MLA WMS Interest Group February 21, 2019, St. Louis, MO

WorldShare Management Services Update

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Product Manager,
Delivery Services

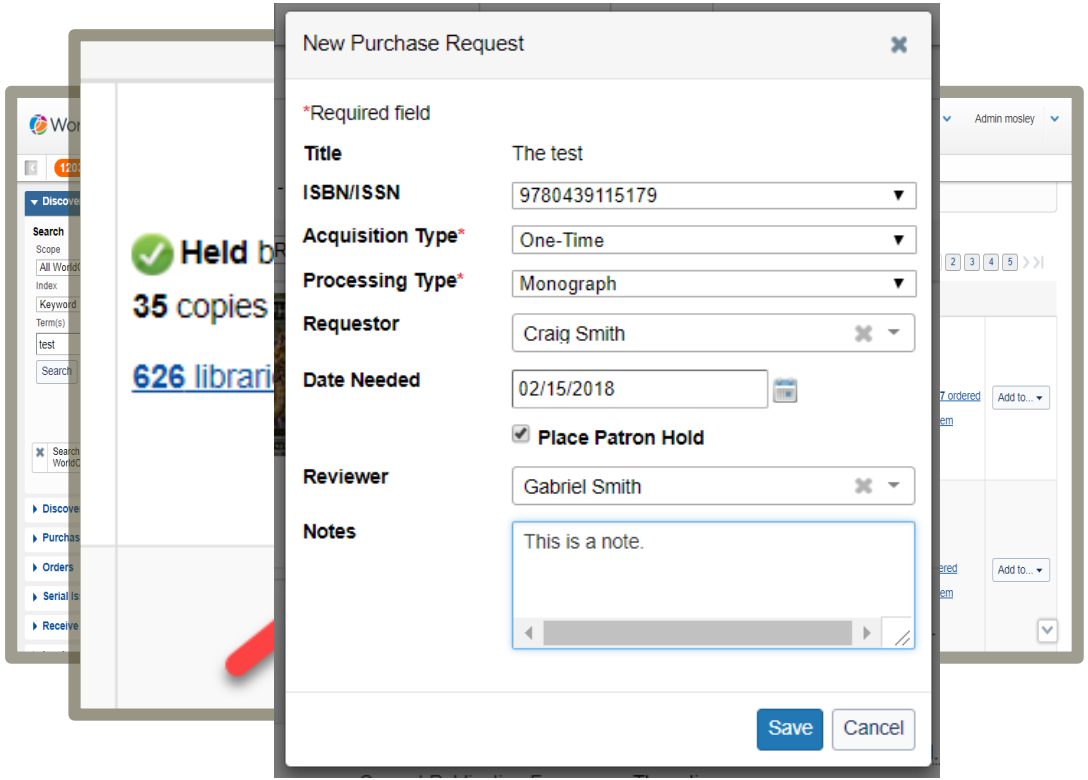
Our update today

- Patron Service: Engagement and Fulfillment
- Consortia and Collaboration Across Libraries
- Optimizing and Extending Resource Management
- WorldCat Discovery recent enhancements
- WorldCat Discovery upcoming enhancements

PATRON SERVICE: ENGAGEMENT AND FULFILLMENT

Available now: patron purchase requests

- **WMS libraries** can now add requests for items to be purchased to a queue
- **Tipasa libraries** can take requests directly from patrons via Discovery
- Staff decide whether to deny requests, send to Tipasa to borrow, or Acquisitions to purchase

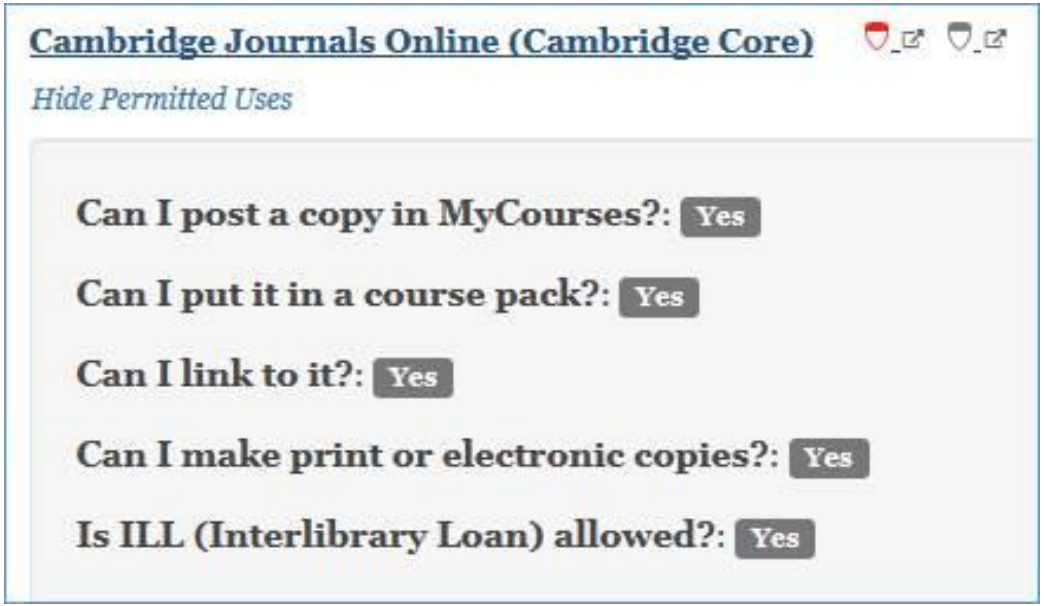


Tipasa – WorldShare Circulation integration

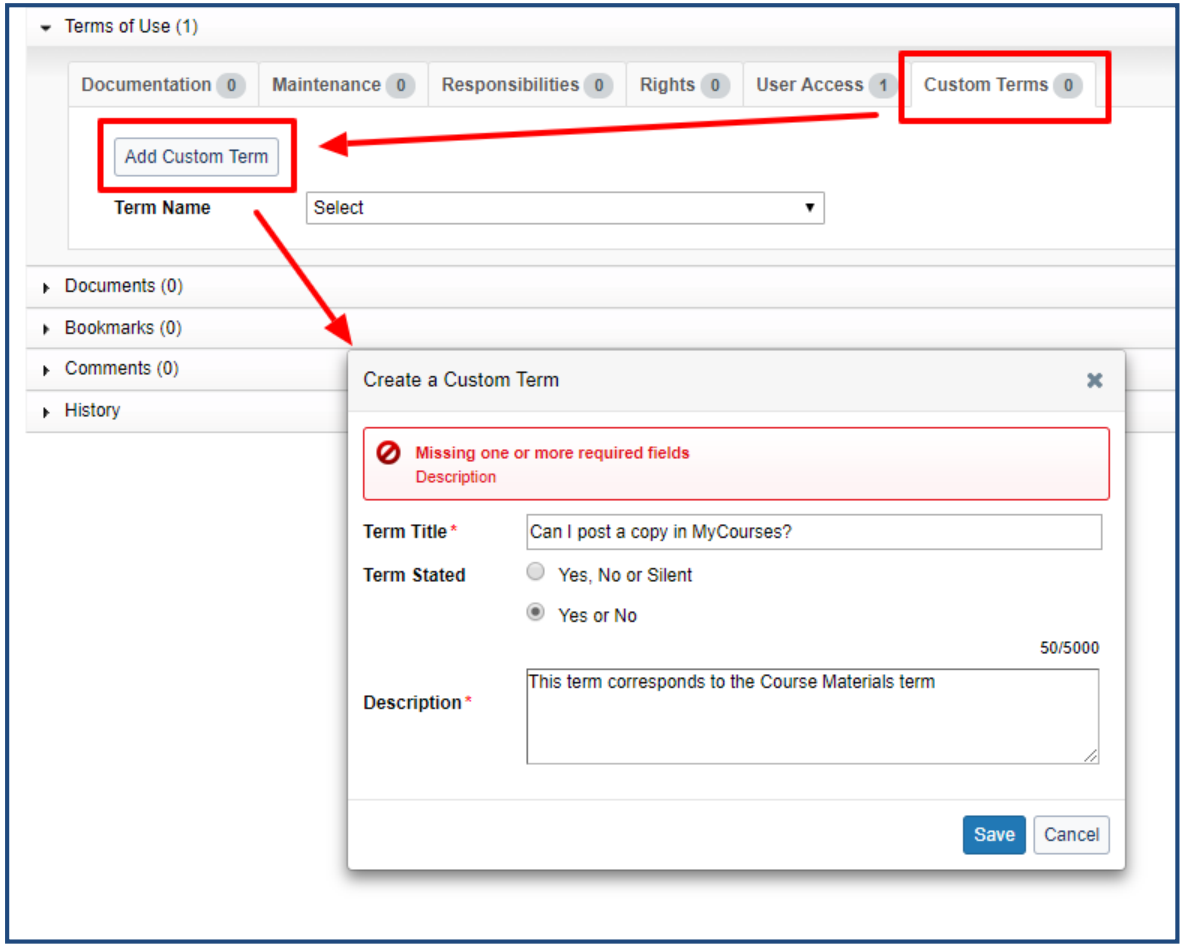
- ILL librarians will work in Tipasa
- Both supplying and lending libraries will see Tipasa activity reflected in Circulation
- NCIP messages will be sent into Circ
- Circulation staff and patrons will be able to see Tipasa transactions reflected in their local library account

License Manager Terms of Use

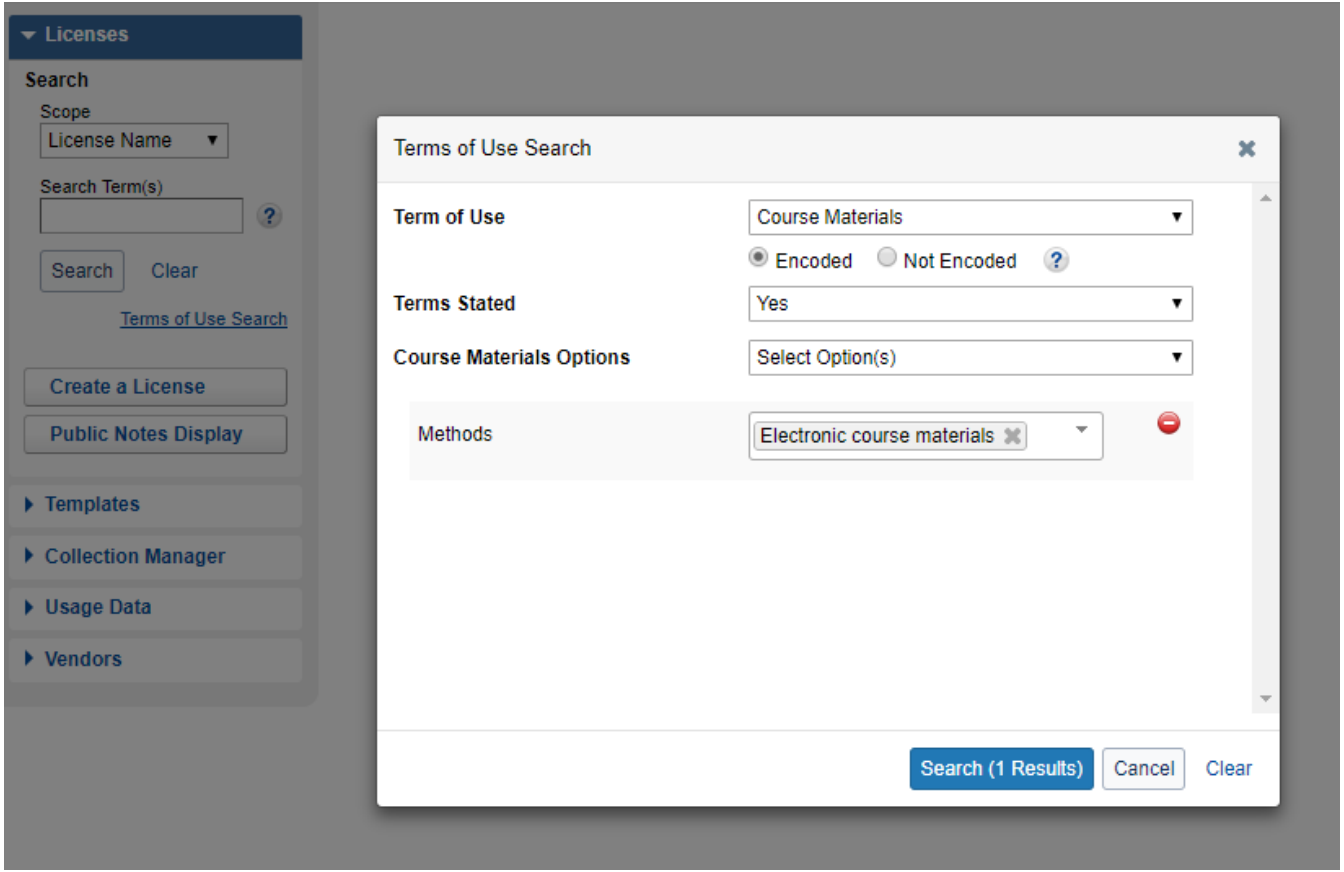
- Representing Terms of Use to patrons in Discovery or A-Z lists



