

ILL Annual Meeting OCLC Update

MARK BEATTY
MBEATTY@WILS.WISC.EDU
 608.265.5719
[HTTP://WWW.WILS.WISC.EDU](http://www.wils.wisc.edu)

Today

- Say Hello to WS ILL
 - Web-scale Management Services
 - Yet more new stuff

The Rate of Change

- Quarterly major installs, updates and deletions
- Started last Jan. 2011
- Likely to continue through 2013
- Changes are happening to:
 - Admin
 - Registry
 - ILL Policies and Deflections
 - Statistics

OCLC Training

- 5 courses of OCLC content for WCRS, thru Dec. 2012
 - WiLS covers every other month
 - Borrowing
 - Lending
 - Deflection
 - Custom Holdings
 - Patron Initiated
 - <http://training.oclc.org/training>
 - WS ILL courses in development
- OCLC Support
 - <http://www.oclc.org/us/en/support>
 - Phone number: 800.848.5800
 - Yeah, you can still call us <grin>

Keyes to the Next Year

- Constant change, and at the same time ...
- Much and most will remain the same, but with a different User Interface
- Move on your own Feb 2013
 - Have almost a year to transition
 - Patron Initiated users start in July 2013
 - Awaiting full features
- You get to decide when to move
 - But once you move you can't go back
- All migrations, end of WCRS, target is Dec. 2013

Atlas and ILLiad

- OCLC working with Atlas per usual
- There are authentication issues for ILLiad to access the new WS ILL system
- Atlas will announce when they are ready for the move
- Follow their directions

What's Really New?

- Article Exchange
- New Lender String Report and Assessment Tools
- Custom Holders Symbol Searcher
- Longer Admin names
- Email from any status and point in process
- WorldCat Knowledge Base
- Policies: more options and deflections
 - \$\$\$, constant data update and due date: n/a
- Future Date: Gone

Staying up to date

- The WRS service is being enhanced at a rapid rate to migrate to WMS
 - WorldShare Management Services, most users self move in February of 2013
 - <http://www.oclc.org/us/en/webscale/default.htm>
- Be sure to stay tuned by subscribing for updates at:
 - <http://www.oclc.org/us/en/email/subscribe.htm>

Demos

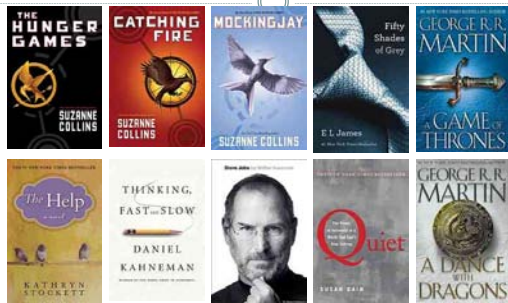
- Katie Birch slide show



OCLC Delivery Services

Katie Birch
Portfolio Director
birchk@oclc.org

Top 10 requested titles in WorldCat Resource Sharing last FY



ILLiad

Headlines

- 8.1. and 8.2. will not be supported after 30 June 2013
- 8.3 was released in August
- 580/1227 ILLiad libraries are now hosted
- Integrates with Article Exchange using an addon

Transforming ILL

WS ILL

Article
Exchange

Part of your WorldCat Resource Sharing subscription

Article Exchange

- Cloud based document delivery service
- Replacing Ariel in many institutions
- **Eliminates security issues** - no firewall issues.
- **Files up to 60 MB – including high resolution** documents – can be placed on the site for pick-up by library users.
- Supports compliance with **copyright** guidelines with **automatic deletion** of files. Viewed files are deleted after **5 days or 5 views** and unviewed files are deleted after 30 days.

Select "Drop file" and locate the PDF or Image file

The screenshot shows the OCLC Article Exchange website. A Windows Explorer window is open on the left, displaying the 'This PC' view. The 'Drop file' button on the website is highlighted with a red circle. Below the button, there are instructions for sending items, including a note that the system supports PDF and image files up to 10 MB.

You will receive a tinyurl and password

The screenshot shows the OCLC Article Exchange interface after a request is submitted. The page displays the article details: OCLC AN: 20097, Title: Dog fancy, Article Author: Herman Shepherd, Article Title: Dogs are the best, Volume: 6, Number: 34, Date: 2009, Pages: 23-24. A red circle highlights the URL <http://oclc.org/oclc> and the password '6ZfrBQ'. Below the details, there are instructions on how to retrieve the file and time constraints.

