

08.10.2024

Amersfoort (NL)



OCLC CONTACTDAG
De toekomst is nu

WorldShare Management Services, now and in the future

Maximilien Sangoi

Senior Product Manager

#OCLCNL24



OCLC CONTACTDAG

De toekomst is nu

Welkom



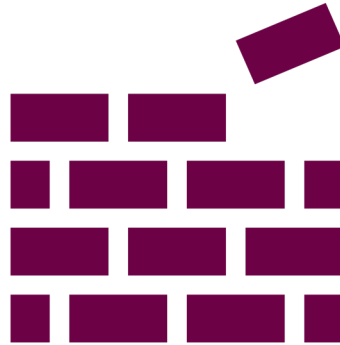
Maximilien Sangoi

WMS Senior Product Manager EMEA

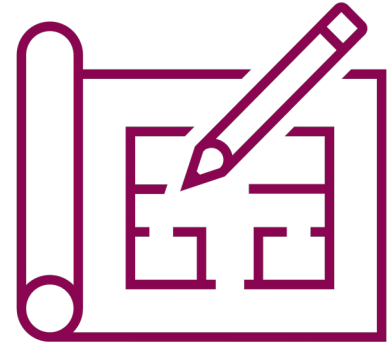
Today's Themes



Latest Deliveries



Product Roadmap



**Upcoming Projects
and Developments**

Latest deliveries



Latest deliveries

Latest deliveries

Oct
2023



Improvements
on budget
management

Latest deliveries

 WorldShare[®]
Acquisitions

**Oct
2023**

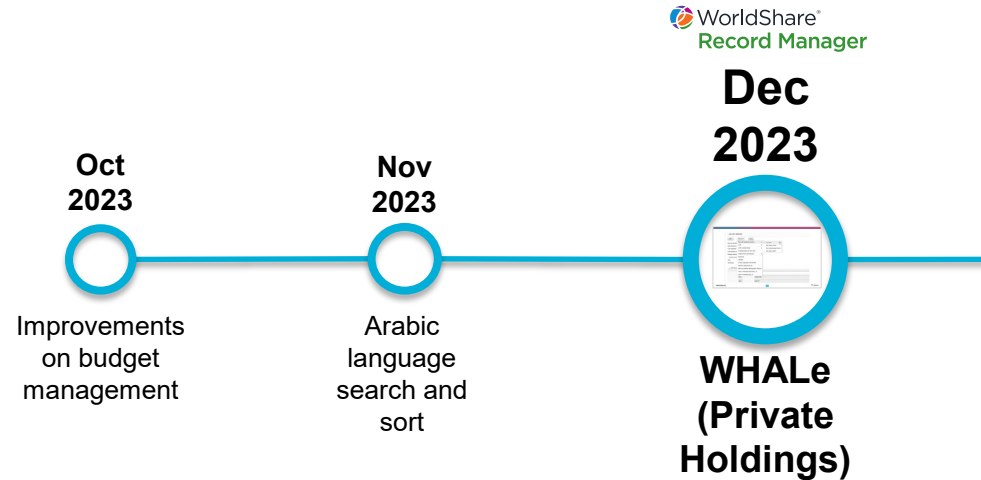


**Improvements
on budget
management**

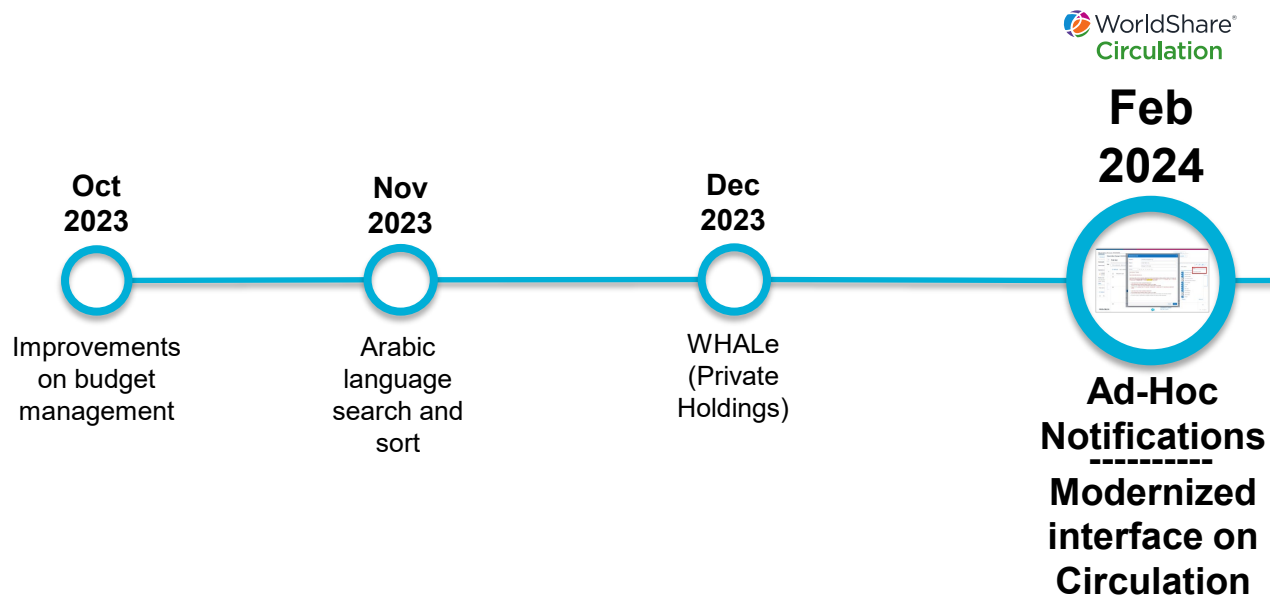
Latest deliveries



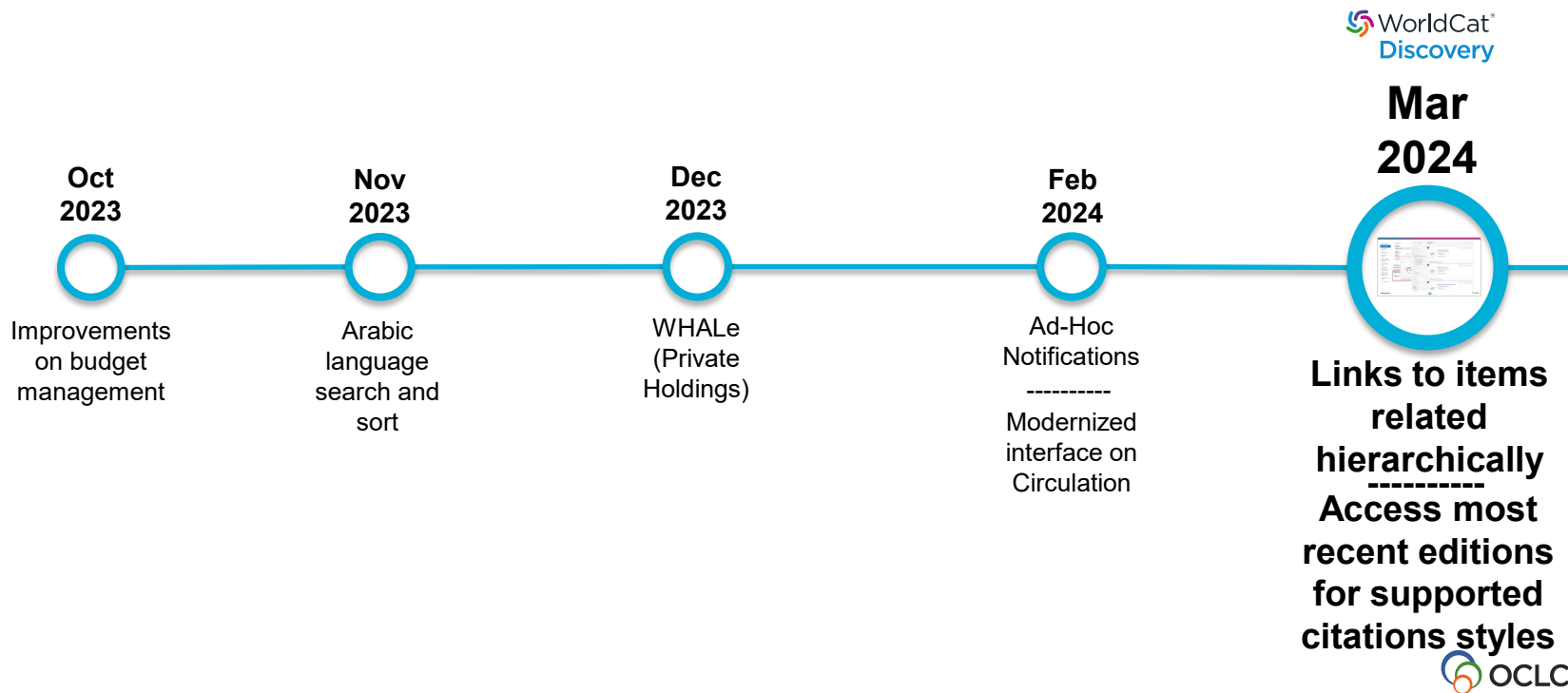
Latest deliveries



Latest deliveries



Latest deliveries



Latest deliveries