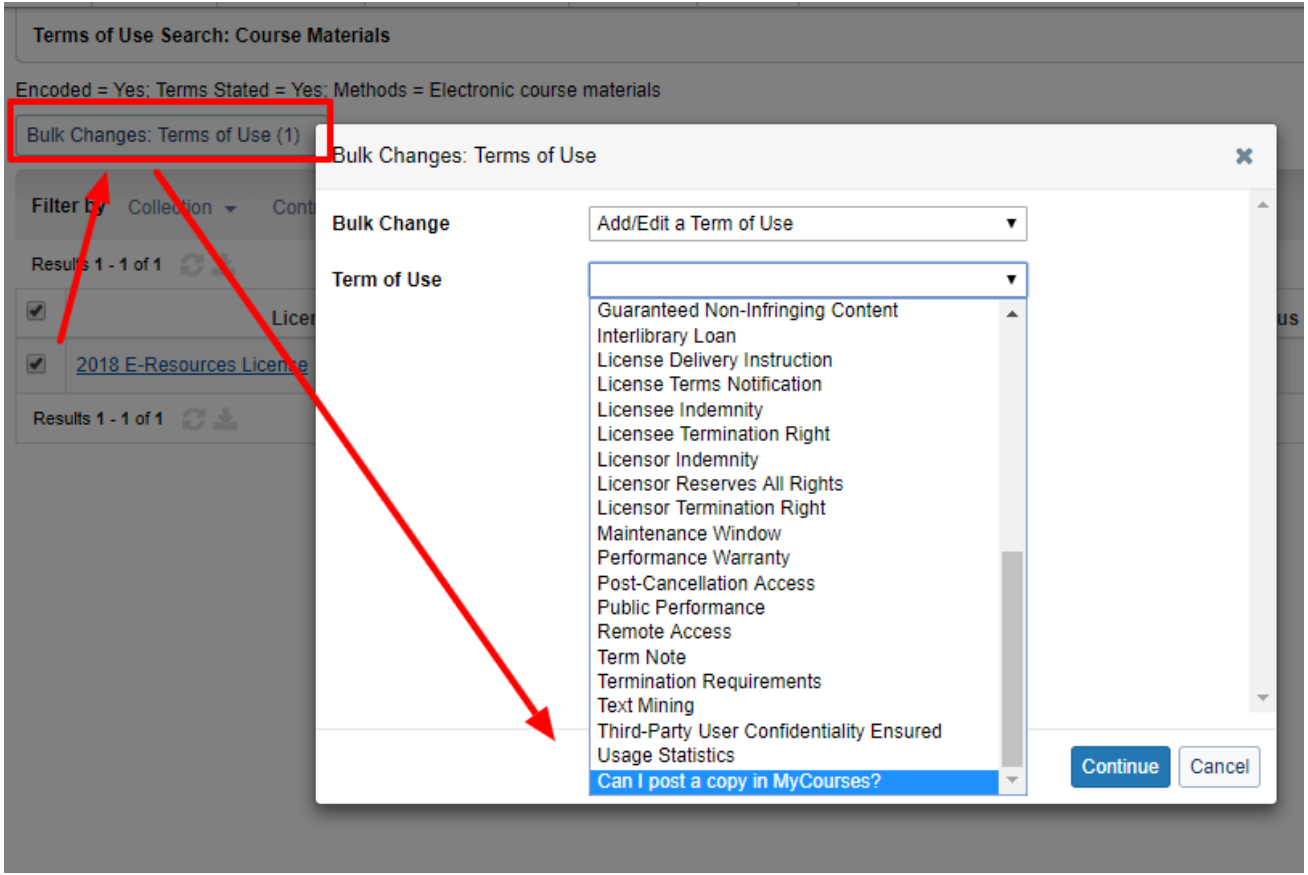
Create a Custom Term



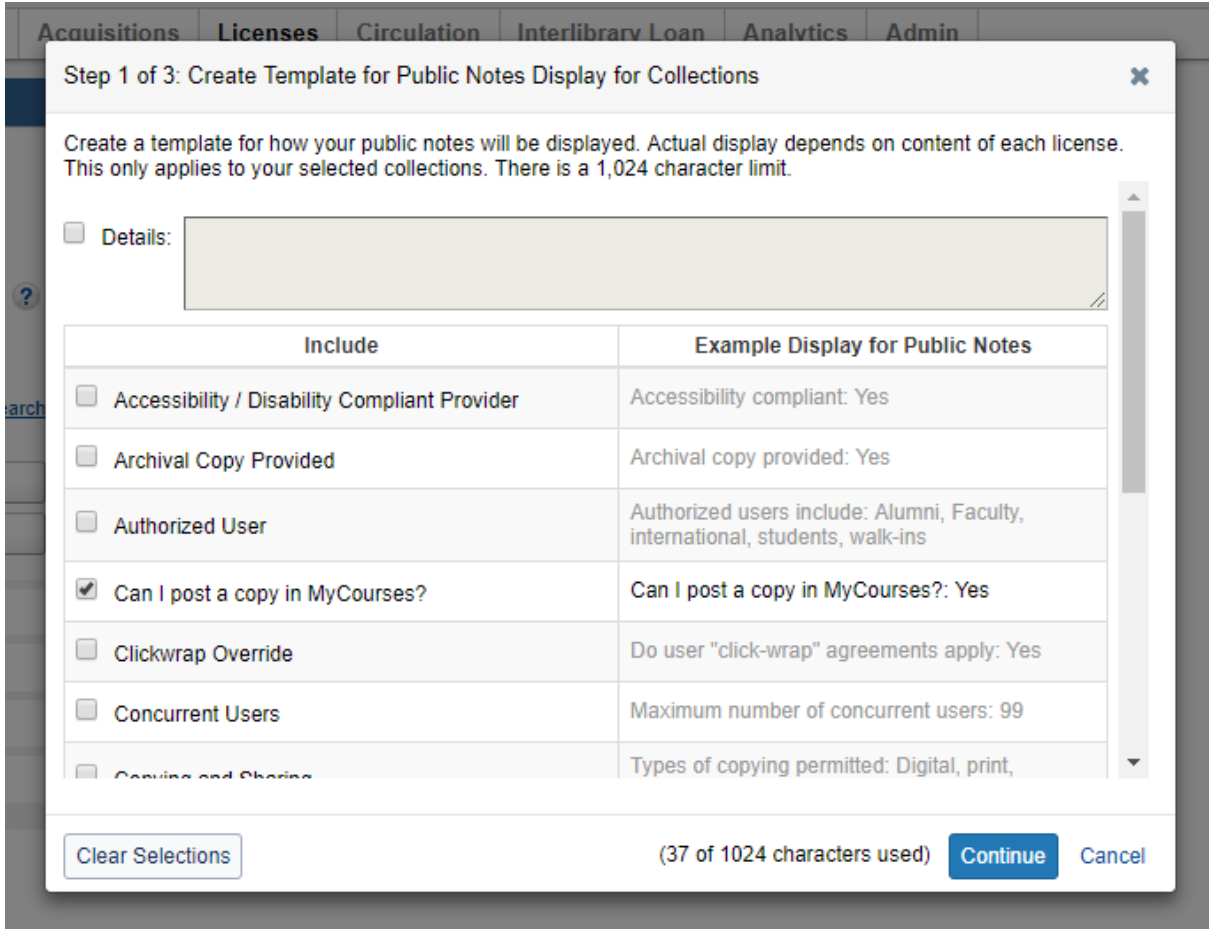
Search all Licenses containing specific Terms



Bulk Update Terms in all licenses



Wizard walks you through setting these Terms for public display



Coming soon: integrated fulfillment

- Integration between Relais D2D and Circulation
- Shift unfilled requests from group circulation to ILL system
- Support multiple pickup locations for a branch

Also coming soon

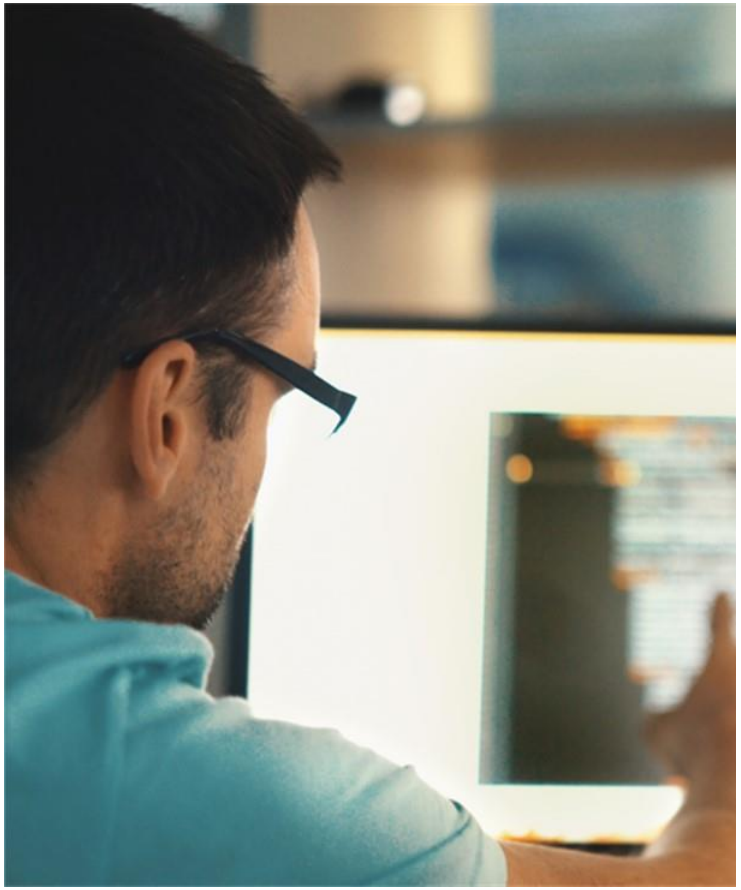
Circulation worker role

- Limited view and edit privileges for patron information

Upgraded notification service

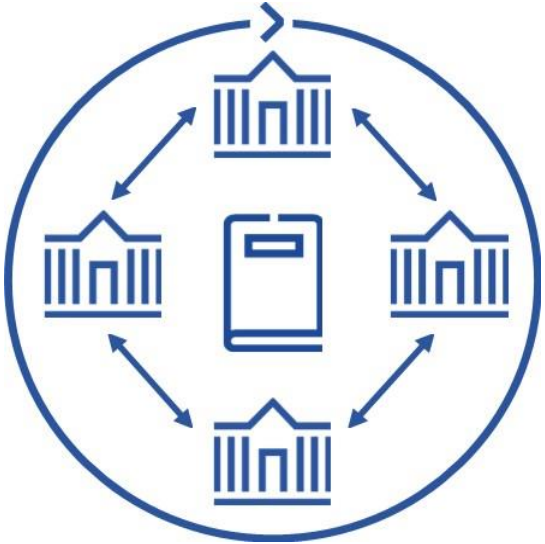
- Supports text notifications, customizable templates,
  patron format preference

Online payment of fines and fees



CONSORTIA AND COLLABORATION ACROSS LIBRARIES

Available now: consortium support



Analytics Group Administrator role

- Can create group-level reports in Circulation, Acquisitions, and E-resources domains

New Group Circulation reports

- Group Circulation Events Detail Report
- Group Open Hold Requests Report
- Group Overdue Items Report
- Group All Checked Out Items Report

Coming soon: consortium support

Multi-institution roles

- A single set of credentials will let you operate against any one of a group of libraries as a Cataloguer, Electronic Resources Librarian, KB Administrator, Circulation Desk Worker, etc.

Multiple library cards

- Patrons will be able to access their accounts to view checked out items, renew material, view and cancel holds etc. from a single set of credentials

Coming soon: consortium support

Shared Acquisitions

- Group voting on subscriptions and packages
- Member opt-in to group packages
- Group invoicing of individual members for shared subscriptions and purchases

Inherited roles and policies

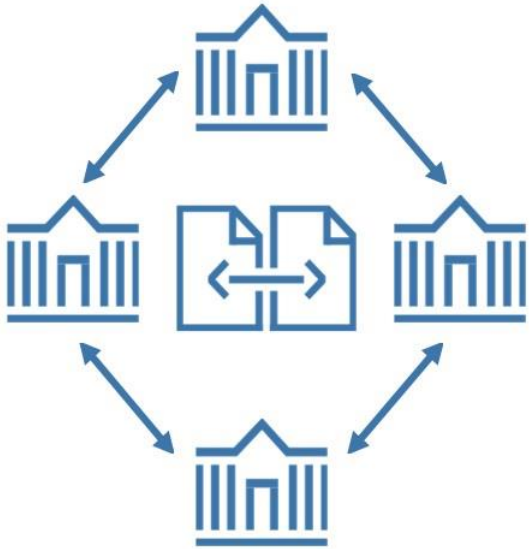
- Allow templates to be defined for a group and inherited by all libraries within the group

Mask patron details at libraries other than home library

Coming soon: consortia enhancements

- Enhance holds transits and expiry for multiple libraries/branches
- Enhance SIP2 to support self-check stations across consortia
- Group administrators can run group reports in the Cataloging/Collection domain
- Group cataloging/collection reports:
  - Count of New and Removed Group Titles
  - Title Counts for Group Catalogue
  - Title Holdings Count by Institution
  - Titles Held by a Single Institution

Coming soon: collaboration across libraries



Report Designer

- Libraries will be able to share reports queries/templates from Report Designer with the rest of the Report Designer Community

- Your library will be able to pick up any of these templates and run them against your own data