This is what the borrowing library or patron sees

The screenshot shows the OCLC Article Exchange website's login page. It features a 'Please enter your password' field and a 'Get my file' button. The page is designed for borrowing libraries or patrons to access their requested files.

Article Exchange Statistics

The screenshot shows a 'Daily Report Article Exchange Lending Report - Institution'. The report includes a table with columns for Borrower Name, Institution Name, Institution State, Institution Country, ILL Number, File Size, Request Date, Lending Date, and Date Received. A red circle highlights the 'File Size' and 'Request Date' columns. The report is for the period July 1, 2012 - July 7, 2012, for the institution DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR.

Borrower Name	Institution Name	Institution State	Institution Country	ILL Number	File Size	Request Date	Lending Date	Date Received
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	620096	6200960001.pdf	620096	620096	620096
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1027275	1027275001.pdf	1027275	1027275	1027275
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1024497	1024497001.pdf	1024497	1024497	1024497
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1024502	1024502001.pdf	1024502	1024502	1024502
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1024503	1024503001.pdf	1024503	1024503	1024503
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1024504	1024504001.pdf	1024504	1024504	1024504
DEF	DEF HONGELISE BIBLIOTEN, THE ROYAL LIBR	EU	DA	1024505	1024505001.pdf	1024505	1024505	1024505

There's an App for that...

The screenshot shows the OCLC Developer Network interface. A callout box highlights the 'Article Exchange API' with the following details:

Article Exchange API	Production	A write web service for cloud-based document delivery. Provides developer level access to the Article Exchange document-sharing site. Article Exchange provides a single, secure location where lending libraries can place requested documents and the borrowing library can retrieve articles or book chapters the library user requested via interlibrary loan.	Developers can upload and share documents of image-type files, such as .pdf, .png, .jpg, .tiff and other image file formats. Upon successful upload, the response contains a unique password-protected URL that can be shared with the library user so s/he can retrieve the uploaded materials.	XML, JSON	XML, JSON
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Your institution branding and text

The screenshot shows the Brantford University Article Exchange page. It features the Brantford University logo at the top. Below the logo is a yellow header area with a 'Select a file to drop' instruction and an 'Upload the file' button. A red maple leaf icon is also present. Below the header, there is a section for 'Use this page to upload documents being sent to requesting libraries' and another section for 'This is the (branded) Article Exchange page instructions'. The footer contains copyright information for WorldShare.

Brand what?


The screenshot shows the Brantford University Article Exchange page with several callouts pointing to branding elements:


- give your own logo your own logo
- add create your own email text message
- increase the buttons to your own wording
- add your own text in the bottom section
- add your own colors


WorldShare ILL


Part of a WorldCat Resource Sharing subscription

OCLC's WorldShare strategy




Library Built


Partner Built



OCLC Built


App Gallery

Web Services

Data 

Infrastructure

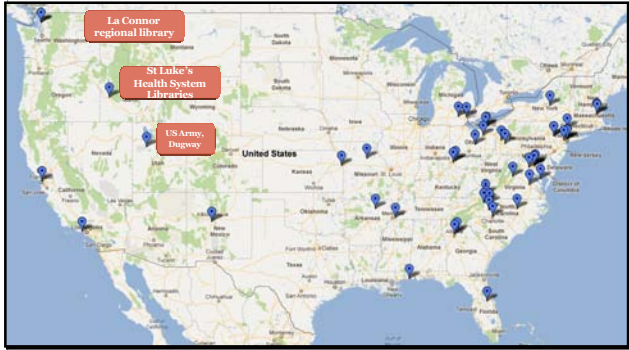
Platform Management 

- **Applications:** Provide a single integrated set of management services for libraries to improve visibility and efficiency, including services from OCLC, partners and libraries
- **Web services:** Make library data available to libraries and partners to build and share new services and applications, creating new value for libraries and their users
- **Data:** Expand the range and types of library data represented and "connected" through WorldCat data hub
- **Infrastructure:** Enable libraries to benefit from the efficiencies and flexibility of cloud, mobile and social technologies through a single global infrastructure

Advisory Group

<ol style="list-style-type: none"> 1. Jefferson County Public Library 2. Washington County Cooperative Library Services 3. Delaware County Library System 4. Illinois State Library 5. Harrison College 6. Mercer University 7. Bartholomew County Public Library 8. Spalding University 	<ul style="list-style-type: none"> ✓ Franca Rosen ✓ Cassie Maringer ✓ Helen Subbio ✓ Lynn Bierma ✓ Vickie Pitts ✓ Andrew Shuping ✓ Denise Wirrig ✓ Emily Stivers
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55 Phase 1a libraries – very small, borrowing only libraries