**Apr
2024**



**Share public
user notes
with the
library user**

**Mar
2024**

Links to items
related
hierarchically

Access most
recent editions
for supported
citations
styles

**Feb
2024**

Ad-Hoc
Notifications

Modernized
interface on
Circulation

**Dec
2023**

WHAle
(Private
Holdings)

**Nov
2023**

Arabic
language
search and
sort

Latest deliveries

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Share public
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library user

WorldShare[®]
Record Manager

May
2024



**Connections
Record Manager
– WC Entities**

Latest deliveries

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Connections
Record
Manager –
WC Entities

WorldCat[®]
Discovery

Jun
2024



**Filter search
results for
physical journals**

**View License
Terms of use for
individual titles**

Latest deliveries

**Mar
2024**



Links to items related hierarchically

Access most recent editions for supported citations styles

**Apr
2024**



Share public user notes with the library user

**May
2024**



Connections Record Manager – WC Entities

**Jun
2024**



Filter search results for physical journals

View License Terms of use for individual titles

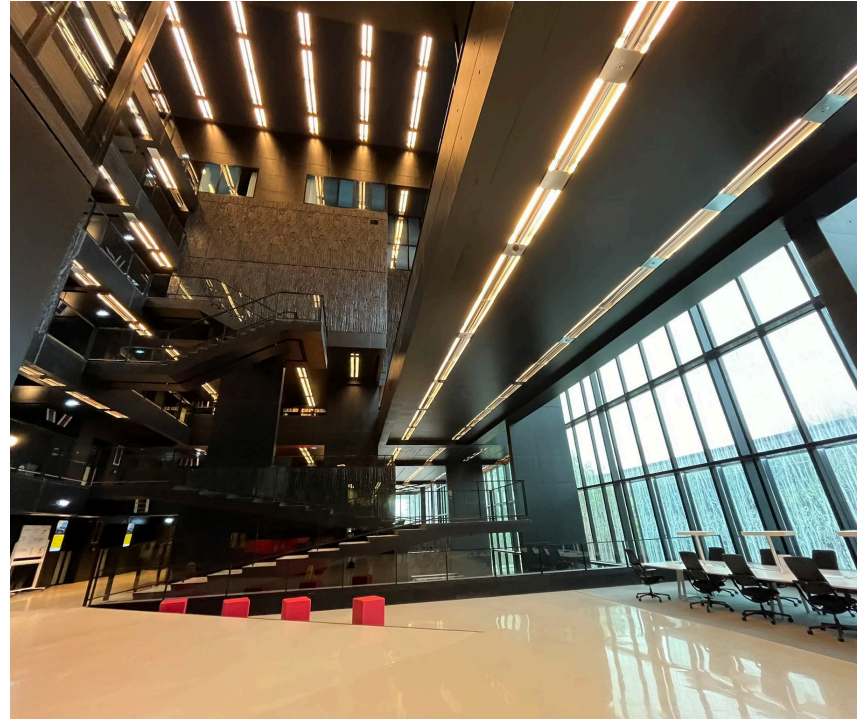
 WorldShare[®]
Acquisitions

**Aug
2024**



**Recommended
custom fields**

Roadmap



WorldShare
Acquisitions

- Prevent over-expenditure when paying invoice based on cash balance

WorldShare
Circulation

- NextGen Notifications:
 - Loans (part 1)
 - Export account overview
- Smart Recalls

WorldShare
Collection Manager

- Bulk select and deselect titles within a collection

WorldCat
Discovery

- Benefit from reduced duplication in search results
- Accessibility enhancements
- Expand search results to include book reviews, newspaper articles

