

October 2022

Discovery to Delivery Conference 2022

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# OCLC Update

**Tony Melvyn**

OCLC Product Manager

# Today's agenda

- **Welcome!**
- Our vision and smart fulfillment strategy
- Reminders: Services available at no extra cost
- What's new?
- What else you receive along with your WorldShare ILL, Tipasa, or ILLiad service



# Together...

we help  
libraries share  
the world's  
knowledge.

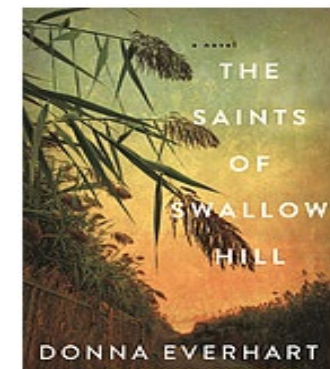
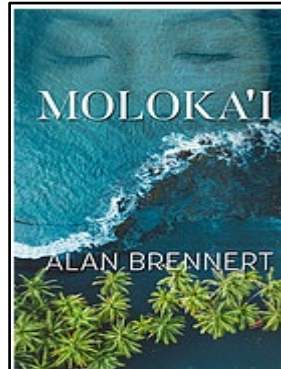
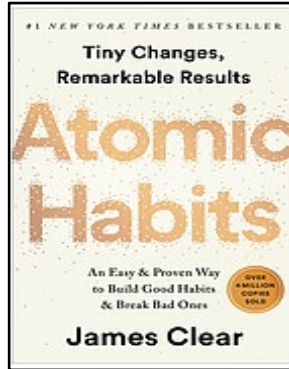
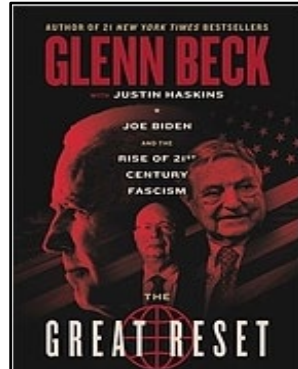
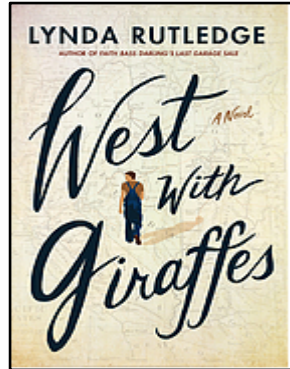
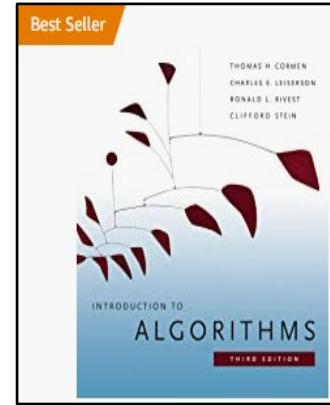
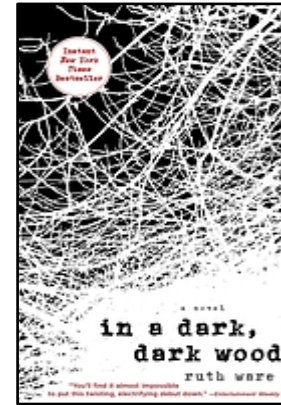
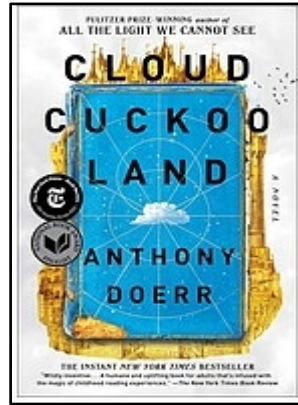
# 10,000+



libraries in OCLC's resource sharing network, **the largest in the world.**

*Expand your collection with materials from thousands of libraries worldwide.*

# Top 10 most requested monographs from Indiana libraries (Jan-Sept 2022)



# Our vision



# Library **on-demand**

Anything, anytime, anywhere.