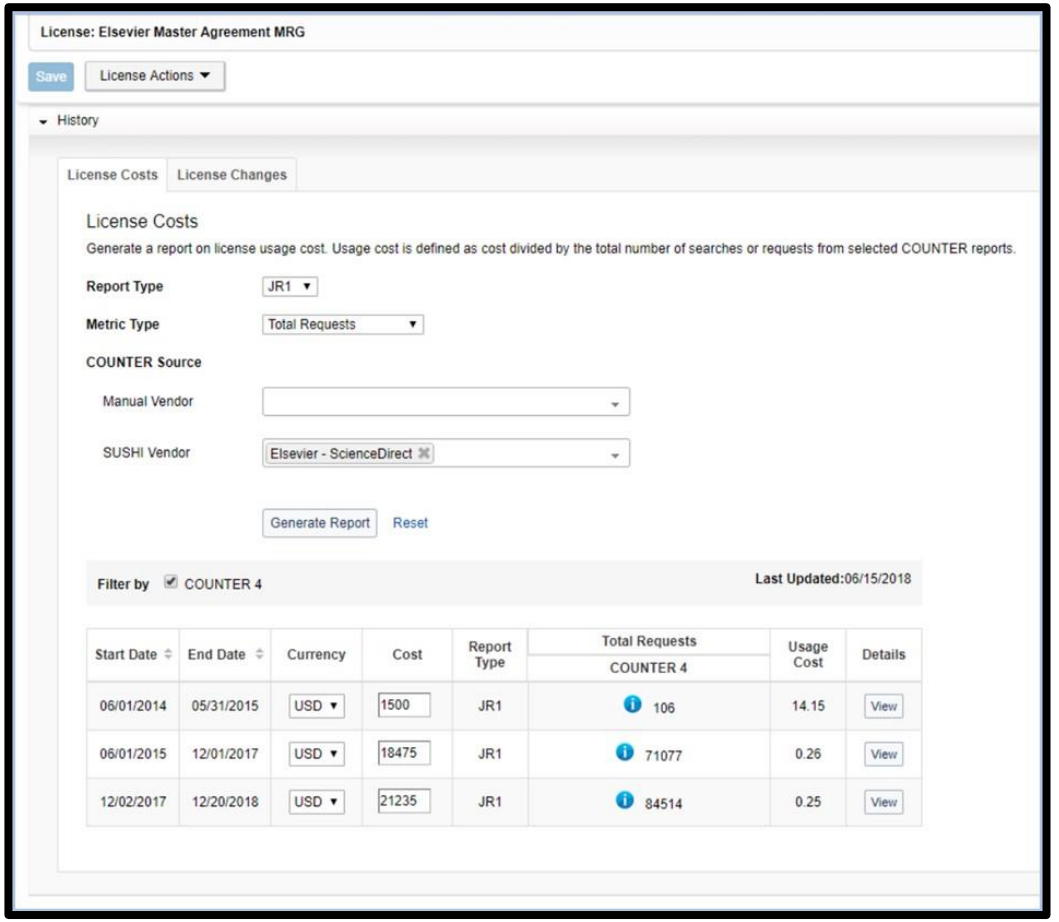
OPTIMIZING AND EXTENDING RESOURCE MANAGEMENT

Available now: resource management

- Direct import of vendor files via FTP
- Split costs across funds
- Edit Invoice Total
- Collection Management functions on Digby mobile app

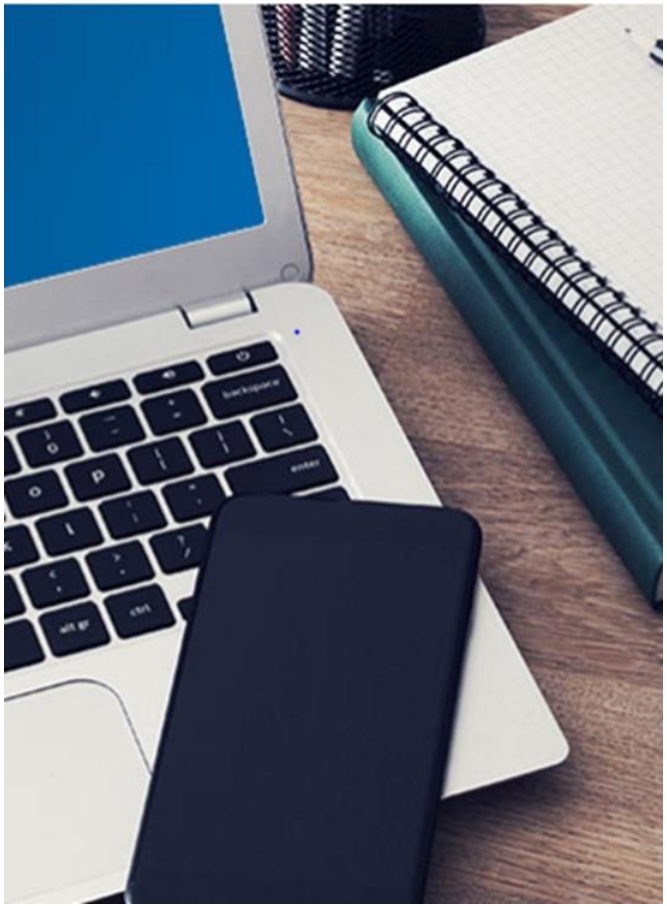
For libraries with License Manager:

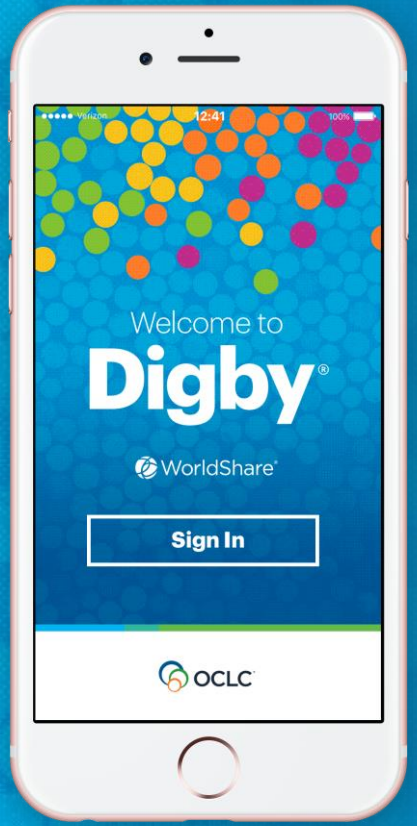
cost-per-use for collections



Resource Management: coming soon

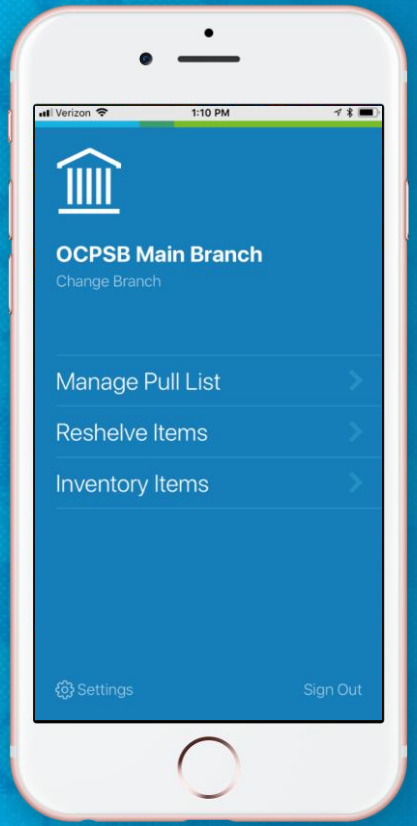
- Edit Placed Order
- Title capture in License Manager
- Legal Deposit support
    - Including Receipt and claim notices





Digby®

OCLC



Digby®

- Paperless pull lists
- Reshelving and “soft” check-in
- Check in/clear status
- Inventory

OCLC

What's next for Digby?

- Collection shifting
  - Bulk update of item location, status
  - Includes setting and clearing temporary locations
  - ~~**DEMONSTRATION**~~
- Search Discovery
- ILL pull lists
- Weeding/deaccession pull lists

Bulk Patron Delete

Overview of bulk patron delete

- **There is a delete file format and requirements** for submitting a file of patron records to be deleted from WMS or Tipasa
- **Matching for deleting patron records** mirror the fields used for ongoing patron data loading
- **Delete files will be submitted** to a new file directory
- **Bulk deletion of patron** accounts can be sent ongoing i.e. end of semester for removing expired accounts

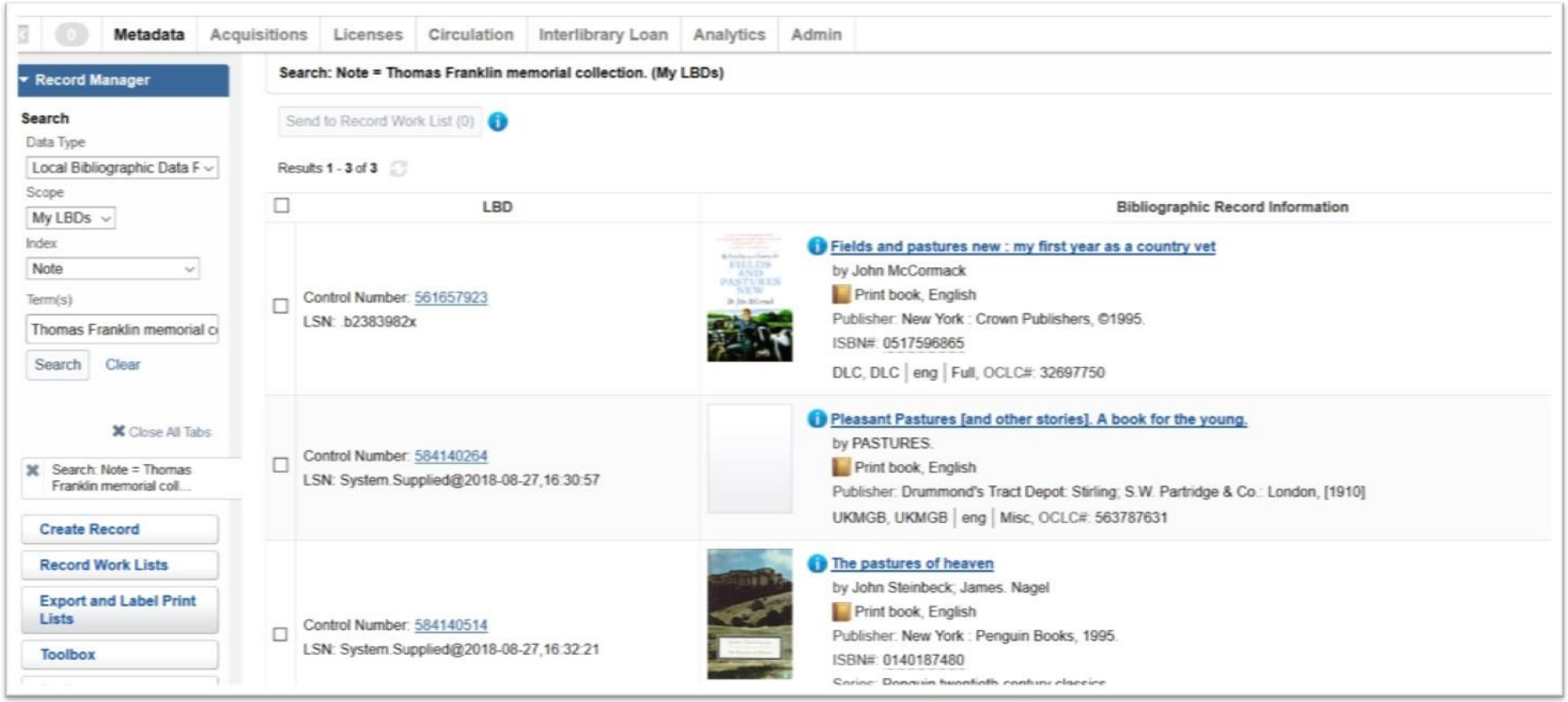
What does this mean for your library?

ACTION REQUIRED

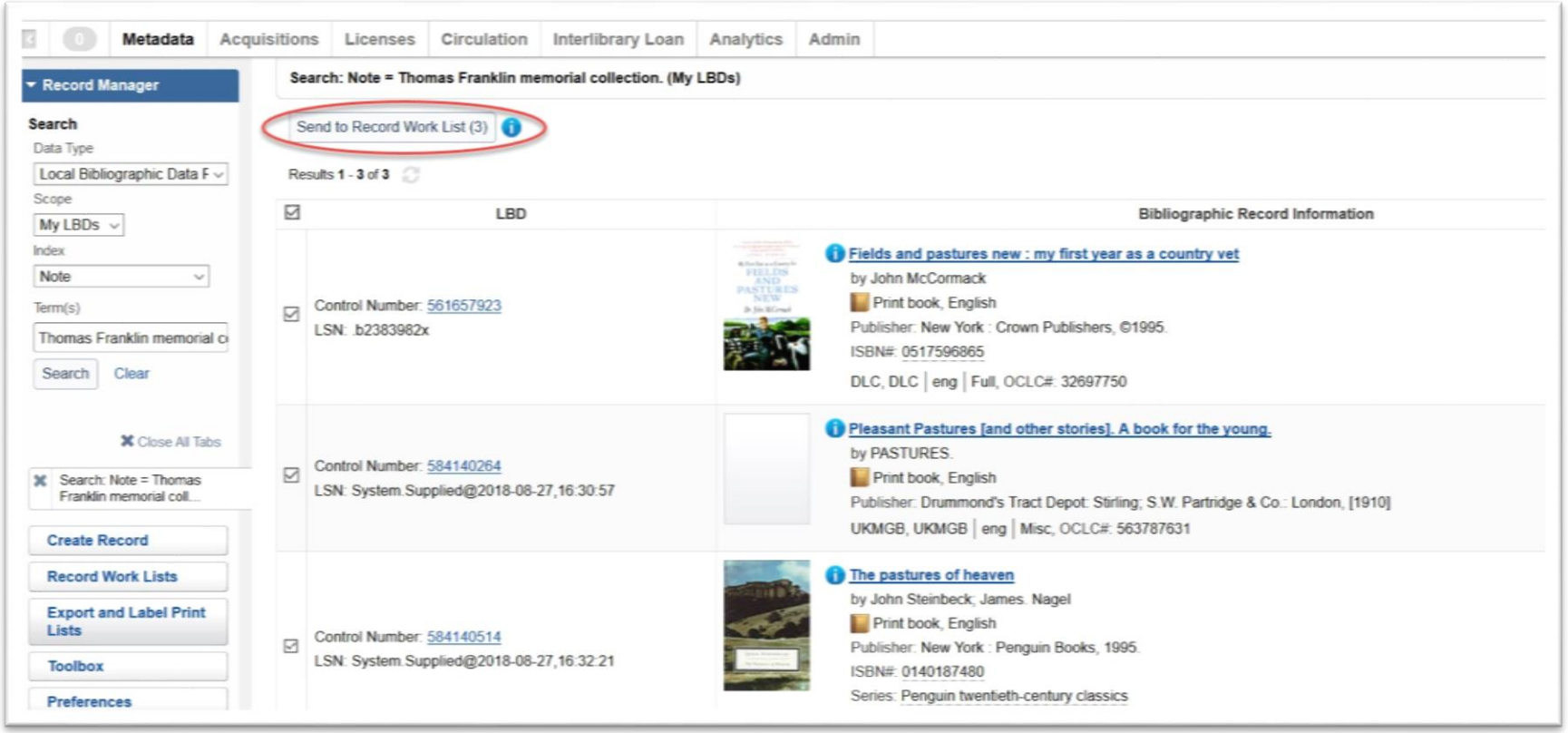
- **If you wish to remove patron records from WMS or Tipasa in bulk, you must** use the new delete template (tab-delimited) or XML schema and submit a patron delete file for review to OCLC
- **If you wish to send ongoing patron data deletes,** you can once you have an initial file reviewed and approved by OCLC

