Transforming ILL
What OCLC's WorldShare will mean to you

Katie Birch
Portfolio Director
birchk@oclc.org
But first, this....
Most requested titles in FY12?

**NUMBER 1**

- 5299 Requests
- Rank 2011 – #24
- $2.02 Amazon price
- Movie released 23 March 2012

**NUMBER 2**

- 4213 Requests
- Rank 2011 – #39
- $10.51 Amazon price
And more....

**NUMBER 3**
- 2606 Requests
- Rank 2011 – #11
- $9.87 Amazon price

**NUMBER 4**
- 2486 Requests
- 2012 new entry
- $9.33 Amazon price
- Published 3 April 2012
It's really FIVE Shades Of Grey: Analysis reveals that only one in ten finishes the bestseller - and we prefer the original trilogy.

By ROB WAUGH

PUBLISHED: 16:04 EST, 11 August 2012

They are spotted everywhere - wide-eyed and open-mouthed, gripped to Fifty Shades Of Grey.

But next time you see someone reading this summer's racy bestseller, don't leap to any conclusions about which passages they are poring over.

For it's very likely they are reading one of the lengthy exchanges between lovers Anastasia Steele and Christian Grey in which there is nothing more than talk – fully clothed.

The revelation comes from electronic data which also reveals that readers might be male, not female.

E. L. James's novel is now the bestselling book in the UK since records began, with more than 5.3 million copies sold in paper and ebook forms.

About 70 per cent of readers bought it in the electronic format – and this technology has revealed intriguing titbits about how we read the book.

Data collected by Kobo, the firm which makes eBook readers sold by WH Smith, shows that only 18,000 readers using the system who rated the book after buying it have finished it so far – just 10.5 per cent of a total of 170,000.
Top 10 requested titles in WorldCat Resource Sharing last FY

Predictions?
http://www.rwa.org/cs/the_romance_genre/romance_literature_statistics/industry_statistics

Bowker’s Monthly Tracker shows that e-book sales of romances have proportionally doubled in one year, up from 22 percent in the first quarter of 2011 to 44 percent in the first quarter of 2012. This is in comparison to the total market, where only 26 percent of books are purchased in e-book format.

According to the results of RWA’s romance buyer survey, a whopping 94 percent of romance buyers read romance e-books (includes purchased and free titles). Romance e-books are being read mostly on a Kindle (41 percent), distantly followed by the Nook (16 percent), Kindle Fire (13 percent), iPad (10 percent), and other devices.
WorldShare Platform

A platform for collective innovation

Nov 2012
The age of the platform

How Amazon, Apple, Facebook, and Google Have Redefined Business

"Essential reading on the state of business today – and where it is going. Ignore this book at your own peril."
—Adrian G. Dale, award-winning author, The 24-Hour Customer

Phil Simon

Foreword by Mitch Joel, President of Twist Image and author of Six Pixels of Separation
A platform [is]...an extremely valuable and powerful **ecosystem** that quickly and easily scales, morphs, and incorporates new features, users, customers, vendors, and partners. The most vibrant platforms embrace **third-party collaboration**…to foster symbiotic and mutually-beneficial relationships.

*Phil Simon*, technology consultant and author, “The Age of the Platform”
OCLC’s “platform” history

- Cooperative cataloging...
- Integration with ILLiad
- WorldCat Search API
- Developer Network
- “Webscale” Management Services
- WorldShare Platform

OCLC’s WorldShare strategy

- **Applications**: Provide a single integrated set of management services for libraries to improve visibility and efficiency, including services from OCLC, partners and libraries.

- **Web services**: Make library data available to libraries and partners to build and share new services and applications, creating new value for libraries and their users.

- **Data**: Expand the range and types of library data represented and “connected” through WorldCat data hub.

- **Infrastructure**: Enable libraries to benefit from the efficiencies and flexibility of cloud, mobile and social technologies through a single global infrastructure.
What is the WorldShare Platform?

A place to facilitate collaborative innovation through online forums, mashathons, etc.
<table>
<thead>
<tr>
<th>TITLE</th>
<th>STATUS</th>
<th>WHAT IS IT</th>
<th>WHAT IT DOES</th>
<th>QUERY PROTOCOLS</th>
<th>RECORD FORMATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenURL Gateway</td>
<td>Production</td>
<td>An OpenURL-resolving Web service that redirects Web-based applications to provide their end-users direct access to full-text articles and other online resources available from libraries. The OpenURL Gateway pulls OpenURL data from the WorldCat Registry—a global directory for libraries, consortia, archives and museums. (<a href="http://www.worldcat.org/registry/institutions">www.worldcat.org/registry/institutions</a>)</td>
<td>• Directs Web users to full text and other online resources at an appropriate library based on the user's IP address.</td>
<td>OpenURL</td>
<td>None - Creates a URL redirect</td>
</tr>
</tbody>
</table>
| QuestionPoint knowledge base API | Production | Developer-level access to QuestionPoint knowledge base Question and Answer (Q&A) pairs that QuestionPoint libraries saved for future re-use, for FAQ pages, for patron searches. The QuestionPoint global knowledge base is a collection of Q&A pairs contributed by nearly 500 libraries worldwide. Local knowledge bases are built and maintained by single libraries or regional library groups and usually contain information more specific to that group. | • Provides search access to QuestionPoint Q&A pairs and returns questions that match the query.  
• Accesses a specific Q&A pair with metadataQuestion ID  
For example, the QuestionPoint knowledge base API could be used to retrieve a list of questions that have been asked on the topic of baseball.  
The API could then be used to return information about a specific question on that topic.  
For example: Which National League baseball teams have never won a World Series? | REST            | 📚 HTML  
🔹 XML  
🔹 Text  
🔹 JSON  

