OCLC Asia Pacific Distributors Meeting 2019

# WMS : Do things differently so you have time to do different things

**Shigeki Sasagawa & Yider Hsu**

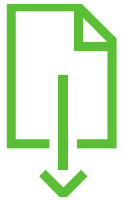
Library Consultants, OCLC APAC

# Agenda

1. What is WMS?
2. Why libraries choose it?
3. Where we start? / How we differentiate?
4. Useful reference

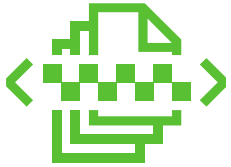
WorldShare® Management Services
What is WMS?

# WorldShare® Management Services



**ACQUIRE**

Save time on selecting and acquiring



**DESCRIBE**

Get more time to catalog unique materials

**DISCOVER**

Help your users easily find and get resources

**CIRCULATE**

Streamline circulation tasks and training

**SHARE**

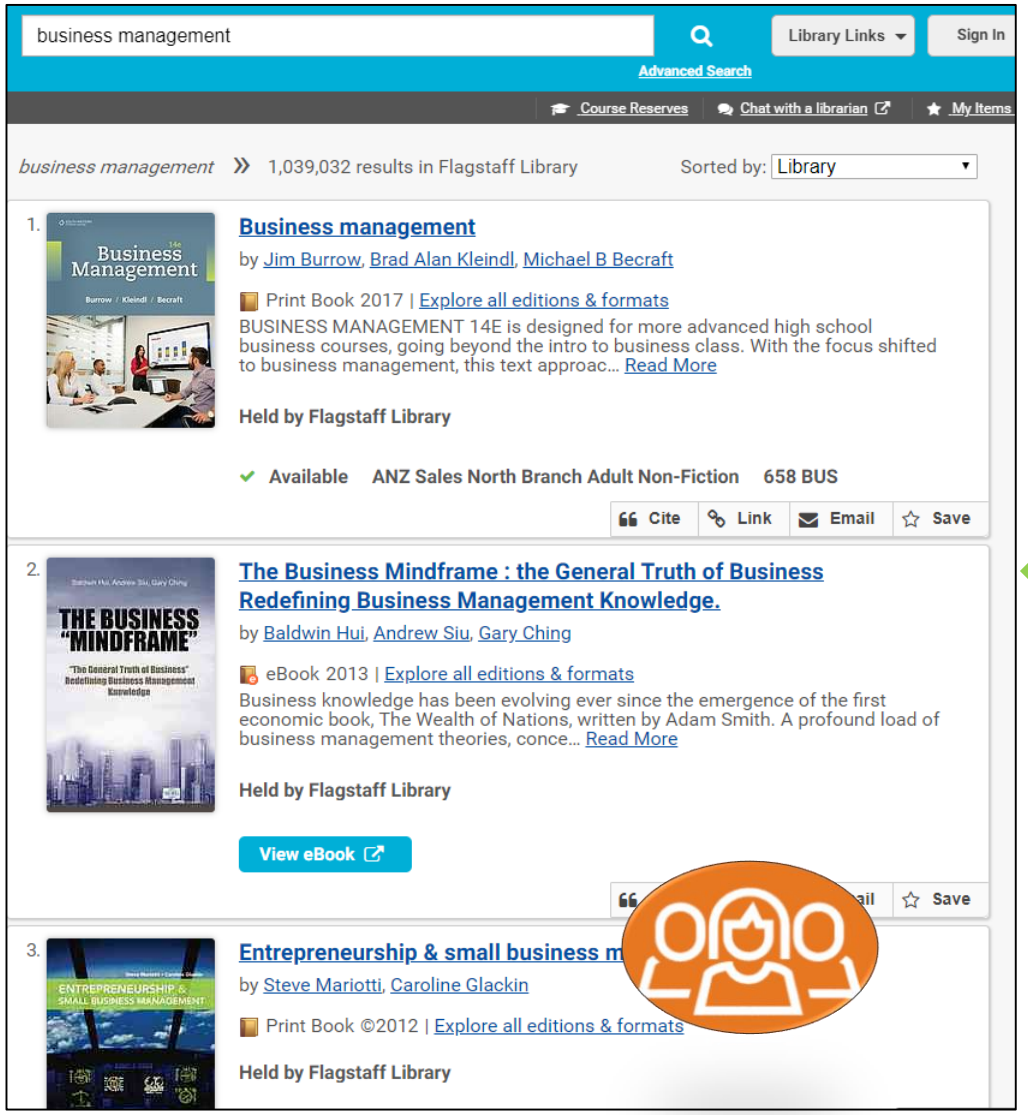
Automate borrowing and lending

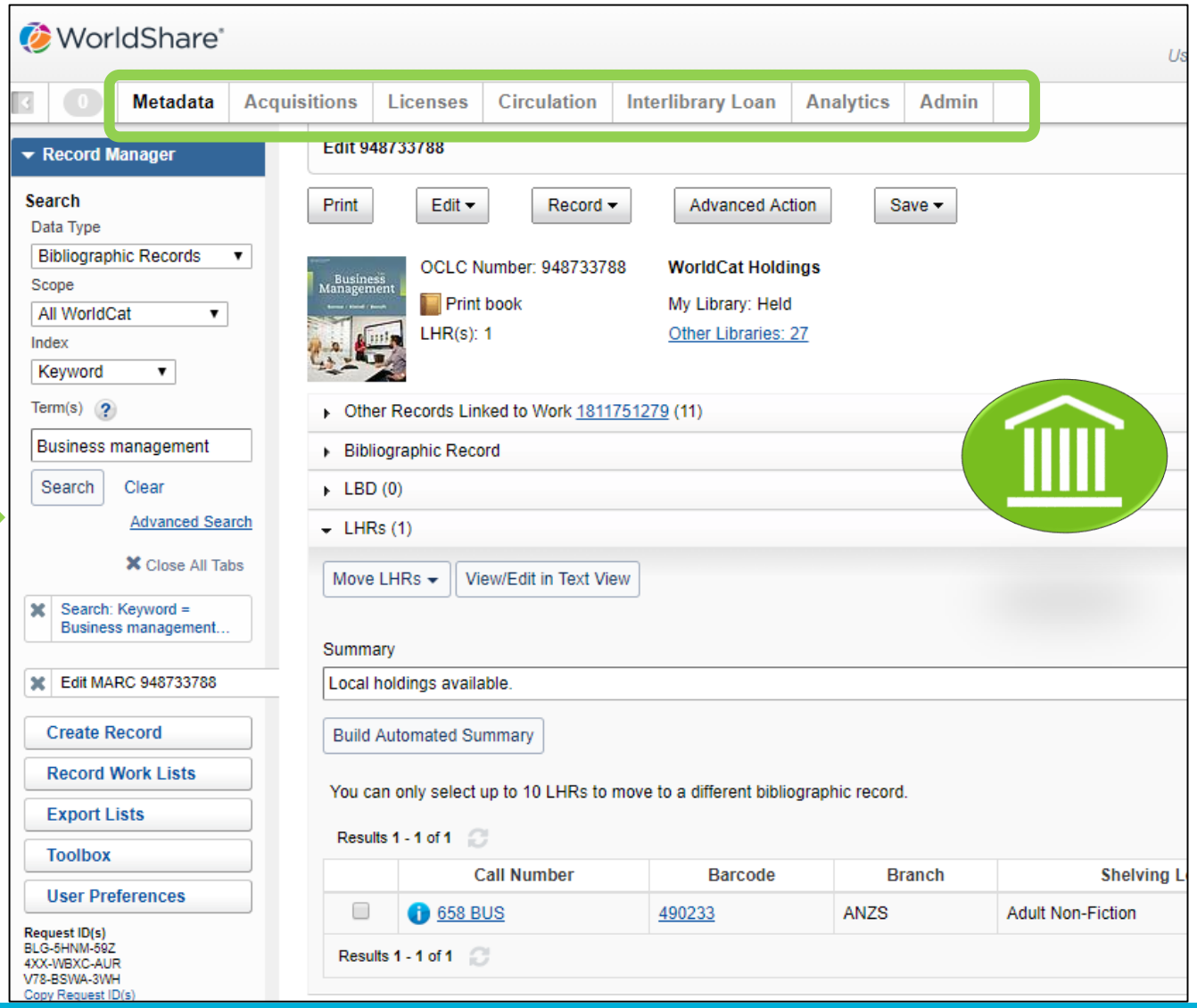
**ANALYZE**

Support your library's decisions

## An advanced, cloud-based library services platform

# WorldShare® Management Services





WorldShare® Management Services
Why libraries choose us?

WorldShare® Management Services