LBD Bulk Edit Workflow

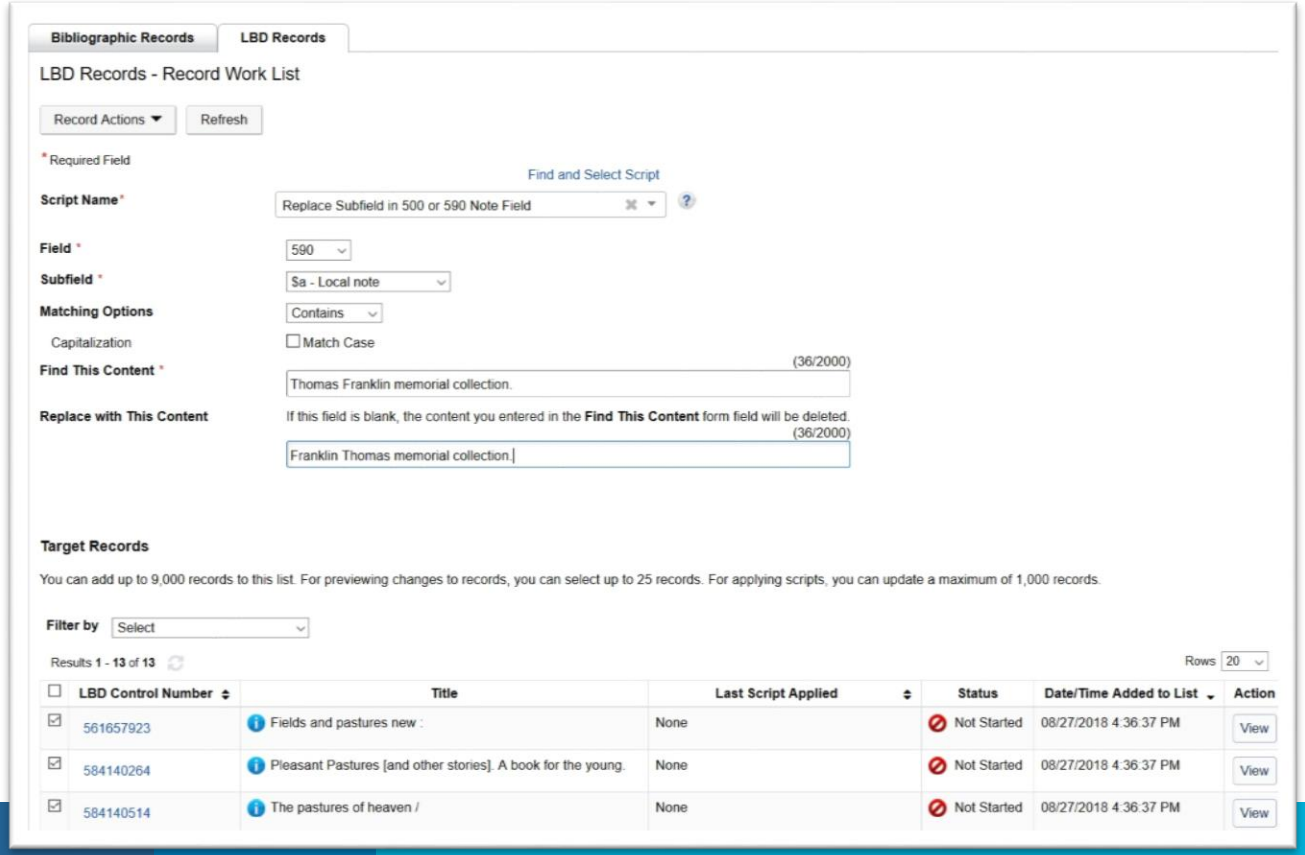
Search for LBD



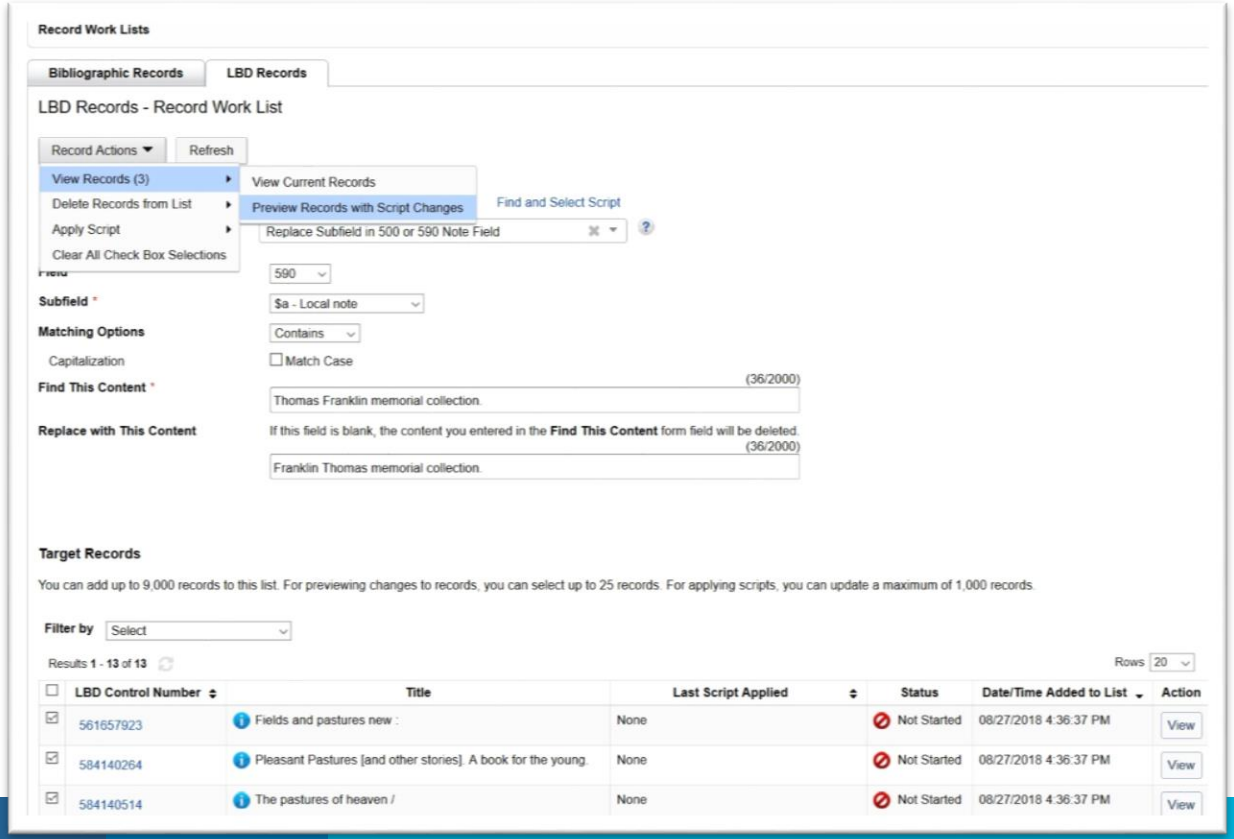
Select and send to work list



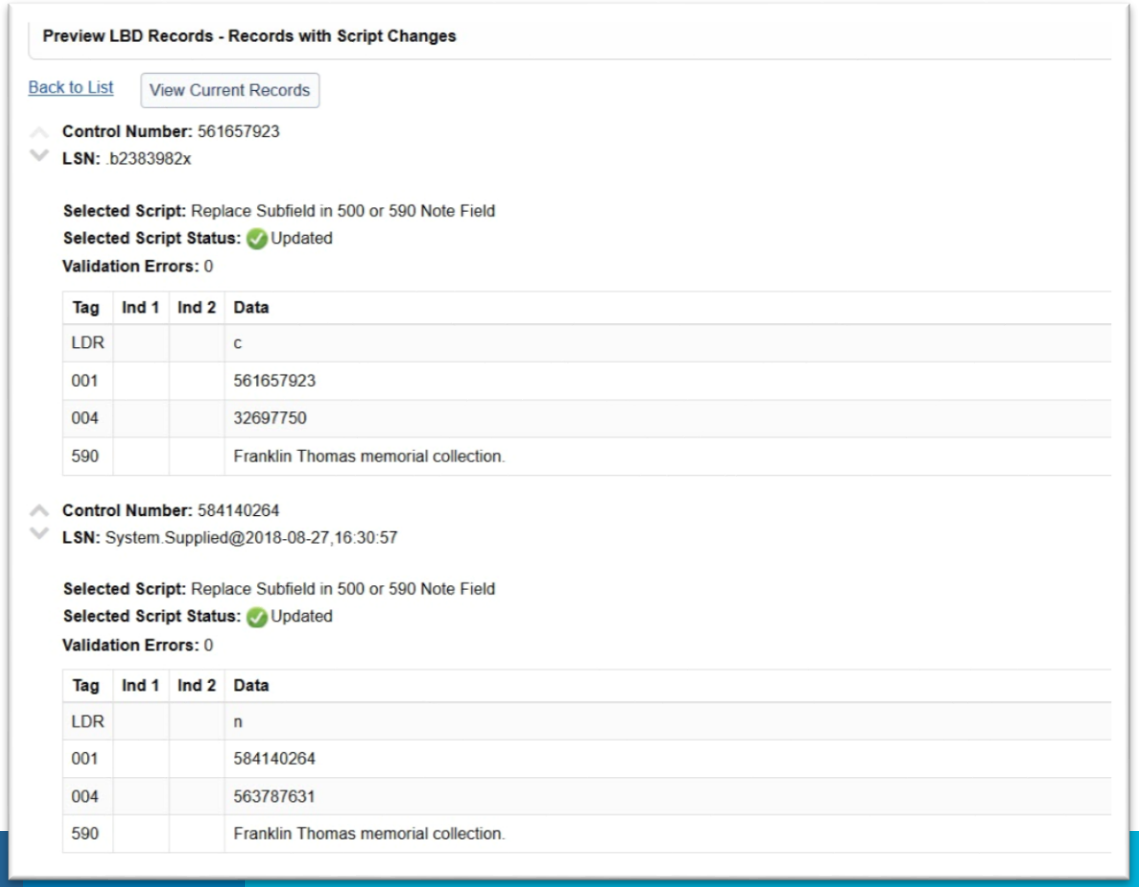
Record work list – Select your script



Preview your changes



Preview display



Preview LBD Records - Records with Script Changes

Back to List | View Current Records

Control Number: 561657923
LSN: .b2383982x

Selected Script: Replace Subfield in 500 or 590 Note Field
Selected Script Status: Updated
Validation Errors: 0

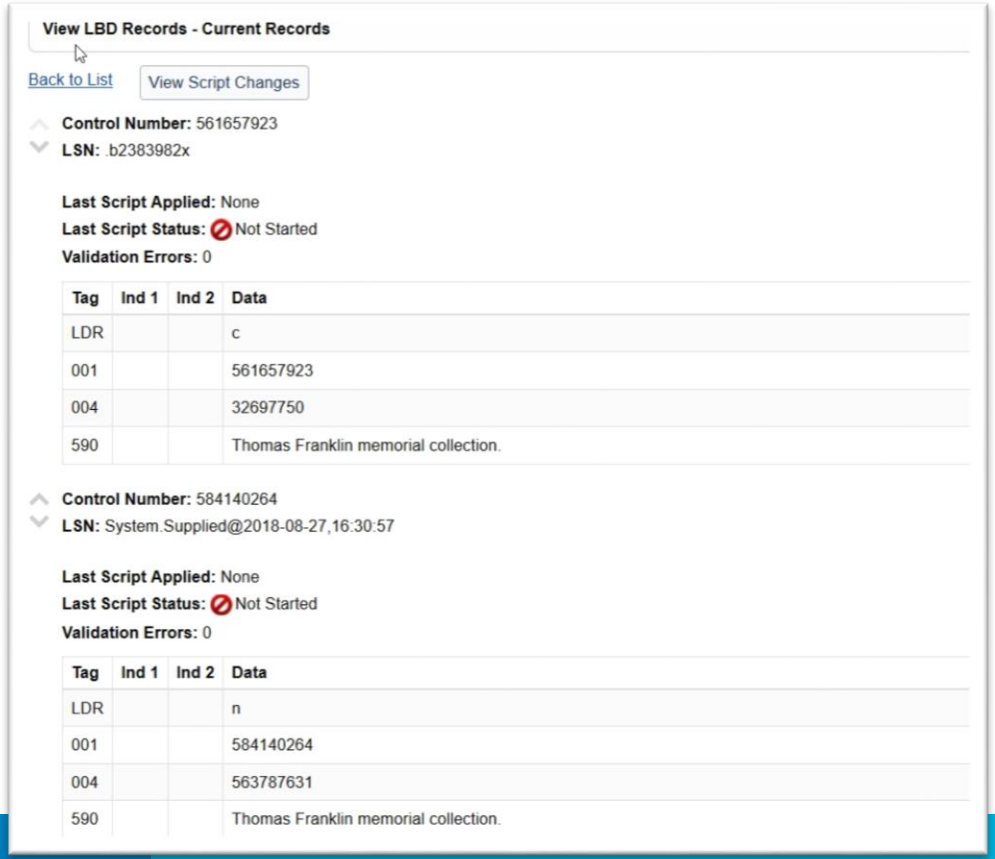
Tag	Ind 1	Ind 2	Data
LDR			c
001			561657923
004			32697750
590			Franklin Thomas memorial collection.