WorldShare
Record Manager

- Automatically filter to branch on the Copies screen based on user's branch selection

WorldShare
Reports & Report Designer

- View reports in Microsoft Power BI (Part 1)
- Refreshed user interface on the SAP Business Objects platform

WorldShare Acquisitions	<ul style="list-style-type: none"> Prevent over-expenditure when paying invoice based on cash balance 	<ul style="list-style-type: none"> Support COUNTER 5.1
WorldShare Circulation	<ul style="list-style-type: none"> NextGen Notifications: <ul style="list-style-type: none"> Loans (part 1) Export account overview Smart Recalls 	<ul style="list-style-type: none"> NextGen Notifications: <ul style="list-style-type: none"> Email alert to staff Resent/print/view notification from History
WorldShare Collection Manager	<ul style="list-style-type: none"> Bulk select and deselect titles within a collection 	
WorldCat Discovery	<ul style="list-style-type: none"> Benefit from reduced duplication in search results Accessibility enhancements Expand search results to include book reviews, newspaper articles 	<ul style="list-style-type: none"> Display of additional Marc fields: <ul style="list-style-type: none"> 788 (Parallel description in another language of cataloguing)
WorldShare Record Manager	<ul style="list-style-type: none"> Automatically filter to branch on the Copies screen based on user's branch selection 	
WorldShare Reports & Report Designer	<ul style="list-style-type: none"> View reports in Microsoft Power BI (Part 1) Refreshed user interface on the SAP Business Objects platform 	<ul style="list-style-type: none"> View reports in Microsoft Power BI (Part 2)

WorldShare Acquisitions	<ul style="list-style-type: none"> Prevent over-expenditure when paying invoice based on cash balance 	<ul style="list-style-type: none"> Support COUNTER 5.1 	<ul style="list-style-type: none"> Controlled Access to Budgets
WorldShare Circulation	<ul style="list-style-type: none"> NextGen Notifications: <ul style="list-style-type: none"> Loans (part 1) Export account overview Smart Recalls 	<ul style="list-style-type: none"> NextGen Notifications: <ul style="list-style-type: none"> Email alert to staff Resent/print/view notification from History 	<ul style="list-style-type: none"> NextGen Notifications: <ul style="list-style-type: none"> Loans (part 2)
WorldShare Collection Manager	<ul style="list-style-type: none"> Bulk select and deselect titles within a collection 		<ul style="list-style-type: none"> Export data in KBART format for more than one knowledge base collection at a time Create and populate a WorldCat knowledge base collection using a query collection
WorldCat Discovery	<ul style="list-style-type: none"> Benefit from reduced duplication in search results Accessibility enhancements Expand search results to include book reviews, newspaper articles 	<ul style="list-style-type: none"> Display of additional Marc fields: <ul style="list-style-type: none"> 788 (Parallel description in another language of cataloguing) 	<ul style="list-style-type: none"> Modernized advanced search preview
WorldShare Record Manager	<ul style="list-style-type: none"> Automatically filter to branch on the Copies screen based on user's branch selection 		
WorldShare Reports & Report Designer	<ul style="list-style-type: none"> View reports in Microsoft Power BI (Part 1) Refreshed user interface on the SAP Business Objects platform 	<ul style="list-style-type: none"> View reports in Microsoft Power BI (Part 2) 	<ul style="list-style-type: none"> View reports in Microsoft Power BI (Part 3) Author custom report designer reports