# Expanding globally

**600+**
libraries worldwide selected WMS

WMS libraries in
**22**
countries

As of March 2019

OCLC

# “...more time is spent with our patrons…”

“We spend a lot less time doing work in the WMS system, which means **more time is spent working with our patrons**. Because of the efficiencies we've gained, we're looking at positions and realigning library staff in more outward-facing service roles where in the past they would be doing back office work.”

**Miranda Novak**
Technology Services Manager
College of St. Benedict and St. John’s University

# Why 600+ libraries worldwide have chosen OCLC and WMS

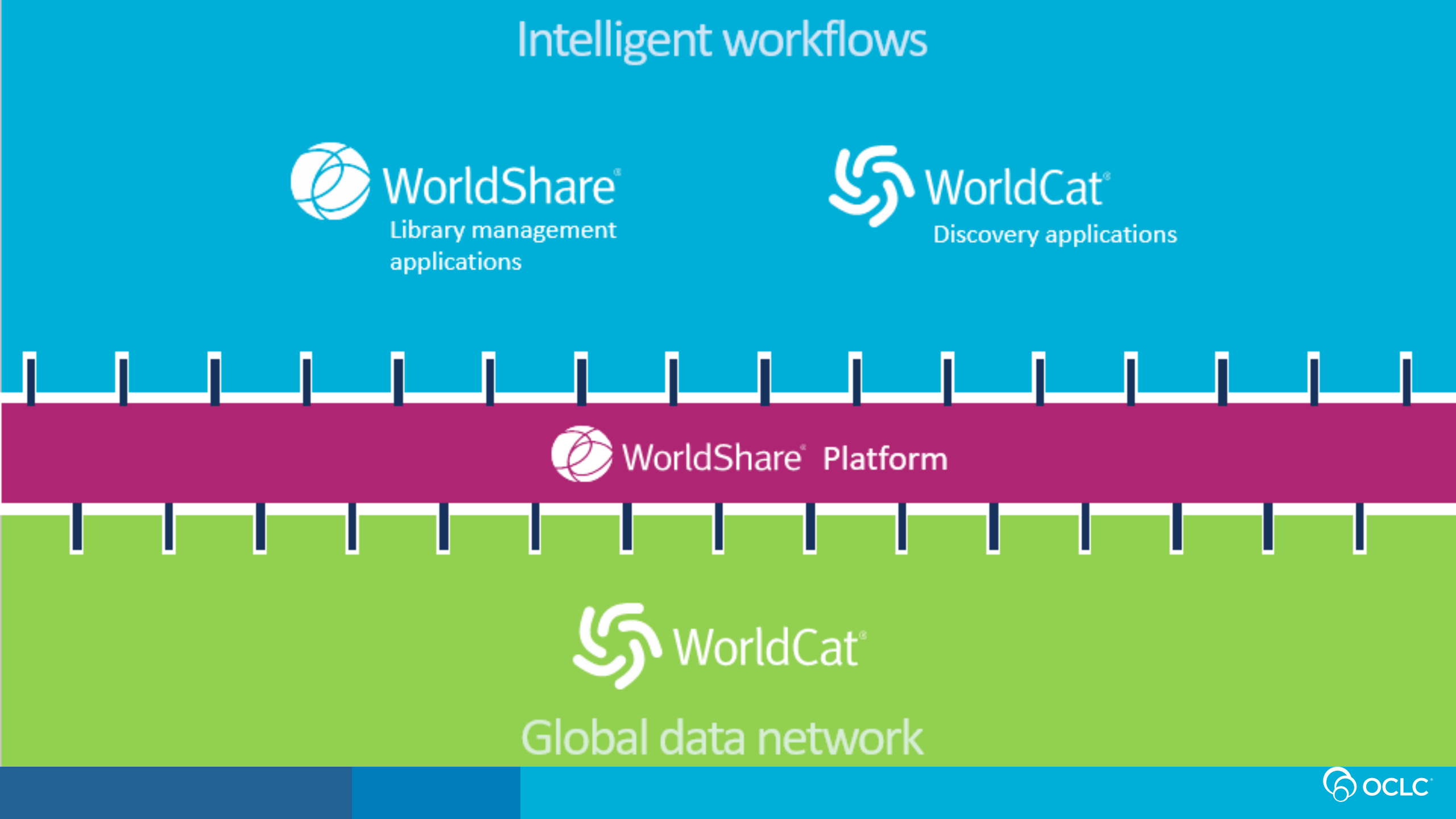
1. OCLC's sole **focus** is the **advancement of libraries**.
2. **Streamlined workflows** through shared metadata.
3. A **state-of-the-art platform** for collective innovation.
4. The **user is at the center** of all that we do.
5. **Flexibility without complexity**.
6. **Automated** and streamlined **e-resource management**.
7. An expansive **set of analytics tools**.