Control Number: 584140264
LSN: System.Supplied@2018-08-27,16:30:57

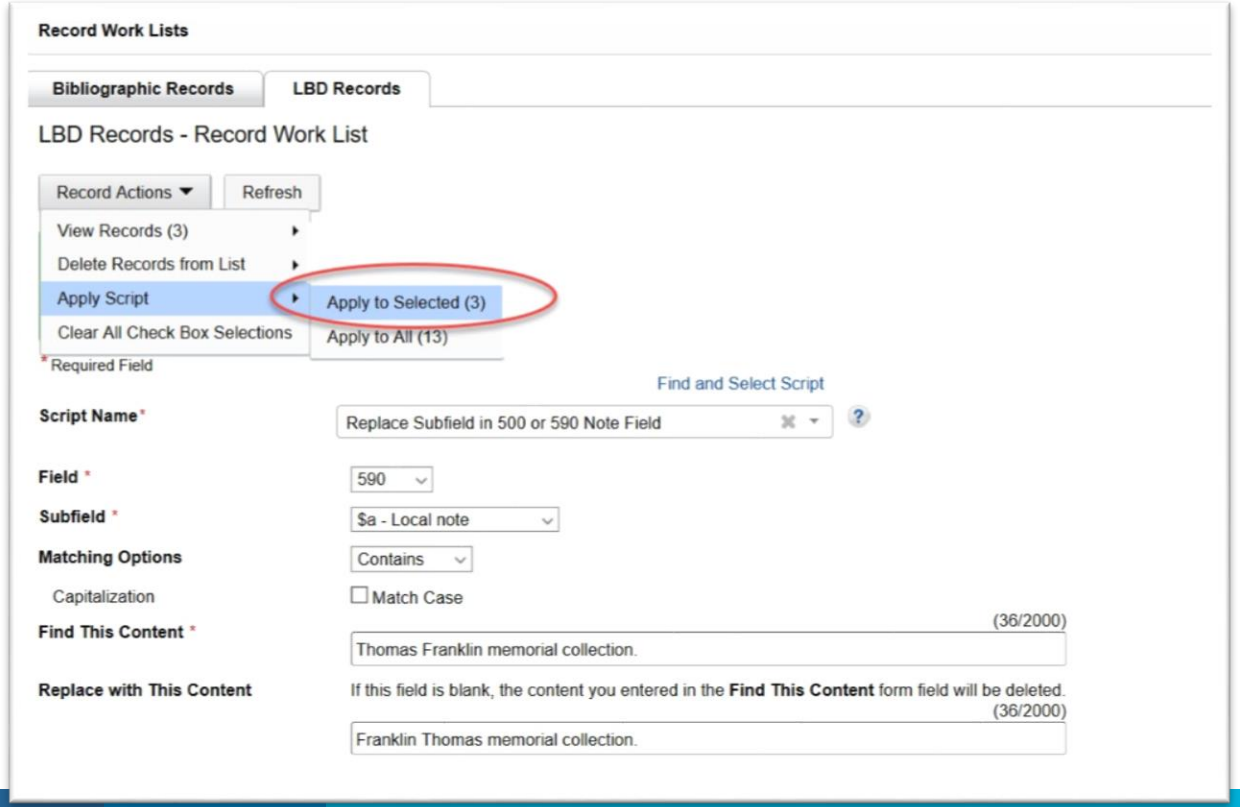
Selected Script: Replace Subfield in 500 or 590 Note Field
Selected Script Status: Updated
Validation Errors: 0

Tag	Ind 1	Ind 2	Data
LDR			n
001			584140264
004			563787631
590			Franklin Thomas memorial collection.