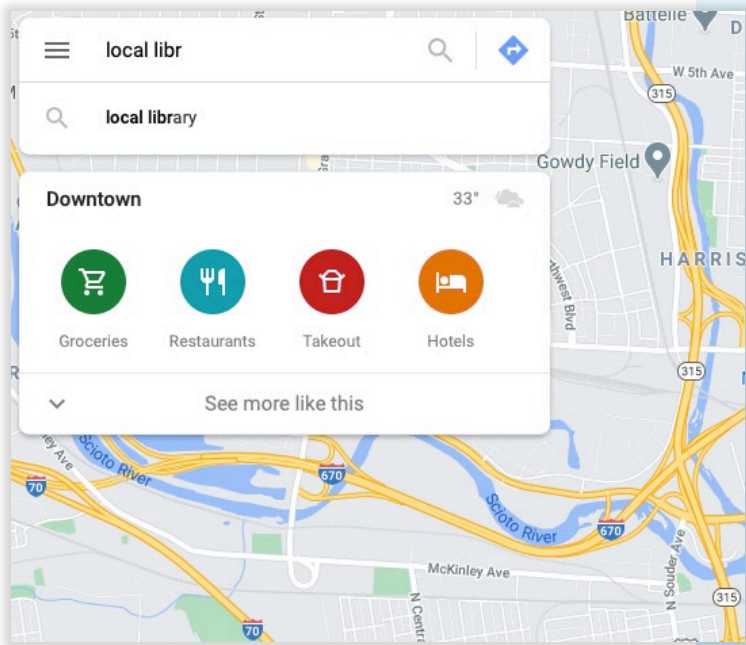
[oc.lc/library-on-demand](https://oc.lc/library-on-demand)





# Smart fulfillment

Optimized delivery to meet user preferences



[oc.lc/smartfulfillment](https://oc.lc/smartfulfillment)





# Smart fulfillment powers the only resource sharing services you'll ever need

**Powerful network of 10,000+ libraries** optimizing reliable, fast fulfillment to meet library and user preferences



**Reminders!**  
**Services available**  
**at no extra cost**



## Real-time availability

### What is it?

- Connects to a lender's local catalog to see if an item is on the shelf
- Responds "no" automatically if item is checked out or unavailable

### How does it help?

- Gets requests to lenders that can supply more quickly
- **Speeds borrower turnaround time** systemwide
- **Reduces time as a lender** spent looking up item availability



## Real-time availability in action

Since January 2021, RTA has saved libraries  
**305,000+ manual lookups,**  
**plus moved items faster on network**

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Date	Supplier	Response
2022-04-13 15:26:20	YBM	No - Auto-Deflection
2022-04-13 15:26:20	COO	No - System Checked Availability
2022-04-13 15:26:22	VYL	Supplied

# Notable Top 10's in Indiana



## Top 10 with "Real-time availability"

Symbol	Name	Count
IEP	Evansville Vanderburgh Public Library	806
IND	University of Notre Dame	749
IUL	Indiana University	494
HV6	Purdue University Fort Wayne	229
IPL	Purdue University Library	202
ISO	Saint Joseph County Public Library	155
IMI	Marian University	137
IUP	Indiana University - Purdue University Indianapolis	135
INB	Bartholomew County Public Library	122
IBS	Ball State University Library	103

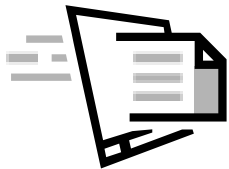
# How does setup work?

1. Submit the survey at [oc.lc/realtimeill](https://oc.lc/realtimeill).
2. The OCLC team configures your library.
  - Setup will be completed within 2 weeks.
  - We'll contact you if there are any questions or we need more information.

This feature works with most library systems:

- WMS, Alma, Aleph, Polaris, Koha, Sierra, Millennium, Voyager, Sirsi, FOLIO





## Express program

### What is it?

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An exclusive group of libraries that...