Phased migrations

Phase 1b

- Starts September
- 30 libraries registered
- borrowing only libraries

Phase 2

- Starts mid-November
- Borrowing and lending libraries

The borrower workflow

WorldShare Management Services
Interlibrary Loan Home

Search for requests
Request ID:

Quick Links

- Borrowing:
 - New For Review (130)
 - Not Reviewed (112)
 - Reviewed (18)
 - Produced (17)
 - Conditional (8)
 - In Transit (12)
 - Not Returned (2)
 - Unfilled (1)
 - Received (1)
 - Expired (8)
 - Received (1)
 - Received On Use (8)
 - Received Requested (8)
 - Received Approved (8)
 - Received Denied (8)
 - Checked (8)
 - Recalled (2)
 - Received but Missing (8)
 - Returned (1)
 - Returned (4)
 - Returned but Missing (1)
 - Print Queue (1)
- Lending:
 - Can Req. Search (18)
 - Site (2)
 - Comments (2)
 - Conditions Accepted (1)
 - Not Returned (1)
 - Checked (1)
 - Returned Requested (1)
 - Returned (1)
 - Returned Denied (1)
 - Returned Approved (1)
 - Returned but Missing (1)
- Other:
 - Patrons Director
 - OCLC Service Configuration
 - OCLC Usage Statistics

Message Board

From Administrator on 2012-09-20

Welcome to the new WorldShare Interlibrary Loan. Thank you for your commitment to OCLC and your assistance in bringing this new service to the interlibrary loan community.

To simplify your return to WorldShare 3.1, please bookmark [this page](#).

WorldShare Management Services
Interlibrary Loan Home

Borrowing Requests: New For Review (130)

