

# Implementing WMS in AMICAL Libraries : Experience and Opportunities

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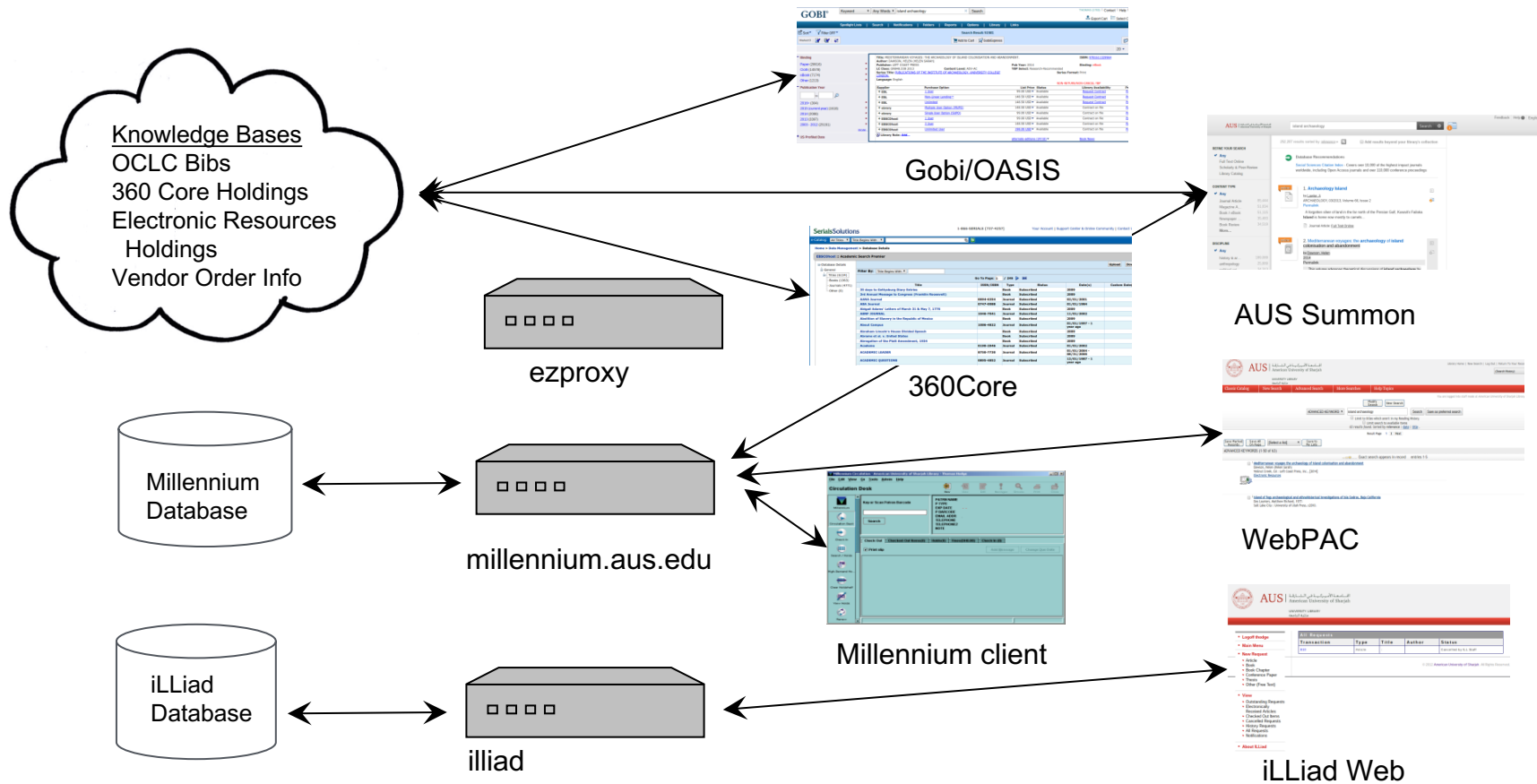
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Head Librarian  
John Cabot University  
emorani@johncabot.edu

# Evaluation

# Background (AUS 2014-15)

- Millennium was no longer being developed
  - We wanted an LSP not another ILS
- Key distinctions between ILS and LSP
  - integrated knowledge-base
  - integrated print and electronic management features
  - discovery-style searching
  - cloud based applications and data
- 3 vendors in market - III, OCLC, Proquest





# Process Part 1 - RFQ

- All 3 vendors were invited to give demos so that we knew enough to evaluate them
- Based on these and sample RFQ/RFP's from other libraries, we prepared and issued an RFQ in Feb. 2015
- Responses evaluated by librarians familiar with specific modules
- Best scoring product was OCLC's Worldshare Management Services (WMS)

# Evaluation Scoring

Scoring : 0 = Doesn't Exist/Not Planned, 1 = Planned, 2 = In Development, 3 = Exists, 4 = Exists and Well Done									
		Weight		***** Innovative *****		**** OCLC ****		**** Proquest ****	
				Score	Notes	Score	Notes	Score	Notes
3.4	API's and User-Contributed Data			1.83333		3.0833		3	
3.4.1	APIs   user API support			3	Cannot grade a list. Not sure what is included with cost and what is extra.   Selection of premade APIs, access to PostgreSQL database for user API creation; unspecified which are paid and which are included	3.5	Cannot grade list. "APIs do not require additional licencing fees." Anyone can develop their own API.   As long as I've understood correctly, the APIs (mostly) do not cost extra.	3	
3.4.2	Back-up, restore user data   backup, recovery and sensitive data purging			0.66667	Can delete information, but not recover lists/records	2.6667	No mention of recovering a deleted list.	3	
Total Score All 3 Areas				2.87142		3.126		2.4521	

# Process Part 2 - Due diligence

- We verified our choice was viable
- This involved further Demos of Discovery and Circulation components
- Followed by several rounds of questions to OCLC to verify basics - "Have you tested Bibliotheca self-check machines with WMS ?", "Can you demonstrate how X works ?"

# Process Part 3 - Agreement

- Announced selection, notified unsuccessful vendors - March 2015
- Negotiated with OCLC on payment terms - March 2015
- Signed Master Agreement and Order Form - April 2015
- Began implementation - May 2015

# Migration

# Migration Timeline

- May - Sep 2015 - DMQ, Scope Statement, Translation Table
- October - November 2015 - Primary Data extract and loading, acceptance testing
- November - December 2015 - Circulation parameter input and testing
- January 2016 - Setup external authentication

# Migration Timeline #2

- January 2016 - Circulation staff training
- February 4, 2016 - Circulation goes live
- May 2016 - Migrate open orders from Millennium to WMS
- June 1, 2016 - Acquisitions & Discovery go live, cataloging on WMS only

# OCLC Process Documents

**Data Migration Questionnaire (DMQ)** - is a questionnaire from OCLC about your current system and data, what OCLC services you use, and other details of your library setup

**Translation Table (TT)** - Maps item, serial and patron data fields in your existing system to WMS fields

**Scope Statement (SS)** - Is a document that outlines what work OCLC will do.



# Data Extraction, Transformation, Loading

- Look at the data in your current system
- Understand old system's functions to export the data
- Match to OCLC import formats
- Plan how the data you export will become loadable data
- Agree with OCLC / Edutech who will do what work

# Summary of AUS exports and transformations

Type of information	Format of Millennium output	Required format for WMS input	Transformation
Bibliographic Records	MARC	MARC	minimal
Item Records	XRecord XML + MARC	Embedded in 945 field of the bib records	Perl script
Item Statistics & Transactions	XRecord XML	Tab delimited format	Perl script
Loans	XRecord XML	Tab delimited	Perl script
Patrons	Delimited from Millennium Create List	Tab delimited or XML format	Perl script
Fines	Print to Email	Tab delimited format	Perl script
Orders	Delimited from Millennium Create List		Perl script
Serials Holdings	XRecord XML + MARC	MARC Format for Holdings Data (MFHD) Records	Perl script

# Entering and Testing Circulation Parameters

- Had some training on parameters in September 2015
- Millennium rules to WMS tables mapping exercise
- OCLC recommended entry a few days before live
- We entered our parameters 2 months in advance, as soon as OCLC released the instance for testing
- Did extensive testing to be sure things circulated correctly, holds placed, fines assessed, etc.

