

Delivery Services



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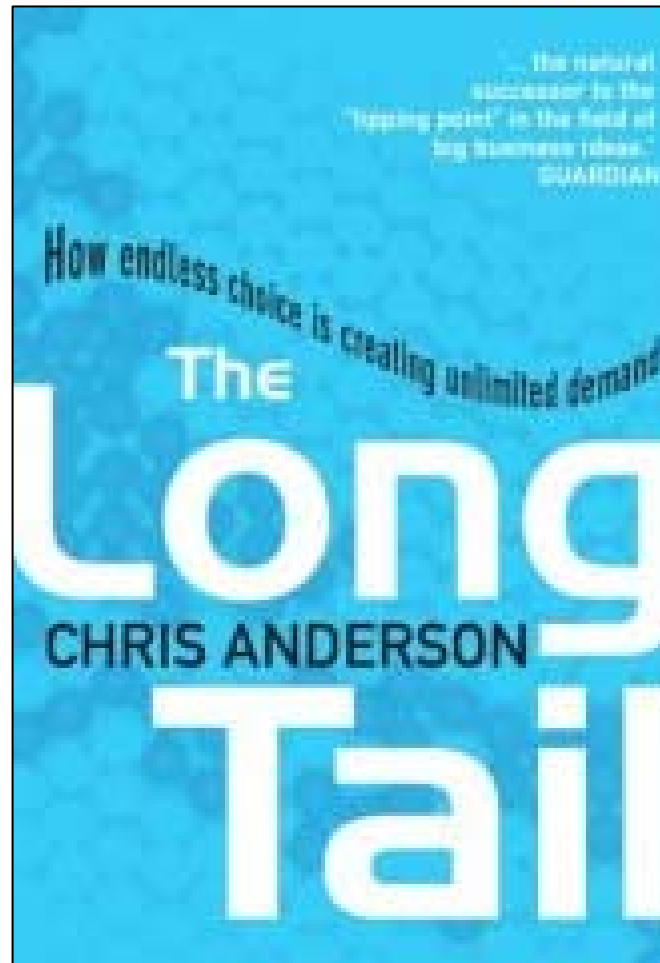
What is and who are Delivery Services?



- WorldCat Resource Sharing - Christa Starck
- Policies and IFM - Jennifer Corsi (Gabriella Holland)
- ILLiad hosting - John Trares
- ILLiad - Genie Powell (Atlas Systems)
- WorldCat Navigator - Anya Arnold
- VDX - Ed Davidson
- WorldCat Link Manager - Glenda Lammers

- Delivery Services - what we're thinking!
- WorldCat Navigator
- WorldCat Resource Sharing
- Policies directory
- ILLiad
- WorldCat Direct

ILL - providing the Long Tail



A patron experience that offers click through access to appropriate licensed and digital content