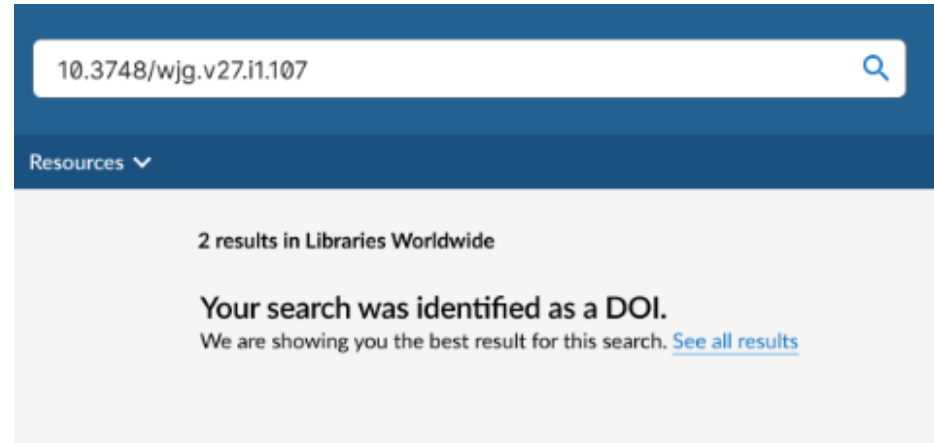
Upcoming Projects and Developments



AI enhanced search queries

- **Automatically detect** key identifiers such as ISBN, ISSN, or DOI to find known items
- **Search by citations** to speed up research discovery
- **Disambiguate searches** by identifying a search as a work, person, concept, place, event, or organization to refine down to the best resources

Draft concept



10.3748/wjg.v27.i1.107

Resources ▾

2 results in Libraries Worldwide

Your search was identified as a DOI.
We are showing you the best result for this search. [See all results](#)

WorldCat Entities

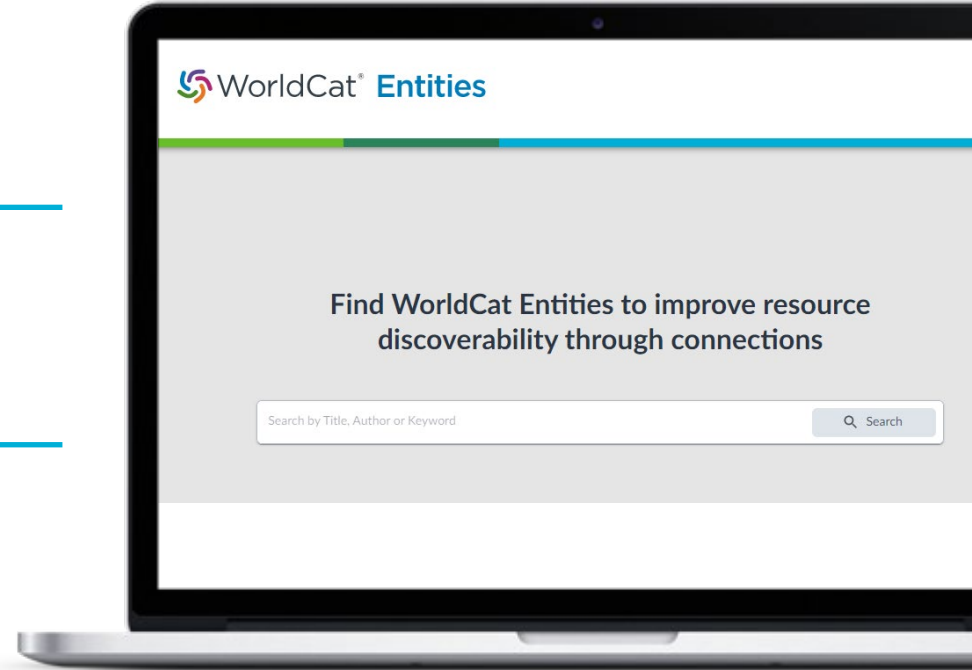
More than 150M entities searchable on publicly available website

Entities contain descriptions of creative Works, Persons, Places, and Events (with more types coming)

Library metadata specialists can look up entity URIs and make new connections that empower discovery and research

entities.oclc.org

#OCLCNL24

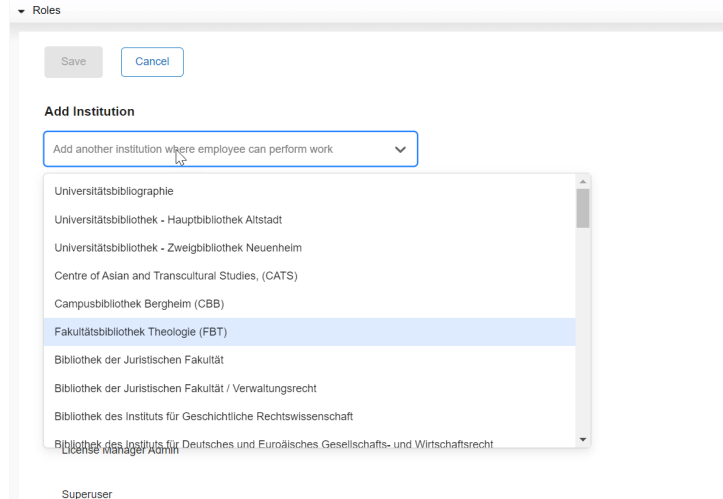


Branch-based Acquisitions

- For some libraries, each branch does their own acquisitions.
- Acquisitions will allow each branch to manage its own:
 - Funds
 - Orders
 - Invoices
 - Renewal lists
 - Purchase requests
 - Automated jobs