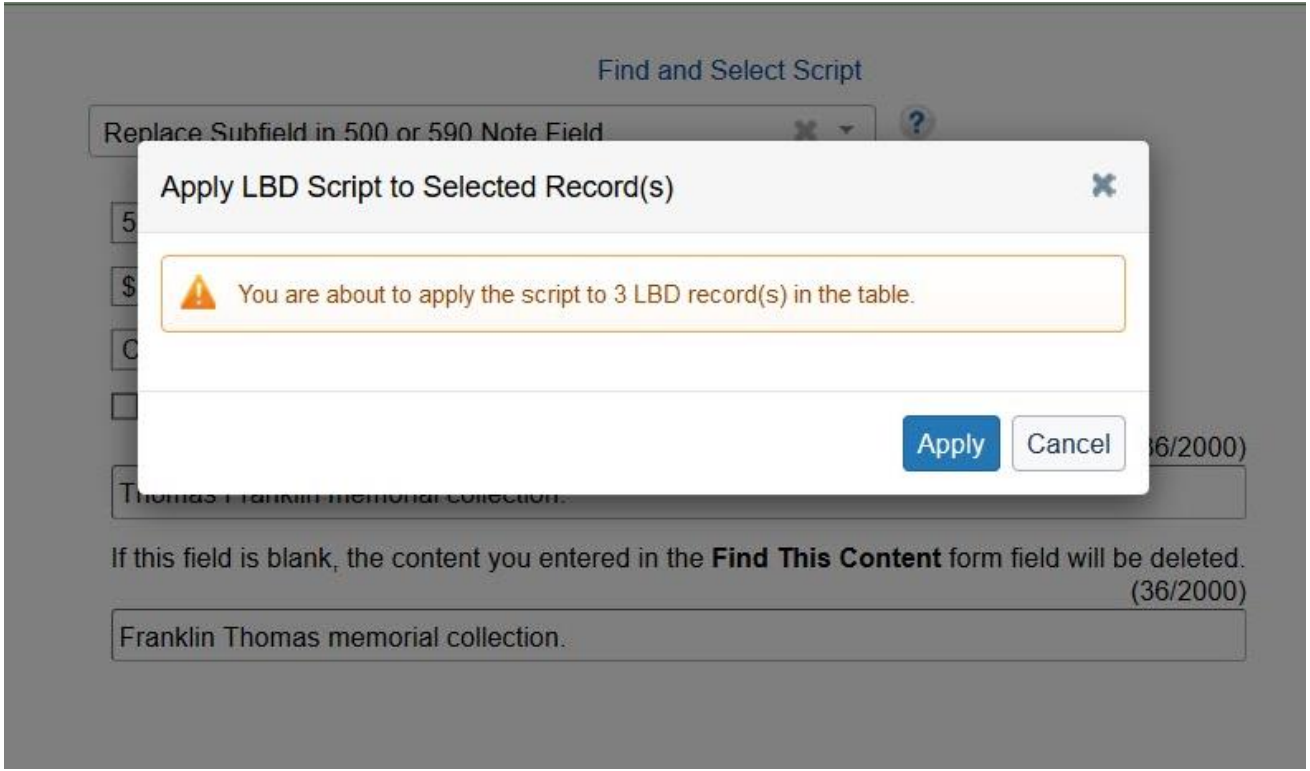
Current display



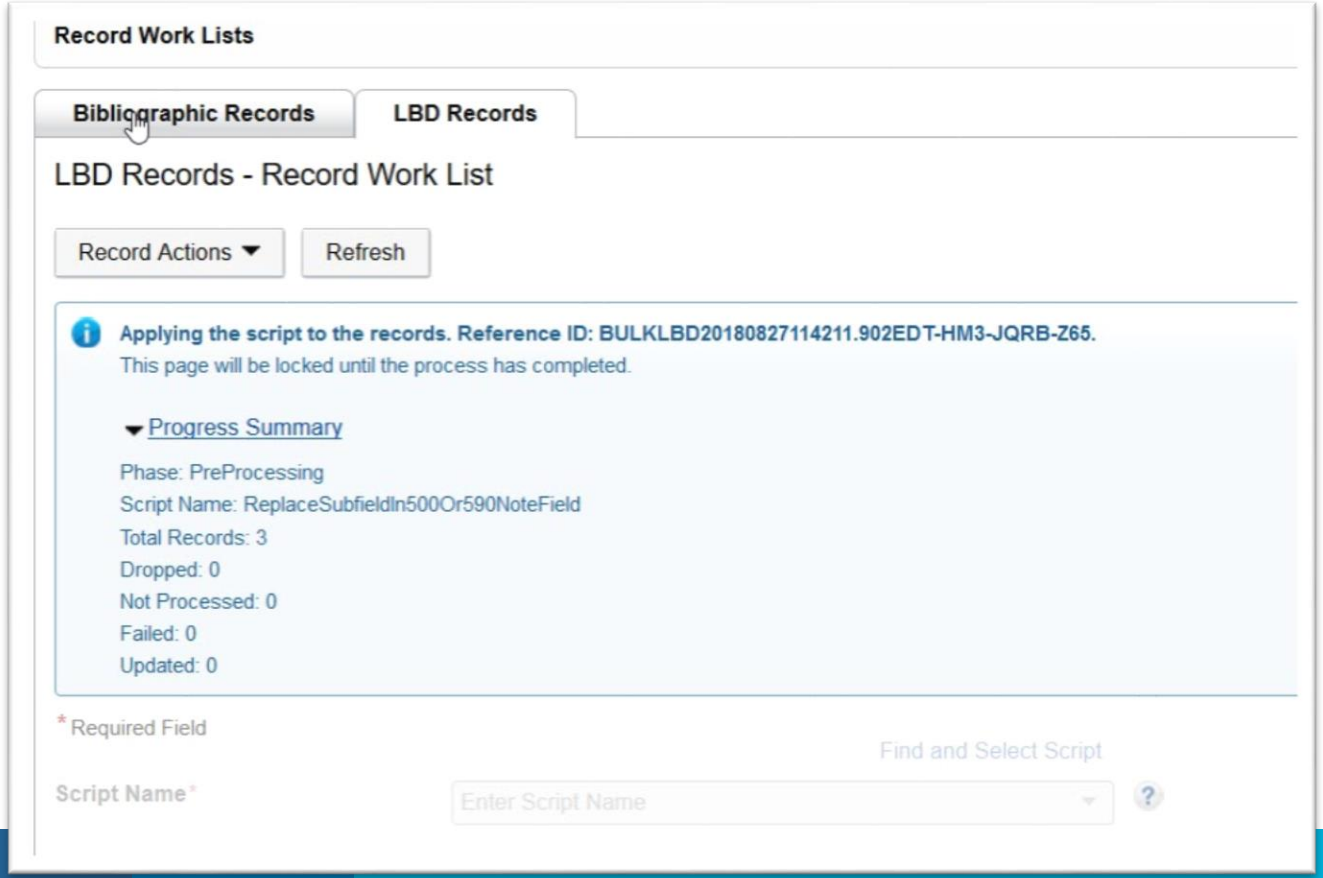
Apply script



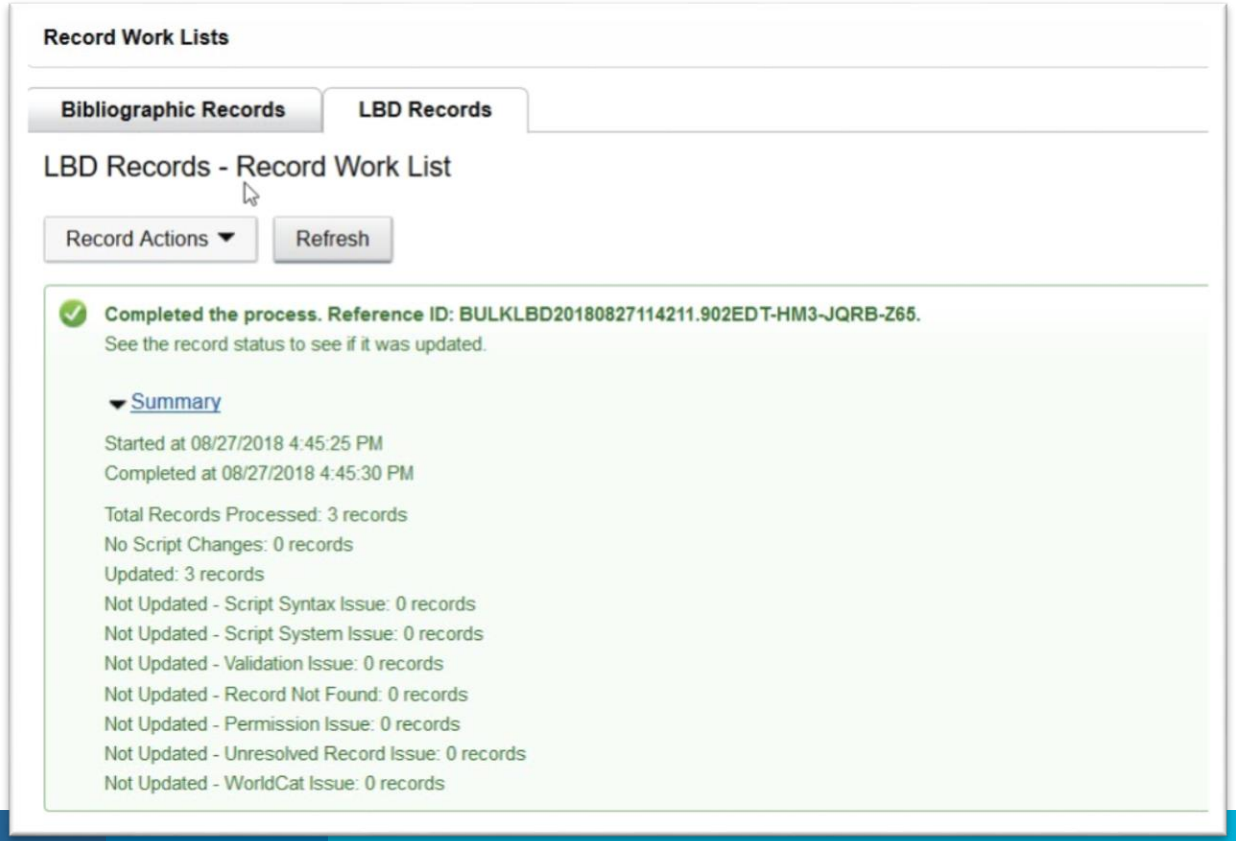
Confirm apply script



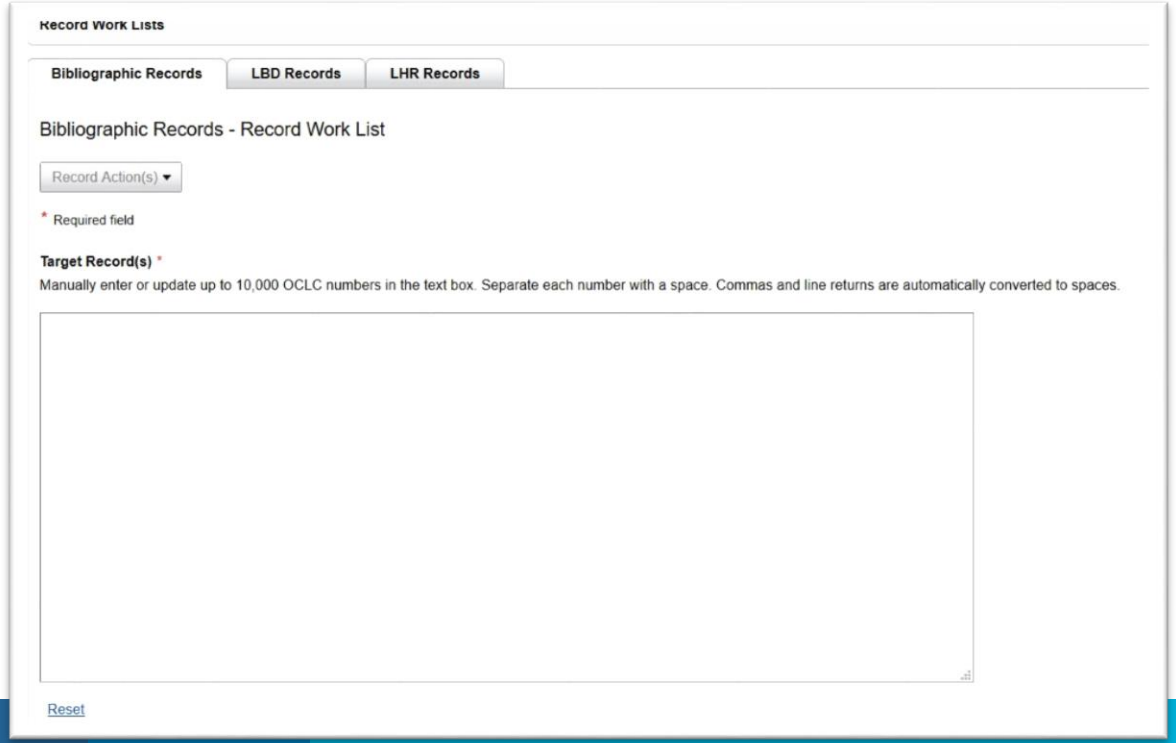
Progress summary



Completed summary



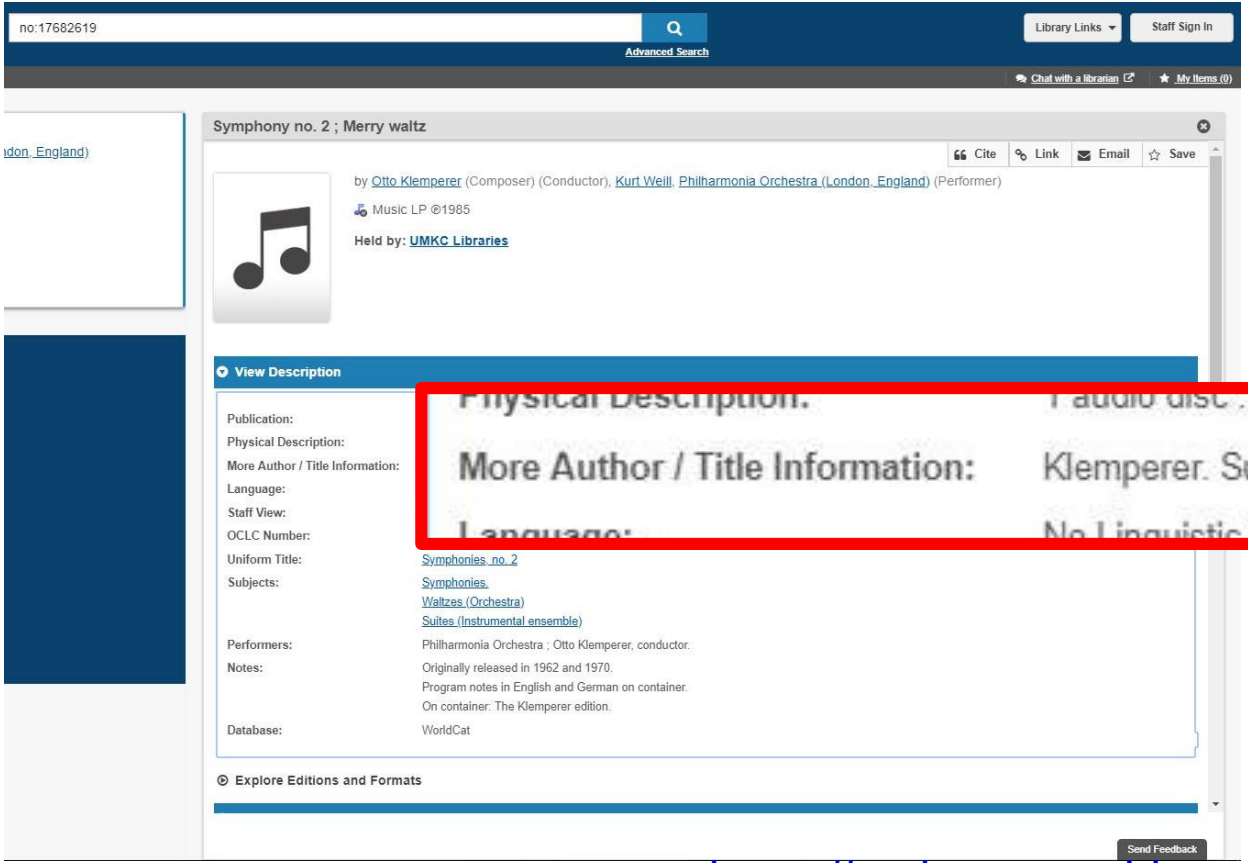
Record actions increased to 10,000 OCLC numbers



Additional Record Manager enhancements

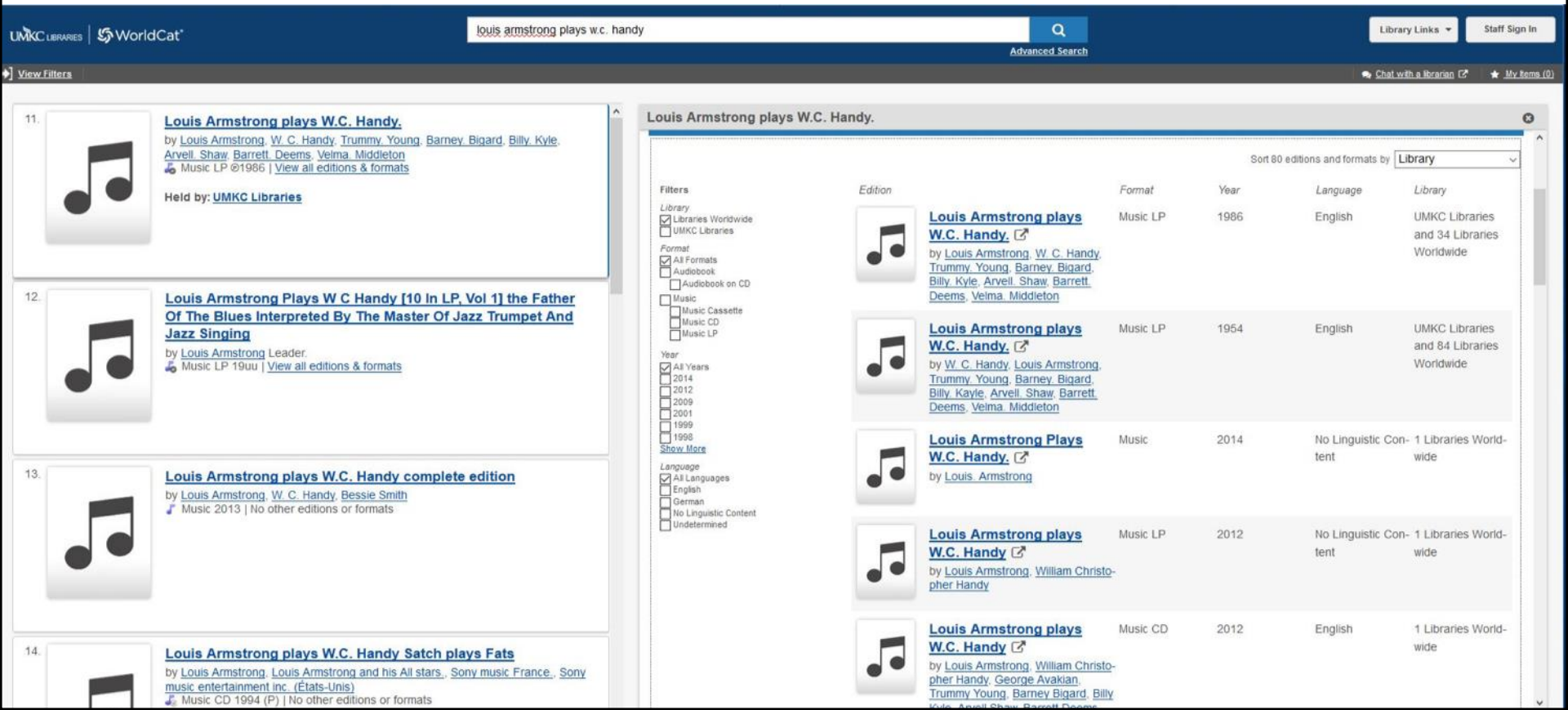
- Search for Local Holdings Records using new options
- Bulk edit of Local Holdings Records
- Efficiently print labels for different materials and location

WORLDCAT DISCOVERY UPDATES: RECENT ENHANCEMENTS



https://umkc.on.worldcat.org/oclc/17682619 2/14/2019

Editions and formats (Dec. 2018 release)



Print Availability on eMaterials

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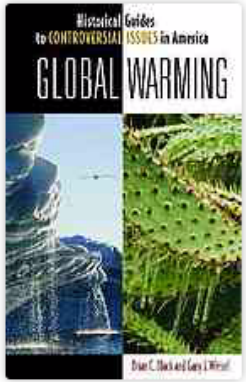

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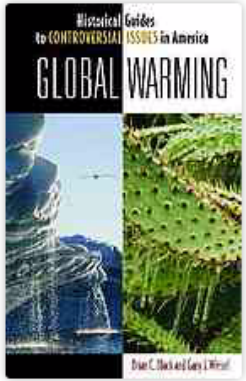
1. 

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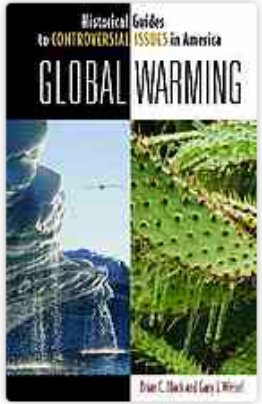
1. 