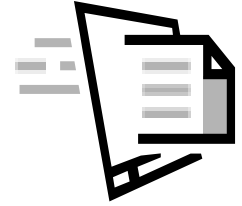
- Has the fastest turnaround times (**18 hours or less**)
- Provides digital resources in an **average of 10 hours**
- Uses the WorldShare ILL network

**1100+ libraries already  
qualified for Express**

### HOW DOES IT HELP?

Enables digital resource borrowing and lending among an exclusive group of libraries

# Notable Top 10's in Indiana



## Top 10 Express libraries

Symbol	Name	Count	Hours TAT
IMS	Saint Mary-of-the-Woods College	3,092	1.36
ILACE	American College of Education	163	2.71
IPC	Purdue University Northwest-Hammond Campus	24	3.81
IVU	Valparaiso University, Christopher Center	1,228	4.66
I3U	Indiana University, South Bend	3,091	5.07
IHC	Hanover College	528	5.14
ISS	Saint Meinrad Seminary & School of Theology	93	6.50
IUO	Indiana University Kokomo	1,077	6.60
XBE	Bethel University Indiana	52	6.77
ILI	Indiana University, Ruth Lilly Law Library	52	7.05

# Streamlined holdings update

## What is it?

- Streamlined offering to help libraries update their holdings
- No additional charge for libraries with a cataloging subscription

## What will it do?

- Reduce “Not Owned” responses to ILL requests
- Add holdings to records in WorldCat that match
- Remove inaccurate holdings
- Add new records where there is no match

## What is not included?

- WorldCat enrichment, high-touch data counseling, LHRs

# Reduce “Not Owned” responses to ILL requests

- **Did you know that “Not Owned” is one of the most common response** lenders use when they respond “no” to an ILL request?
  - Some ILL staff respond “Not Owned” more than 500 times a year
- Does WorldCat present the best view of your library’s holdings? Can your patrons see your latest acquisitions? Do they see items you no longer own?
- **Some ILL departments reduced their “Not Owned” responses by 95%** as a result of OCLC’s free streamlined holdings update
  - Now ILL staff at these libraries no longer respond to requests for titles they don’t own



## Request a streamlined WorldCat holdings update project

Thank you for requesting an update of your library's WorldCat holdings to ensure the best possible access to your collections through OCLC services. This streamlined process will help you quickly update your WorldCat holdings to maximize your library's visibility on OCLC services such as Connexion, WorldShare Interlibrary Loan, FirstSearch, and [WorldCat.org](https://www.worldcat.org).

The streamlined process for updating your library's WorldCat holdings is provided at **no additional charge** with your library's OCLC cataloging subscription. When you send your library's complete MARC 21 catalog data to OCLC, the process matches your records with WorldCat and:

- Adds holdings to matching WorldCat records
- Removes inaccurate WorldCat holdings
- Adds new records when a matching record is not available (optional)

We'll confirm all options with you before starting your project. **For more information on matching, sending files, and more, please see our [FAQ page](#).**

[oc.lc/holdings-request](https://oc.lc/holdings-request)



# ILL request transfer

**Now available** for these integrated library systems (ILSs):

- **Ex Libris** (Alma, Voyager)
- **Innovative** (Millennium, Polaris, Sierra)

