The Challenge (in a nutshell)

- The changing nature of library collections
- The changing expectations of library users
- The inefficiency and legacy status of current library automation systems, not suited to either of the above
How do we best meet these challenges?

Together.
2,000,000,000+ holdings

302,000,000+ items
Representing the collective collection in WorldCat and through Discovery

<table>
<thead>
<tr>
<th>Bibliographic information in WorldCat</th>
<th>Licensed digital content/articles in library collections</th>
<th>Digitized local library content</th>
</tr>
</thead>
<tbody>
<tr>
<td>305 million bibliographic records</td>
<td>999.4 million records</td>
<td>38 million items</td>
</tr>
<tr>
<td>2.1+ billion holdings</td>
<td></td>
<td>(Institutional repositories,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Google, HathiTrust, OAIster)</td>
</tr>
</tbody>
</table>

As of September 2013
1. **Streamline systems and workflows** based on cooperative management—do things differently to save time and 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.

5. Support decision-making with data.

6. Web Services exposure for commercial partners and library software developers.
What is WMS?
What does the WMS application include?

- **Acquisitions** for print and licensed electronic collections
  - all available in one service; includes serials management
- **Circulation and patron management** for the 21st century
  - handled centrally using a simple, web-based interface
- **Discovery and delivery** as users expect it, with a single search interface
  - over 300M physical items and nearly 1B article citations through WorldCat Local
- **Course Reserves and Materials Booking**
  - Manage reading lists, room and equipment scheduling, and collection bookings
- **Cataloging tools** for data creation and enrichment
  - metadata management for the entire collection, powered by WorldCat
- **The WorldCat knowledge base**
  - combining data about your library’s electronic resources and linking features
- **WMS reporting**
  - canned reports, data download, simple collection snapshots, dashboards
- **The WorldShare Platform**
  - access to all the Web Services, App Gallery and DevNet Participation
What *can* be included?

• **Group / Consortial Functionality**

• **Collection Evaluation** *(replacing WorldCat Collection Analysis)*; **Advanced Report-writer** *(under development, available this fiscal year)*

• **WorldShare License Manager**
  
  • Management of license terms, integration with EZproxy, WMS Acquisitions, and the WorldCat knowledge base for electronic resource management efficiencies

• **Integration with EDS Discovery front-end**
158 Live

Over 230 libraries committed worldwide
How WMS helps your library
True cloud solution
The world’s libraries. Connected.

from multiple systems and servers...

to one browser
Simplify workflows
<table>
<thead>
<tr>
<th>Title</th>
<th>Author(s)</th>
<th>Edition</th>
<th>Publisher</th>
<th>ISBN</th>
<th>Library Status</th>
<th>Holdings</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albert Einstein</td>
<td>Kathleen Krull; Boris Kulikov</td>
<td>Book, English</td>
<td>New York, N. Y. : Viking, c2009.</td>
<td>9780670063321 (hardcover)</td>
<td>Not Held by my library</td>
<td>2673 Libraries own this item</td>
<td>Edit record</td>
</tr>
</tbody>
</table>
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

Open box of materials
Go to Receive and Invoice
Input invoice # and click outstanding items
Scan ISBN, adjust call#, scan item barcode
Repeat last step for each item

Send to cataloging
Edits made to records
Send to labeling
Export saved records and download file
Ends made to records
Send to cataloging

Send to cataloging
Go to ILS, find file and import
Run report and find MARC records loaded
Alter call number
Send to labeling

What this has meant for WMS libraries
Leverage shared services and data
Shared order and invoice loading

- Discover Items
- Discover Collections
- Manage Orders
- Track Items
- Receive & Invoice
- Processed Items
- Manage Invoices
- Manage Budgets

**Manage Vendors**

- New Vendor
- Search
  - Keyword
  - ybp
- YBP Library Services

**Metadata**

- Acquisitions
- Licenses
- Circulation
- Interlibrary Loan
- Analytics
- Admin

**YBP Library Services**

- In Use
- Not in Use

**General**

- Links & Logins
- Addresses
- Contacts

**Partner Exchange Services**

**Upload File**

- Type:
  - Import order data
  - Import order data

- File Location:
  - Import shelf-ready data
  - Choose File
  - No file chosen

**Note:** Order file needs to be in MARC format

- Display imported items in WorldCat Local
- Verify OCLC Numbers if provided

**Table**

<table>
<thead>
<tr>
<th>Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013-10-23T13:06:38</td>
<td>PO-2013-7 12 Processed</td>
</tr>
<tr>
<td>2013-10-23T11:33:28</td>
<td>PO-2013-7 11 Processed</td>
</tr>
<tr>
<td>2013-10-12T13:25:09</td>
<td>PO-2013-6 97 Processed</td>
</tr>
</tbody>
</table>

**Failed (View Details)**

- 1 order(s) in file: 1 order(s) created, 0 order reuses.
- 4 item(s) in file: 4 item(s) added to order(s).
Shared prediction patterns, receiving and claiming

Publications Settings

Changes to the information below will be shared with all other libraries that currently subscribe to this title.