# Setting up External Authentication

- It's possible to use OCLC authentication
  - Staff and patrons
- AUS uses campus central authentication
- For external logins, AUS uses a product called Gluu, which offers a Shibboleth style IdP
- OCLC supports Shibboleth, CAS, LDAP/AD, EZproxy for “external” authentication

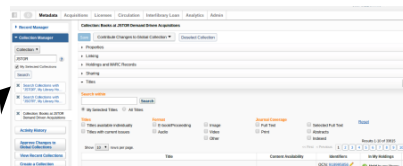
## Lessons learned

- Exporting fines on checked out items caused problems when we also exported check-outs
- Exporting Orders can work, but need to fully understand how the data is structured, and compares with vendor data
- We should have learned more about ERM related data in WMS (licenses, collections, vendors, etc.)
- Test runs and proceduralizing the exports were invaluable when the migration date came

## More Lessons

- Keeping 2 systems in sync (WMS/Worldcat and Millennium/Summon) worked better than I expected
- More information about Serials and Serials data in WMS would have been very useful
- Understand how Authentication with external Shibboleth/CAS affects logout with your setup
- Don't try to map circulation parameters, better to do from scratch based on policies

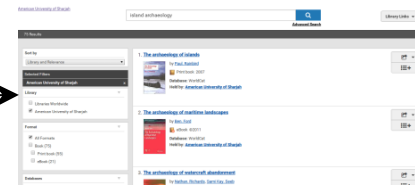
OCLC Knowledge Base  
Worldcat Bibs  
Electronic Resource  
Holdings and Metadata  
Hosted EZProxy  
Serials patterns  
Vendor Description, etc  
Coutts & YBP KB  
Order Information.



WMS Client



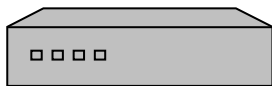
Gobi / OASIS



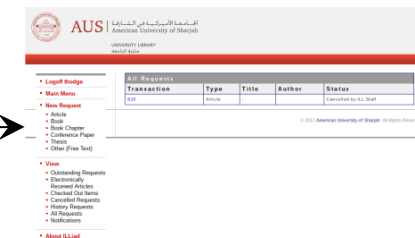
WS Discovery



iLLiad Database



iLLiad



iLLiad Web

# System Level Benefits



# Systemic Benefits

- Staff time savings - TS, IT
- Out-of-pocket cost savings
- Budget simplicity and the one-price model
- Fewer limitations - users, branches, records, firewalls, etc

# Cloud software : time savings

- No Backups
- No Server upgrades
- No Application upgrades
- No patches

# Cloud software : cost savings

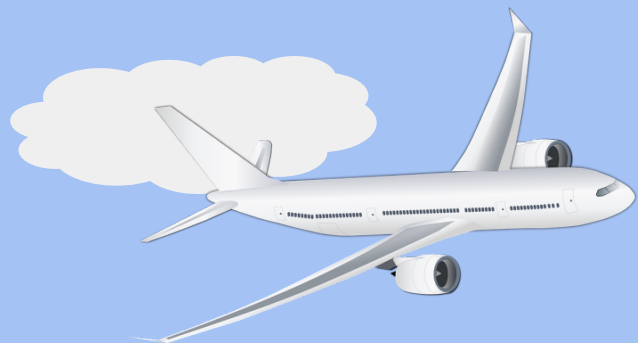
- System Administration time
- Hardware costs
- Out of pocket price neutrality
- Budget simplicity and the one-price model

# Fears allayed : security

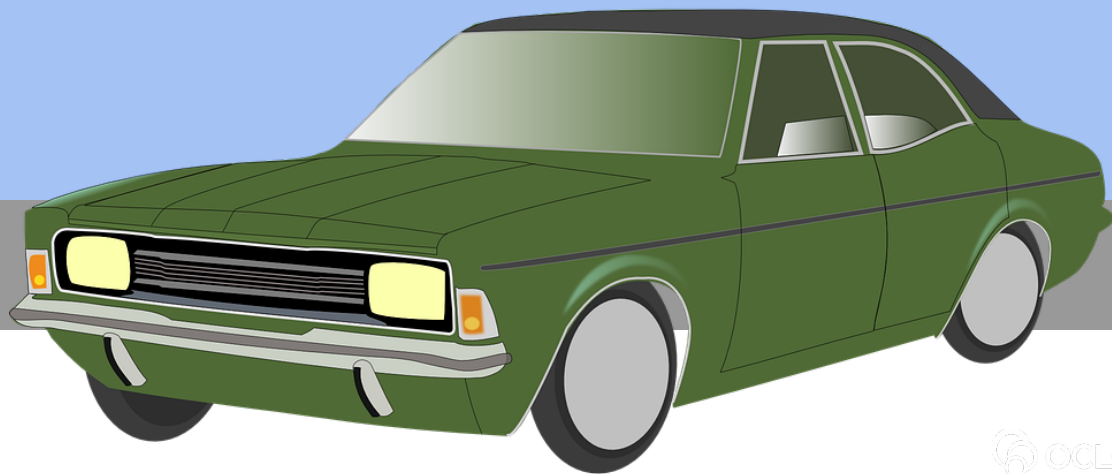
Techcrunch, May 13, 2015, on why Google went with cloud internally

“Maybe it recognizes what so many big companies are learning. There is no safety behind the firewall.”

-Ron Miller



Airplane:  
Seems riskier, actually safer



Car:  
Feels safer, but actually  
much more dangerous

# Cloud software : fewer limitations

- Number of records
- Seats (simultaneous users)
- Branches
- Firewall issues

# Customizations Enabled : API's

# Data accessibility

- Analytics & Report Designer
- Integrated API's
- Standards-based data formats
  - MARC
  - MFHD (MARC Format for Holdings Data)
  - KBART (Knowledge Bases And Related Tools), etc.



# Developments enabled

- [Location Maps](#)
- [Laptop status](#)
- [Libguides resource import](#)

# Developments: Location Maps

View Filters 6,118 Results

Course Reserves My List 0

## 1. Astronomy

by [Percy Seymour](#)

Print book 2014

Held by: [American University of Sharjah](#)

"Astronomy: All That Matters, by leading expert Percy Seymour, is an innovative and intriguing introduction to exciting discoveries and important scientific theory. Each chapter starts... [Read More](#)

[Access online](#)

Available

University Library General Collection -

2nd Floor

QB44.3 .S49 2014

[View all editions](#)

[Save](#)

## 2. A dictionary of astronomy

by [Ian Ridpath](#)

Print book 2012

Held by: [American University of Sharjah](#)

The revised second edition of this established dictionary contains over 4,300 up-to-date entries on all aspects of astronomy from space exploration and the equipment involved, to astrophysics... [Read More](#)

[Save](#)

## Astronomy

by [Percy Seymour](#)

Print book 2014

Held by: [American University of Sharjah](#)

[Access online](#)

MARC

[View all editions](#)

[Close Item Detail](#)

[Save](#)