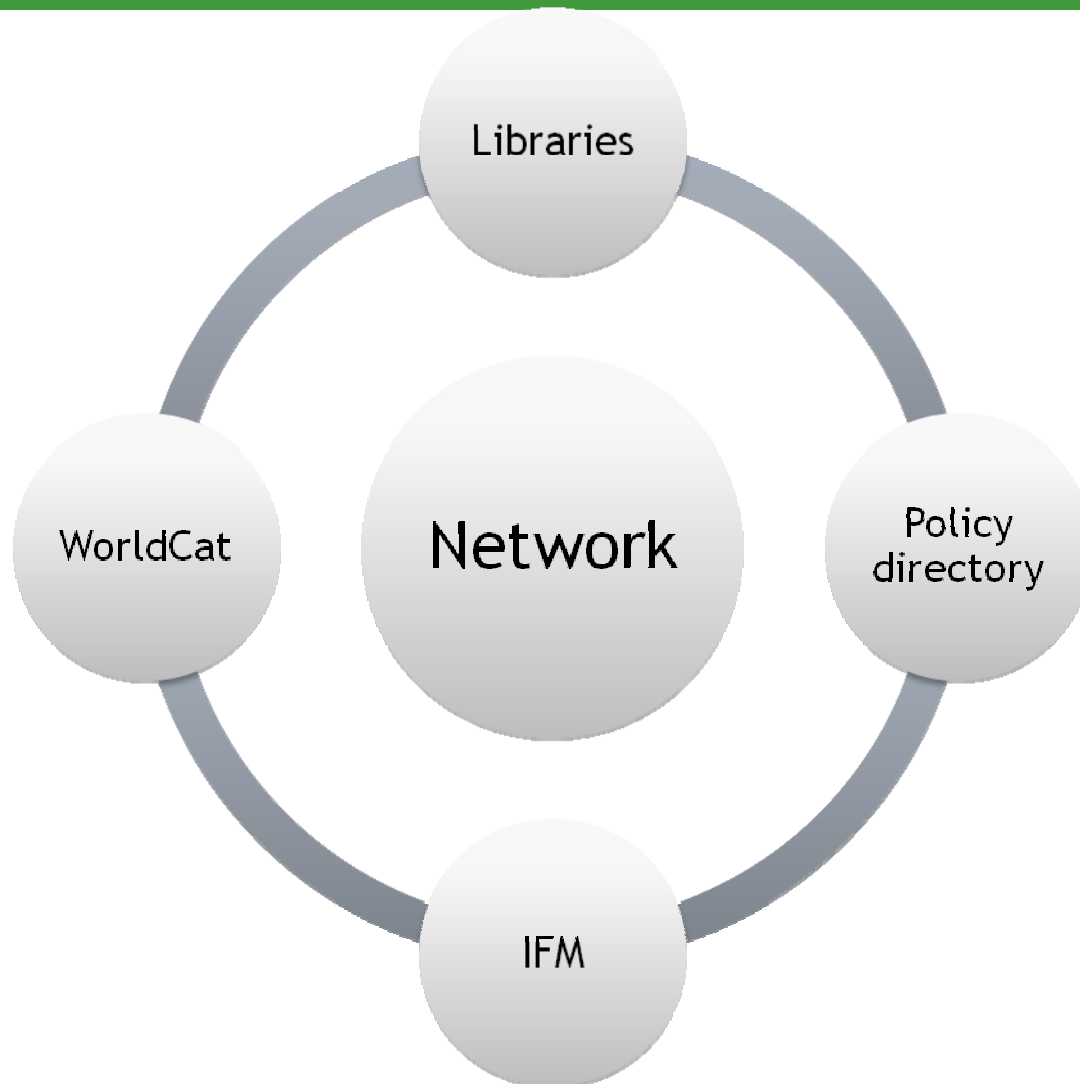
A staff experience that offers buy, as well as borrow and facilitates borrowing and lending of licensed and digital content

New model - Patron experience

Licensed and digital content



OCLC WorldCat Delivery Network



WorldCat Navigator Solution



Anya Arnold
Product Manager
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PATRON USER INTERFACE

REQUEST MANAGEMENT

CIRCULATION INTEGRATION

Current Patron Workflow



Library | Catalog (Vikat)

ASK US! | SUGGESTIONS | MY LIBRARY ACCOUNT

Resources

Research Help

Services

About PSU Library

Keyword | Title | Author | Subject | Journal | Author/Title | Number | Course Reserves

New Search

Modify Search

Send search to
Summit

(Search History)

KEYWORD

redundancy

All Collections

Search

241 results found. sorted by relevance | **date** | title .

Result Page 1 2 3 4 5 6 7 8 9 10 11 ... 21

Next

Save All On Page

KEYWORDS (1-12 of 241)

1

Add to
Saved Items

The next catastrophe : reducing our vulnerabilities to natural, industrial, and terrorist disasters

Perrow, Charles.

Princeton, N.J. : Princeton University Press, c2007. viii, 377 p. ; 24 cm.

HV551.3 .P45
2007

c2007

2

Add to
Saved Items

The power of analogy : an essay on historical linguistics / by Dieter Wanner.

Wanner, Dieter, 1943-

Berlin : New York : Mouton de Gruyter, c2006. viii, 200 p. ; ill. ; 24 cm.