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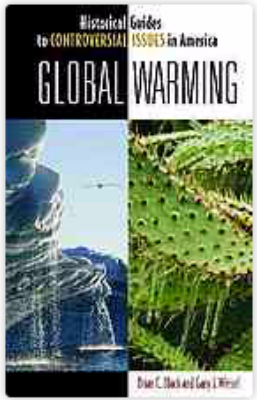

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WORLDCAT DISCOVERY UPCOMING ENHANCEMENTS

Display name subfields & true authority search

- Display subfields $b, $c, $d, $k and $q in name headings, to allow for identification and differentiation of names. (S&DTF Report)
- Make the name search link in the search results screen just below the titles (Community Center Enhancement Request)

Display name subfields & true authority search

- Adams, John, $d 1947-

The John Adams earbox.

by John Adams, Charles Ives, San Francisco Symphony Orchestra., San Francisco Orchestre., Hallé Orchestra.

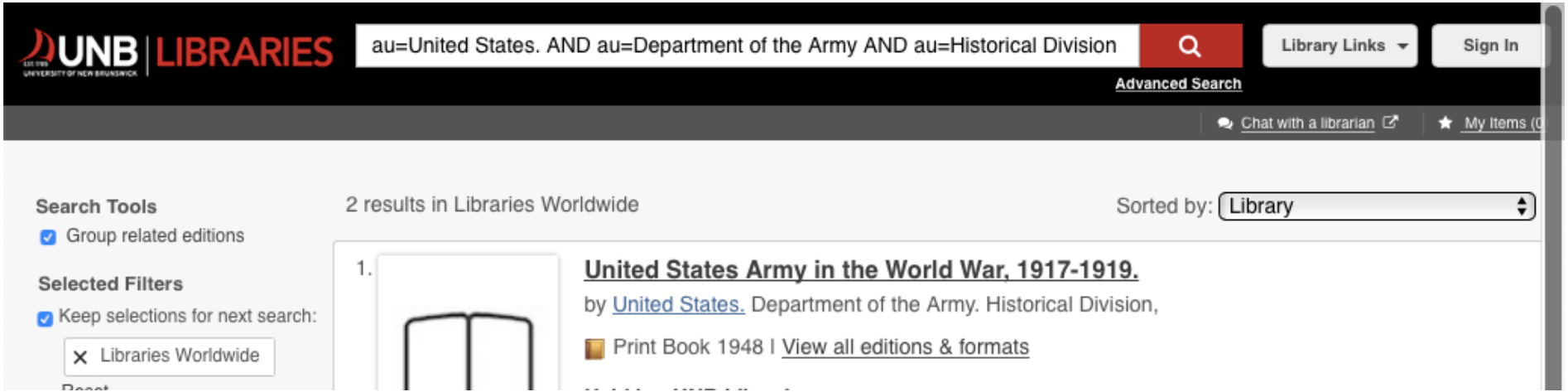
- Bede, $c the Venerable, Saint, $d 673-735

Ecclesiastical history of the English people : with Bede's letter to Egbert

by Bede the Venerable, Saint,, David Hugh. Farmer, R. E. Latham, Egbert Saint,, Cuthbert Abbot of Wearmouth.

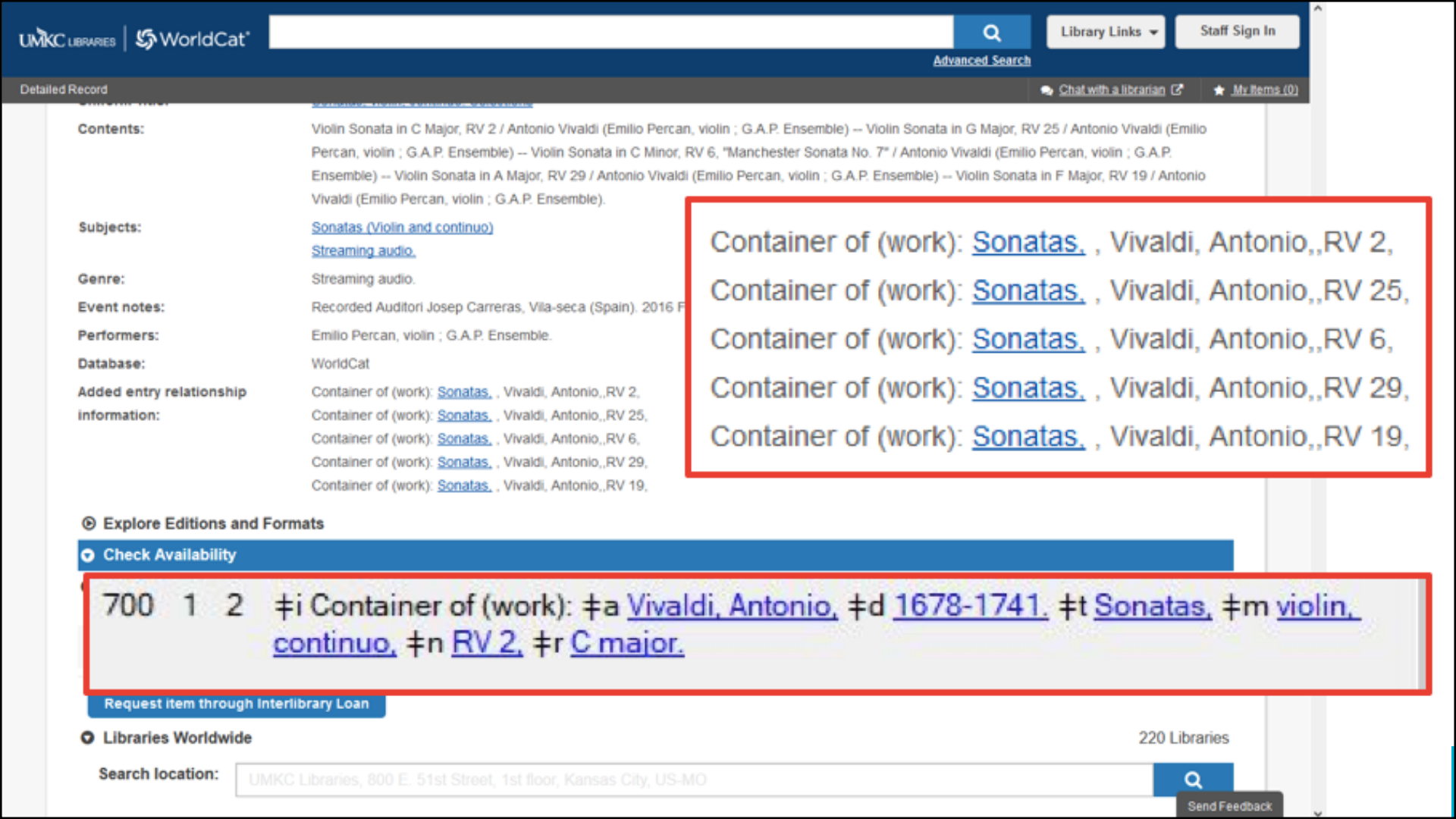
Coming Soon – Display and Search name subfields

- Will display $b, $c, $d, $k, and $q by June 2019
- Will search over subfields with author link shortly after



Display & use 7xx title subfields

- When fields 700, 710, or 711 contain subfield $t, display all title-related subfields (currently $t, $k, $l, $m, $n, $o, $p, $r, $s), together with the name (all name-related subfields). (OCLC S&D TF report)
- When 7xx fields with subfield $t are present, display those fields as hyperlinks to searches on the name-title heading (Community Center Enhancement Request)


UMKC LIBRARIES | WorldCat
Library Links
Staff Sign In
Advanced Search
Detailed Record
Chat with a librarian
My Items (0)
Contents:
Violin Sonata in C Major, RV 2 / Antonio Vivaldi (Emilio Percan, violin ; G.A.P. Ensemble) -- Violin Sonata in G Major, RV 25 / Antonio Vivaldi (Emilio Percan, violin ; G.A.P. Ensemble) -- Violin Sonata in C Minor, RV 6, "Manchester Sonata No. 7" / Antonio Vivaldi (Emilio Percan, violin ; G.A.P. Ensemble) -- Violin Sonata in A Major, RV 29 / Antonio Vivaldi (Emilio Percan, violin ; G.A.P. Ensemble) -- Violin Sonata in F Major, RV 19 / Antonio Vivaldi (Emilio Percan, violin ; G.A.P. Ensemble).
Subjects:
Sonatas (Violin and continuo)
Streaming audio.
Genre:
Streaming audio.
Event notes:
Recorded Auditori Josep Carreras, Vila-seca (Spain). 2016
Performers:
Emilio Percan, violin ; G.A.P. Ensemble.
Database:
WorldCat
Added entry relationship information:
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Container of (work): Sonatas. , Vivaldi, Antonio,,RV 25,
Container of (work): Sonatas. , Vivaldi, Antonio,,RV 6,
Container of (work): Sonatas. , Vivaldi, Antonio,,RV 29,
Container of (work): Sonatas. , Vivaldi, Antonio,,RV 19,
Container of (work): Sonatas, , Vivaldi, Antonio,,RV 2,
Container of (work): Sonatas, , Vivaldi, Antonio,,RV 25,
Container of (work): Sonatas, , Vivaldi, Antonio,,RV 6,
Container of (work): Sonatas, , Vivaldi, Antonio,,RV 29,
Container of (work): Sonatas, , Vivaldi, Antonio,,RV 19,
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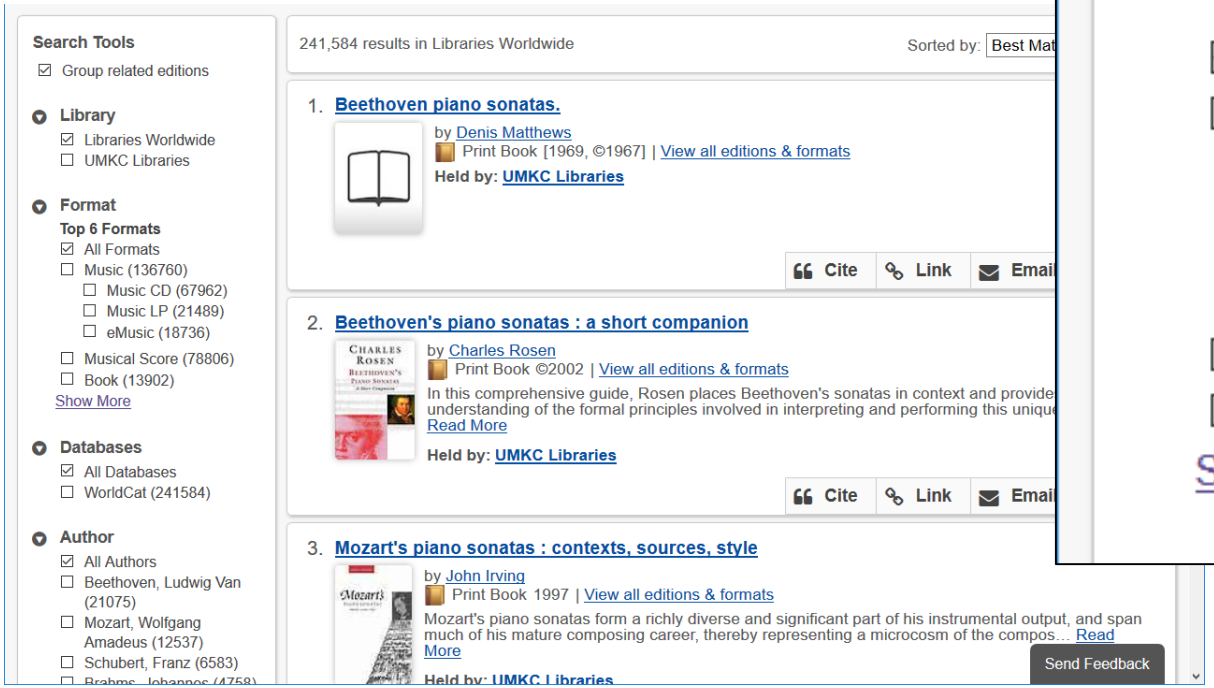
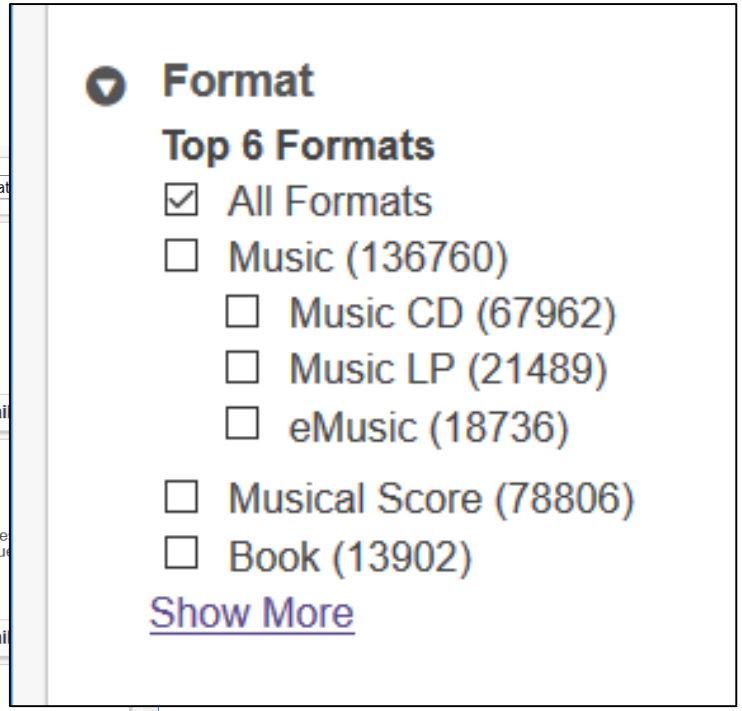
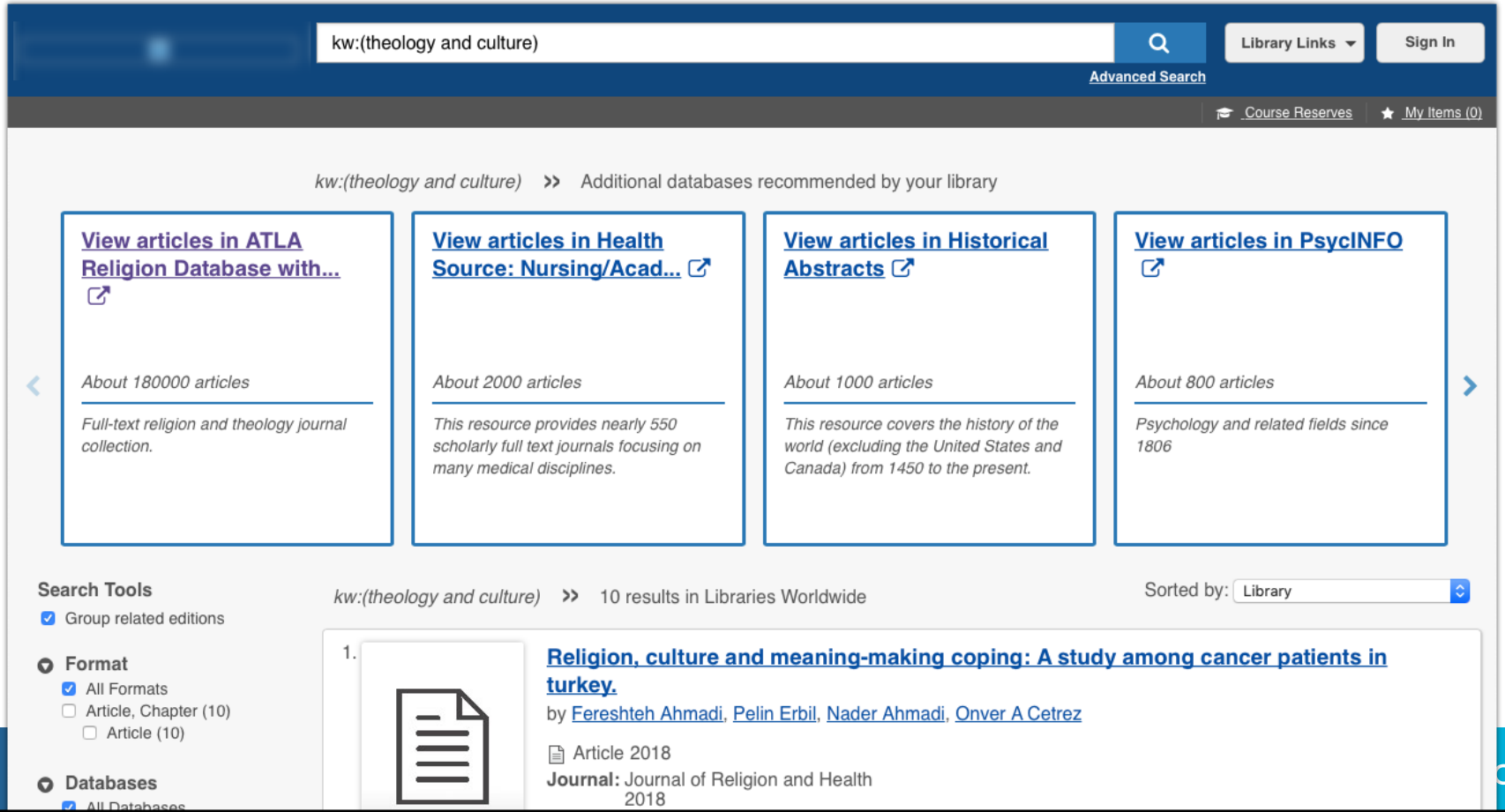
700 1 2 ‡i Container of (work): ‡a Vivaldi, Antonio, ‡d 1678-1741. ‡t Sonatas, ‡m violin, continuo, ‡n RV 2, ‡r C major.
Request item through Interlibrary Loan
Libraries Worldwide
220 Libraries
Search location:
UMKC Libraries, 800 E. 51st Street, 1st floor, Kansas City, US-MO
Send Feedback