⊞ Description

⊞ Editions & Formats 4 Found

✓ Availability / Holdings

⊞ Access Full Text Online 1 Link

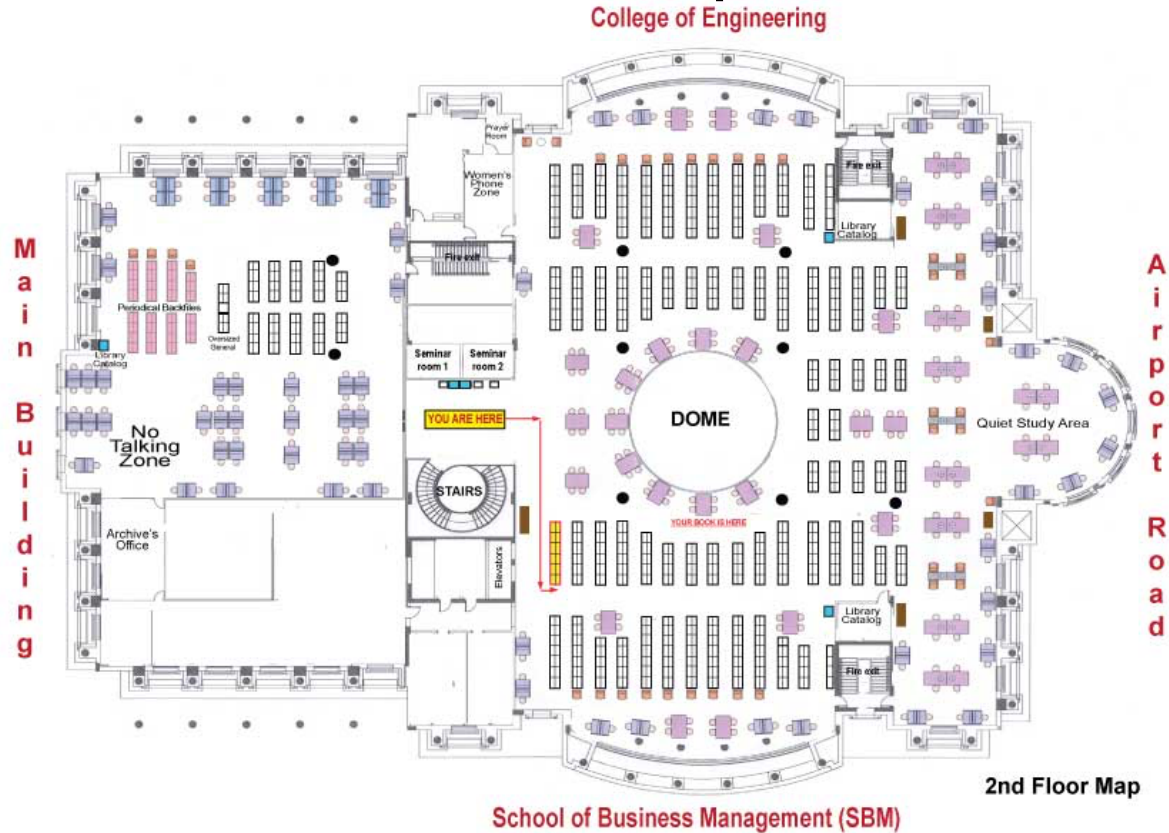
[Location Map](#)

⊞ American University of Sharjah

[Send Feedback](#)

Worldcat Discovery Record

# Developments: Location Maps






































# Developments: Laptop Status

## Library Desktops | Laptops


AUS Library Laptops Status at 2017-03-28 10:04

26 available, 9 checked out.

Laptops can be checked out at the Circulation Desk on the Ground Floor of the Library

						
laptop no.2 available	laptop no.3 available	laptop no.5 available	laptop no.6 available	laptop no.8 available	laptop no.11 available	laptop no.12 available
						
laptop no.13 available	laptop no.14 available	laptop no.15 available	laptop no.16 available	laptop no.17 available	laptop no.18 available	laptop no.19 available
						
laptop no.21 available	laptop no.22 available	laptop no.25 available	laptop no.26 available	laptop no.28 available	laptop no.29 available	laptop no.31 available
						
laptop no.32 available	laptop no.38 available	laptop no.39 available	laptop no.40 available	laptop no.42 available	laptop no.9 due at 12:11	laptop no.35 due at 12:12
						
laptop no.4 due at 12:46	laptop no.7 due at 12:55	laptop no.10 due at 12:59	laptop no.20 Unavailable	laptop no.27 Unavailable	laptop no.37 Unavailable	laptop no.41 Unavailable

# Developments: Libguides Resource Integration



AUS | الجامعة الأميركية في الشارقة  
American University of Sharjah

UNIVERSITY LIBRARY  
مكتبة الجامعة

Library Home | Ask A Librarian | My Library Account | Contact Us

Quick Links > search library webs

SearchResearch HelpTechnology HelpLibrary ServicesFaculty ResourcesAbout Us

American University of Sharjah / LibGuides / A-Z Databases

## A-Z Databases

Find the best library databases for your research.

All Subjects >

All Database Types >

All Vendors / Providers >

Search for Databases

Go

All A B C D E F G H I J K L M N O P Q R S T  
U V W X Y Z #

### 186 Databases found

#### A

**ABI/INFORM Global** <img alt="external link icon" data-bbox="658 630 665 640"/>

ABI/INFORM is a comprehensive business database covering business & economic conditions, corporate strategies, management techniques, as well as competitive and product information. Its international coverage gives researchers a complete picture of companies and business trends around the world.

**Academic Search Complete** <img alt="external link icon" data-bbox="658 748 665 758"/>

Previously known as "Academic Search Premier". Academic Search Complete is an excellent source of scholarly journals in all academic disciplines. This multi-disciplinary database from EbscoHost covers engineering, language and linguistics, education, history, arts and literature, biology, chemistry, engineering, physics, psychology, religion and theology.

**ACM Digital Library** <img alt="external link icon" data-bbox="658 883 665 893"/>

The ACM Digital Library is a vast collection of citations and full text from the Association for Computing Machinery, including journal and newsletter articles and conference proceedings. Topics include cognitive and computer science, informatics, artificial intelligence and mathematics.

# Developments: Libguides Resource Integration

vendor	name	url	enable_proxy	description	content_id
ProQuest	<b>ABI/INFORM Global</b>	<a href="http://ezproxy.aus.edu/login?url=http://search.proquest.com/abiglobal/advanced?accountid=16946">http://ezproxy.aus.edu/login?url=http://search.proquest.com/abiglobal/advanced?accountid=16946</a>	1	ABI/INFORM is a comprehensive business database covering business & economic conditions, corporate strategies, management techniques, as well as competitive and product information. Its international coverage gives researchers a complete picture of companies and business trends around the world.	12104741
Association for Computing Machinery	<b>ACM Digital Library</b>	<a href="http://ezproxy.aus.edu/login?url=http://dl.acm.org/browse_dli.cfm?linked=1&amp;part=journal&amp;coll=portal&amp;dli=ACM">http://ezproxy.aus.edu/login?url=http://dl.acm.org/browse_dli.cfm?linked=1&amp;part=journal&amp;coll=portal&amp;dli=ACM</a>	1	The ACM Digital Library is a vast collection of citations and full text from the Association for Computing Machinery, including journal and newsletter articles and conference proceedings. Topics include cognitive and computer science, informatics, artificial intelligence and mathematics.	12104684
American Chemical Society	<b>American Chemical Society Journals (Front Files)</b>	<a href="http://ezproxy.aus.edu/login?url=http://pubs.acs.org/about.html">http://ezproxy.aus.edu/login?url=http://pubs.acs.org/about.html</a>	1	The American Chemical Society is the leading publisher of peer-reviewed research journals in the chemical and related sciences, serving scientific communities worldwide through an unparalleled commitment to quality, reliability, and innovation.	12104743

# Workflow Improvements

# WMS and Knowledge Bases

- *Knowledge Base (KB)*: a store of information about library resources that we can use in workflows
- KBs are the Building Blocks of WMS
  - Vendors
  - Licenses
  - Serials
  - E-Resources
  - WorldCat



# Knowledge Base Sources

- KBs created, in part, by *Crowdsourcing*
  - Data that is added and refined by multiple libraries
- KBs are also built from *Vendor-supplied data*.

# Arabic Cataloging: Transliteration

The screenshot displays the VRA 2.0 interface with a list of records. A red box highlights a record with ID 245, which is expanded to show its details. The details include the title 'Kitāb waqf as-sultān an-Nāṣir Ḥasan Ibn-Muḥammad Ibn-Qalāwūn 'alā madrasatihi bi-r-Rumaila' and the subtitle '[Elektronische Ressource]'. A context menu is open over the record, showing options like 'Apply Authority Link', 'Controlled Heading', 'Transliterate', 'Unlink Non-Latin Field', and 'Field Help'.

