It’s about Time
Reducing Redundancy with WorldShare Management Services
It’s About time

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Product and Technology Advocate
OCLC

OCLC WorldShare Management Services
Convenience is Crucial Factor in Information-seeking Behavior, according to New Digital Visitors and Residents Report

20 March 2013

This paper, "Visitors and Residents: What Motivates Engagement with the Digital Information Environment?", which was presented at ISIC: The Information Behaviour Conference, held 4-7 September 2012 in Tokyo, reports on the three-year Digital Visitors and Residents project, a longitudinal study funded by JISC, OCLC, the University of Oxford, and the University of North Carolina, Charlotte. The project is an attempt to fill the gap in user behavior studies identified in the JISC Digital Information Seeker Report.

http://oc.lc/Convenience
Options = challenges

Users

- Google
- Wikipedia
- YouTube
- Facebook
- HathiTrust
- Google Scholar
- JSTOR
- iTunes
- Amazon
- BBC News
- WebMD
- ESPN
- A to Z List
- OPAC
- Self-Service
- Cataloging
- Acquisitions
- Print Vendors
- Electronic Vendor
- ERM
- Consortial System
- National/Global System

The world's libraries. Connected.
Options = challenges

Users

Library
Options = challenges

Users

Library
Two overlapping challenges:

- Saving library staff time
- Meeting the time expectations of users

Intro to WorldShare Management Services (WMS)

What our members are experiencing with WMS
"I’m looking for a book..."

1. Is the e-book available?
2. What collection?
3. Do we have it?
4. If not, can I get it?
5. How much does it cost?
6. Do I have money?
7. Delivery time?
8. Should we borrow it?
9. From whom?
10. Etc., etc., etc...

I’d like it on my iPad.

Today.
How do we best meet these challenges?

Together.
It's not an unfamiliar problem

2,000,000,000+

holdings in WorldCat

300+ million records

Millions of hours saved thanks to cooperative cataloging
How can you save time for both staff and users?

1. **Streamline systems and workflows** based on cooperative management—do things differently to save time and to do different things.

2. Stop creating and maintaining redundant data.

3. Get control of e-resources management and access.

4. Make discovery and access easy and fast.
An integrated suite of cloud-based library management applications
## Return on investment

<table>
<thead>
<tr>
<th></th>
<th>Norwich University</th>
<th>Pepperdine University</th>
<th>Bucknell University</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Doing something new</strong></td>
<td>Built new e-classroom with iPads</td>
<td>Cataloged ETDs and special collections</td>
<td>Helped fund Digital Commons</td>
</tr>
<tr>
<td><strong>Efficiency</strong></td>
<td>• Streamlined e-book management</td>
<td>• Tech services</td>
<td>• Reallocated 2.5 FTE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• No servers/clients</td>
<td>• Tech services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Easier e-book management</td>
<td></td>
</tr>
<tr>
<td><strong>User impact</strong></td>
<td>Easier to find what’s needed</td>
<td>Increased patron satisfaction</td>
<td>Moved to more than 90% PDA for p and e monographs</td>
</tr>
<tr>
<td><strong>Savings</strong></td>
<td>$50K/yr</td>
<td>$50K/yr</td>
<td>$90+K/yr</td>
</tr>
<tr>
<td><strong>Students/Collection</strong></td>
<td>3,400 students (FTE); 183,000 collection size</td>
<td>8,000 students (FTE); 326,400 collection size</td>
<td>4,000 students (FTE); 831,000 collection size</td>
</tr>
</tbody>
</table>
What would you do if you had more time?

- Catalog our curriculum materials
- Inventory our collections, catalog our special collections and create a game night
- Redesign our website to be more interactive and patron-centered
- Create new instructional guides
What would you do if you had more time?

- **Pepperdine University Library**: Inventory our collections, catalog our special collections and create a game night.
- **Texas A&M University–San Antonio**: Catalog our curriculum materials.
- **Newbury College**: Create new instructional guides.
- **The Darling Library at Hope International University**: Redesign our website to be more interactive and patron-centered.

OCLC The world’s libraries. Connected.
Streamline systems to streamline workflows
physical stock management

(dis)integrated electronic management

A–Z list
database list
link resolver
metasearch
e-resource management

cataloging
OPAC
circulation
acquisitions
serials

OCLC  The world's libraries. Connected.
from multiple systems and servers... to one browser
Open box of materials

In ILS, click orders, then receive orders

Search orders by order number

Find items in list, check off items that have arrived

Click to receive selected items

Add invoice lines one at a time

Search orders by order number

Find items in list, check off items that have arrived

Click to receive selected items

Add invoice numbers vendor and date

Click add invoice

Click pay invoice

Login to Connexion

Find record, edit and save

Export saved records and download file

Go to ILS, find file and import

Send to cataloging

Run report and find MARC records loaded

Edits made to records

Send to cataloging

Sent to labeling

Send to labeling

Scan ISBN, adjust call#, scan item barcode

Repeat last step for each item

Scan ISBN, adjust call#, scan item barcode

Repeat last step for each item

Scan ISBN, adjust call#, scan item barcode

Repeat last step for each item
Stop creating and maintaining redundant data
An increasing amount of redundant work
Data shared is data enhanced, secured and of better quality