2

# Streamlined workflows through shared metadata.

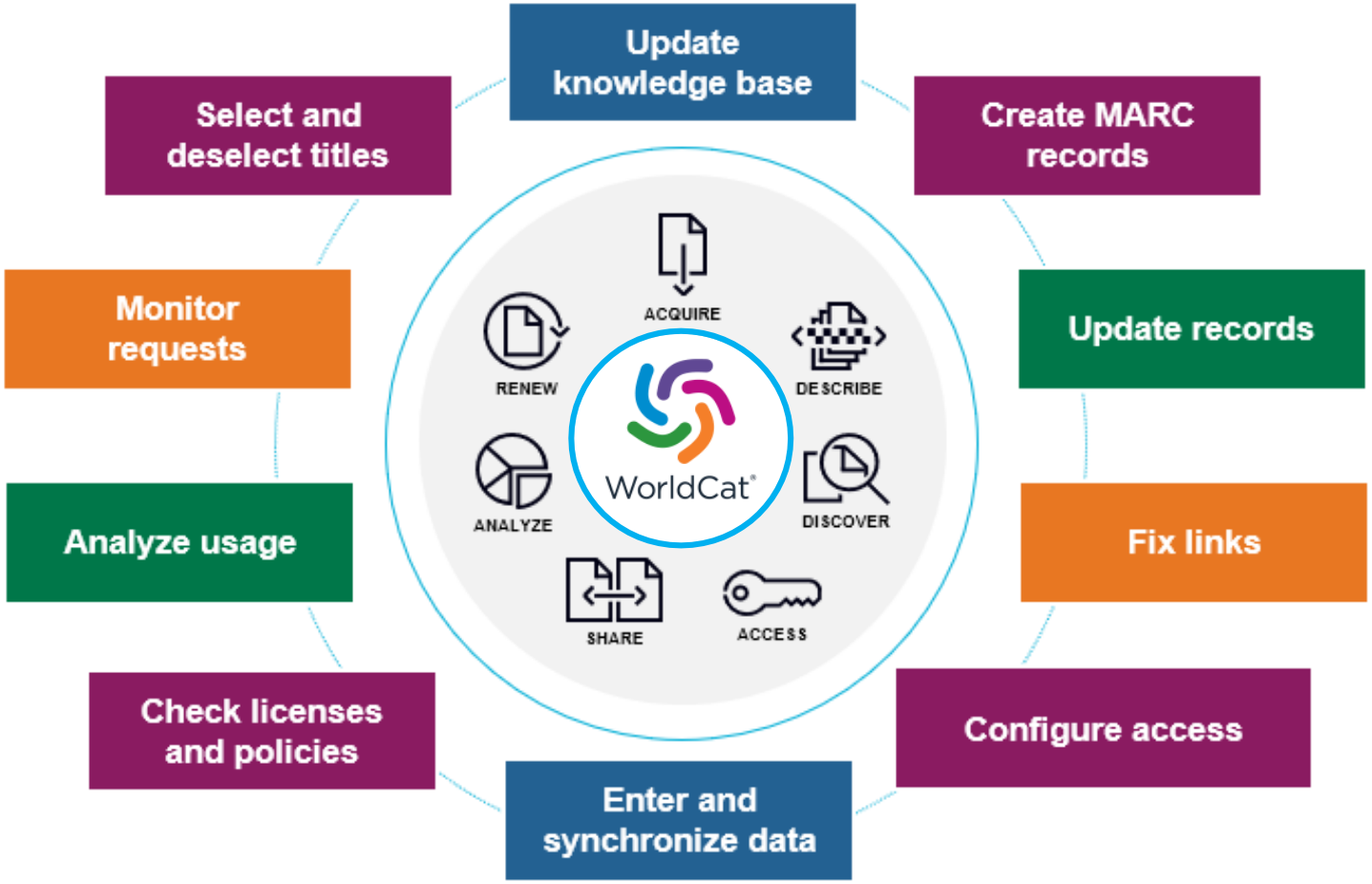
WorldShare Management Services

WorldCat serves as the foundation for all discovery, delivery, and technical services. One platform simplifies integration across workflows.