# Crowdsourced Vendor Records

WorldShare® Need Help? User support info Veronique Lecat

Metadata Acquisitions **Licenses** Circulation Analytics Admin

Manage Rights  
Manage Templates  
Collection Manager  
Harvest Usage Data  
**Manage Vendors**

New Vendor  
Keyword   
\*  
Search  
 Keyword with \*

Vendor Search: Keyword with \* All

Results 1601 - 1700 of 1902 Rows 100 15 16 17 18 19

Private/Public	Vendor Name	Location	My Library Partner
Public	<a href="#">Teachers College, Columbia University</a>	New York, New York, US	<input type="checkbox"/>
Public	<a href="#">TE AKA MATUA RESEARCH LIBRARY</a>	WELLINGTON, NZ	<input type="checkbox"/>
Public	<a href="#">Tech Knowledge</a>	Dubai, AE	<input checked="" type="checkbox"/>
Public	<a href="#">Techstreet</a>	Ann Arbor, MI, US	<input type="checkbox"/>
Public	<a href="#">TENNESSEE DEPARTMENT OF ENVIRONMENT &amp; CONSERVATION</a>	Nashville, TN, US	<input type="checkbox"/>
Public	<a href="#">Tennessee Electronic Library</a>	Nashville, Tennessee, US	<input type="checkbox"/>
Public	<a href="#">Tenn-Share</a>	Nashville, Tennessee, US	<input type="checkbox"/>
Public	<a href="#">Tested Films</a>		<input type="checkbox"/>
Public	<a href="#">testlev</a>	Trondheim, AD	<input type="checkbox"/>
Public	<a href="#">Testpublisher1</a>	Trondheim, NO	<input type="checkbox"/>
Public	<a href="#">Test Vendor</a>	Munich, DE	<input type="checkbox"/>
Public	<a href="#">Test Vendor 01-test</a>	ccc, US	<input type="checkbox"/>
Public	<a href="#">Test Vendor 02</a>	AAA, AAA, AD	<input type="checkbox"/>
Public	<a href="#">Test Vendor 03-a</a>	AAA, AAA, US	<input type="checkbox"/>
Public	<a href="#">TestVendor1</a>	AAA, AAA, AD	<input type="checkbox"/>

# Crowdsourced Vendor Records

WorldShare

Metadata Acquisitions Licenses Circulation Analytics Admin

Manage Rights  
Manage Templates  
Collection Manager  
Harvest Usage Data  
Manage Vendors

New Vendor

Keyword  
neelwafurat

Search

Neelwafurat  
Keyword with neelwaf...

Neelwafurat ☒ In Use ☐ Not in Use

General

Vendor Name\*: Neelwafurat

Country: LB Lebanon

Roles: Retailer [Show options](#)

Language: -- Select --

Relationships: Relation Type -- Select --

Related Vendor

Links & Logins

Addresses

Active Inactive

Address Name
Neelwafurat Default

Add New Address

Address Name\*: Neelwafurat

Address Role: [Show options](#)

Street:

P.O. Box: P.O. Box 5315-13

Postal Code:

City\*: Beirut

Country\*: LB Lebanon

# Crowdsourced License Records

WorldShare® Need Help? [User support info](#) Veronique Lecat

Metadata Acquisitions **Licenses** Circulation Analytics Admin

Manage Rights

Manage Templates

Search

Scope: Template Name

Search Term(s):

Search Clear

Close All Tabs

Search: Templates Name with "proquest"

Create a Template

Collection Manager

Harvest Usage Data

Manage Vendors

Search: Templates Name with "proquest"

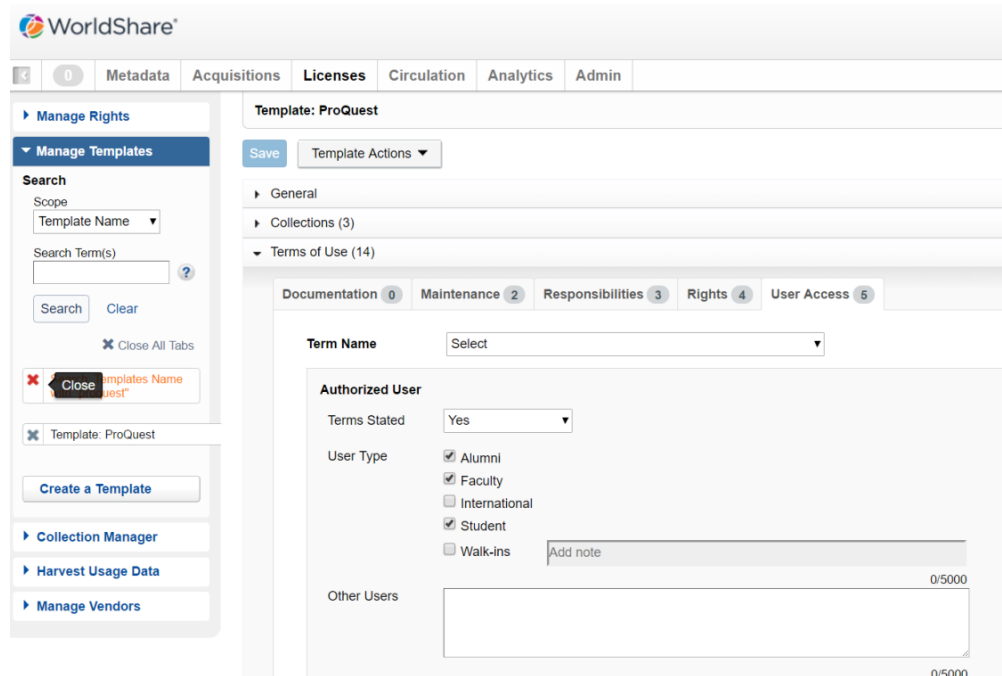
Filter by Filter by Licensor Filter by Type Reset

Results 1 - 4 of 4 Rows 10

License Name	Licensor	Type	Action
<a href="#">Norwich ProQuest License</a>	ProQuest Safari	Public	Create License
<a href="#">ProQuest</a>	ProQuest	Public	Create License
<a href="#">Proquest Packages</a>		Public	Create License
<a href="#">ProQuest Terms and Conditions Addendum Dissertations &amp; Thesis A &amp; I</a>		Public	Create License

Results 1 - 4 of 4 Rows 10

# Crowdsourced License Records



The screenshot displays the WorldShare interface for managing a 'ProQuest' template. The interface is divided into several sections:

- Top Navigation:** Includes tabs for Metadata, Acquisitions, Licenses (selected), Circulation, Analytics, and Admin.
- Left Sidebar:** Contains links for Manage Rights, Manage Templates (selected), Search, and a 'Create a Template' button. Below these are links for Collection Manager, Harvest Usage Data, and Manage Vendors.
- Main Content Area:**
  - Template: ProQuest:** Shows a 'Save' button and a 'Template Actions' dropdown.
  - General:** A section for general information.
  - Collections (3):** A section for collections.
  - Terms of Use (14):** A section for terms of use, which is currently expanded.
- Documentation (0):** A section for documentation.
- Maintenance (2):** A section for maintenance.
- Responsibilities (3):** A section for responsibilities.
- Rights (4):** A section for rights.
- User Access (5):** A section for user access.

The 'Terms of Use' section is further detailed with the following fields:

- Term Name:** A dropdown menu with 'Select' as the current value.
- Authorized User:**
  - Terms Stated:** A dropdown menu with 'Yes' as the current value.
  - User Type:** A list of checkboxes for 'Alumni', 'Faculty', 'International', 'Student', and 'Walk-ins'. 'Alumni', 'Faculty', and 'Student' are checked.
  - Add note:** A text input field.
- Other Users:** A large text area for additional user information.

The interface also includes a 'Close All Tabs' button and a 'Close' button for the 'Template: ProQuest' tab.