P140 .W36
2006

c2006

Current Patron Workflow



Summit

The Orbis Cascade Alliance union catalog

Start Over

Modify Search

Home Library

KEYWORD

redundancy

View Entire Collection

Search

228 results found. sorted by **relevance** | [date](#) | [title](#) .

Result page: **1** [2](#) [3](#) [4](#) [5](#) [Next](#)

Save Marked Records

Save All On Page

KEYWORDS (1-50 of 228)

Most relevant titles entries 1-90

- | | | | |
|---|-------------------------|---|-------|
| 1 | Request | Coding and redundancy : man-made and animal-evolved signals
Hailman, Jack Parker, 1936-
Cambridge, Mass. : Harvard University Press, c2008. | c2008 |
| 2 | Request | Leveraging multimodal redundancy for dynamic learning, with SHACER, a speech and handwriting recognizer
Kaiser, Edward C.
2007.
Electronic Resources | 2007 |
| 3 | Request | The effect of phonic redundancy in text on increasing the reading fluency of second grade students at risk for reading disabilities
MacConnell, Kristen Lynn, 1973-
2006. | 2006 |

Current Patron Workflow



[Home](#) | [Databases](#) | [Searching](#) | [Results](#) | [Resource Sharing](#) | [Staff View](#) | [My Account](#) | [Options](#) | [Comments](#) | [Exit](#) | [Hide tip!](#)

[List of Records](#) | [Detailed Record](#) | [Marked Records](#) | [Saved Records](#) |



Current database: **WorldCat**
Title: **Want one**
Author: **Wainwright, Rufus,**

Please place ILL requests for work related items only. The Library can help you locate where to go for personal requests.

*Last Name

*First Name

*Address/Mail Code

Notes

Current Staff Workflow



Current Model

- Local ILS
- Consortia Borrowing System
- Interlibrary Loan System

FirstSearch: Blank Workform (Staff View) - Windows Internet Explorer

http://firstsearch.oclc.org/WebZ/FSPage?pagename=sageblankworkform:sessionId=fsapp14-41111-fj76ir7-... oclc ill

File Edit View Favorites Tools Help

del.icio.us TAG

Tam's... Intra... FirstS... 50 W... Libra... Fi... X staff... Web... Tom ...

Staff View **Blank Workform** | [OCLC Library Home Page](#) | [Use QuestionPoint](#) | [Contact the OCLC Library](#)

[Home](#) [Databases](#) [Searching](#) [Resource Sharing](#) [Collection Analysis](#) [My Account](#) [Options](#) [Policies Directory](#) [Comments](#) [Exit](#)

[Request Manager](#) [Blank Workform](#) [Printing](#) [Batch](#) [My Requests](#) [Go to page](#)

Admin Link Print Help

IFM information has been transferred.

Apply Constant Data:

GENERAL RECORD INFORMATION

Request Identifier: NEW Status: Workform
Request Date: 20080728 Source: FSILLSTF
OCLC Number:
Borrower: OCC * Need Before: 20080827
* Lenders:
Request Type:

BIBLIOGRAPHIC INFORMATION

[Connect to the catalog of the OCLC Library](#)

Author:
Uniform Title:

Done Internet 100%

PATRON USER INTERFACE



Group Scoping Local Scoping View Requests

REQUEST MANAGEMENT

Automatically.... Applies local, group, global policies

Builds Lending String

Retrieves Availability

CIRCULATION INTEGRATION



Automatically.... Check Out

Place Hold

Check In

Patron Experience



The Patron Experience



A consortia and their members choose between two patron interfaces

1. WorldCat Local
2. WorldCat Group Catalog

PATRON USER INTERFACE

REQUEST MANAGEMENT

CIRCULATION INTEGRATION

The Patron Experience



<http://summit.worldcat.org>

<http://unclibraries.worldcat.org/>

<http://worldcatconsortiademo.worldcat.org/>

WorldCat Navigator Request Engine



Navigator Request Engine - Benefits



- Build an **Unlimited Lender String**
- Search the Resource Sharing Network to find a lender outside the group
- Automatically conduct circulation functions if found within the group,