Branch-based Acquisitions

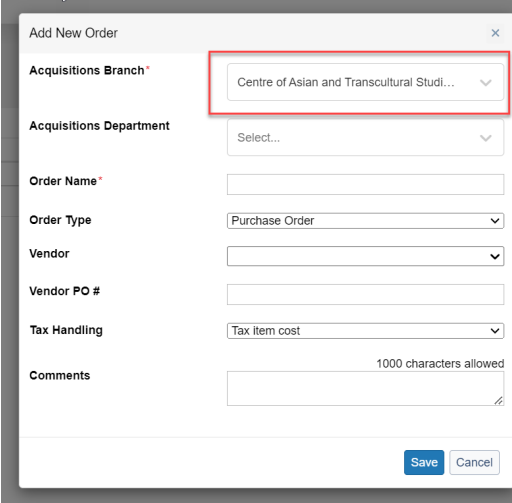
- Library can assign branch-specific permissions to each user:



The screenshot shows a web interface for managing roles. At the top, there is a dropdown menu labeled 'Roles'. Below it are two buttons: 'Save' and 'Cancel'. The main section is titled 'Add Institution' and contains a text input field with the placeholder text 'Add another institution where employee can perform work'. A dropdown menu is open below the input field, displaying a list of institutions. The institutions listed are: Universitätsbibliographie, Universitätsbibliothek - Hauptbibliothek Altstadt, Universitätsbibliothek - Zweigbibliothek Neuenheim, Centre of Asian and Transcultural Studies, (CATS), Campusbibliothek Bergheim (CBB), Fakultätsbibliothek Theologie (FBT), Bibliothek der Juristischen Fakultät, Bibliothek der Juristischen Fakultät / Verwaltungsrecht, Bibliothek des Instituts für Geschichtliche Rechtswissenschaft, and Bibliothek des Instituts für Deutsches und Europäisches Gesellschafts- und Wirtschaftsrecht. The 'Fakultätsbibliothek Theologie (FBT)' option is currently selected and highlighted in blue. At the bottom of the window, the text 'Superuser' is visible.

Branch-based Acquisitions

- When creating an order, invoice, etc. the user can assign an “Acquisitions Branch” to their data:



The screenshot shows a web form titled "Add New Order" with a close button (X) in the top right corner. The form contains several fields:

- Acquisitions Branch***: A dropdown menu with the selected option "Centre of Asian and Transcultural Studi..." highlighted by a red rectangular box.
- Acquisitions Department**: A dropdown menu with the text "Select..." and a downward arrow.
- Order Name***: A text input field.
- Order Type**: A dropdown menu with the selected option "Purchase Order" and a downward arrow.
- Vendor**: A dropdown menu with a downward arrow.
- Vendor PO #**: A text input field.
- Tax Handling**: A dropdown menu with the selected option "Tax item cost" and a downward arrow.
- Comments**: A text area with a character limit of "1000 characters allowed" and a small icon in the bottom right corner.

At the bottom right of the form, there are two buttons: "Save" (in blue) and "Cancel" (in white).

Branch-based Acquisitions

- Users from ANY branch can VIEW acquisitions data for all branches.
- But users can only CREATE, EDIT, and DELETE data for THEIR OWN branch.

Next-Generation Notifications

Delivered	2024	2025		2026			
<p>Improve monitoring of patron notifications with enhanced notification history</p> <p>Use the new Miscellaneous notification to send a custom message to a patron</p> <p>Configure My Account's Profile tab to control which communication preferences display to your users</p> <p>Configure My Account to display public patron notes to your users</p>	<p>Account Overview Confirmation notifications to share summary and detailed information with a patron</p> <p>Use new loan overdue billing options to charge bills on a schedule before an item is returned</p> <p>Use the new loan notifications to improve communication with patron as items are checked out, renewed, and returned to the library (part 1)</p> <p>View more information about loan overdue billing details and status information in My Account</p>	<p>Email Alert when unable to deliver a notification to a patron</p> <p>Resend or print a notification directly from a patron or item's notification history</p>	<p>Use the new loan notifications to improve communication with patron as items are checked out, renewed, and returned to the library (part 2)</p>	<p>Use the new hold notifications to improve communication with patrons during the lifecycle of a request</p> <p>Use the new patron membership and suspension notifications</p> <p>New notification features in the WMS Sandbox</p>	<p>Use the new billing notifications to improve communication with patrons as bills are created and resolved in WMS</p> <p>Use the new item scheduling notifications</p>	<p>Configure text message content to be generated from WorldShare Circulation</p>	<p>Use the new room scheduling notifications</p> <p>Configure improved slips for library staff</p>