“Music” facet label





A&I Database recommendations



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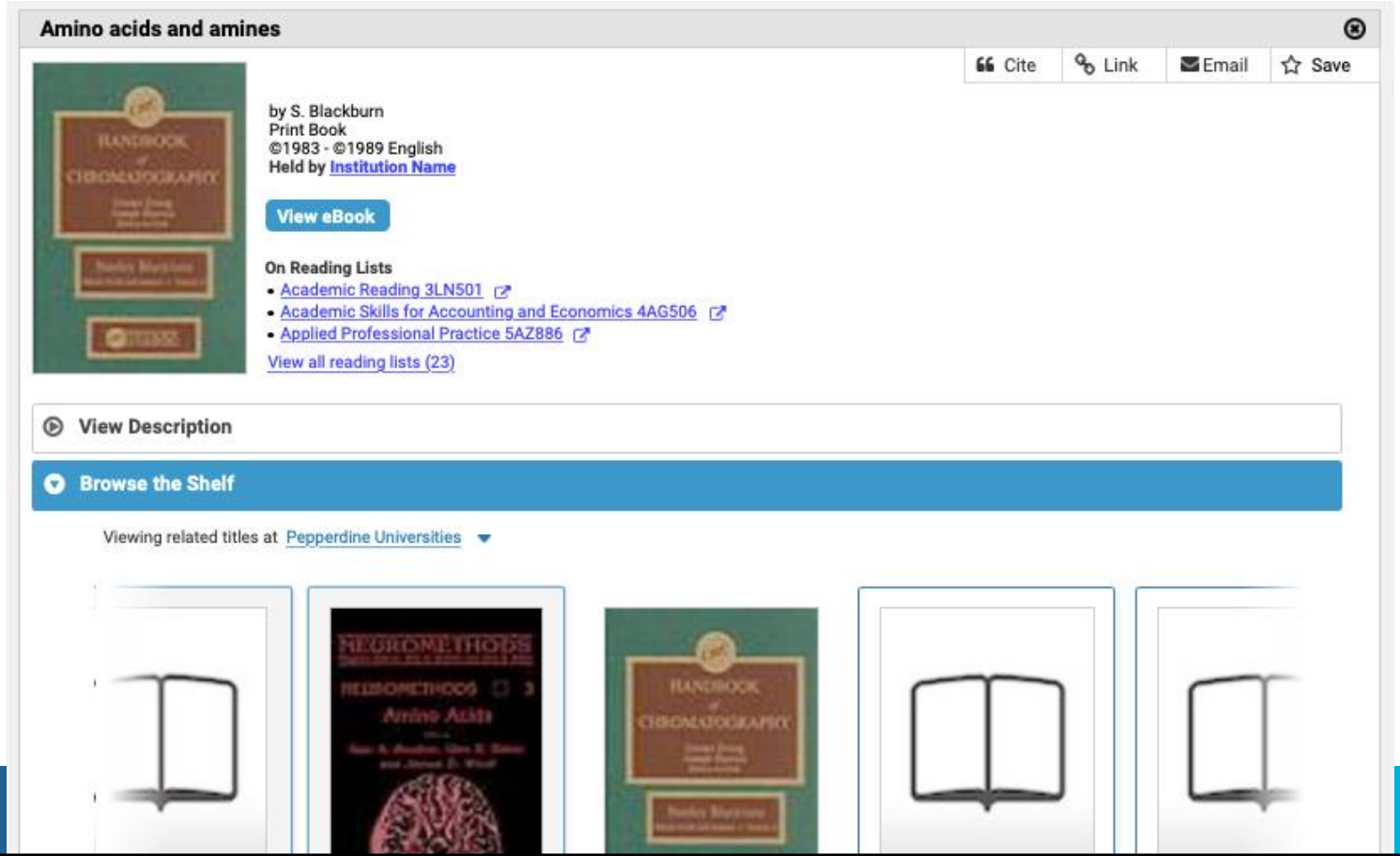

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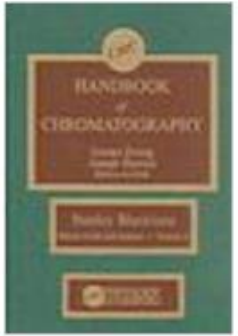

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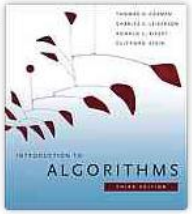
1. 

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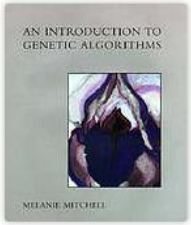
2. 

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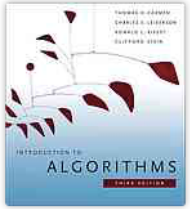
1. 

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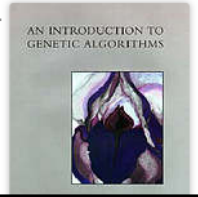
2. 

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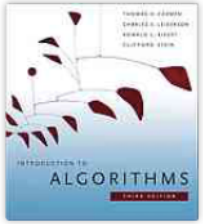

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- Help us build the next phase of search relevance enhancements
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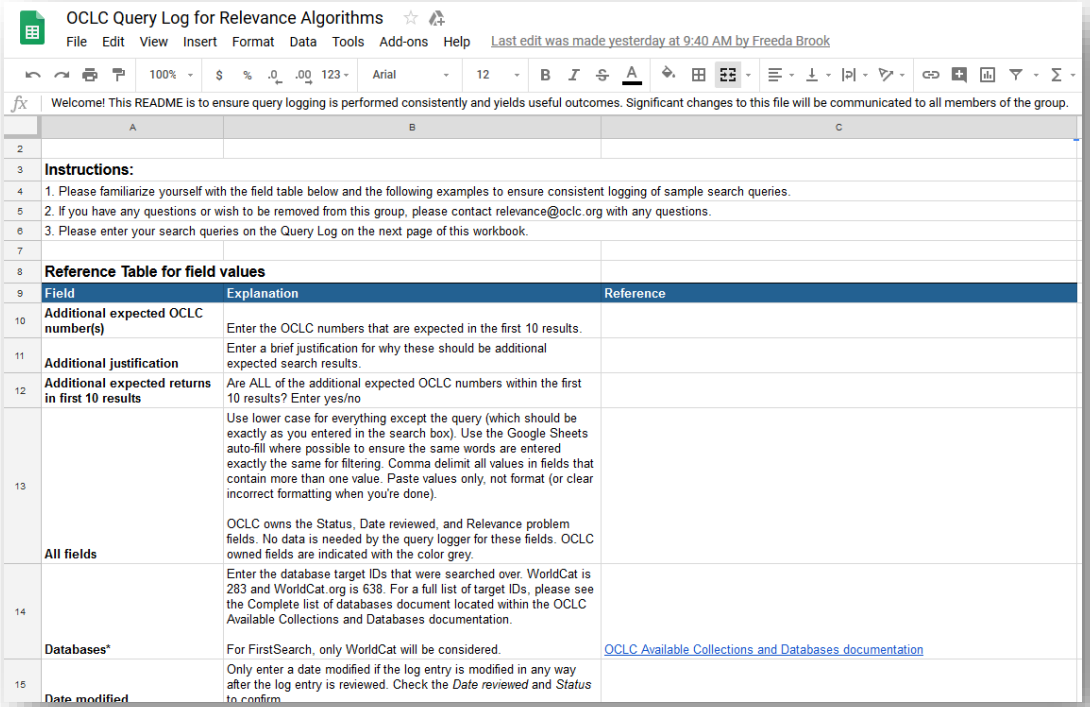

OCLC Query Log for Relevance Algorithms

File Edit View Insert Format Data Tools Add-ons Help Last edit was made yesterday at 9:40 AM by Freeda Brook

Welcome! This README is to ensure query logging is performed consistently and yields useful outcomes. Significant changes to this file will be communicated to all members of the group.

	A	B	C
2			
3	**Instructions:**		
4	1. Please familiarize yourself with the field table below and the following examples to ensure consistent logging of sample search queries.		
5	2. If you have any questions or wish to be removed from this group, please contact relevance@oclc.org with any questions.		
6	3. Please enter your search queries on the Query Log on the next page of this workbook.		
7			
8	**Reference Table for field values**		
9	**Field**	**Explanation**	**Reference**
10	**Additional expected OCLC number(s)**	Enter the OCLC numbers that are expected in the first 10 results.	
11	**Additional justification**	Enter a brief justification for why these should be additional expected search results.	
12	**Additional expected returns in first 10 results**	Are ALL of the additional expected OCLC numbers within the first 10 results? Enter yes/no	
13	**All fields**	Use lower case for everything except the query (which should be exactly as you entered in the search box). Use the Google Sheets auto-fill where possible to ensure the same words are entered exactly the same for filtering. Comma delimit all values in fields that contain more than one value. Paste values only, not format (or clear incorrect formatting when you're done). OCLC owns the Status, Date reviewed, and Relevance problem fields. No data is needed by the query logger for these fields. OCLC owned fields are indicated with the color grey.	
14	**Databases***	Enter the database target IDs that were searched over. WorldCat is 283 and WorldCat.org is 638. For a full list of target IDs, please see the Complete list of databases document located within the OCLC Available Collections and Databases documentation. For FirstSearch, only WorldCat will be considered.	OCLC Available Collections and Databases documentation
15	**Date modified**	Only enter a date modified if the log entry is modified in any way after the log entry is reviewed. Check the *Date reviewed* and *Status* to confirm	

Q & A

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Thank you!

Jay Holloway

hollowaj@oclc.org

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