| WMS Acquisitions API       | Production | A read-write Web service for the Acquisitions module of OCLC WorldShare Management Services so library staff can create, update, delete and submit orders for materials they’d like to acquire. Provides developer-level access to order data. | Lets you create purchase orders as needed for your institution. Facilitates the access to and edit existing orders or update an individual order status, and submit purchase orders to fulfillment vendors. Through the Acquisitions API, you can combine your data with external fulfillment vendor data, such as that from Amazon, Biblio, YBP and others and save a lot of time, steps and screens in acquisitions workflows. | OpenSearch       | 📚 XML  
🔹 JSON  

---
Automatic ILL Request Verification

This application uses C# and the WorldCat Search API to automatically find library locations that hold the requested item. The downloaded request file is processed through the application to find identifying numbers for the requested item, with those numbers sent to the Search API in a Library Locations request. The resulting list of libraries is then sorted by our own internal referral priorities and printed out on the request.

LOCATION:

52428286
WLM
SSH
TDS
DCB
SPP
ETC
CCE
RCL
GZF
W73
W75
WZR
WIV

Title: The very best of the Beach Boys; sounds of summer.
Author/Article Author: Beach Boys.

Volume/Issue: Article Date: Pages:

Return to: MII
Ship to: GRR

Pickup Location: St. Cloud Public Library

Contact Name
Paul Swanson
Institution
Minitex
Related Web Service(s)
WorldCat Search API

Average:

Your rating: None Average: 5 (14 votes)
Partner built applications

Future partner app integrations, made possible by

OCLC
WorldShare™ Platform

Relais
International

AutoGraphics

Clio

Atlas Systems

Rapid ILL

The world’s libraries. Connected.
Transforming ILL

Article Exchange

WorldShare ILL
Article Exchange

Part of your WorldCat Resource Sharing subscription
Article Exchange

- Cloud based document delivery service
- Replacing Ariel in many institutions
- **Eliminates security issues** - no firewall issues.
- Files up to 60 MB – including high resolution documents – can be placed on the site for pick-up by library users.
- Supports compliance with **copyright** guidelines with **automatic deletion** of files. Viewed files are deleted after **5 days or 5 views** and unviewed files are deleted after 30 days.
Article Exchange – documents uploaded

February  | March  | April   | May     | June    | July    | August   | September | October
---       | ---    | ---     | ---     | ---     | ---     | ---      | ---       | ---       
10,000    | 15,000 | 20,000  | 25,000  | 30,000  | 35,000  | 40,000   | 50,000    | 60,000
Countries using Article Exchange
Article Exchange - WorldShare ILL – Lender workflow
The world's libraries. Connected.
Select “Drop file” and locate the PDF or Image file.
You will receive a tinyurl and password

OCLC AN: 20097
Title: Dog fancy.
Article Author: Herman Shepherd
Article Title: Dogs are the best
Volume: 6 Number: 34 Date: 2009 Pages: 23-24

Your requested article is available at http://oclc/VqFMPx
Use this case-sensitive password: 9kJzFtRBQ

Please note the following time constraints:
* Once a file is retrieved, it remains available for thirty (30) days. After thirty days, the file will be removed from the Article Exchange site.
* Each document file can be retrieved a maximum of five (5) times for each URL/password combination.
* Files that are not retrieved remain available for 30 days following the original request date. After 30 days, they are automatically removed from the Article Exchange site.
**WorldShare ILL: Article Exchange**

### National geographic.

#### Can you supply?
- Yes
- No
  - No Reason Given
  - Conditional: Additional Info needed

#### Request Details (Request ID 66893740)

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<tbody>
<tr>
<td>Source</td>
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<td>645125T</td>
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<tr>
<td>Lenders</td>
<td>NDFTP</td>
</tr>
<tr>
<td>External ILL</td>
<td><a href="http://mac.njpickelr.us:8080/ill/jdtick1">http://mac.njpickelr.us:8080/ill/jdtick1</a></td>
</tr>
<tr>
<td>Title</td>
<td>National geographic</td>
</tr>
<tr>
<td>ISBN</td>
<td>0027-3098</td>
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<td>Borrower</td>
<td>NDDLY</td>
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<td>Need Before</td>
<td>12/1/2012</td>
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<tr>
<td>Requested on</td>
<td>11/1/2012</td>
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<td>Shipped Date</td>
<td>11/14/12</td>
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<td>80559740</td>
<td></td>
<td>National geographic,</td>
<td>Julie Firefox</td>
<td>11/12/12</td>
<td>12/12/12</td>
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<tr>
<td>80559979</td>
<td></td>
<td>National geographic,</td>
<td>Fred Dragon</td>
<td>11/07/12</td>
<td>12/07/12</td>
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<tr>
<td>80563920</td>
<td></td>
<td>Beethoven's lost night</td>
<td>Fred Logo</td>
<td>10/30/12</td>
<td>12/30/12</td>
</tr>
</tbody>
</table>
URL and password

