Agenda:

- Introductions
- Review of services and resources available for Illinois libraries
- Overview of WorldShare and WorldCat – the intersection of workflow and data access
- Demonstration of the Illinois Group Catalog – https://illinois.on.worldcat.org
- Transition of FirstSearch to WorldCat Discovery Services (How are you currently using FirstSearch in your library operations and patron service? Services will run in parallel until FirstSearch is retired; libraries can use both services during this time and provide feedback.)
- Does your library need their own WorldCat Discovery URL? Decision flowchart and next steps.
- Configuration considerations for WorldCat Discovery to maximize WorldShare ILL workflows and patron interaction (Demonstration of patron-initiated ILL request from Discovery; staff submission of article request from Discovery)
- Managing Metadata and extending e-Resource access (Demonstration of Collection Manager and database content selection)
What services do you get with a cataloging contract?

Metadata Services include Collection Manager and Record Manager for managing both physical and electronic collections.

What services do you get with a resource sharing contract?

What services do you get with a FirstSearch/WorldCat Discovery contract?

You can transition to WorldCat Discovery at any time. FirstSearch and WorldCat Discovery will run in parallel. The sooner you transition to WorldCat Discovery, the longer your opportunity to provide feedback to the community which helps inform the development efforts.
WorldCat is a set of databases that together comprise the most comprehensive global network of data about library collections and services. WorldCat data is contributed, maintained and shared by libraries around the world. It is managed and enhanced by OCLC.

WorldCat Discovery Services is an integrated suite of cloud-based applications that enables people to discover those resources.

WorldShare provides a set of library management applications and platform services.
This is a visual model of where data is pulled from and displayed within WorldCat Discovery.

John McCullough, OCLC Product Manager for Discovery Services responded on the WORLDCAT-DISCOVERY-L list on October 3, 2014:

Central Index vs Knowledge Base

Regarding the distinction between the License Databases and the Knowledge Base, I understand your confusion – the same databases and providers appear in both, which appears redundant or confusing. The way I think about these is using the model of WorldCat. WorldCat at its core has two levels: a database of all the book titles held by the cooperative’s libraries (some 320M of them) and also a database of all of the holdings in the cooperative’s libraries – which libraries hold which of those titles. The electronic equivalent of this is similarly twofold. OCLC’s Central Index of article metadata – intended to be a searchable aggregate all of the articles in the world – is basically the electronic equivalent of WorldCat’s 320M titles. The Knowledge Base is the electronic equivalent of WorldCat holdings – it’s how you identify whether your library “holds” (i.e. has access to) a specific article or eBook.

The Licensed Content and Databases area of Service Config manages the Central Index. For Discovery, the Central index provides the metadata which users can search against and which displays fields like title, author etc for a given article or eBook in the interface. The Knowledge Base then determines those parts of the experience which pertain to whether your library “holds” or has access to that article or eBook – i.e. should a link to full-text appear on that article, and should that article sort as “locally held” in the results. The Central Index (Licensed Content and Database module) drives discovery of e-content; the Knowledge Base powers fulfillment of e-content.

If you set up a given database (say JSTOR) in the Knowledge Base but not the Central Index, you will have set up the part of the system that offers a full-text link from a JSTOR article once it is found, but NOT the part of the system which returns JSTOR articles in the search results! In many cases you may have some of those articles from other providers, so users will retrieve them if you’ve set up another major aggregator – but any articles unique to JSTOR will not appear in search results in Discovery if it’s not set up in the License Content and Database section. So the double setup is critical to a complete discovery and fulfillment experience.
This diagram isn’t meant to alarm you 😊 Rather, it shows within one key application area (WorldShare ILL), how other information, interfaces, and applications intersect in the daily workflows of library operations.

This represents the tools and workflows covered in just one of our curriculum areas, WorldShare ILL.
The Illinois libraries landscape for sharing. This concept diagram is credited to Veronda Pitchford, RAILS. No wonder resource sharing can lead to misconceptions – which sharing did you mean?
All libraries in Illinois can provide access to the Statewide Illinois Catalog at http://illinois.on.worldcat.org to staff and patrons. Scoping by geographic area within the state helps identify libraries that hold a title.
If your library does not participate in the cataloging and resource sharing (ILL) services, you will not use a custom URL. Instead you will provide access to your patrons and staff to the Statewide Illinois Catalog.

