Implementing WMS in AMICAL Libraries: Experience and Opportunities

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Background

- Development of our current system (Horizon from SirsiDynix) discontinuous and unreliable
- E-book management almost impossible without sysadmin

ENVIRONMENTAL SCAN (2014): 3 POSSIBLE OPTIONS FOR THE FUTURE

- Open source ILS, like KOHA (but no internal developers)
- SirsiDynix's new cloud version
- LSP integrating e-resource management - our preferred choice

WMS was the most interesting LPS for us:

- Accepted to offer an early adopter's discount
- We were already cataloging in Worldcat - using WMS would spare time
- We had already implemented Worldcat Local and then Worldcat Discovery
- We were already using WMS-ILL
EARLIER STEPS:

- RESPOND (2007): Batch load back in 2007. From then on, used Connexion for cataloging and Firstsearch for ILL.
- WORLD CAT LOCAL: (Quickstart, 2010). New record reclamation in 2012-2013. Fully implemented in 2013-2014 to provide an article-level link resolver.

WMS:

- Started ordering and cataloging in WMS on July 1st 2015 (beginning of the FY).
- Circulation in the old catalog until December 2015
- LHR batch load in summer 2015, with loan history
- Defined circulation policies in the Fall-Winter 2015.
- CALLED TOM FOR ADVICE (“Is this too fast?” - “No, You are ok!”)
- Switched to the hosted version of EZ Proxy
- OCLC Team visit in December.
- Went live from January 2016.
Search Experience

ALREADY EXPERIENCED WITH WORLDCAT LOCAL/DISCOVERY in 2014-2015

- Users exposed to the holdings of the most important US libraries
- Enriched content and strong information retrieval power
- AMICAL GROUP scoping
- Seamless integration with ILL FORM
  - User view
  - Staff view

AFTER THE IMPLEMENTATION OF WMS

- No longer flanking the old opac, Discovery becomes the user interface. Searches increased from 500,000 to 2,300,000.
Staff Benefits

- Simplified system administration tasks
- Improved management of e-resources, and remote access granted to all
- Relevant time saving in acquisitions and cataloging
- Nice, easy interface
- Responsive design (in the future: tablets at the Circulation Desk)
- ER statistics harvestable
- Collection analysis integrated with circulation data
Sysadmin - Before WMS

LOCAL IT SERVICES
- SERVER ADMIN
- HARDWARE MAINTENANCE
- SOFTWARE UPGRADES AND PATCHES
- NETWORK ADMIN
- DATABASE MAINTENANCE AND BACKUPS
- EZPROXY MAINTENANCE AND CONFIGURATION

LIBRARY
- OPAC CONFIGURATION
- DATABASE CONFIGURATION (search indexes and policies)
- DATA MANIPULATION (queries and batches)
- CONTACTS WITH SUPPORT (new releases, bugs and problems)
- DATABASE MAINTENANCE INFO FOR JCU IT
- REMOTE ACCESS CONFIGURATION INFO FOR JCU IT

SHARED RESPONSIBILITIES FOR DATABASE ADMINISTRATION AND REMOTE ACCESS CONFIG
Sysadmin - After WMS

- discovery configuration
- policies
- data manipulation (queries and batches)
- contacts with helpdesk (bugs and problems, remote access configuration requests)
- documentation
- community center

Online Helpdesk
- bugs and problems
- remote access configuration
E-resources

BEFORE WORLDCAT LOCAL AND WMS

- E-JOURNAL AGGREGATORS entered in e-journals list (EBSCO A to Z) and Libguides, remote access granted by local EZproxy
- SINGLE E-JOURNALS entered in the catalog and in the e-journals list (EBSCO A to Z) with no remote access
- E-BOOK COLLECTIONS entered in Libguides, with remote access through EZProxy
- SINGLE E-BOOK TITLES entered in the catalog with active link to full text, remote access through EZProxy
- No link resolver for the article level

AFTER

- HARMONISED TREATMENT OF ALL TYPES OF RESOURCES
  - Entered in the knowledge base (either with creating a local collection or using vendors’ created collections)
  - Remote access through a hosted version of EZ-Proxy
Acquisitions and cataloging workflow

BEFORE

- Acquisitions librarian checks the book to be ordered in Worldcat
- Creates an order in the ILS
- At book arrival, cataloger downloads MARC record from Connexion
- Imports the MARC record
- Merges the record order and the MARC record
- Adds the call number

AFTER

- Acquisitions librarian selects the right record in Worldcat (or from the knowledge base) and adds it to the order
- At book arrival, cataloger checks the record and adds the call number
License Manager

This is the latest module we are implementing at JCU.

It lets you

- Store, analyze and renew licenses (either crowdsourced or created by yourself)
- Harvest usage data (COUNTER reports) via the SUSHI protocol
  - List of configuration requirements from available vendors

All monthly usage reports for each vendor can be seen, grouped by date and downloaded in the Harvest History menu.

COUNTER DB1, BR1 and JR1 reports can be merged to allow comparisons between databases in the Analytics module.
### Merged COUNTER E-Journal/E-book Usage Summary

**John Cabot University Library**

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## Merged COUNTER Database Usage Summary

**John Cabot University Library**

**Report Criteria:**
- **Begin Date (YYYY-MM):** 2016-06
- **End Date (YYYY-MM):** 2017-04
- **Vendor Name:** All

### Vendor Usage Analysis

<table>
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<th>Vendor Name</th>
<th>COUNTER Database Name</th>
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<th>Federated Search Count</th>
<th>Record View Count</th>
<th>Result Click Count</th>
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**All Measures:**
- Regular Search Count
- Federated Search Count
- Record View Count
- Result Click Count