PATRON USER INTERFACE

REQUEST MANAGEMENT

CIRCULATION INTEGRATION

Circulation Integration



Circulation Integration



Circulation integration is a key service component for several OCLC Discovery and Delivery Products

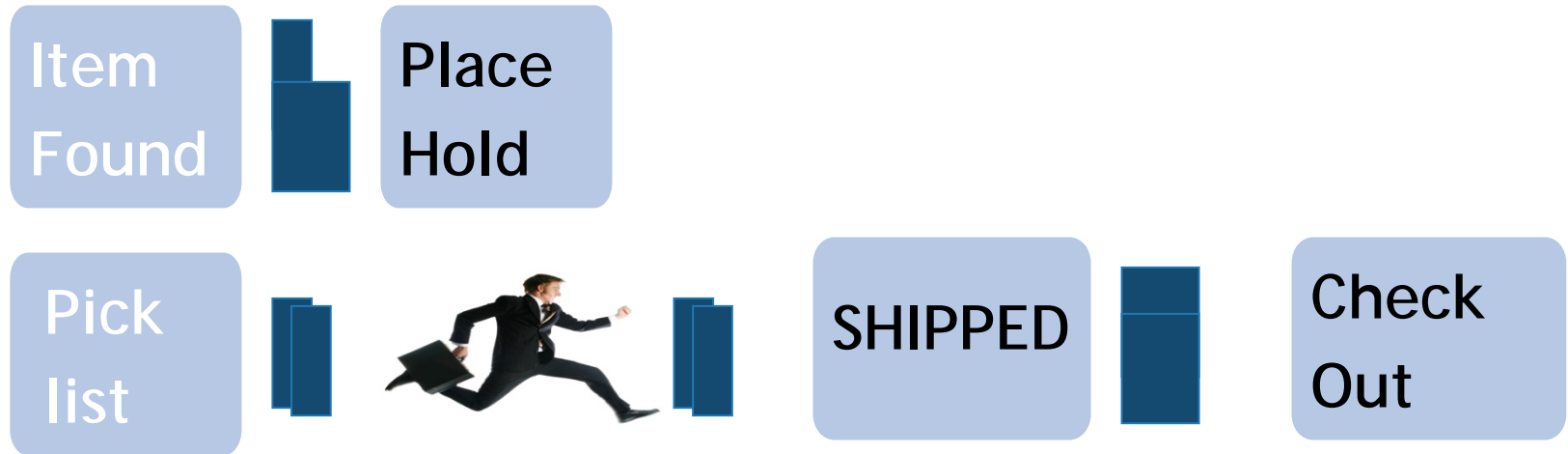
