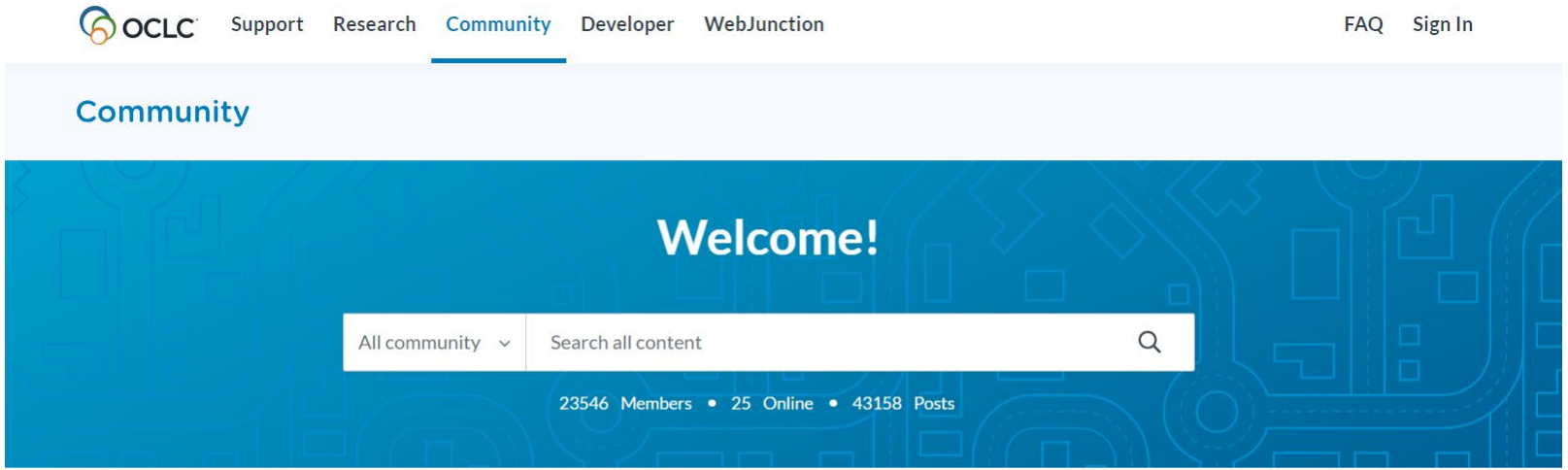
- Ad-hoc messages
- Account Overview export
- Notices history with re-send
- User format choice
- Template improvements
- Reply-to address
- SMS text message support
- One account