Show 10 items per page | Refresh | Results 1-10 of 130

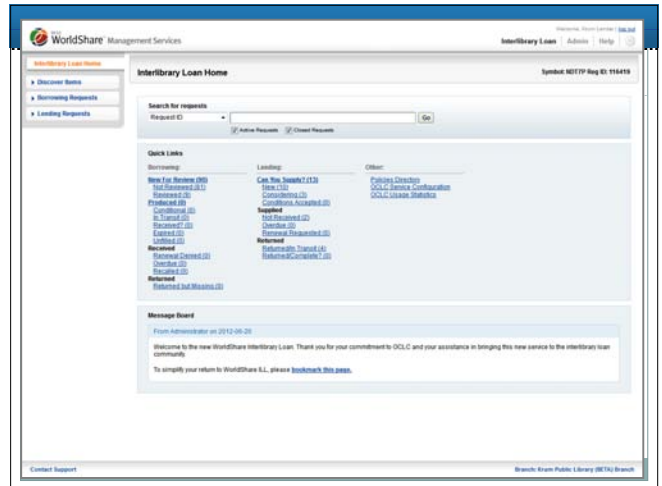
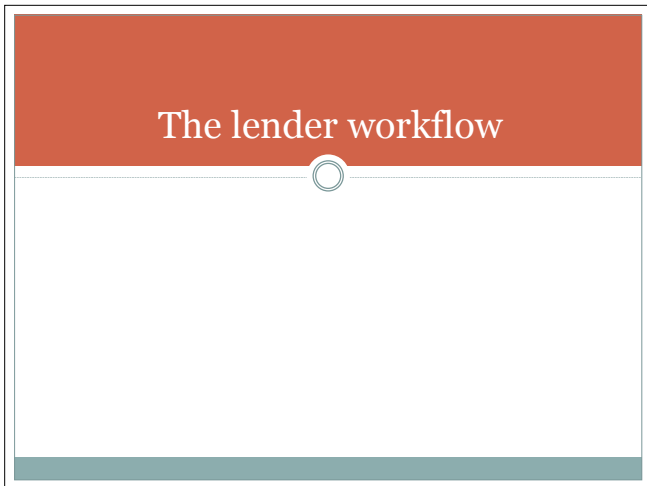
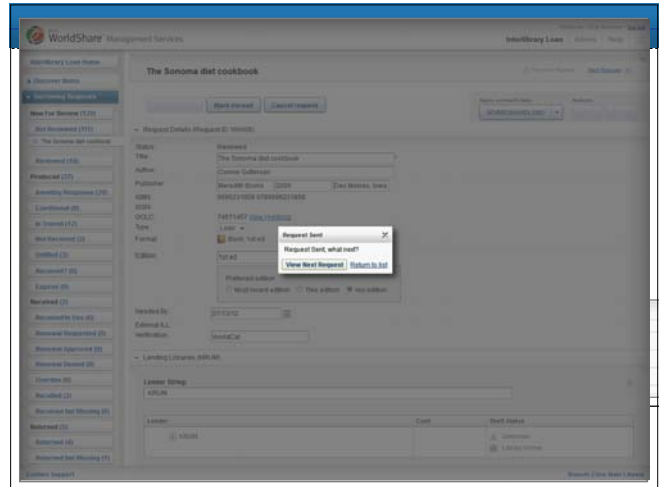
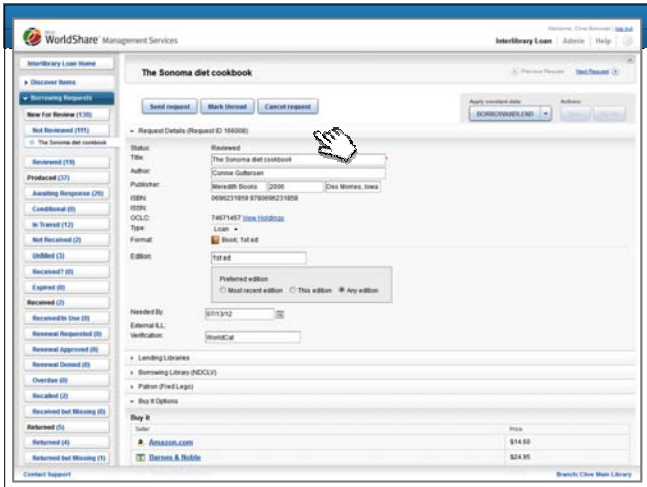
ID	Status	Media Type	Title	Patron	Date Requested	Requested By
100008	Reviewed		Agriculture start-ups	who	09/18/12	06/30/12
100009	Reviewed		Europe's last coastbook	qphg	09/18/12	06/28/12
100020	Reviewed		Customs clearance issues in the Americas	Fred Lego	09/14/12	07/14/12
100022	Reviewed		The Best of Maxwell Franks	Fred Lego	09/14/12	07/14/12
100021	Reviewed		The very best of Antarctica	Fred Lego	09/14/12	07/14/12
100010	Reviewed		Baroque	Fred Lego	09/13/12	07/13/12
100014	Reviewed		Books Don't Drink about	Fred Lego	09/13/12	07/13/12
100012	Reviewed		Phases of the moon	Fred Lego	09/13/12	07/13/12
100011	Reviewed		South Atlantic	Fred Lego	09/13/12	07/13/12
100013	Reviewed		The economist	Fred Lego	09/13/12	07/13/12

WorldShare Management Services
Interlibrary Loan Home

Borrowing Requests: Not Reviewed (112)

Show 10 items per page | Refresh | Results 1-10 of 112

ID	Status	Media Type	Title	Patron	Date Requested	Requested By
100008	Not Reviewed		The Socratic method	Fred Lego	09/13/12	07/13/12
100007	Not Reviewed		Beethoven's last mass	Fred Lego	09/13/12	07/13/12
100004	Not Reviewed		Customs clearance issues in the Americas	Fred Lego	09/13/12	07/13/12
100003	Not Reviewed		The Best of Maxwell Franks	Fred Lego	09/13/12	07/13/12
100002	Not Reviewed		The very best of Antarctica	Fred Lego	09/13/12	07/13/12
100001	Not Reviewed		Class of enemies and comrades	Fred Lego	09/13/12	07/13/12
100000	Not Reviewed		Class of a hero's son, a calm hero	Fred Lego	09/13/12	07/13/12
100002	Not Reviewed		Shark	Fred Lego	09/13/12	07/13/12
100012	Not Reviewed		Phases of the moon	Fred Lego	09/13/12	07/13/12
100010	Not Reviewed		The economist	Fred Lego	09/13/12	07/13/12



WorldShare Management Services
Interlibrary Loan Home

Search for requests
Request ID:

Quick Links

Borrowing	Lending	Other
Can You Supply? (1)	Can You Supply? (1)	Can You Supply? (1)
Conditions Accepted (0)	Conditions Accepted (0)	Conditions Accepted (0)
Requested to Transact (0)	Requested to Transact (0)	Requested to Transact (0)
Not Received (0)	Not Received (0)	Not Received (0)
Overdue (0)	Overdue (0)	Overdue (0)
Renewed Requested (0)	Renewed Requested (0)	Renewed Requested (0)
Returned (0)	Returned (0)	Returned (0)
Returned to Transact (0)	Returned to Transact (0)	Returned to Transact (0)
Returned/Complete? (0)	Returned/Complete? (0)	Returned/Complete? (0)
Returned but Missing? (1)	Returned but Missing? (1)	Returned but Missing? (1)
Print Queue (14)	Print Queue (14)	Print Queue (14)

Message Board

From Administration on 2012-05-25

Welcome to the new WorldShare Interlibrary Loan. Thank you for your commitment to OCLC and your assistance in bringing this new service to the Interlibrary Loan community.

To simplify your return to WorldShare ILL, please bookmark this page.

WorldShare Management Services
Interlibrary Loan Home

Lending Requests: New (6)

ID	Media Type	Title	Borrower	Date Requested	Requested By
156204	Book	Back to America	NDCV	06/14/12	07/14/12
156205	Book	Shark in a woman's bag...Cable News	NDCV	06/14/12	07/14/12
156206	Book	Shark in a woman's bag...Cable News	NDCV	06/14/12	07/14/12
156207	Book	Shark in a woman's bag...Cable News	NDCV	06/14/12	07/14/12
156208	Book	Shark in a woman's bag...Cable News	NDCV	06/14/12	07/14/12
156209	Book	Shark in a woman's bag...Cable News	NDCV	06/14/12	07/14/12

WorldShare Management Services
Interlibrary Loan Home

How the Grinch stole Christmas

Can you supply? Yes No Partial Shipping Partial Full Ship Partial Book Shipment

Request Details (Request ID: 156217)

Status:	Considering	Borrower:	NDCV
Type:	WorldCat	Need Before:	07/12/12
Source:	WorldCat	Due Date:	
OCLC:	178325	Shipped Date:	06/29/12

Location	Status	Call number	Notes
Brook Hollow juvenile books	DUE 07-09-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	DUE 07-09-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	DUE 06-29-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cody juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	

WorldShare Management Services
Interlibrary Loan Home

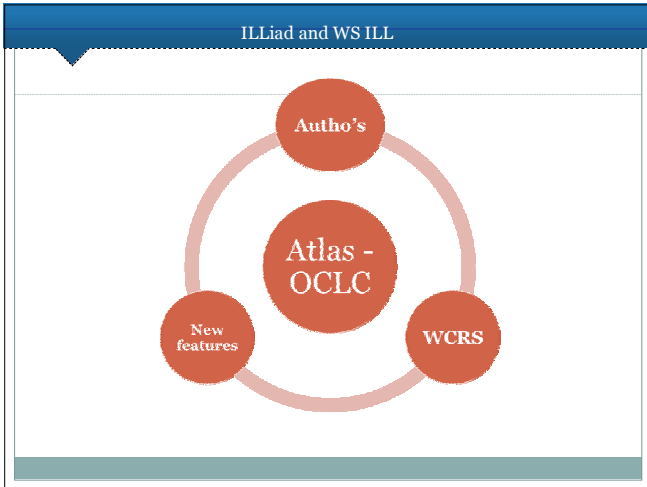
How the Grinch stole Christmas

Can you supply? Yes No Partial Shipping Partial Full Ship Partial Book Shipment

Request Details (Request ID: 156217)

Status:	Considering	Borrower:	NDCV
Type:	WorldCat	Need Before:	07/12/12
Source:	WorldCat	Due Date:	

Location	Status	Call number	Notes
Brook Hollow juvenile books	DUE 07-09-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	DUE 07-09-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	DUE 06-29-12	JUVENILE EASY SEUSS	
Brook Hollow juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cody juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Cortez juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	
Great Northwest juvenile books	✓ CHECK SHELF	JUVENILE EASY SEUSS	



Clio?

Depends what version you are running, but you may need an upgrade.

What browser do you use?