PATRON USER INTERFACE

REQUEST MANAGEMENT

CIRCULATION INTEGRATION

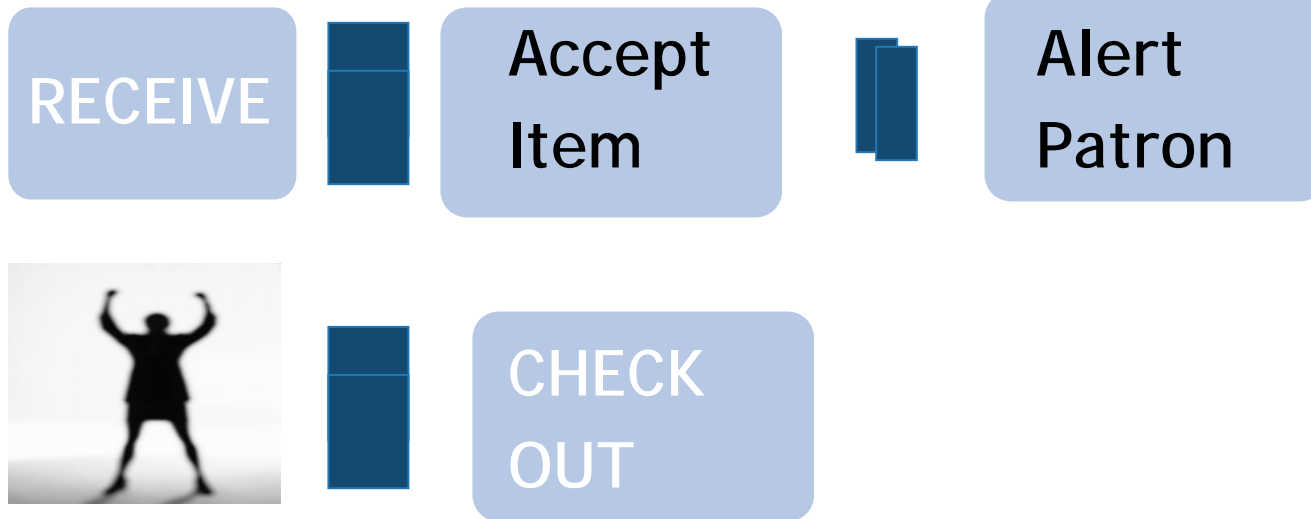
Circulation Integration

Lending Library



Circulation Integration

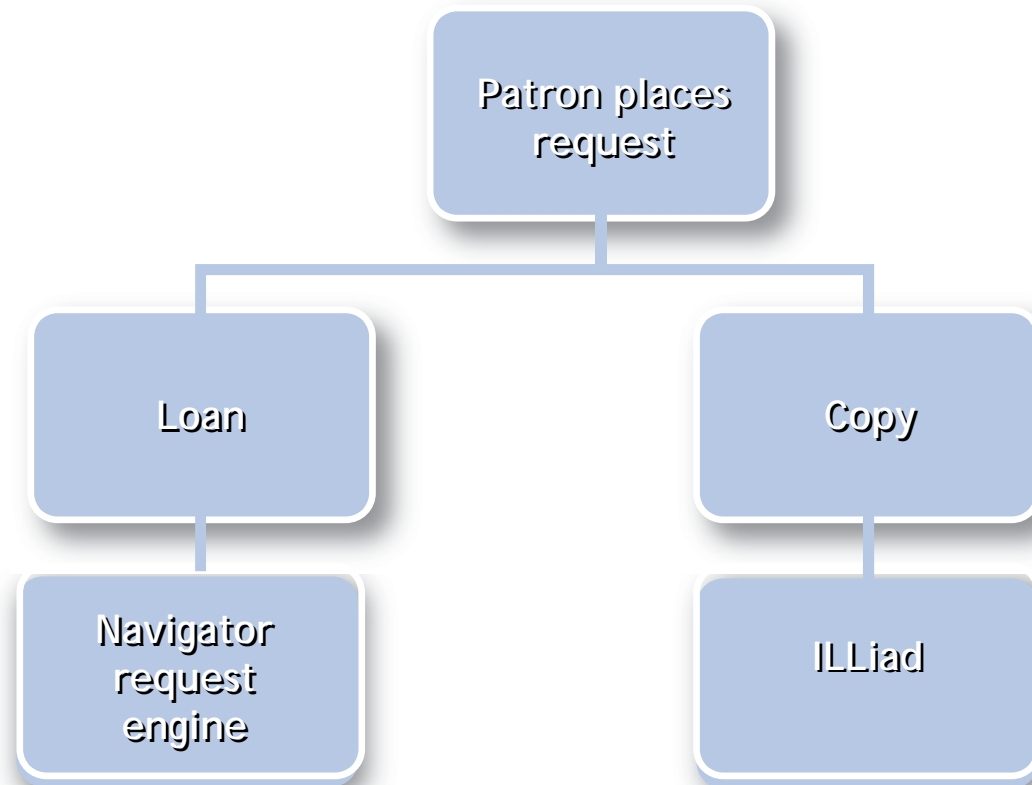
Borrowing Library



Where does ILLiad fit?