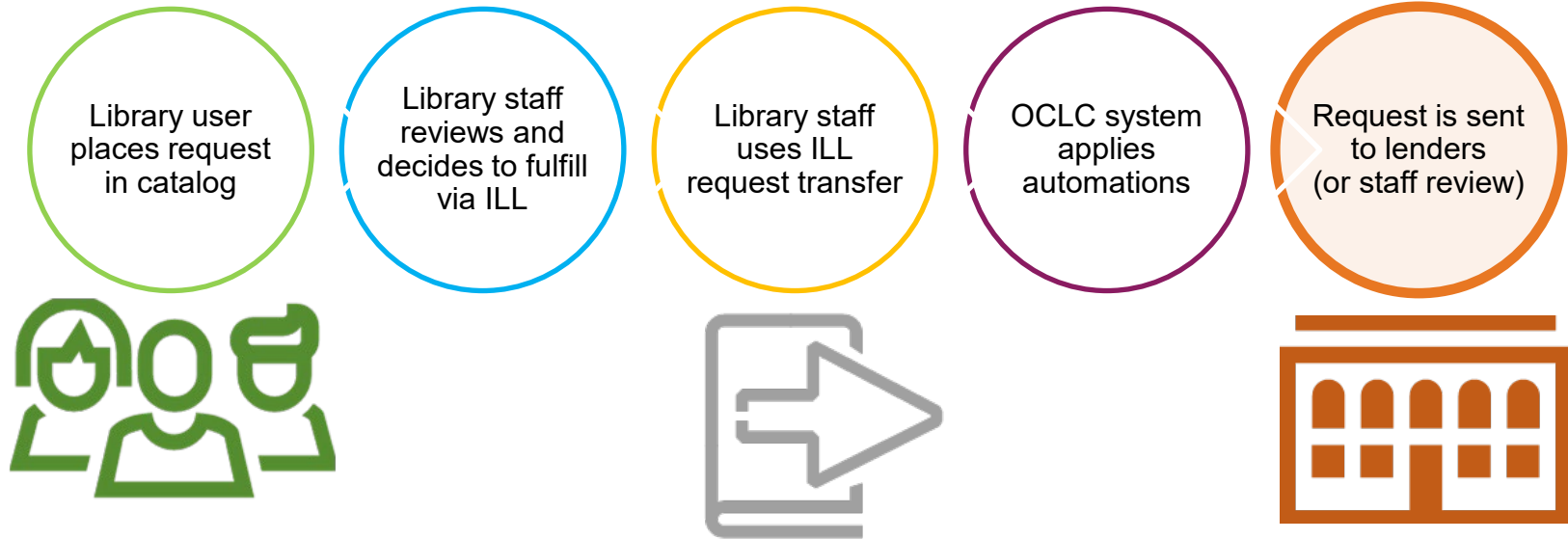
**ILL request transfer lets you:**

- Transfer requests initiated in your library's ILS (catalog) to WorldShare ILL or Tipasa.
- Manage the request in WorldShare ILL or Tipasa just like any other request.

**To get started, go to [oc.lc/ill-transfer](https://oclc.org/ill-transfer)**



# ILL request transfer



# Explore the **new** WorldCat.org



[Create account](#) | [Sign in](#)

[Home](#) [Libraries](#) [Topics](#) [Lists](#) [About](#) [For Librarians](#)

Find items in libraries near you

Items ▾

Search for books, articles, and more

Search



# New experience for libraries and users

Reaches more people with a mobile-friendly and accessible experience

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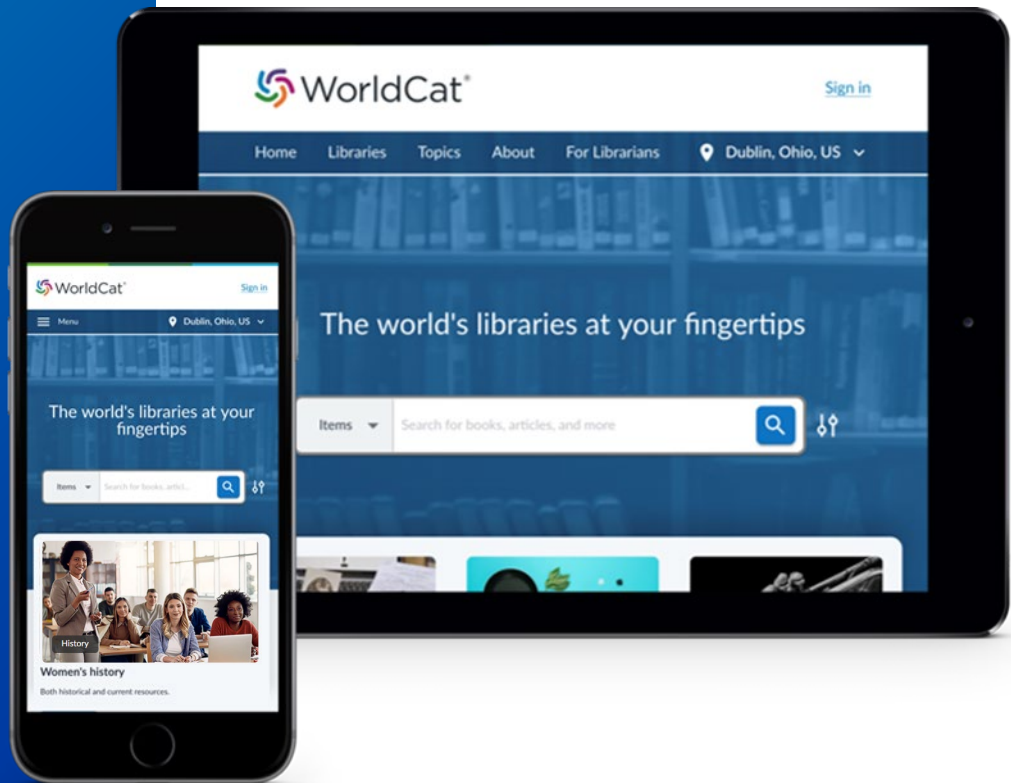
Connects more people to your library with tools to promote your collections