Supported	Supported	IE9 ✓ IE8 – Feb 2013 IE7 – <u>Not</u> supported
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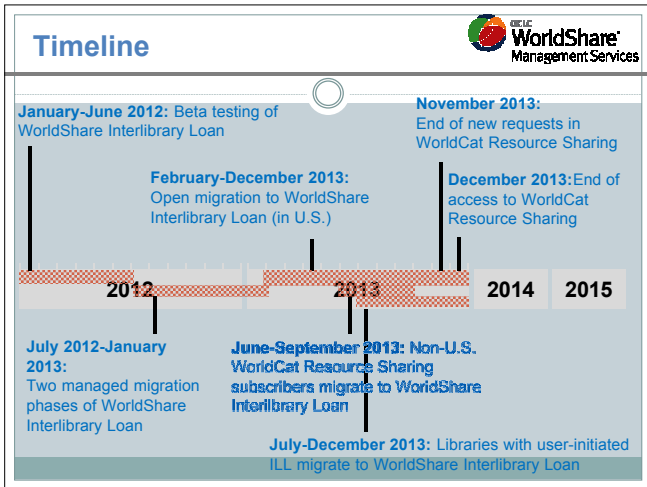
Migration options

Self-starters

- Look out for “Get Started” notices!

Managed

- Look out for training dates



Keep up to date <http://www.oclc.org/migrate-worldshare-ill/>

OCLC® The world's libraries. Connected.™

WorldCat Membership Products and Services Research

WorldShare Interlibrary Loan

OCLC WorldShare™ Interlibrary Loan is a new service that will replace WorldCat Resource Sharing, as part of libraries' existing subscriptions. The service centralizes workflows now managed in multiple systems, and will provide new functionality that speeds fulfillment of interlibrary loan requests and saves time for library staff and library users.

WorldShare™ Interlibrary Loan is included at no additional charge in existing OCLC resource sharing subscriptions.

WorldShare Interlibrary Loan will go beyond traditional interlibrary loan to provide a truly integrated delivery solution for libraries. The service will integrate discovery and delivery of electronic, digital and print materials within a single interface. It will also support evolving workflow changes in libraries, such as the option to purchase needed items rather than borrow them.

The new WorldShare Platform supports new features in WorldShare ILL that require interoperation with other applications, such as the display of lender costs from the Policies Directory and display of item availability from a library's ILS.

The migration from WorldCat Resource Sharing to WorldShare Interlibrary Loan will allow us to transform traditional interlibrary loan into a much broader fulfillment service with associated workflows. In the new service, interlibrary loan will be one of any number of fulfillment options a library may select according to the needs of its users and library policies.

Keep up to date

OCLC-SHARING-I - <https://www3.oclc.org/app/listserv/>

*Action
 Subscribe Unsubscribe
 Please check below any lists to which you would like to subscribe or unsubscribe, then submit to OCLC.

*Available Lists (check all that apply)

- OCLC CANADA
This list was created to be a forum for you to feel free to ask questions, share information, pass along advice, and exchange ideas among OCLC Canada libraries.
- OCLC CAT
OCLC-CAT is a discussion forum for library staff using or considering any OCLC cataloging and metadata services.
- OCLCAP-I
OCLC Asia Pacific announcements, information, and news releases.
- DOORPATE-I
Announcements of new and revised documentation added to OCLC's web site
- OCLC FIRST SEARCH-I
FirstSearch announcements, information, and documentation
- MARCADA-I
The MARCADA-I listserve is a discussion forum for users of the MARCADA service which is a joint service of OCLC and Backstage Library Works. MARCADA offers the automation of many cataloging tasks with the option for customization for libraries local system needs.
- OCLC-CJK
OCLC CJK Users Group (discussion)
- OCLC NON-LATIN SCRIPTS-I
A discussion forum for users of OCLC non-Latin scripts, including Arabic, Bengali, Chinese, Cyrillic, Devanagari, Greek, Hebrew, Japanese, etc.
- OCLC-SHARING-I
Announcements, changes and enhancements to OCLC resource sharing services.
- OCLC-WCA
OCLC-WCA is a discussion forum for library staff using or considering using the WorldCat Collection analysis service.
- Batchload-I
A forum for Batchload users, including Local Holdings Record Updating service (LHRU) users to help each other share ideas and get practical advice for using Batchload service.
- OCLC-WORLDCAT-SELECTION-I
OCLC WorldCat Selection-I is a discussion forum for people using or considering the WorldCat Selection service.
- OCLC-WCAT PARTNERS-I

OCLC
Delivery Services

Katie Birch
Portfolio Director
birchk@oclc.org

PDF Show

- Features: WCRS v. WS ILL
- PDF will become fully available as we approach Feb 2013 migration date
- Note: terminology changes
- Note: features added, changed, dropped and anticipated

ILL Annual Meeting OCLC Update

MARK BEATTY

MBEATTY@WILS.WISC.EDU

608.265-5719

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