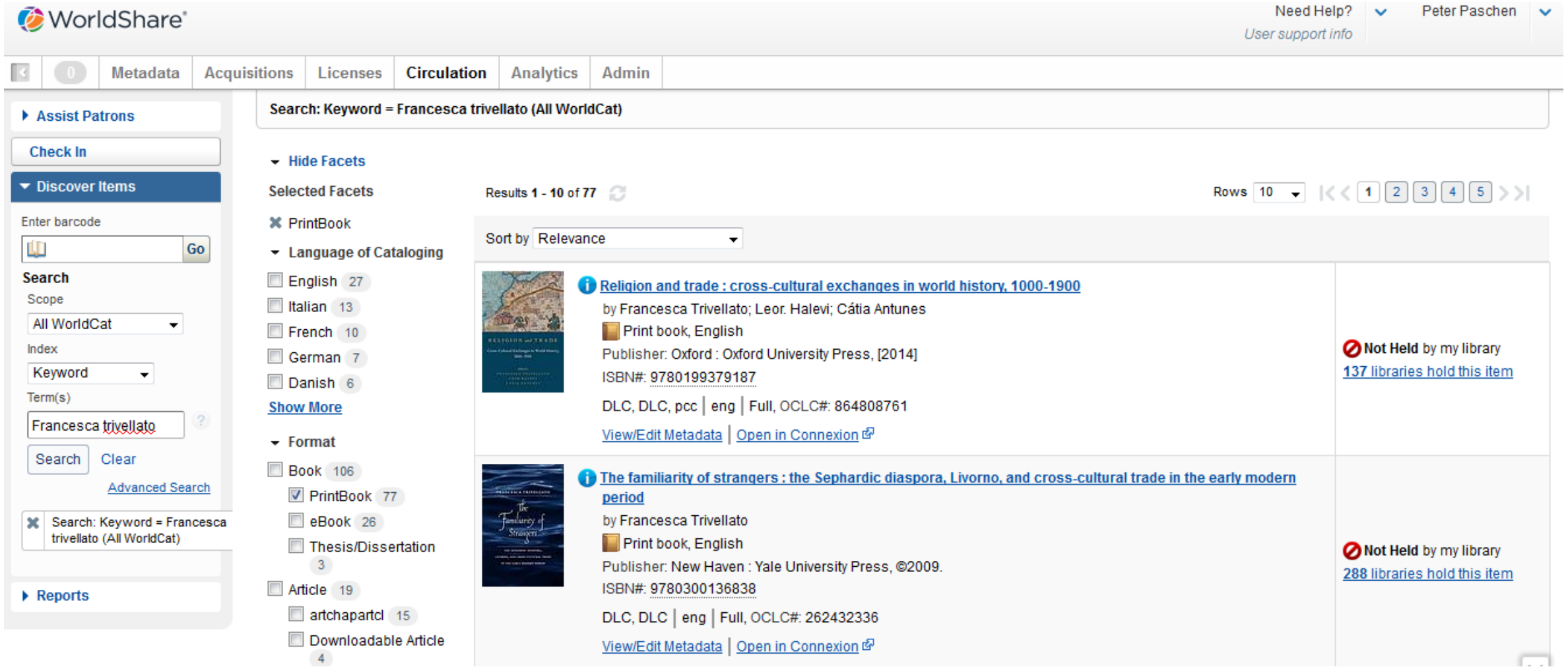

Intelligent workflows
WorldShare
Library management applications
WorldCat
Discovery applications
WorldShare Platform
WorldCat
Global data network
OCLC

# WorldCat at the center

WorldShare® Management Services



# Record Manager



# Acquisitions

1016150

- Downloadable Archival Material 1013088
- Article 108207
  - Downloadable Article 77837
  - Print Article 30370
- Computer File 65070
  - Computer File Digital 55268
- Video 40980
  - DVD 14903
  - VHS 8743
  - eVideo 7533
  - Bluray 2834
  - Film 2440

Show More

Year

View/Edit Metadata | Open in Connexion

**The test**

by Peggy. Kern; Albertooo Einstein

Print book, English

Publisher: New York : Scholastic, [2013], ©2011.

ISBN#: 9780545395526

Series: Bluford High

BTCTA, BTCTA | eng | Full, OCLC#: 798059672

View/Edit Metadata | Open in Connexion

**Held** by m

**2** copies sele ted / **2** ordered

**241** libraries hol

Add to...

Order

Purchase Request

**The Test**

by Kem Lang; Films for the Humanities & Sciences (Firm); Films Media Group.; Public Affairs Television (Firm); Albertooo Einstein

eVideo, English

Publisher: New York, N.Y. : Films Media Group, [2013], ©1996.

Series: Genesis: A Living Conversation with Bill Moyers

ACCEM, ACCEM | eng | Full, OCLC#: 872343491

View/Edit Metadata | Open in Connexion

**Held** by my library

**4** copies selected

**209** libraries hold this item

Add to...

The test

Results 1 - 5 of 115

Rows 5 | 1 | 2 | 3 | 4 | 5

| Title (ISBN/ISSN) | Budget/Fund | Location | Quantity | Unit Price | Discount (%) | Service Charges | Shipping | Tax 1 (%) | Total | Custom Fields | Notes |
|---|---|---|---|---|---|---|---|---|---|---|---|
| The color purple : a ... 0151191549 | 2014 Jun - Dec (6 / test3 | OCLC Library Mai / Petratest | 1 | 1,005.00 | 5.00 | 0.00 | 0.00 | 0.00 | 954.75 | | 1 |
| Signal processing ... 9780130909992 | 2014 Jun - Dec (6 / Test New Budget F | OCLC Library Mai / Petratest | 1 | 219.60 | 0.00 | 0.00 | 0.00 | 0.00 | 219.60 | | 1 |
| Becoming Richard ... 9780062123305 | 2014 Jun - Dec (6 / Test New Budget F | OCLC Library Mai / Petratest | 1 | 27.99 | 0.00 | 0.00 | 0.00 | 0.00 | 27.99 | | |
| From Stalinism to ... 9780195094466 | 2014 Jun - Dec (6 / Test New Budget F | OCLC Library Mai / Petratest | 1 | 49.95 | 0.00 | 0.00 | 0.00 | 0.00 | 49.95 | | |
| Neuropsychology : a ... | 2014 Jun - Dec (6 / Bob Test 1 | | | | | | | | | | |

Assign multiple budgets/funds

Results 1 - 5 of 115

**Budget: 2014 Jun - Dec**

**Period** 6 Months **Start** 06/21/2014 **End** 12/20/2014 Enable for use **St**

Copy Budget Structure

| | |
|---|---|
| **Budgeted** | 553,132,665.00 |
| **Expended** | 25,125.42 |
| **Encumbered** | 20,224,757.74 |
| **Remaining Balance** | 532,882,781.84 |