Community Center Update

OCLC

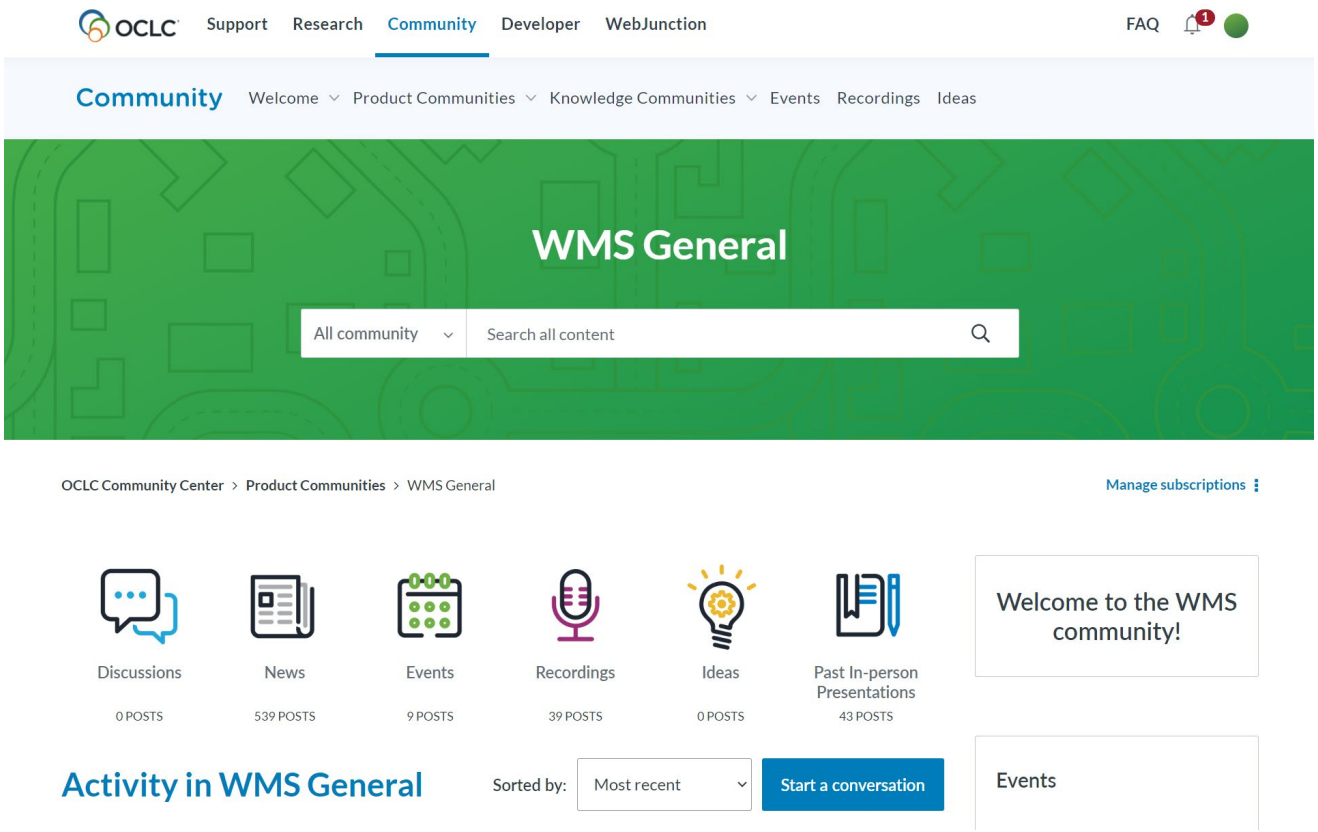
New Community Center



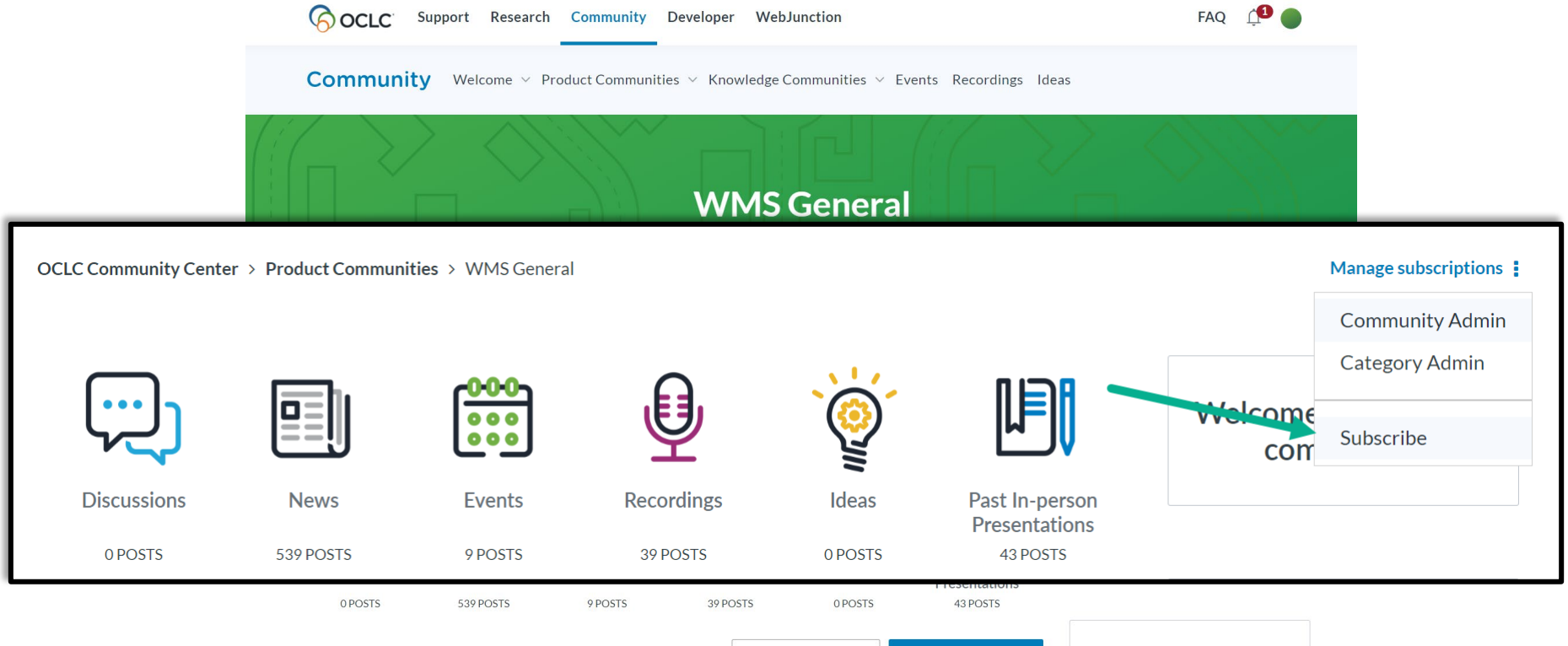
Welcome to the OCLC Community Center!