While you do not need to request a custom URL if you have cataloging and resources sharing subscriptions, a customized Discovery URL extends the Discovery experience for both staff and patrons. To take advantage of these features, your library will need to customize the Discovery interface. We have detailed training classes and videos on configuration.

**WorldCat Discovery Services** Support, Training & Documentation

http://www.oclc.org/support/services/discovery.en.html
Anyone can search in your library’s WorldCat Discovery interface by visiting your URL. Patrons do not need to create accounts to use the patron features.

By creating staff accounts, your staff can see additional information in WorldCat Discovery.
Notice the MARC record button that will display the Description in MARC format. You will be able to see the complete record.
Once your WorldCat Discovery account is set up and linked to the same account used for WorldShare ILL, you will be able to search within Discovery to locate items requested by your patrons and staff.

When you have the matching bib record, click the Staff ILL Request button to transfer the bib data directly to WS ILL, so all you need to do is select potential lenders and create the request.

This process works for both loans and article copies.
Once authenticated with a staff login, you can use the “li” index label in searches to check specific library holdings, including your own.

You can add other search terms and/or qualifiers to narrow this result set: for example:

`li:tsf NOT x0:Jrnl NOT x0:artchap` -- searches symbol TSF but excludes journals AND articles/chapters

You are not limited to searching only your library symbol. If you have a partner library, or a library in your consortium and you want to check whether they hold a certain title or what they have in a certain subject area, you may combine this search with other search terms, For example: this searches a different library but adds the same qualifiers as above: `li:c5u NOT x0:Jrnl NOT x0:artchap` -- different library (CONCORDIA UNIVERSITY, LIBRARY IRVINE, CA 92612-3299)

Or combine search terms with the OCLC symbol search: `mathematics Number Theory AND li:c5u`
This diagram includes the steps for the workflow with Direct Request profiles added to the interlibrary loan cycle.

After the patron fills out the request form and submits the request, a few different things can happen.

If the Borrowing library has no profile set, or the request submitted by the patron does not match the Direct Request profile, the request will get routed to the Borrowing library’s New for Review queue like it normally would—effectively following the path labeled “A” on the diagram—a Patron-initiated, Staff-mediated request.

But, if the patron-submitted request does match on the Direct Request profile the library has established, then the steps in path “B” on this diagram will be followed: the system will filter the request, and send the request the lenders in the Custom Holdings Paths that the Direct Request profile points to, and thus bypass the Borrowing library’s New for Review queue and send the request directly to lending libraries. This is known as a Patron-Initiated, Unmediated request, and the Direct Request profile is the feature in WorldShare ILL that allows for this Unmediated process to take place.
We can easily stop all requests for e-resources from coming into our queues by setting a deflection policy based on format.

From the OCLC Policies Directory, within the Policy tab we will create a deflection policy, selecting the formats we will not lend or copy. In the case of electronic content, consider whether you want to automatically say no to both copy and loan requests. The system will automatically process these “no” responses on our behalf.

It is helpful to use the Policies Directory Profile to communicate your lending policies to requesting libraries. From the Profile tab, you can indicate that electronic resources are non-circulating.

Choose all the electronic content formats you wish to deflect. By selecting
- Computer file
- e-audiobook
- e-serial
- e-text
- internet resource
all electronic content should be deflected
The policy we set up is very broad and comprehensive in deflecting electronic formats. If your library wants to provide copies of articles from e-journals, a policy this restrictive will prevent that option. So, review the deflection policy that matches your lending policies and staffing levels.
If your library maintains electronic collections through the knowledge base, using Collection Manager, you can set E-License terms related to interlibrary loan per collection. This level of detail allows deflection to be applied based on licensing terms.

Approach the building of knowledge base collections and making them accessible for resource sharing using the following steps. This work is generally managed by your electronic resources librarian. ILL staff should work with them to fine-tune how best to respond to ILL requests for articles in these collections.

First, add your collections to the knowledge base from Collection Manager which is included with your full cataloging subscription.

Next, depending on the subscription services your library has, you can manage ILL terms of usage or E-License terms within Collection Manager, or using an added service, License Manager.