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Provides users more ways to engage including easier list creation and sharing

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Improves fulfillment with access to local library e-resources



# Users can now connect directly to your library from Google Search

The Tipping Point: How Little Things Can Make a Big Difference

Book by Malcolm Gladwell

Book preview  
22/202 pages available

[PREVIEW](#)

**Borrow**

- Near Lakeland, FL
- Polk County Library Cooperative
  - Audiobook
  - Lakeland Public Library, Lakeland Publ...
- Southeastern University
  - Hardcover
  - Steelman Library

[EDIT LOCATION](#)

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STEELMAN SEU LIBRARY

no:55586972

Sign in

Advanced Search Course Reserves Resources

Search history Saved Items (0)

Group This Search

Group Related Editions

1

[Cite](#) [Share](#) [Save](#)

**The tipping point : how little things can make a big difference**

Authors: [Malcolm Gladwell 1963-](#) (Author)

[Print Book](#) 2002, First Back Bay paperback edition.  
Boston : Back Bay Books, an imprint of Little, Brown, 2002.

**Summary:** "The tipping point is that magic moment when an idea, trend, or social behavior crosses a threshold, tips, and spreads like wildfire. Just as a single sick person can start an epidemic of the flu, so too can a small but precisely targeted push cause a fashion trend, the popularity of a new product, or a drop in the crime rate. This

Show More



# Together...

we create  
technology  
with a  
purpose.

# What's new?



# Introducing automation for lending for WorldShare ILL, Tipasa, and ILLiad

- In March 2020, we launched automated request manager with [automations for new borrowing requests](#).  
In August 2022, we've added [automation for lending requests](#).
  - You can automatically assign the right lending charge to every incoming lending request, based on:
    - Who the request is from,
    - Request type
    - Material format
  - You can automatically assign a due date based on your policies.

# Lending automation setup

WorldShare ILL

## Automated Request Manager

[Help on this screen](#)

[Borrowing](#) **Lending**

### Lending New Request

These standard actions are done for all Lending New Requests:

- Deflections**  
Deflects requests based on [Policies Directory](#) settings
- Supplier status check**  
Checks if current supplier status is set to yes
- Knowledge base holdings check**  
Checks for WorldCat knowledge base holdings and adds a link to requested content
- Group affiliations check**  
Identifies groups of which both borrower and lender are members
- Time to Respond**  
Visible in Can You Supply? queues; displays how long a lending request will stay with your library before aging or expiration
- Real time availability check**  
Allows system to respond no to requests for unavailable items; [request configuration](#)
- OPAC holdings check**  
Attaches local call number, shelving location and availability status to request; requires configuration by OCLC
- Lending Priorities Assignment**  
Displays requests from configured groups of libraries in separate queues; configurable under [Advanced Workflows](#)

**Main Automations**  
Configure automations that will be applied to new lending requests. Only the best matching automation will be applied to a request.