ILLiad Request Workflow



ILL Request Workflow



Product Launch



- Orbis live for staff- October
- Orbis live for patrons - December
- University of North Carolina - early 2009
- Official product launch at ALA Midwinter

WorldCat Navigator Complete solution



Patron Interface

- Local and Group

Request Management

- Automatically building lender strings based on real time availability

Circulation Integration

- Developing ways to communicate with ILS regardless of vendor

WorldCat Resource Sharing Update



Christa Starck Weiker
Product Manager
WorldCat Resource Sharing
OCLC

Updated Lender Reasons for No



Added

- Branch policy problem

Renamed

- Lacking Volume / Issue (Old version: Lacking)
- Not on shelf / Missing (Old version: Not on shelf)
- Technical Processing (Old version: In process)

Retired

- Charges
- Locations not found
- On reserve (now use: In use / on loan)
- On hold (now use: In use / on loan)
- Lost (now use: Not on shelf / Missing)
- Not found as cited (moved to Conditional response)
- Lacks copyright compliance (moved to Conditional response)

Moved from Reason for No

- Not found as cited
- Lacks copyright compliance

New

- Duplicate request?
- Borrower concerns / please contact lender

Going Green! Summer 2009



- New Categories for Users
 - SHIPPED
 - RECEIVED
- Items would stay in these categories for the life of the request, no need to maintain paper copy of the request

Tracking

- UPS, DHL, FedEx, USPS
- Implement APIs in WCRS, web services, VDX (not all at the same time)
- Re-implement "WILL SUPPLY" category
- With barcode reader to enter tracking number in and move to SHIPPED

Deflection

- Based on local holdings, the lender that has up-to-date local holdings can elect to not receive requests for which they do not hold the item

Reasons for no: Deflection

- Lenders want the ability to set what the reason for no is in the case that multiple reasons apply, for a specific policy

Auto-trigger RECEIVED after XX days

- This would be a solution for IFM on SHIPPED/UNDO SHIPPED/NOT RECEIVED
- This would help our lenders receive IFM payment accurately, not forcing libraries to invoice one another

- Statistics
- Authentication for WCRS from WorldCat Local and WorldCat.org
- Link resolution from WCRS using Link Manager
- NEW DOCUMENTATION

June

- Global Policies in the WorldCat Registry

2009

- New user interface

- New Milestones
- Version 7.3
- OCLC ILLiad Hosting Service
- Version 8.0

- **Over 1000 ILLiad libraries!**
 - 100+ new ILLiad libraries added during the past year
- **302 OCLC hosted ILLiad sites!**
 - 234 of which are on current version

- Overhauled Web reports - new graphs and layouts
 - Better performance and more customization
- Odyssey Helper added to help streamline Lending and Doc Del Odyssey deliveries
- Web Circ module - this web-based access module allows limited access to ILLiad for circulation staff to help check materials in and out of ILLiad

ILLiad 7.3 (cont.)



- ILLiad System Manager service combines ILLiad Cleanup and Email Manager services
- Rapid Manager - a new Web service for handling Rapid requests in the ILLiad client
 - Additional functionality will be in v.7.3.1
- In preparation of ILLiad v.8.0, the Customization Manager uses a new ribbon-based interface and .NET to connect to the SQL database

- 302 OCLC hosted ILLiad sites
 - 234 of which are on current version
- Over 50% of new orders are for the OCLC hosted option
- Self-hosted to OCLC hosted migrations
 - Ongoing: Harvard Univ., Ohio State Univ., Kutztown Univ.

- Provides ILLiad server software, Web Server and a SQL Database Server
- Monitoring service notifies OCLC operations when ILLiad or Web services are inoperative anytime 24/7
- Online scheduling of upgrades

- **Anti-virus software**
- **Dedicated network firewall**
- **Backups include:**
 - Hourly - ILLiad SQL Database
 - Nightly - SQL Database, Web pages & PDF files
 - Weekly - archived and sent to offsite storage

OCLC ILLiad Hosting Service (cont.)