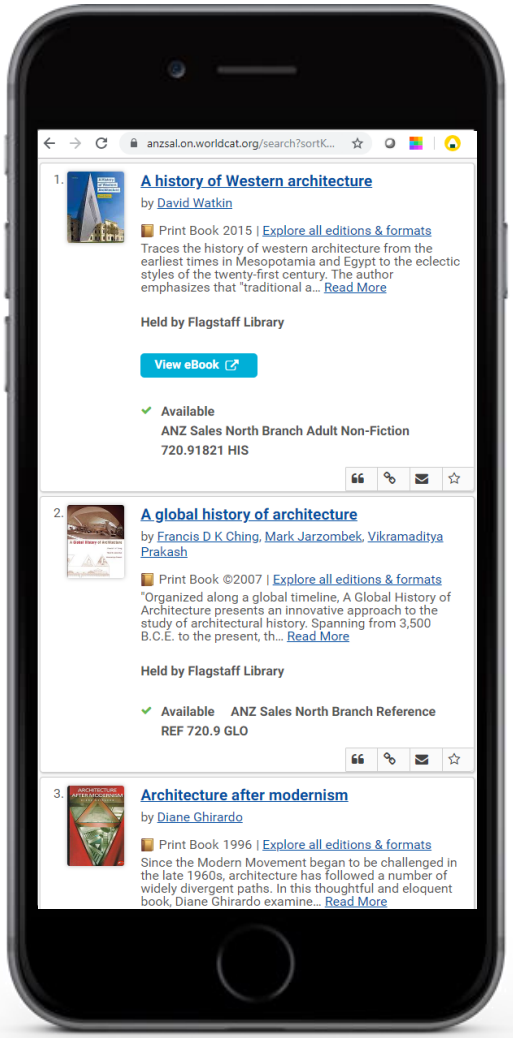
5

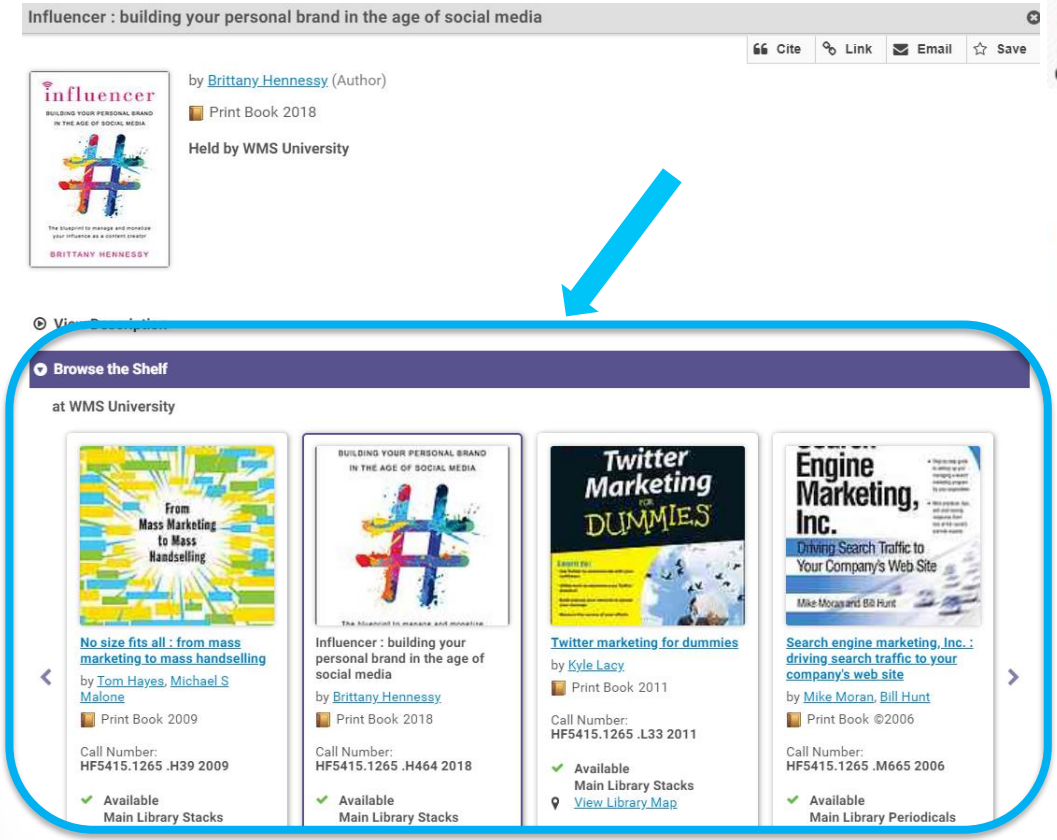
# Flexibility without complexity.

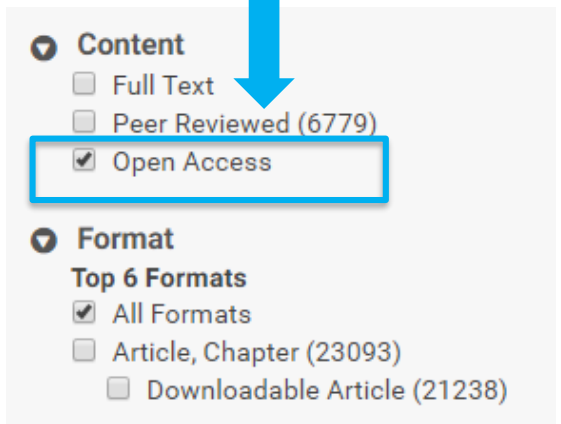
WorldShare® Management Services

The most flexible discovery system in the industry.

# WorldCat® Discovery Services



# Our approach to meeting each library's needs

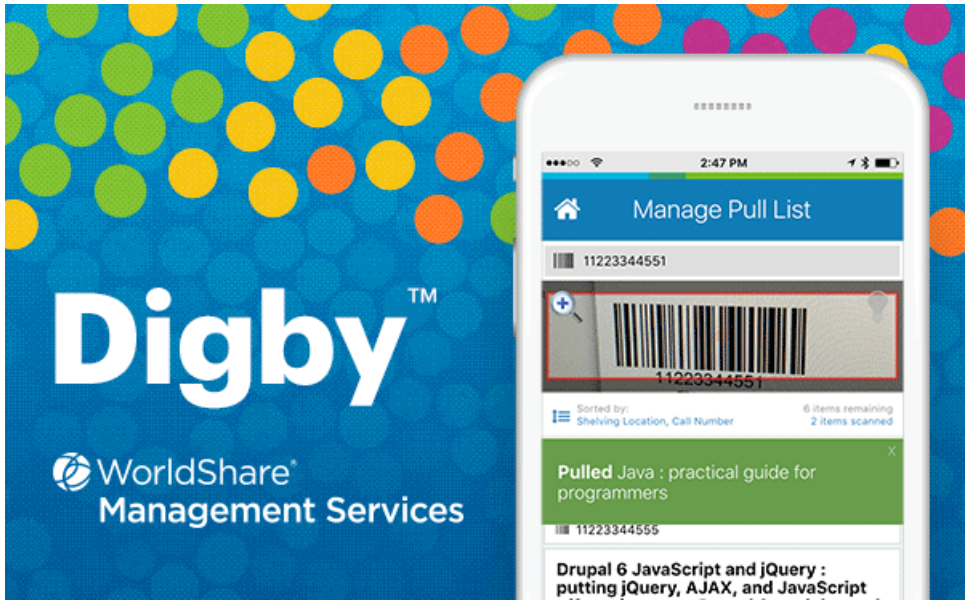
## Configuration *vs.* Customization

- Driven by user research
- Fit-for-purpose
- Best-practices "baked in"
- Fewer clicks
- No coding skills required
- Adjusts when enhancements are added

# Circulation

Responsive design means mobility in the library

1. Identify a Patron
2. Help Check-out, Check-in
3. Manage Hold Items etc.



6

# Automated and streamlined e-resource management.

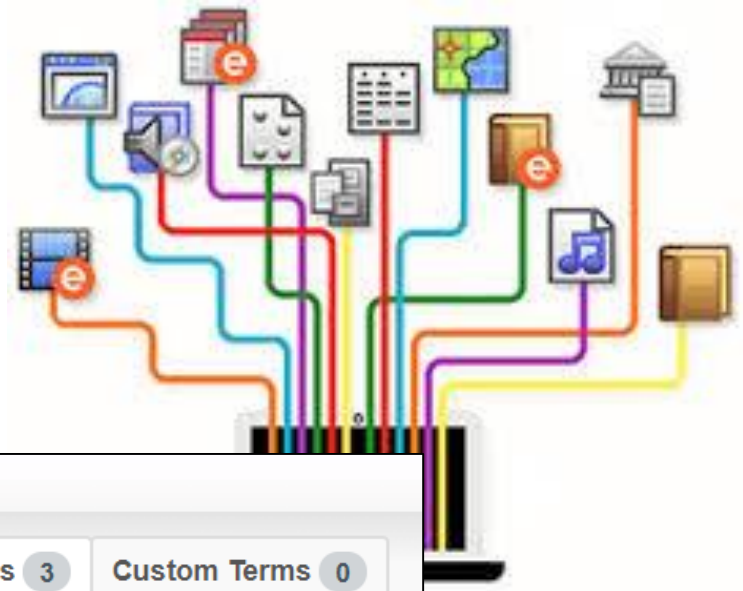
WorldShare® Management Services

A uniquely integrated interface
to meet e-resource challenges.