- Not just traditional library data
  Bibliographic data, yes…PLUS:
  - Vendor data
  - Knowledge base data
  - Serial check-in data
  - Evaluative content
  - Licensing data
  - FRBR, GLIMIR
  - VIAF, DDC, ONIX, LCSH
  - Linked data

- Create once, enhance often, share widely
- Shared storage and security benefits
Many hands make light (and better!) work

The expert community and automated processes enhanced by many libraries

enhanced by OCLC
Get control of e-resources
WorldShare Management Services and your e-resources

Simplify the process of adding holdings

Aggregate e-resource data
- e-books, e-journals, articles, databases and digital materials
- Integrated with central index of more than 1.7 billion articles, e-books and other e-content

Maximize discovery and access
E-management services

- License management
- Link resolution and A to Z list
- Collection management of metadata
- Shared knowledge base collection
- DDA fully automated by integration with supplier
- Expedited ILL
- Synchronizing holdings with WorldCat
Current DDA workflow

Configure title profile with provider

Provider sends MARC records

Massage records

Provider bills library

Locate records

User triggers purchase

User triggers purchase

Provider sends OCLC purchased titles

Provider sends OCLC title list

OCLC sets holdings in knowledge base

OCLC sets holdings in Discovery

User triggers purchase

Library updates title profile with provider

OCLC adds/deletes holdings in Discovery

Provider sends MARC records

Locate and delete records

Add new records

Provider sends MARC records

Edit to show purchased

Library updates title profile with provider

OCLC moves from DDA to standard collection

Add new records
Make discovery and access easy and fast
Re-integrating discovery and access of library collections
Search results for 'family history cntrl' limited to Libraries Worldwide

1. **Licensed**
   - Title: *Something happened here: local and family history in the classroom: toolkit for educators*
   - Author(s): by Oklahoma. Department of Libraries.
   - Publisher: State or province government publication
   - Language: English
   - Libraries that own this item: OCLC University

2. **Physical**
   - Title: *A history of the Allerton family in the United States: 1585 to 1885, and a genealogy of the descendants of Isaac Allerton, “Mayflower pilgrim,” Plymouth, Mass., 1620*
   - Author(s): by Walter S Allerton; Horace True Currier
   - Publisher: Chicago : S.W. Allerton, 1900.
   - Libraries that own this item: OCLC University

3. **Digital**
   - Title: *Sidney Edgerton family papers, 1859-1864*
   - Author(s): by Sidney Edgerton; Mary Wright Edgerton; Martha Edgerton Plessmann; Wilbur Fisk Sanders; Edgerton family.
   - Libraries that own this item: OCLC University
At no additional charge

• Full OpenURL link resolver functionality
  Inbound, outbound OpenURL resolution with A–Z listings using the WorldCat knowledge base

• Central index for content
  replaces searches of multiple services and interfaces

• Evaluative content
  No additional fees for cover art, tables of contents, reviews

• Mobile
  with no extra software, development or integration
A growing community
The WMS Community (The Americas)

300+ libraries worldwide committed to WMS
The growing WMS community

University of Delaware

Congratulations on being the first ARL and the 200th library to go live with WorldShare Management Services!

Learn more

300+ libraries worldwide committed to WMS
200+ libraries live and using the service every day
WMS community gatherings

Northeast Regional Gathering 2013 at Bucknell University

Midwest Regional Gathering 2013 at The University of Nebraska Omaha

Australian Gathering 2014

California Gathering February 2014, hosted by Fuller Theological Seminary
2014 WMS Community Leadership Team

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What would you do if you had more time?

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- Newbury College: Create new instructional guides
- The Darling Library at Hope International University: Redesign our website to be more interactive and patron-centered
“The big reason that we chose to move to WMS was the more efficient use of staff time. The staff is our most valuable resource; it’s the thing we spend the most money on over time, and it’s the thing that we wanted to save and we wanted use in better ways. We’ve seen that immediately and it’s continued to evolve since we went live with WMS.”

Jason Griffey
Former Chief Technology Strategist, Library IT
University of Tennessee Chattanooga
“UNCG believes that WorldShare Management Services are the next major advance in library cooperation. The services significantly reduce redundant and duplicative effort across libraries, thereby allowing each library to focus on their unique content and strengths.”

Tim Bucknall
Assistant Dean of University Libraries and Head of Electronic Resources and Information Technologies
University of North Carolina at Greensboro
It’s about time... and it’s about time
Reducing redundancy with WorldShare Management Services

Questions?

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