# Crowdsourcing E-Resource Collections

Collection: AMICAL Oxford Handbooks Online

Save Cooperative Management Delete Collection

Properties  
Linking  
Holdings and MARC Records  
Sharing

Titles More Actions

Search within  Search

My Selected Titles All Titles

**Titles**  
☐ Titles available individually  
☐ Titles with current issues

**Format**  
☐ E-book/Proceeding  
☐ Audio

☐ Image  
☐ Video  
☐ Other

**Journal Coverage**  
☐ Full Text  
☐ Print

☐ Selected Full Text  
☐ Abstracts  
☐ Indexed

Reset Results 1 - 10 of 86 Rows 10 << 1 2 3 4 5 >>

Title	Content Availability	Identifiers	Selections	Action
<a href="#">The Oxford handbook of American drama</a>	E-book/Proceeding: 2014 E-book/Proceeding	OCN: <a href="#">880244890</a> ISBN: 9780199731497 <a href="#">Website</a>	✓ Held by my library Available only in Collection <a href="#">Delete Title</a>	
<a href="#">The Oxford handbook of American literary naturalism</a>	E-book/Proceeding: 2011 E-book/Proceeding	OCN: <a href="#">838126891</a> ISBN: 9780195368932 <a href="#">Website</a>	✓ Held by my library Available only in Collection <a href="#">Delete Title</a>	
<a href="#">The Oxford handbook of animals in classical thought and life</a>	E-book/Proceeding: 2014 E-book/Proceeding	OCN: <a href="#">961362</a> ISBN: 9780199589425 <a href="#">Website</a>	✓ Held by my library Available only in Collection <a href="#">Delete Title</a>	
<a href="#">The Oxford handbook of British and Irish war poetry</a>	E-book/Proceeding: 2009 E-book/Proceeding	OCN: <a href="#">838127007</a> ISBN: 9780199559602 <a href="#">Website</a>	✓ Held by my library Available only in Collection <a href="#">Delete Title</a>	

# E-Resource Collections added by Vendors

Record Manager

Collection Manager

Provider

springerlink

My Selected Collections

Search Clear

Close All Tabs

providerUid with "springerlink"

Search Providers with "springerlink"

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

providerUid with "springerlink"

Collection Actions

Filter by Select Reset


Results 31 - 40 of 752

Rows 10

	Collection	Type / Attributes	Provider	Updated	Selections	Sharing	Action
<input type="checkbox"/>	<a href="#">Springer Biomedical and Life Sciences eBooks 2014 English-International</a> Collection ID: springerlink.ebooksb1s2014	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 12:20 AM	<input type="checkbox"/> Not Selected by my library Titles: 0/550 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Biomedical and Life Sciences eBooks 2015 English-International</a> Collection ID: springerlink.ebooksb1s2015	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 12:17 AM	<input type="checkbox"/> Not Selected by my library Titles: 0/594 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Biomedical and Life Sciences eBooks 2016 English-International</a> Collection ID: springerlink.ebooksb1s2016	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 12:30 AM	<input checked="" type="checkbox"/> Selected by my library Titles: 648/648 <a href="#">Deselect</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Biomedical and Life Sciences eBooks 2017 English-International</a> Collection ID: springerlink.ebooksb1s2017	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 12:32 AM	<input checked="" type="checkbox"/> Selected by my library Titles: 103/103 <a href="#">Deselect</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Book Archive - All Themes</a> Collection ID: springerlink.ebooksbaall	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/02/2017 12:17 AM	<input type="checkbox"/> Not Selected by my library Titles: 0/53,409 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Book Archive - Behavioral Sciences</a> Collection ID: springerlink.ebooksbabehavioralscience	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 10:03 PM	<input type="checkbox"/> Not Selected by my library Titles: 0/1,403 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Springer Book Archive - Biomedicine and Life Sciences</a> Collection ID: springerlink.ebooksbabiomed	Knowledge base collection • Non-Customizable	<a href="#">SpringerLink</a>	04/01/2017 10:26 PM	<input type="checkbox"/> Not Selected by my library Titles: 0/7,860 <a href="#">Select</a>		<a href="#">Add to Order</a>



# E-Resource Collections added by Vendors upon request



**Regarding incident I16111065; American University in Sharjah**  
(A7U); request new KB collection for Ebsco Arab World Research Source

December 5, 2016 6:19 PM

**Source**

From: [support-uk@oclc.org](mailto:support-uk@oclc.org)

To: "Veronique Lecat" <[vlecat@aus.edu](mailto:vlecat@aus.edu)>

[KB-L JIT WorldC...ecember 2 2016.msg \(109.5 KB\)](#) [Preview](#) | [Download](#) | [Remove](#)

Dear Veronique,

I can confirm that Arab World Research Source has now been added, please see the listserv announcement if you hadn't already seen it.

Kind regards,  
Jo

---

OCCL  
<http://www.oclc.org>

---

You can track this incident via:

<https://oclc.topdesk.net/tas/public/contained/incidentpublic?unid=7e54078ef2774c4889a47497c71fb9c2>  
Request:

15-11-2016 12:44 PM [GMT +1:00] Lecat, Veronique: Request  
- Collection for Ebsco Arab World Research Source

Hello,


I'd like to request that you create an OCLC collection for the Arab World Research Source database. I've already sent this request to EbscoHost, but I thought I ought to ask you as well. There are existing collections for other Ebsco databases, but none yet for Arab World.


Regards,  
Veronique Lecat


Search Collections with "arab world research", My Selected Collections

Collection Actions ▾

Filter by  [Reset](#)

Results 1 - 1 of 1 

<input type="checkbox"/>	Collection	Type / Attributes	Provider	Updated	Selections
<input type="checkbox"/>	<a href="#">Arab World Research Source</a> Collection ID: EBSCOhost.awr	Knowledge base collection • Non-Customizable	<a href="#">EBSCOhost</a>	03/17/2017 01:35 AM	 Selected by my library Titles: 402/402 <a href="#">Deselect</a>

Results 1 - 1 of 1 

# E-Resource Collections maintained by Vendors

Collection: Books at JSTOR All Purchased

Save Contribute Changes to Global Collection Deselect Collection

Properties

Linking

Holdings and MARC Records

Sharing

Titles More Actions

Search within  Search

My Selected Titles All Titles

**Titles**  
☐ Titles available individually  
☐ Titles with current issues

**Format**  
☐ E-book/Proceeding  
☐ Audio

☐ Image  
☐ Video  
☐ Other

**Journal Coverage**  
☐ Full Text  
☐ Print

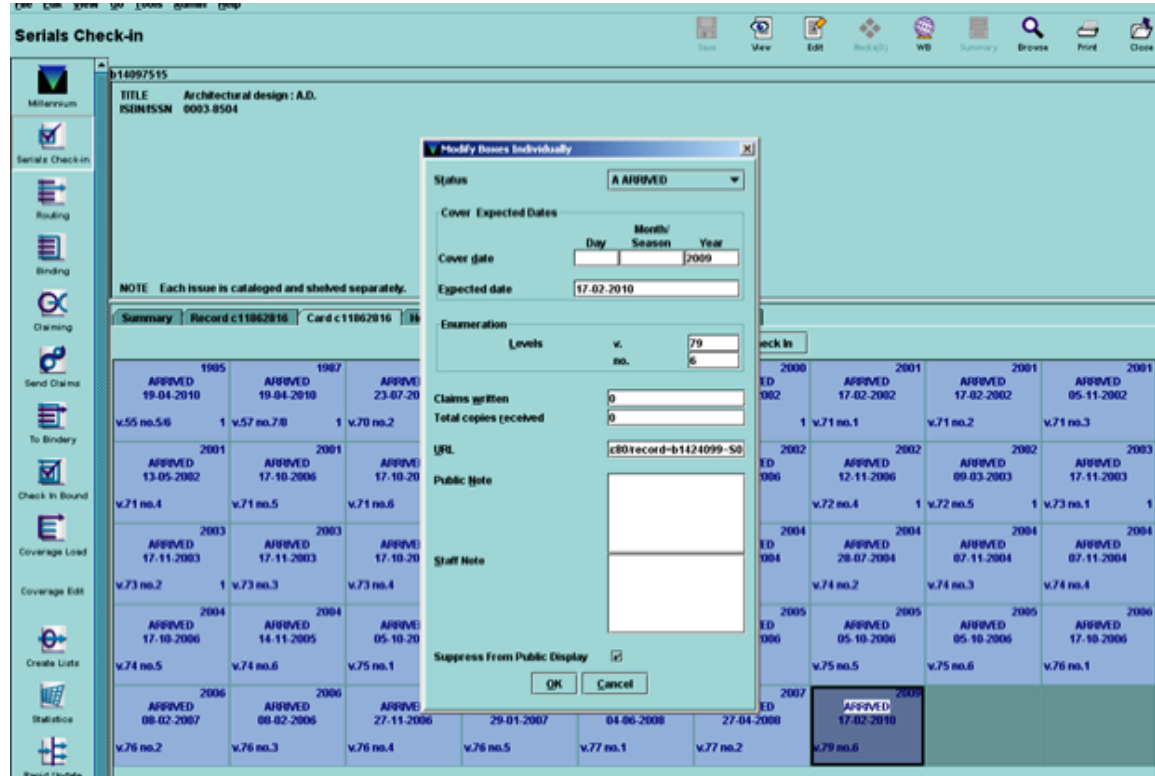
☐ Selected Full Text  
☐ Abstracts  
☐ Indexed

