WorldShare Management Services

Update

Annette Dortmund, Sr Product Manager EMEA, OCLC
Agenda

Facilitating Change – Annette Dortmund, OCLC

Implementing Change – Geert Harmanny, TU Kampen

Embracing Change – Amada Marcos and María de la Peña, IE University
'Technology changes the user, and the user changes us. ... We’ve got to be far more innovative, far more proactive, in response to user needs and expectations.'

Gwenda Thomas, University of Cape Town, in *Meeting the Challenge: Optimising your Library’s Return on Technology Investment (OCLC Report)*
Strategic Planning

Goals

Desired Outcomes

Results

Targets

Strategies
3 Factors of Change

Tools

People

Process
Phases of individual transition

Goal: Direction

Letting go → Transition → Beginning

Who decided?
What’s going to happen to me?
What was wrong with the way we were?
Oh, now I see how this can work well!
THE ART OF INVENTION

WorldShare Management Services
Tool for Change

OCLC EUROPE, MIDDLE EAST AND AFRICA REGIONAL COUNCIL
Facilitating change – WorldShare
THE ART OF INVENTION

Question time
Outline of the presentation

1. about the TU Kampen library
2. why we decided to change to WMS
3. installation, configuration and maintenance
4. migration
5. evaluation
1

Some facts on the Theological University Kampen and its library
General facts

- one faculty: theology
- ca. 140 students, 20 academic staff
- ca. 150,000 volumes
- ca. 300 periodical subscriptions (print or print and online)
- started with ebooks in 2014
- library staff: 2 persons assisted by 2 students
- a few hundred active patrons
Available e-resources

- a few dozen periodical subscriptions (online and in print)
- a few hundred periodicals online in ATLA Serials
- a handful of databases with texts
- a handful of bibliographical databases
- started recently with ebooks
2

Why Kampen decided to change to WMS
The problem

- bibliographic databases were well used
- online journals were seldom used, students and staff read the print copy.

- hard copy journals were easy to find in the catalogue, but information on e-journals not, they were listed on the website
- e-journals could only be read in the library

Needed: discovery system + proxyserver to improve access to our digital collection
OCLC

- Supplier of our library system (LBS4)

- Needed products: Worldcat Discovery + EZproxy

- Proposed solution: WMS (EZProxy included)
OCLC WMS

Save time and money. Improve service to users.
WorldShare Management Services is an integrated suite of cloud-based library management and discovery applications, offering librarians a comprehensive and cost-effective way to manage library workflows efficiently, and improve access to library collections and services.
WMS what’s included

Acquisitions
Circulation
Metadata
Resource Sharing
Discovery
Analytics
License Management (optional)

But there is no airtight separation between these parts
Apparant advantages of WMS

- **Improve service to users**: Discovery and EZProxy
- no software needed
- based on Worldcat
- international cooperation
- OCLC is not a commercial company but an association of libraries
Disclaimer

Disclaimer OCLC: WMS is a cloud service, no deviations from the standard workflows are possible. This may complicate the acceptance of the system by some employees.
installation, configuration and maintenance
Installation

All shared software is in the cloud:
- nothing to install, only a web browser is needed
- software is fixed for worldwide use, no modifications for single libraries
- new releases about four times a year
Configuration

Customizing and configuration of the standards through a webbrowser by the application WMS Configure
- default language, time, currency
- loan policy
- budgets
- etc.
Identification

- user management for librarians and patrons is the same, the librarian is a patron with extra qualifications
- OCLC is working to implement a single sign in across many of its Web properties. But some OCLC Web properties are not yet using this single sign-in option.
- so you need at least 5 accounts with passwords for all applications
- in a small library where one person has many tasks this is very awkward
Work in progress

- WMS is rather new and the software is constantly improved. Adjustments come at a high pace.
- no tardy democratic procedures for new functionality
- decisions are made by OCLC, but the people in Dublin, Ohio know very well that they have to take into account the experiences of the rest of the world
- so all comments and requests are welcome
4. Migration

1. Local holdings
2. Circulation data
3. Acquisition data
Local holdings

- upload of all title data into Worldcat
  has been done since 2006
- matching and merging process in Worldcat
  mixed results
- conversion of local holding information into the Worldcat format
  very small percentage of failures, often due to inconsistencies in our data
Circulation data

- all borrower data were successfully imported into WMS

- all lending information was not transferred to WMS, all outstanding items were checked in with the old system and checked out with WMS
Acquisition data

- vendor data
- monograph orders
- journal subscriptions done manually
- multipart: inadequate solution for our situation, but after a few releases the problems were solved
Evaluation
Conclusion

- What we needed: improved access to our digital collection
- The result: our patrons are enthusiastic
- Our conclusion: excellent design, with good prospects, but there is still a lot of work to be done
- Experiences from other libraries: the library staff is often far more critical than the patrons
Major problems

- matching and merging in Worldcat
  one of the most debated issues on the OCLC listservices
- multiparts
  partly solved in new releases

Main cause: data conversion
Major advantages

- successful connection and linking between printed and online collection
- international cooperation: shared cataloguing, sharing of other information
OCLC support

- many praises for the hard work of the OCLC staff (in Leiden and elsewhere)
- many improvements within one year
- plenty information on the OCLC support site
- several listservers with a lot of input from colleagues and OCLC

- WMS is new, also for the OCLC staff at the European helpdesks, so sometimes you have to explain to them a feature within WMS before they understand your problem
Workflow

- Disclaimer: *no deviations from the standard workflows are possible.*
- However the workflow is often completely different from what we were used to
- *This may complicate the acceptance of the system by some employees*
- Especially those who have used the same routing for many years
Phases of individual transition

- Letting go: What was wrong with the way we were?
- Transition: Who decided?
- Beginning: What's going to happen to me?
- Oh, now I see how this can work well!
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IE University (Video)

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Amada Marcos and María de la Peña, IE University
To see the presentation, please click on picture or paste this URL into your browser:

EMEA REGIONAL COUNCIL MEETING 2015

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Question time
Thank you!