# Collection Manager

1. Manage your e-resources by activating
2. Collection becomes more visible once activated
3. Utilize the global and add the local

# License Manager



Collections (2)

Update Public Notes

Select Collection *

License Expiration — Deselect collection(s) when license expires

| Collection | Type/Attributes | Selected | Provider | Existing Public Note Content | Action |
|---|---|---|---|---|---|
| Gale Academic OneFile<br>Collection ID: galegroup.aone | Knowledge base collection | Yes | Gale Group<br>Provider ID: galegroup | View public notes text | Remove |
| Gale Virtual Reference Library<br>Collection ID: galegroup.gvrl | | | | | |

Terms of Use (4)

Documentation 0 | Maintenance 0 | Responsibilities 0 | Rights 1 | User Access 3 | Custom Terms 0

Term Name: Select

Authorized User

Terms Stated: Yes

User Type:
- [x] Alumni
- [x] Faculty
- [ ] International
- [x] Student
- [ ] Walk-ins

Add note

Discovery

Check Availability

Access Online

| | Publication | Database / Coverage |
|---|---|---|
| View full text | Contemporary Nurse | Gale Academic OneFile (2005-04~2014-12) |

Notes

Collection: Authorized users include: Alumni, Faculty, students Interlibrary Loan: Yes

License Manager

# With Less Time

# Do More

EBSCO WILEY
CAMBRIDGE UNIVERSITY PRESS OXFORD UNIVERSITY PRESS
INGRAM Springer
ProQuest ELSEVIER

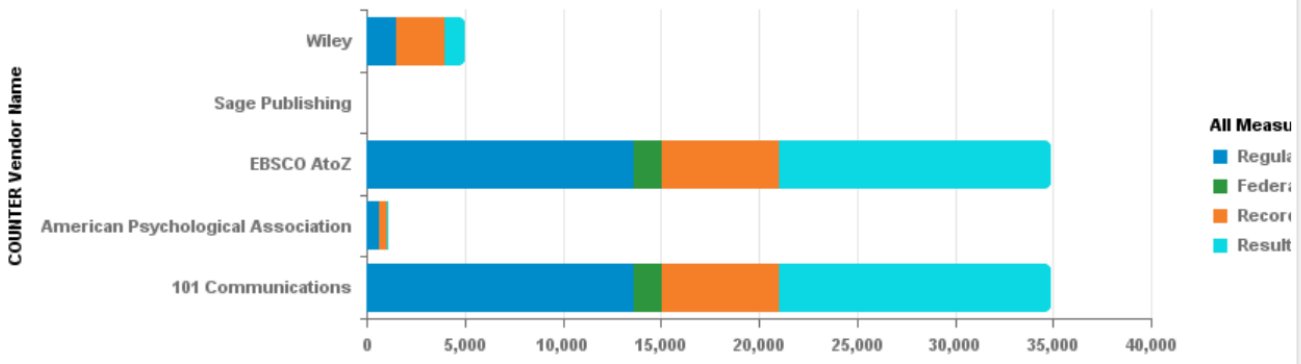
| | | |
|---|---|---|
| Lancet Neurology, The | OCN: 223402743<br>ISSN: 1474-4422<br>EISSN: 1474-4422<br>Website | Not Held by my library<br>Select Title |
| Lancet Oncology, The | OCN: 450058376<br>ISSN: 1470-2045<br>EISSN: 1470-2045<br>Website | Not Held by my library<br>Select Title |

WorldShare

## Merged COUNTER Database Usage Summary

OCLC WorldShare Management Services - Library

Report Criteria: Begin Date (YYYY-MM): 2017-05 End Date (YYYY-MM): 2018-05
Vendor Name: All




| Vendor Name | COUNTER Database Name | Regular Search Count | Federated Search Count | Record View Count | Result Click Count |
|---|---|---|---|---|---|
| 101 Communications | All Databases | 3,757 | 0 | 1,461 | |
| | Biological Abstracts | 0 | 0 | 0 | |
| | BIOSIS Citation Index | 294 | 0 | 122 | |

7

# An expansive set of analytics tools.

WorldShare® Management Services

Business intelligence framework for decision support.

## WorldShare Reports

- Standardized
- Available for all workflows
- Easy to run
- Use filters for more flexible reports