[Reset](#)

Results 1 - 10 of 396

Rows 10 < 1 2 3 4 5 >

Title	Content Availability	Identifiers	Selections	Action
<a href="#">1948: A History of the First Arab-Israeli War</a>	E-book/Proceeding: 2008-01-01	OCN: <a href="#">402826490</a> ISBN: 9780300126969 <a href="#">Website</a>	<input checked="" type="checkbox"/> Held by my library <a href="#">Deselect Title</a>	<a href="#">Add to Order</a>
<a href="#">50 Reasons to Buy Fair Trade</a>	E-book/Proceeding: 2007-01-01	OCN: <a href="#">654106778</a> ISBN: 9780745325842 <a href="#">Website</a>	<input checked="" type="checkbox"/> Held by my library <a href="#">Deselect Title</a>	<a href="#">Add to Order</a>
<a href="#">Abortion Law in Transnational Perspective: Cases and Controversies</a>	E-book/Proceeding: 2014-01-01	OCN: <a href="#">888552457</a> ISBN: 9780812246278 <a href="#">Website</a>	<input checked="" type="checkbox"/> Held by my library <a href="#">Deselect Title</a>	<a href="#">Add to Order</a>
<a href="#">Abu Dhabi, the United Arab Emirates and the Gulf Region: Fifty Years of Transformation</a>	E-book/Proceeding: 2017-01-01	OCN: <a href="#">964526433</a> ISBN: 9783959400009 <a href="#">Website</a>	<input checked="" type="checkbox"/> Held by my library <a href="#">Deselect Title</a>	<a href="#">Add to Order</a>
<a href="#">Addiction and Responsibility</a>	E-book/Proceeding: 2011-01-01	OCN: <a href="#">738439014</a> ISBN: 9780262015509 <a href="#">Website</a>	<input checked="" type="checkbox"/> Held by my library <a href="#">Deselect Title</a>	<a href="#">Add to Order</a>



# Crowdsourcing Serials in WMS

**Discover Items**

My Library Holdings ▾

Title ▾

landscape architecture ?

Search Clear

[Advanced Search](#)

✕ Close All Tabs

✕ Search: Title = landscape architecture (My Library...)

✕ Landscape architecture.

**Discover Collections**

**Orders**

**Serial Issues**

**Receive and Invoice**

**Invoices**

**Budgets**

**Vendors**

**Landscape architecture. (1755527)** Details Copies (1) Holds (0) Issues 1 of 368 < >

Notes (0)

Receive Issues Manage Issues

Use this screen to receive issue(s) for your institution.

**Stop Receiving** Status: **Receiving** [Edit receiving settings](#)

From [ ] to [ ] Received ALL Search

Results 1 - 10 of 66 Rows 10 < < 1 2 3 4 5 > > ⚙

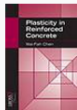
Enumeration	Chronology	First Received (All Libraries)	Last Received (My Library)	Expected Release	Type	Copies Received	Action
v.107 n.5	2017 May			05/02/2017	Basic	0 of 1	<button>Receive</button>
v.107 n.4	2017 April	03/22/2017		04/02/2017	Basic	0 of 1	<button>Receive</button>
v.107 n.4 p.Your Land	2017 April	03/23/2017		04/01/2017	Supplement	0 of 1	<button>Receive</button>
v.107 n.3	2017 March	03/01/2017		03/02/2017	Basic	0 of 1	<button>Receive</button>
v.107 n.2	2017 February	02/01/2017	02/16/2017	02/02/2017	Basic	1 of 1	<button>Unreceive</button>
v.107 n.1	2017 January	01/03/2017	01/30/2017	01/02/2017	Basic	1 of 1	<button>Unreceive</button>
v.106 n.12	2016 December	12/05/2016	12/20/2016	12/02/2016	Basic	1 of 1	<button>Unreceive</button>
v.106 n.11	2016 November	11/03/2016	11/07/2016	11/02/2016	Basic	1 of 1	<button>Unreceive</button>

# Ordering Individual records selected from WorldCat

Results 1 - 10 of 70335 (only first 5000 available.)

Rows 10

Sort by Relevance

	<p><b>1 Reinforced concrete deep beams</b> by F. K. Kong eBook, English Publisher: Glasgow : Blackie ; New York : Van Nostrand Reinhold, 1990. ISBN#: 0203034880 BUF, BUF, pcc   eng   Full, OCLC#: 62187218 <a href="#">View/Edit Metadata</a>   <a href="#">Open in Connexion</a></p>	<p>✓ Held by my library 1399 libraries hold this item</p>	<p>Add to Order</p>
	<p><b>1 Plasticity in reinforced concrete</b> by Wai-Fah Chen eBook, English Publisher: Ft. Lauderdale, FL : J. Ross Pub., ©2007. ISBN#: 9781441695796 Series: J. Ross Publishing classics NST, NST   eng   Min, OCLC#: 739120673 <a href="#">View/Edit Metadata</a>   <a href="#">Open in Connexion</a></p>	<p>✗ Not Held by my library 1082 libraries hold this item</p>	<p>Add to Order</p>
	<p><b>1 Reinforced concrete design handbook,</b> by American Concrete Institute. Print book, English Publisher: [Detroit] Published cooperatively by American Concrete Institute, Portland Cement Association, Concrete Reinforcing Steel Institute [and] Rail Steel Bar Association, ©1955. DLC, ZXC   eng   Full, OCLC#: 1609240 <a href="#">View/Edit Metadata</a>   <a href="#">Open in Connexion</a></p>	<p>✗ Not Held by my library 158 libraries hold this item</p>	<p>Add to Order</p>
	<p><b>1 Reinforced concrete</b> by R. Holland eBook, English Publisher: London : Thomas Telford, 1997. Series: Appraisal and repair of building structures OCLCE, OCLCE, dir   eng   Min, OCLC#: 605471089 <a href="#">View/Edit Metadata</a>   <a href="#">Open in Connexion</a></p>	<p>✗ Not Held by my library 18 libraries hold this item</p>	<p>Add to Order</p>

# Ordering entire collections of e-resources selected from Collection Manager

Search Collections with "iop"

Collection Actions ▾

Filter by Select Reset

Results 1 - 10 of 19 Rows 10 1 2 >>

<input type="checkbox"/>	Collection	Type / Attributes	Provider	Updated	Selections	Sharing	Action
<input type="checkbox"/>	<a href="#">Institute of Physics</a> Collection ID: openly.jsCate.iop	Knowledge base collection • Customizable	<a href="#">Institute of Physics</a>	04/02/2017 12:21 AM	⊘ Not Selected by my library Titles: 0/103 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Institute of Physics (IOP) Historic Archive 1874-2013 - DFG</a> Collection ID: global.48195.39	Knowledge base collection • Non-Customizable	<a href="#">Institute of Physics</a>	12/21/2016 06:58 PM	⊘ Not Selected by my library Titles: 0/101 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">Institute of Physics BIBSAM Journals 2014-2016</a> Collection ID: IOP.bibsam	Knowledge base collection • Non-Customizable	<a href="#">Institute of Physics</a>	12/14/2016 10:15 AM	⊘ Not Selected by my library Titles: 0/100 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">IOP CRKN Archives</a> Collection ID: IOP.crknArchive	Knowledge base collection • Customizable	<a href="#">Institute of Physics</a>	12/14/2016 03:22 AM	⊘ Not Selected by my library Titles: 0/45 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">IOP CRKN Archives Update</a> Collection ID: IOP.crknArchiveup	Knowledge base collection • Customizable	<a href="#">Institute of Physics</a>	12/14/2016 10:14 AM	⊘ Not Selected by my library Titles: 0/13 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">IOP CRKN Current</a> Collection ID: IOP.crkn	Knowledge base collection • Customizable	<a href="#">Institute of Physics</a>	12/14/2016 03:44 AM	⊘ Not Selected by my library Titles: 0/125 <a href="#">Select</a>		<a href="#">Add to Order</a>
<input type="checkbox"/>	<a href="#">IOP eBooks</a> Collection ID: IOP.ebooks	Knowledge base collection • Customizable	<a href="#">Institute of Physics</a>	03/20/2017 11:20 AM	✓ Selected by my library Titles: 0/118 <a href="#">Select</a>		<a href="#">Add to Order</a>