[+ Add New](#)

# Lending automation saves time

## Examples of how you can use lending automation to save time:

- **If your library has different loan periods for different material formats** or different libraries, set up lending automation to apply the constant data record that reflects the appropriate loan period.
- **If your library charges different fees to different libraries**, create a custom holdings group to represent libraries you charge and then set up lending automation to apply the constant data record that reflects the appropriate charge to requests from libraries in that group.
- **If your library has multiple branches**, set up lending automation to apply a tag for the branch name where the requested item is held. **(Tipasa only)**

# Off-system requesting: what? why?

- Do you ever request items from libraries that aren't on the OCLC network and don't use an ILL system?
  - Requesting from a small special library
  - Requesting from a museum or an archive
  - Requesting from an international library
- Do you ever get lending requests from libraries via email?
- Does tracking these off-system requests involve workarounds and mental gymnastics?

# Benefits of off-system requesting

- **Track all requesting activity in WorldShare ILL or Tipasa.**
  - **As a borrower**, manage the requesting, receiving, and returning of materials with off-system lenders.
  - **As a lender**, manage the reviewing, responding, sending, and returning of materials with off-system borrowers.
- Review your library's off-system requests in **OCLC Usage Statistics**.

**Released in April** for WorldShare ILL and Tipasa

# Off-system requesting: new queues

Interlibrary Loan Home NDCLV Reg ID: 114960

▶ Discover Items

▶ Borrowing Requests

▶ Lending Requests

▶ Purchasing Requests

▼ **Off-System Requests**

    Borrowing (1)


    Lending (1)


    Create Lending Request


▶ Print Queue (7)

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Off-System: **Borrowing (1)**

Results 1 - 1 of 1  Rows 20 ▼

ID	Status	Media Type	Title	Patron	Off-System Lender	Need Before	Due Date
<a href="#">212437221</a>	Submitted		<a href="#">Foreign affairs.</a>	Josh Patron	Abbey Library	10/07/2022	

Results 1 - 1 of 1  Rows 20 ▼





# Together...

we build  
stronger  
communities.

# With your OCLC services, you receive...

- Live, instructor-led and recorded training ([oc.lc/help](https://oc.lc/help))
- Extensive documentation
- Community Center for online collaboration and updates ([oc.lc/community](https://oc.lc/community))
- Quarterly Product Insight sessions
- Support via email or phone ([oc.lc/support](https://oc.lc/support))
- All this at no additional charge



The screenshot shows the OCLC Community Center homepage. At the top, there is the OCLC logo and the text "OCLC Community Center". Below this, there are navigation links: "Communities", "Enhancements", "Global Release Calendar", and "Member Directory". The main heading is "Connect. Collaborate. Contribute." followed by a welcome message: "Welcome to the OCLC Community Center, where you can:". A list of bullet points follows: "Connect with community peers", "Collaborate, ask questions and gain insight", "Contribute and share ideas to improve products", and "Stay on top of and discuss OCLC announcements". There is a "Sign in" button and a link to the "OCLC Community Center help page". A grid of colorful speech bubble icons is displayed on the right. Below the main content, there is a "Communities" section with a grid of links for various services: Developers (OCLC APIs), Library Management (WorldShare Acquisitions, WorldShare Analytics, WorldShare Circulation, WorldShare License Manager, Capira, EZ proxy, Shared Print, Wise), Metadata Services (Cataloging and Metadata, WorldShare Collection Manager, WorldShare Record Manager, WebDewey, CONTENTdm), and Resource Sharing (WorldShare Interlibrary Loan, Tipasa, Special, COVID-19 and Libraries). A note at the bottom states: "This list will be expanded as community spaces become available for other OCLC products."

October 7, 2022

**OCLC Update**

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**Thank you!**

**Tony Melvyn**

OCLC Product Manager



# Together...

we make  
breakthroughs  
possible.

Because what is  
known must  
be shared.®