Using Service Configuration, turn on knowledge base settings in the WorldShare ILL configuration to activate a link to your knowledge base collections for enhanced interlibrary loan of articles, including display of ILL terms of use within the WorldShare ILL request form.
Finally, to have the system automatically say no to requests for titles within your knowledge base collections which do not allow resource sharing, set a deflection policy in the OCLC Policies Directory.
If you have collections that cannot be shared through ILL, indicate this restriction in the ILL terms of use. Since some licenses forbid sharing, it will save staff time and potential license violations by setting up a deflection policy based on E-License terms.

If the terms are set to No, automatically deflect requests for titles or articles within those collections.
The service is highly configurable and therefore can seem overwhelming in the options. Start using Discovery now, and as you learn more extend the functionality with more customized configurations. This does not have to be done immediately. Explore, extend, enhance, engage.
Use Case Example 1

Scenario:
Your library does not participate in the Group Services contract for cataloging, resource sharing, and holdings representation in the statewide catalog.

Recommended Actions:
Provide access to the IL Statewide Group Catalog on your website for patrons to search titles and holding libraries throughout the state.

Share information with staff of the availability of the IL Statewide Group Catalog.

https://illinois.on.worldcat.org

This scenario represents what libraries may want to consider if they do not participate in the Group Services contract which include cataloging and resource sharing. All libraries in Illinois can provide patron access to the Illinois group catalog – https://illinois.on.worldcat.org
Use Case Example 2

**Scenario:**
Your library has an existing discovery interface which serves as your main patron interface.

Your library holdings are up-to-date in your own OPAC; this information may be updated periodically in OCLC.

Your reference staff works with patrons when they want to request material not held by the library.

**Recommended Actions:**
Provide access to the IL Statewide Group Catalog on your website for patrons to search titles and holding libraries.

Configure your custom Discovery URL to serve reference and public service staff, allowing them to place an ILL request on a patron’s behalf, or directly submitting to WSILL with appropriate staff permissions.

Provide staff accounts for viewing MARC records in Discovery and searching by OCLC symbol.

This example reflects a common scenario where a discovery interface is tied to your existing integrated library system which reflects current state of holdings. Your library or consortia may only periodically update holdings in WorldCat, as such it does not reflect the same accuracy of your own catalog.

As an added resource, provide access to your patrons to the IL Statewide Group Catalog which will allow them to search all of WorldCat and look for libraries within the state that have the title.

With your cataloging and resource sharing contract, you can take advantage of the features of WorldCat Discovery Services to extend the research reach of your staff when assisting patrons. Configure your Discovery URL to best suit the activities of your staff so that it is a tool for discovery and fulfillment. For example, you could enable the ILL fulfillment button for staff to submit requests on behalf of patrons.
If your library wants to further take advantage of the services available in your contract, you can provide WorldCat Discovery as an option for your patrons. Remember that holdings will be reflected based on OCLC WorldCat holdings information, so you need to consider your current practices for updating that information.

As a cataloging subscriber, libraries can request access to Collection Manager to add their e-resource collections to the knowledge base. The knowledge base serves as an indicate of holdings of these resources. By maintaining your collections in the knowledge base, using Collection Manager, you can extend access to those resources in Discovery. E-resources can also be added through auto-load of library-specific collections from certain providers and through Pubget.

Patrons can then access both print and electronic library resources from the single WorldCat Discovery interface.
You’ve configured your electronic collections and patrons are being more self-reliant. You may want to take advantage of their interest and knowledge, giving them more control over the process of requesting titles through ILL. A Direct Request Profile can be configured which allows certain ILL requests to be send to lenders in custom holdings paths. This allows unmediated submission of ILL requests that match the profile, freeing up ILL staff time.

Additionally, you are committed to resource sharing and have been diligent in negotiating e-resource licenses which allow lending through ILL. By entering these license terms in Collection Manager within the collection settings, you can automate saying “no” to ILL requests which cannot be provided, and allow those that can to enter your request queue.
The Community Center can be accessed directly from WorldShare. To participate in the discussion, be sure to complete your community profile.

Training and additional resources are available from the Support & Training link within the WorldShare Circulation Community. You must be authenticated through the community center before accessing these resources.
If you have not started your transition, register for your custom URL.

Bookmark these links for additional information on the services you have available, configuring your Discovery experience to best match your library’s workflows, staff and patron needs.