**VS**

## WorldShare Report Designer

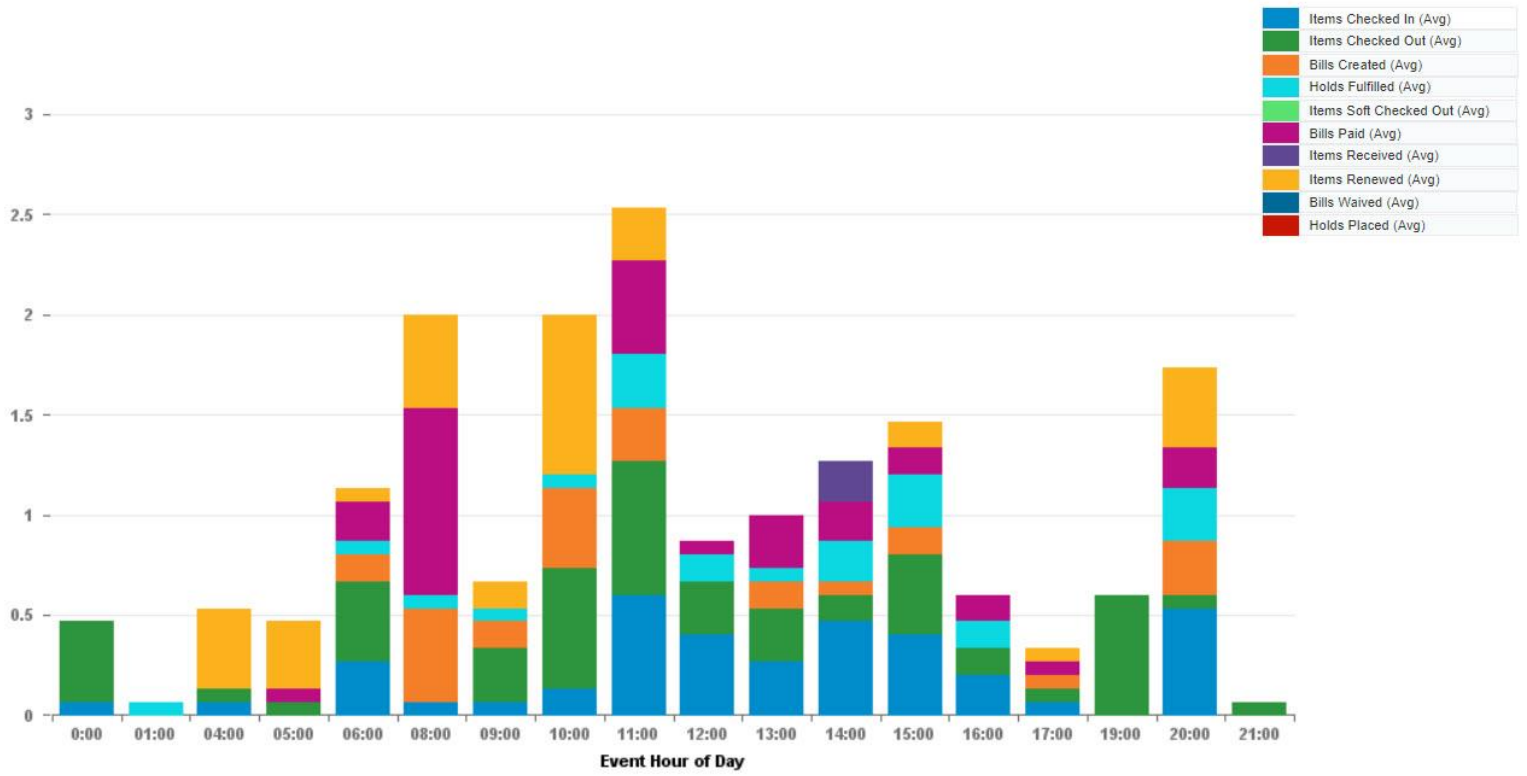
- Take advantage of all data in WMS
- Build custom reports, charts, and visualize data
- Build from scratch or use existing reports as base

WorldShare

## Hourly Average Circulation Activity Daily Chart

WMS University

| Report Criteria : | Event Date Start: | 2018-03-01 | Event Date End: | 2018-06-18 |
|---|---|---|---|---|
| | Event Branch Name: | Main Library | Event Day Name of Week: | Tuesday |

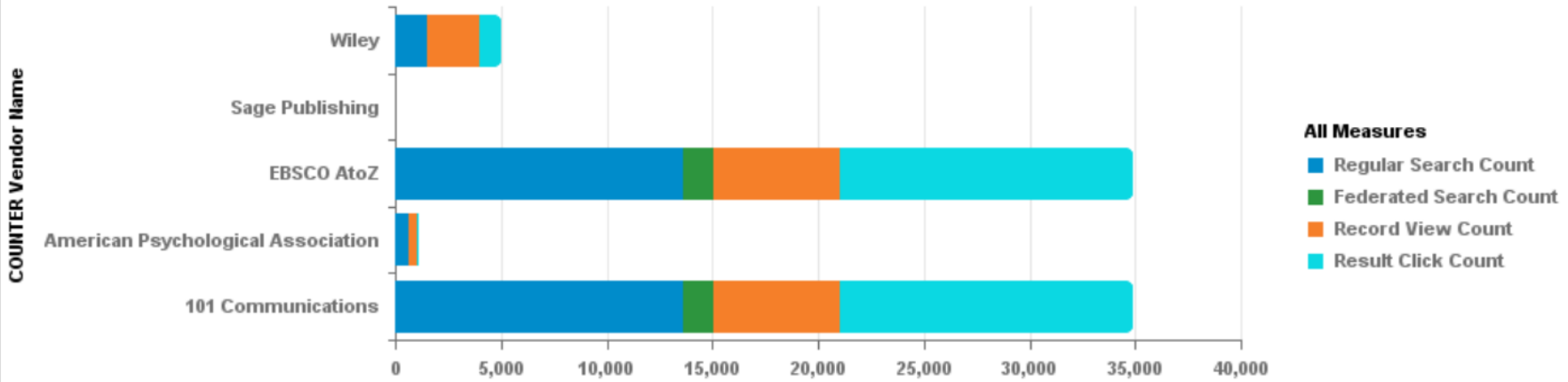


WorldShare

# Merged COUNTER Database Usage Summary

OCLC WorldShare Management Services - Library

| | | | | |
|---|---|---|---|---|
| **Report Criteria:** | **Begin Date (YYYY-MM):** | 2017-05 | **End Date (YYYY-MM):** | 2018-05 |
| | **Vendor Name:** | All | | |