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

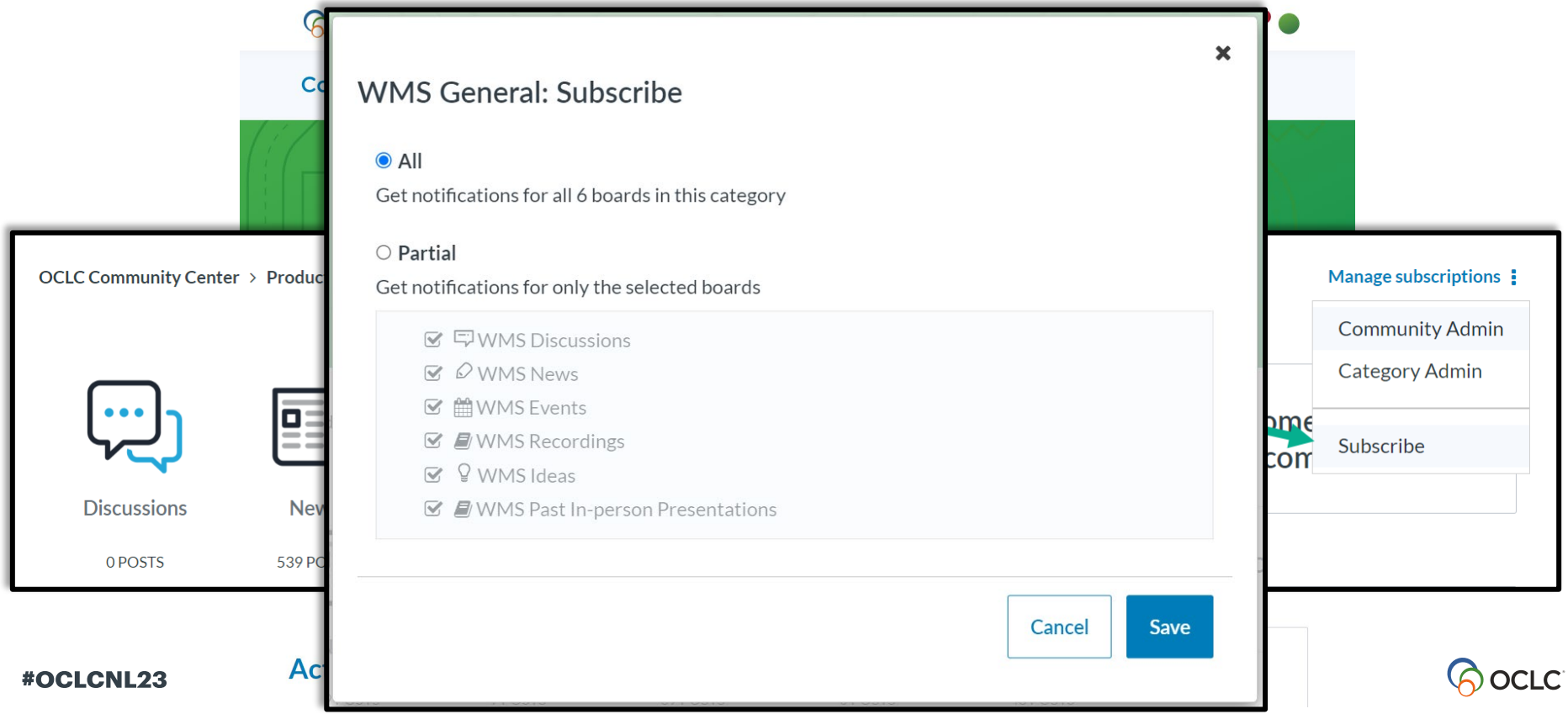
WMS General Community



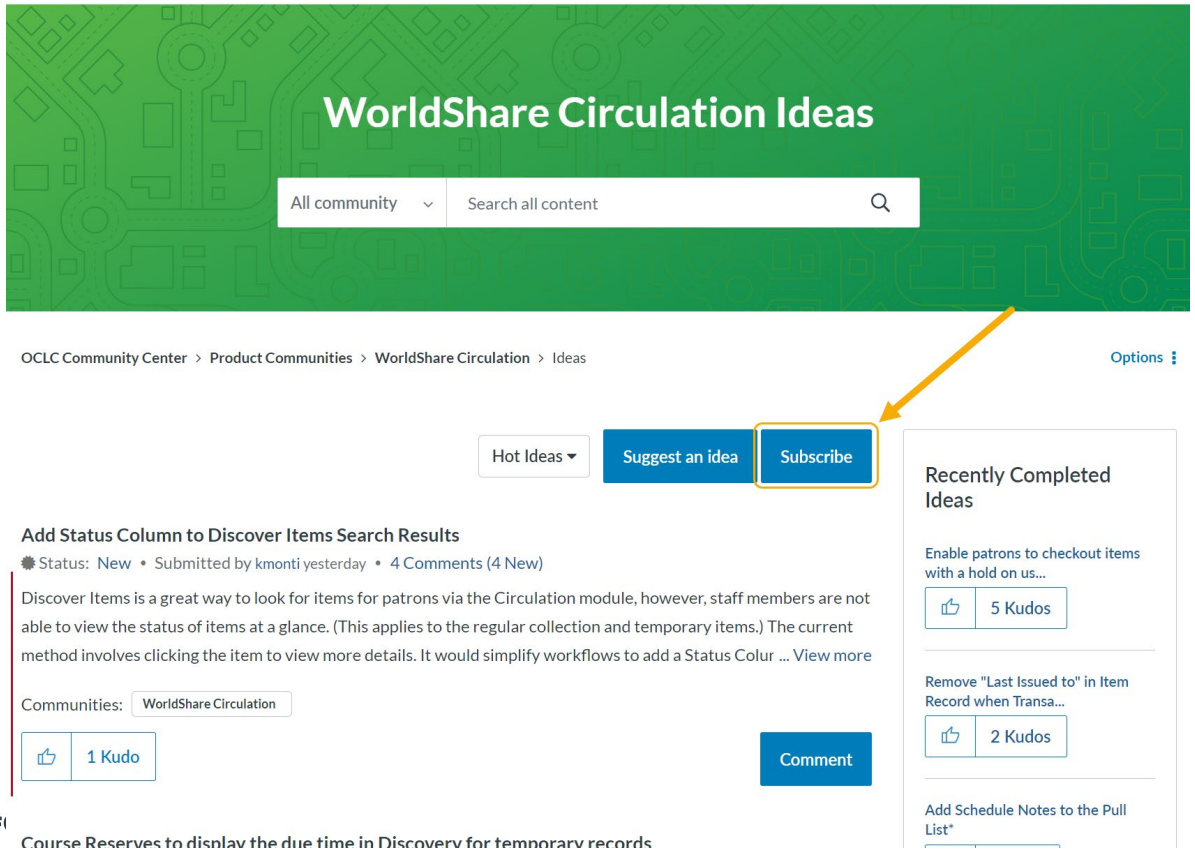
WMS Community: Subscribe



WMS Community: Subscribe All



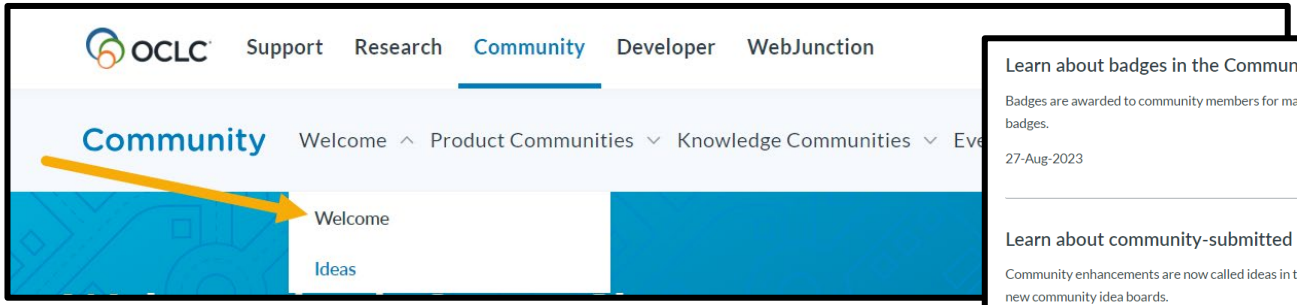