Ursula Under

Checkout

Account overview

Enter barcode *

Refresh Last

Format

Renew

Account overview confirmation

Channel:

Recipient:

Reply to:

Subject: WMS University Library: Your account



Hello Ursula,

The following is an overview of your library account. You may view the current status of your account at any time by logging into [My Account - Checkouts](#).

Account Summary

Your library account will expire on Thursday, September 25, 2025

Your account's current block status: No. If your account is blocked, please contact library@university.edu for assistance.

Overdue Loans

You have 2 loan(s) **overdue**.

Please note that you will be charged the full replacement cost and a non-refundable processing fee for overdue materials if you fail to return them before the long overdue date.

Title	Item Call Number	Automatic renewal?	Due Date/Time
Papers of Roland Thaxter,	THAXR Box 1 1	No	Thursday, June 27, 2024, 10:15:00 AM Eastern Daylight Time
Sailing alone around the room : new and selected poems /	PS3553.O47478 S25 2001 1	No	Monday, July 15, 2024, 11:59:59 PM Eastern Daylight Time

Cancel Send

New Reports and Report Designer

The screenshot shows the WorldShare interface. At the top, there is a navigation bar with the WorldShare logo on the left and user information on the right: "Need Help? User support info" and "Max Sangol". Below the navigation bar is a menu with the following items: Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The main content area displays a report titled "Alert". The report header shows "Received" and "Alert". Below the header, the report content area is empty, displaying "No data to display". At the bottom of the report content area, there are two buttons: "Compose Alert" on the left and "Delete All Rows" on the right. In the bottom right corner of the interface, there are two icons: a circular refresh icon and a checkmark icon.

Reports platform timeline

By the end of 2024	By June 2025	By end of 2025
View reports <ul style="list-style-type: none"><input type="checkbox"/> Circulation events<input type="checkbox"/> Patron information<input type="checkbox"/> Local holding record<input type="checkbox"/> Serials received<input type="checkbox"/> Circulation fiscal transactions<input type="checkbox"/> New and removed titles<input type="checkbox"/> Circulation item status<input type="checkbox"/> Acquisitions<input type="checkbox"/> Collection holdings	View reports <ul style="list-style-type: none"><input type="checkbox"/> Circulation holds<input type="checkbox"/> ILL (Tipasa, Resource Sharing for Groups)<input type="checkbox"/> COUNTER 5 reports<input type="checkbox"/> E-resources title overlap<input type="checkbox"/> Acquisitions vendor<input type="checkbox"/> Title holdings<input type="checkbox"/> Circulation scheduled items Author reports <ul style="list-style-type: none"><input type="checkbox"/> Create custom reports	Additional functionality <ul style="list-style-type: none"><input type="checkbox"/> Schedule reports<input type="checkbox"/> Share your reports<input type="checkbox"/> View shared reports<input type="checkbox"/> Create and view group reports

Overlap period with full PowerBI and Business Objects Jan – June 2026

Open Access workflows

- **Ongoing:** NISO Operationalizing Open Access Business Processes Working Group
- **Phase 1:** Support for entering invoice data for open access processing charges for articles.
- **Phase 2:** Support for library management of author requests for payment of open access processing charges (including approval, affiliation check, etc.)
- **Phase 3:** Integration with OA ecosystem, e.g. publisher dashboards to ingest requests (to reduce re-keying by libraries), in particular OA Switchboard

Library defined roles

- Create task inventory ('check out')
- Assign tasks to users
- Don't have to use OCLC-supplied templates for roles

- Sets foundation for:
 - Medical leave function
 - Batch management (student workers)
 - Task Management workflows

Bedankt!

Maximilien Sangoi

Senior Product Manager

sangoim@oclc.org