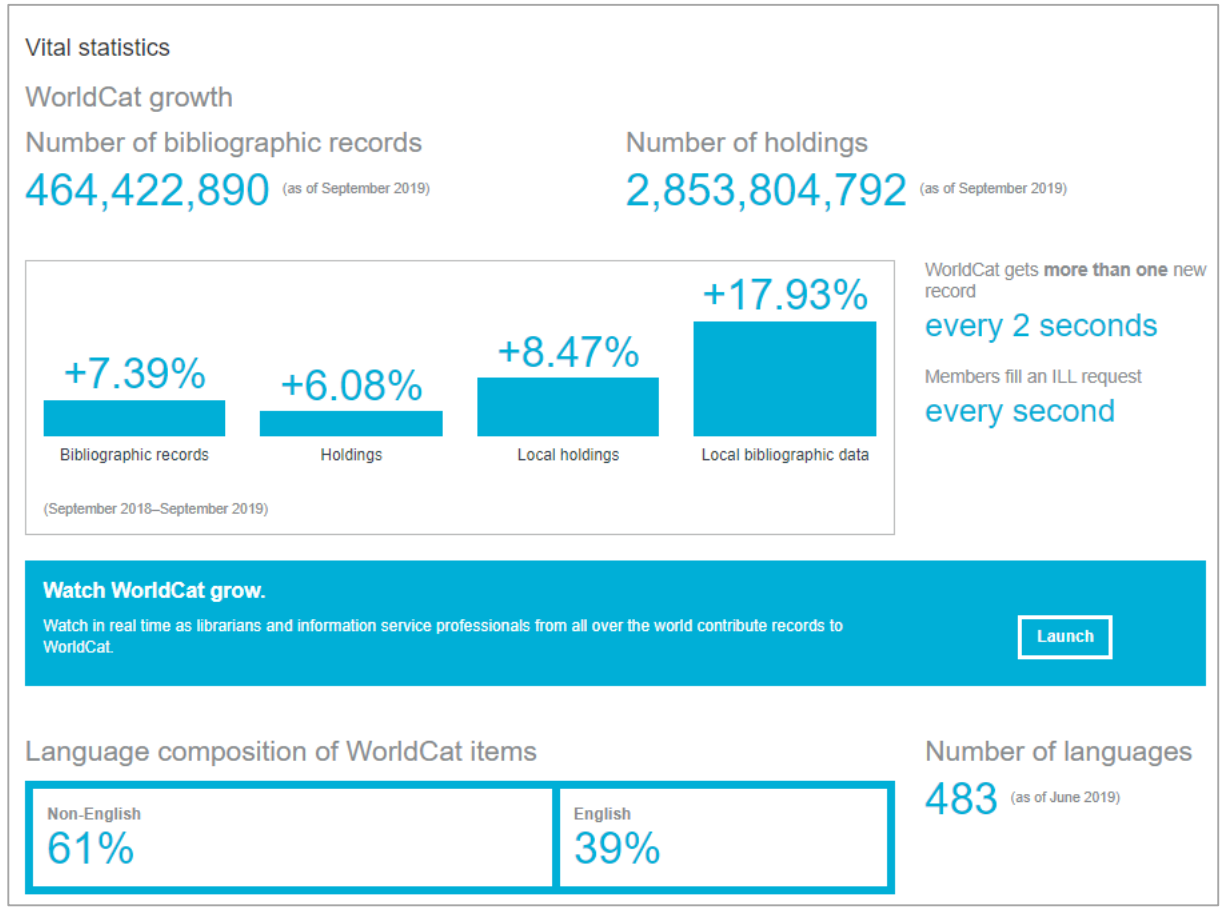



| Vendor Name | COUNTER Database Name | Regular Search Count | Federated Search Count | Record View Count | Result Click Count |
|---|---|---|---|---|---|
| 101 Communications | All Databases | 3,757 | 0 | 1,461 | 3,518 |
| | Biological Abstracts | 0 | 0 | 0 | 0 |
| | BIOSIS Citation Index | 294 | 0 | 122 | 246 |

WorldShare® Management Services
Where we start?
How we differentiate?

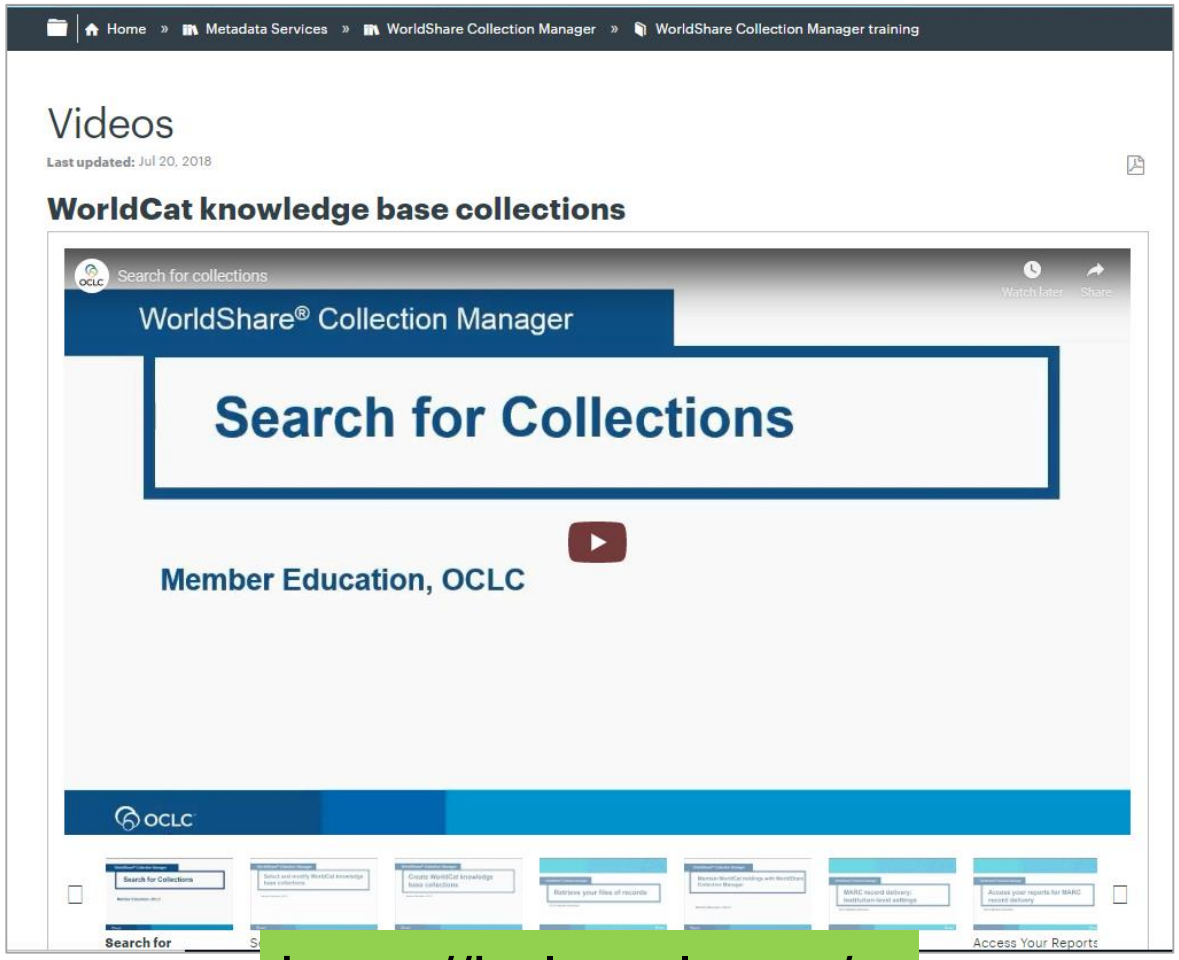
WorldShare® Management Services
Reference

# Inside WorldCat




https://www.oclc.org/en/worldcat/inside-worldcat.html

# OCLC Support




https://help.oclc.org/

# Now, Your Turn!

**Thank you!**

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