Specify the publication pattern for this title below.

Publication Frequency:

<table>
<thead>
<tr>
<th>Level</th>
<th>Caption</th>
<th>Type</th>
<th>Increments After</th>
<th>Resets After</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volume (v.)</td>
<td>Number</td>
<td>12</td>
<td>2 Never</td>
</tr>
<tr>
<td>2</td>
<td>Number (n.)</td>
<td>Number</td>
<td>12</td>
<td>Never</td>
</tr>
</tbody>
</table>

Most Recent Issue: v.190 n.11 2013 December

Next Predicted Issue: v.190 n.12 2014 January
v.191 n.1 2014 February
v.191 n.2 2014 March
v.191 n.3 2014 April
v.191 n.4 2014 May
v.191 n.5 2014 June

Save Cancel
<table>
<thead>
<tr>
<th>Collection</th>
<th>Shared by</th>
<th>In My Holdings</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ebook Library (Demand Driven Acquisitions)</strong></td>
<td>![Checkmark] ![Edit Icon] Held by my library (4/396291) Titles</td>
<td>![Checkmark] ![Deselect Collection Icon] Deselect Collection</td>
<td>![Add To Order Icon] Add To Order</td>
</tr>
<tr>
<td>Provider: Ebook Library</td>
<td>Customizable: Demand Driven Acquisitions</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ebook Library Catalogue</strong></td>
<td>![Checkmark] ![Edit Icon] Held by my library (8/396291) Titles</td>
<td>![Checkmark] ![Deselect Collection Icon] Deselect Collection</td>
<td>![Add To Order Icon] Add To Order</td>
</tr>
<tr>
<td>Provider: Ebook Library</td>
<td>Customizable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Results 1-2 of 2 Show 10 rows per page.
Current DDA workflow

1. Configure title profile with provider
2. Add records to Discovery
3. OCLC sets holdings in Discovery
4. Locate records
5. OCLC moves from DDA to standard collection
6. Provider sends MARC records

Provider sends MARC records

Provider sends OCLC title list

User triggers purchase

Locate and delete records

Library updates title profile with provider

Provider sends OCLC purchased titles

Provider bills library

OCLC adds/deletes holdings in Discovery

Add new records

Massage records

OCLC sets holdings in knowledge base

User triggers purchase

Update title profile with provider

Library updates title profile with provider

OCLC moves from DDA to standard collection

Add new records

Locate records
Scaling partnerships
Cooperative syndication

Libraries

Content partners

OCLC WorldCat

OCLC WorldShare

Library service partners

Consumer service partners
Library service partners

Ex Libris
Primo

EBSCO
Discovery Service

Summon
One search box... your library discovered.

RAPID

Auto-Graphics

ATLAS
SYSTEMS, INC.

Relais
INTERNATIONAL

Clio

Image
Access

iVina

Scannx

Sustainable
Collection Services

SCS

Alibris

OCLC
The world's libraries. Connected.
Looking ahead...
Looking forward...

• Collaboratively building Webscale with libraries...

• What is scale for the WorldShare initiative?

Over 230 libraries committed worldwide
Tipping point?

- The Web is all about scale
- OCLC can help libraries build scale
  - ~9,000 libraries use OCLC Cataloging
  - ~10,000 libraries use WorldCat Resource Sharing (ILL)
  - ~20,000 libraries use OCLC FirstSearch
- All these applications and libraries are moving…
After
Data, platforms, cloud infrastructure applications...and community
User Support Center

Explore the User Support Center to learn how to implement and use WMS, answer your questions, and participate in discussions with other WMS users.

1. Implement
   - Interact with OCLC staff to launch WMS.

2. Train
   - Learn how to use WMS modules.

3. Discuss
   - Join the conversation with other WMS users.

Community

Community page

The WMS Community is Growing:

120+ Libraries Live!
200+ signed

Map of WMS libraries
100th Library Video

Congratulations to the following libraries celebrating 1st WMS Anniversaries in August:
- Altamaha Technical College, Jesup, GA
- Brenau University, Gainesville, GA
Community Collaborations
Community Feedback
Enhancement Inquiry – We need your Input!

COMMUNITY QUESTIONS:

1. Do you have other user stories/business cases that this feature would be useful for?
2. How do you see this feature improving or affecting your workflow?
3. Are there other assumptions or considerations that this feature should consider?
4. What suggestions do you have for developing scenarios to test this feature?

Please post your responses to these questions as a comment below.

User Story: Assigning actionable dates to items assigned a temporary shelving location

As a WMS staff, when an item is moved to a temporary shelving location I want to associate a future date to the item that when reached will notify staff to move the item back to its permanent shelving location.
WMS Releases - New Features & Enhancements

- Analytics
- WC Local
- License Mgr
- Circulation
- Acquisitions

We listen…
Panel discussion with John Teskey and Kenley Neufeld
Discussion