Subscribe to Idea notifications

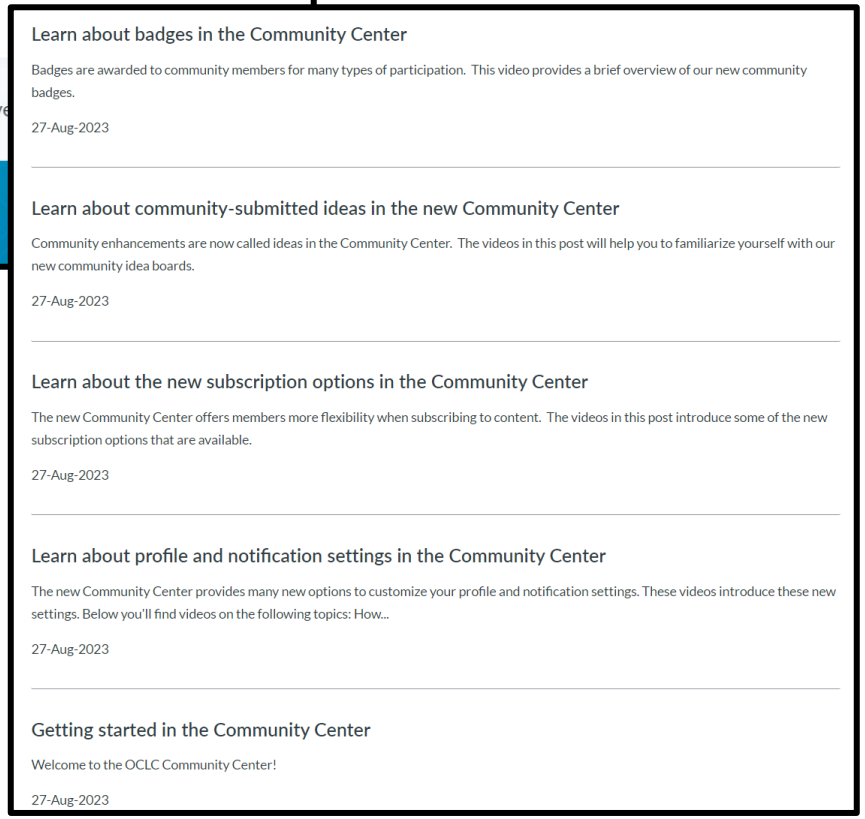


Stay informed about ideas

- 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



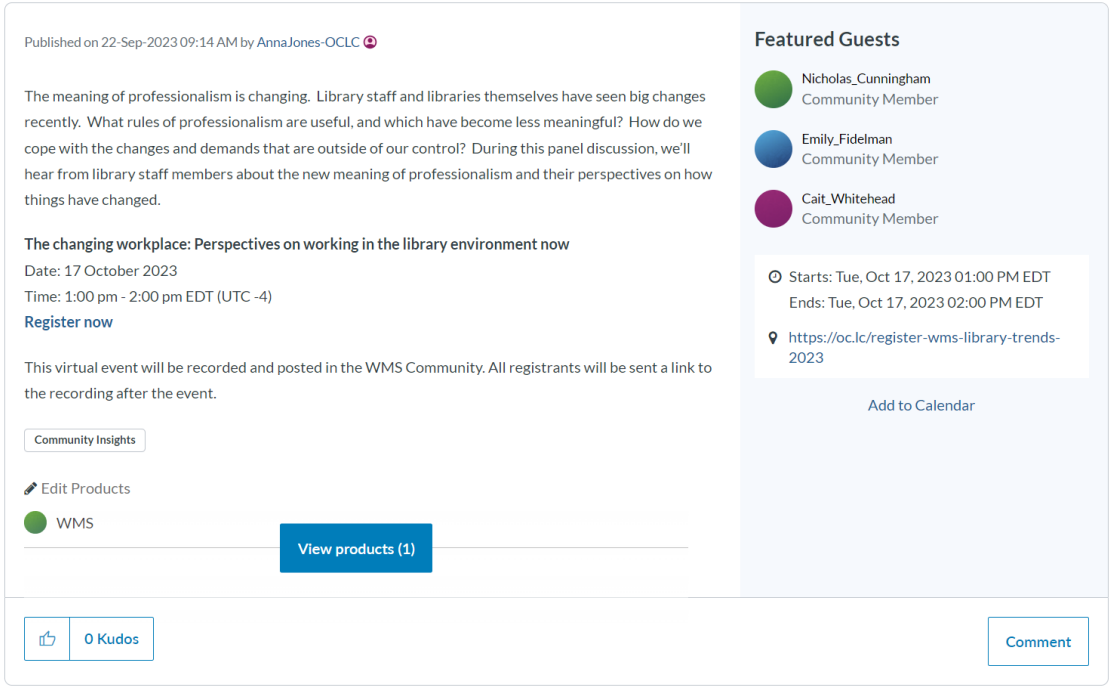


New Welcome area

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

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.

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Maximilien Sangoi
Senior Product Manager
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Bedankt!

OCLC