- “OCLC can quickly fix solve some problems for us instead of giving us directions on how to solve it for ourselves” - PA
- “We are a medium size library and a hosted site and I can't imagine any cons.” - FL
- “OCLC hosts our ILLiad connection and I don't know what we would do without it. In addition to a fairly easy delivery method (ftp to the OCLC server), the customer support is outstanding. I doubt that we would receive the same support internally due to their unfamiliarity with ILLiad and many other concerns. ” - NY

ILLiad 8.0 (and beyond)



- Complete re-write of all software from Delphi programming language to C#
- Ribbon-based interface for all ILLiad client components
- Will also use .NET to connect to the SQL database
- the .NET communication model removes the BDE (Borland Database Engine) component requirement and should increase client/server communication performance
- Expected around the end of 2008; demos at ALA Midwinter



Exploring home delivery of physical materials to users

Phase 1 - lending library to user

Phase 2 - pilot with commercial supplier

Components

- Funding for equipment and postage by OCLC
- Facilitate equipment and packaging materials for home delivery (and return) of materials
- Survey patrons and librarians on use and value

OCLC

- Determine level of patron interest in home delivery
- Define logistics of home delivery
- Test NCIP for patron authentication and workflow savings

Montana

- Central NCIP authentication works smoothly and seamlessly for user
- Home delivery option becomes viable
- Courier possibilities are discovered as part of the process
- Montana statewide library card gains local and statewide support

Patron feedback



I love this! I hope it will become a feature of our library.

It's wonderful. It allows me to utilize the library's service with much more convenience as I live far away from the library.

Service was quick and convenient. It was exciting to get, felt like Christmas!

Cool, to just order online and have it delivered home

Patrons love the home delivery option

- Overwhelmingly positive about home delivery
- Over 90% willing to recommend service to others
- 60% of users are willing to pay
 - \$5 range, per delivery or item
- Over 70% said they chose home delivery for convenience

Patrons from non-pilot communities interested in service

Less work for library staff (when NCIP worked as planned)

Montana staff experiences



This is a great service! We would love to continue providing the service to our patrons, but because of budget constraints we will not be able to continue this service.

The whole idea and "mission" of the program is great. We all learned a lot by participating in this pilot program and tried to keep that in mind throughout the program. Patrons loved it and even those who may not have tried it - talked as if they saw the merit in the service. It is a great service for those who can afford to offer it. Patrons loved it!

Over the next year

- Tracking for major carriers
- Home delivery in existing products
 - WCRS/ILLiad, VDX, WorldCat Navigator
 - Home delivery as option to own patrons via OCLC ILS products
 - Built around returning materials to home library for return to lender

In the next 2+ years

- End user payment put in place
- Negotiations between OCLC and major carriers for shipping discounts for OCLC members

Same purpose: Home delivery for ILL Request

Differences:

- Resources provided by book supplier instead of lending library
- Patron may purchase book
- Patron may keep book longer
- Borrowing library pays for each delivery

- **Goals:**

1. Reduce costs by eliminating wasteful steps in library supply chain
2. Get ILL requests to patrons faster
3. Add more value to WorldCat Resource Sharing community by offering alternatives to traditional ILL

Progress So Far - limited to US libraries



- 11 Pilot Participants
- Columbus Metropolitan Library, Ohio - May
- High Plains Library District, Colorado - May
- Westerville Public Library, Ohio - June
- Lincoln Trail Libraries District, Illinois: - September
 - Des Plaines Public Library
 - Champaign Public Library
 - Edwardsville Public Library
 - University of Illinois @ Chicago
 - University of Illinois @ Springfield
 - Lewis & Clark Library System
 - Lincoln Library
 - Hoopeston Public Library

- Better World Books must have an interesting inventory...
 - >950 requests from non-pilot libraries through WorldCat Resource Sharing
 - Not-pilot libraries receive many of the same benefits as pilot libraries, except there is no home delivery - libraries still have to receive request and process like any other ILL
 - 30 day loans
 - Postage paid return envelope
 - Ability to purchase book

- *VERY PRELIMINARY USER SURVEY RESULTS...*
- 4 months into the pilot
 - 91% of users agreed, or completely agreed with the statement, "Overall, I was satisfied with the home delivery service." (77% completely agreed)
 - 84% plan to use the service again
 - 87% would recommend the service to others
 - 5% purchased the book
 - 92% very satisfied with option to purchase book



<http://www.oclc.org/productworks/betterworldbook.htm>



Thank You!

Questions?

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