# Ordering Individual e-books/e-journals selected from Collection Manager

Collection: All EBSCO eBooks

Save Select Collection

Titles

Search within  
robots Search

My Selected Titles All Titles

Titles

Titles available individually  
Titles with current issues

Format

E-book/Proceeding  
Audio

Image  
Video  
Other

Journal Coverage

Full Text  
Print

Selected Full Text  
Abstracts  
Indexed

Reset

Results 1 - 10 of 215

Rows 10 << 1 2 3 4 5 >>

Title	Content Availability	Identifiers	Selections	Action
<a href="#">10 Cool Lego Mindstorm Dark Side Robots Transports and Creatures</a>	E-book/Proceeding: 2002	OCN: 51562458 ISBN: 9781931836593 <a href="#">Website</a>	Not Held by my library Select Title	Add to Order
<a href="#">Absolute Beginner's Guide to Building Robots</a>	E-book/Proceeding: 2004	OCN: 57683206 ISBN: 9780789729712 <a href="#">Website</a>	Not Held by my library Select Title	Add to Order
<a href="#">Adaptive Mobile Robotics - Proceedings Of The 15th International Conference On Climbing And Walking Robots And The Support Technologies For Mobile Machines</a>	E-book/Proceeding: 2012	OCN: 811564957 ISBN: 9789814415941 <a href="#">Website</a>	Not Held by my library Select Title	Add to Order
<a href="#">Advances In Climbing And Walking Robots - Proceedings Of 10th International Conference (Clawar 2007)</a>	E-book/Proceeding: 2007	OCN: 850163072 ISBN: 9789812708151 <a href="#">Website</a>	Not Held by my library Select Title	Add to Order
<a href="#">Advances In Mobile Robotics - Proceedings Of The Eleventh International Conference On Climbing And Walking Robots And The Support Technologies For Mobile Machines</a>	E-book/Proceeding: 2008	OCN: 820944649 ISBN: 9789812835765 <a href="#">Website</a>	Not Held by my library Select Title	Add to Order

# WMS and Knowledge Bases

- KBs result in better-integrated workflows
- Serials receiving
  - KB = Less work, Fewer errors
- Ordering
  - From WorldCat KB
  - From Collection Manager KB



# Standard Reports and Report Designer

- Standard reports
  - Part of the system
  - Contains many standard useful reports
- Report Designer
  - Add-on
  - Based on SAP business objects
  - Accreditation reports from Conspectuses
  - Useful day-to-day reports

# Community Center



Communities ▾ Directory

## Collection Manager



Community Home

Discussions

News

Events

Workflows

Enhancements

Support & Training

### Popular Links

- [Regularly Scheduled Office Hours](#)
- [Documentation List](#)
- [MARC Record Output](#)
- [Updates and Releases](#)
- [Collection Manager Roadmap NEW!](#)

### Community Workflows

- [Films on Demand: Canada](#)
- [MARC & KBART processing with Perl](#)
- [View All Community Workflows](#)

### November Product Insights

We recently hosted our first Collection Manager Product Insights session, where the product team discussed recent and upcoming enhancements, as well as showed off a some wireframes related to a release early next year.

[View the recording](#)

### Tip: Sharing Collections

Check out our newest Tip, [Options for sharing WorldCat knowledge base data with other members](#), which provides more information on types of sharing and additional things to consider

### Input Needed - MARC File Delivery

Help our team make sure we're moving ahead in the right direction, take a brief survey [HERE](#)

### Recent Discussions



Use Licence Manager data (yes / no) about Interlibrary loan to deflect Interlibrary loan requests

Jeff Simon Posted 20 January 2017 in Forum-Collection Manager



### News

06 February 2017

[JIT WorldCat knowledge base data updates for January 30-February 3, 2017](#)

This JIT (just-in-time) update contains information about new content providers and collections that are now available in the WorldCat kn ...

### Upcoming Events

13 February 2017

[Product Insights: Collection Manager](#)

19 February 2017

[WorldCat knowledge base scheduled maintenance - 19 February 2017](#)

06 May 2017

[Product Insights: Collection Manager](#)

07 February 2017

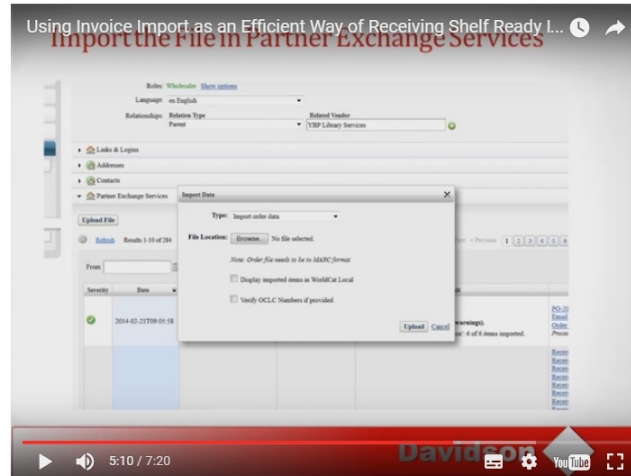
# Remote and Video training

## Acquisitions

Community Home Discussions News Events Enhancements Support & Training

Workflow Video

Using Invoice Import as an Efficient Way of Receiving Shelf Ready Items



Presenter: Craig Milberg, Asst Director, Discovery Services, Davidson College

Recorded: Feb 27, 2014

# Challenges and Opportunities

# Some WMS Challenges

- Loss of internet/OCLC services
- We rely heavily on one service provider (OCLC)
- Patrons see what other libraries have
- Conceptual and skill set changes

# Opportunities for new service models

- Location independence
- Any computer/ tablet/ phone with a browser is a potential workstation
- Going to users rather than making them come to you



# Thank you

Thomas Hodge [thodge@aus.edu](mailto:thodge@aus.edu)  
Assistant University Librarian, AUS

Elisabetta Morani - [emorani@johncabot.edu](mailto:emorani@johncabot.edu)  
Head Librarian, John Cabot

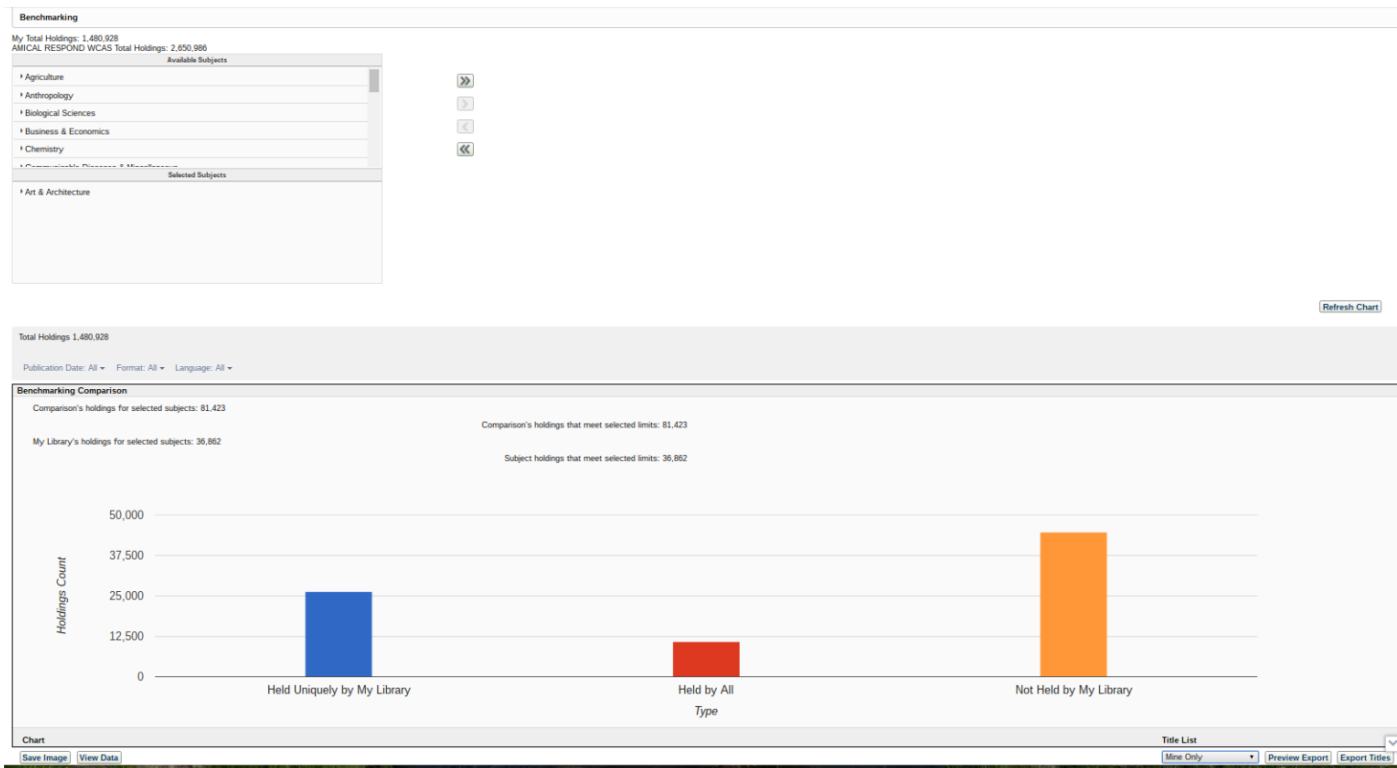
# Evaluating the Change : Mildly interesting numbers



# Understanding a new environment

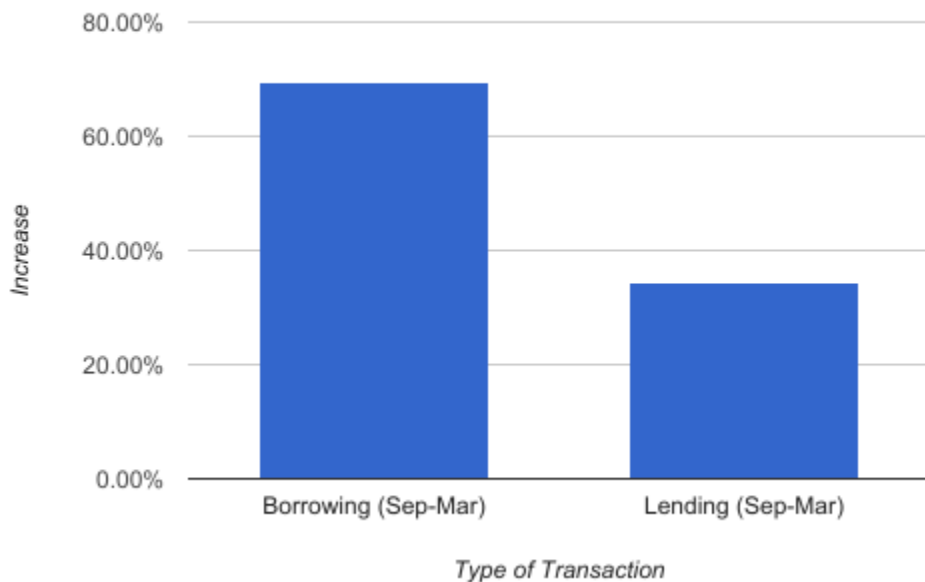
- Comparing ourselves to other libraries
- Impact on resource sharing
- User behavior after migration

# Collection Evaluation and ILL

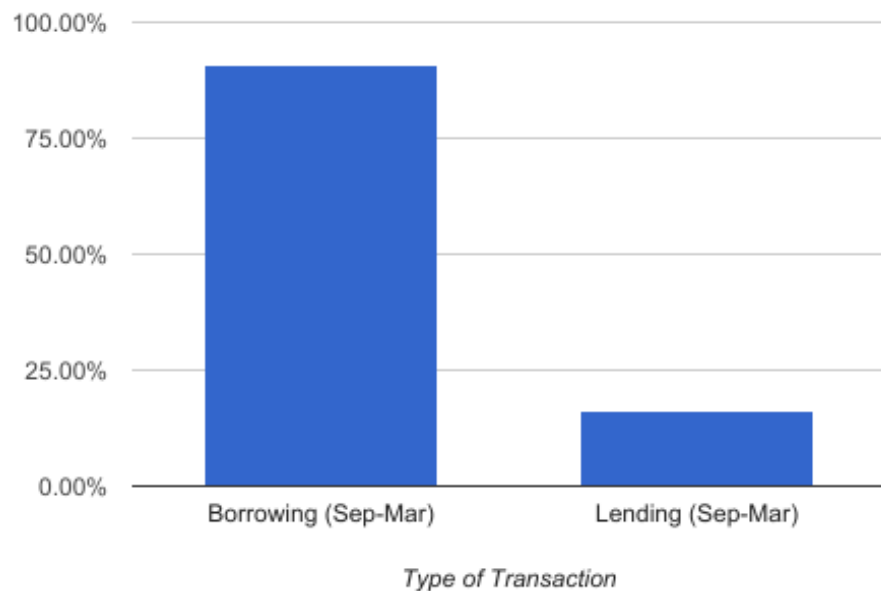


ILL / Document Delivery Impact

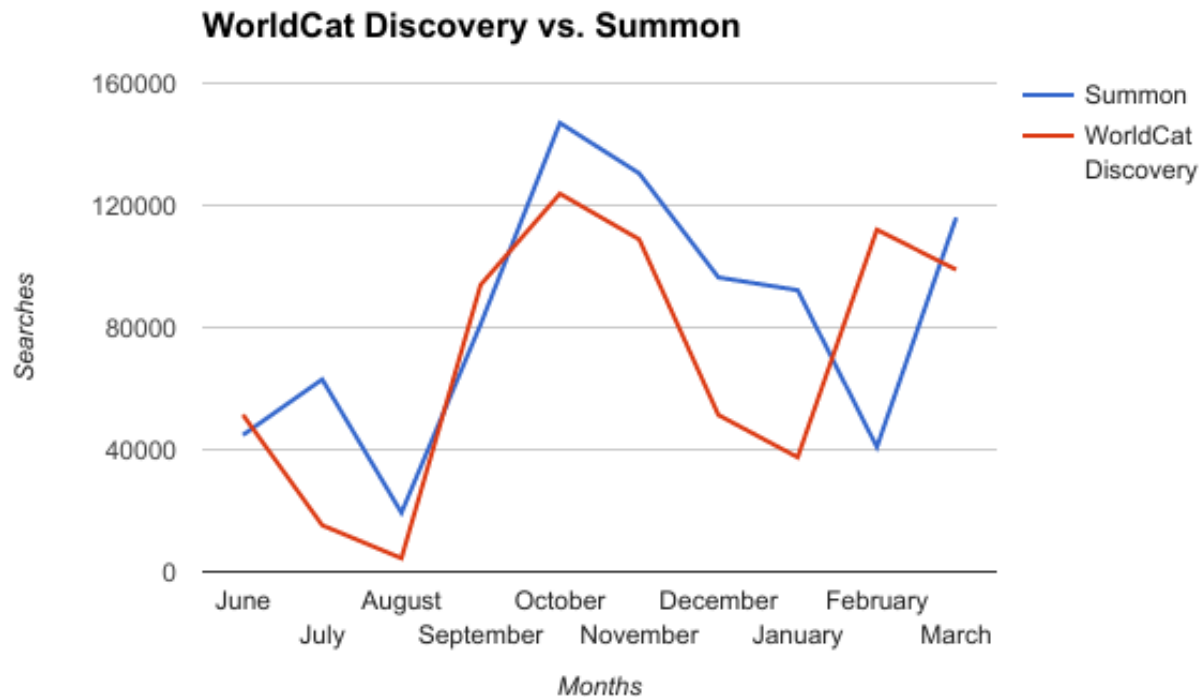
**Transaction Increases vs. Type of Transaction**



**\$\$\$ Increase vs. Type of Transaction**



## Summon vs WC Discovery Searches



## Evaluating Summon vs WCD

### Original Tabulation

	Summon	WorldCat
Successful linking to resources	95.88%	83.91%
Result relevance	3.794871795	3.564102564
Result quality	3.794871795	3.743589744

### Adjusted for Configuration Errors

	successful links to articles	only successfully linked to journal	overall success
Summon	91.76%	4.12%	95.88%
WorldCat original tabulation	75.86%	8.05%	83.91%
WorldCat adjusted tabulation	84.71%	7.64%	92.36%