OCLC Article Exchange

Please enter your password

Password:

Get my file

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### Daily Report Article Exchange Lending Report -- Institution

**REPORTING PERIOD:** July 1, 2012 - July 7, 2012  
**INSTITUTION:** DET KONGELIGE BIBLIOTEK, THE ROYAL LIBR  
**SYMBOL:** DKB

<table>
<thead>
<tr>
<th>Borrower Symbol</th>
<th>Institution Name</th>
<th>Institution State</th>
<th>Institution Country</th>
<th>ILL Number</th>
<th>File Name</th>
<th>File Size</th>
<th>Upload Date</th>
<th>Viewed Date</th>
<th>Turn Around Time (ddhh:mm:ss)</th>
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<tbody>
<tr>
<td>DKB</td>
<td>DET KONGELIGE BIBLIOTEK, THE ROYAL LIBR</td>
<td>EU</td>
<td>DA</td>
<td>92308061</td>
<td>923080610001.pdf</td>
<td>507860</td>
<td>02-Jul-12</td>
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<td></td>
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</tbody>
</table>

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**Article Exchange Statistics**

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**OCLC** The world’s libraries. Connected.
Article Exchange Web service - upload

**Article Exchange API**

Production - A write web service for cloud-based document delivery. Provides developer level access to the Article Exchange document-sharing site. Article Exchange provides a single, secure location where lending libraries can place requested documents and the borrowing library can retrieve articles or book chapters the library user requested via interlibrary loan.

Developers can upload and share documents of XML, JSON, XLS image-type files, such as pdf, png, jpg, tiff and other image file formats. Upon successful upload, the response contains a unique password-protected URL that can be shared with the library user so she can retrieve the uploaded materials.
Use this page to upload documents being sent to requesting libraries.

This is the first link.
This is the second link.

This is the (branded) Article Exchange page instructions.
This is the first instruction.
This is the second instruction.
Brand what?

- Your can add your own logo
- Add your own colors
- Add a create own email text message
- Rename the buttons to your own wording
- Add your own text in the bottom section

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WorldShare ILL

Part of a WorldCat Resource Sharing subscription
Up to now - 3 Goals

1. Parity with WorldCat Resource Sharing
2. Transforming ILL
3. Introducing platform services
Moving to Service Config:
- Constant data
- Custom groups and paths
- Direct Request

Same request ID in WCRS and WS ILL
Transforming ILL roadmap

Alternative workflows

- New workflows for purchase as well as traditional ILL
- Workflows for digital, in-copyright request management

Fulfilment profiles

- For electronic, digital and print just in time purchase
- Tighter integration with alternate services

Making IFM available to content providers

- To enable purchase via IFM in content provider web sites
Extending fulfilment options

“pseudo-lender” workflow
FY13 - Delivery Platform services

Legacy web services
Policies Directory
Article Exchange upload
Article Exchange download
IFM upload service

Feb 2013

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WorldShare ILL

What, when, how?!
Advisory Group

1. Jefferson County Public Library
2. Washington County Cooperative Library Services
3. Delaware County Library System
4. Illinois State Library
5. Harrison College
6. Mercer University
7. Bartholomew County Public Library
8. Spalding University

Franca Rosen
Cassie Maringer
Helen Subbio
Lynn Bierma
Vickie Pitts
Andrew Shuping
Denise Wirrig
Emily Stivers
55 Phase 1a libraries – very small, borrowing only libraries
Phased migrations

Phase 1b
• Started in September
• 30 libraries registered
• borrowing only libraries

Phase 2
• Starts mid-November
• 250 Borrowing and lending libraries
January-June 2012: Beta testing of WorldShare Interlibrary Loan

March-December 2013: Open migration to WorldShare Interlibrary Loan (in U.S.)

June-September 2013: Non-U.S. WorldCat Resource Sharing subscribers migrate to WorldShare Interlibrary Loan

July-December 2013: Libraries with user-initiated ILL migrate to WorldShare Interlibrary Loan

November 2013: End of new requests in WorldCat Resource Sharing

December 2013: End of access to WorldCat Resource Sharing
What if I use ILLiad?

- 9 digit authos do not work with WS ILL
- ILLiad libraries that want access to the WS ILL interface will require a *new* username and password
- Working with Atlas Systems
  - Quarterly roadmap meetings
- OCLC and Atlas Systems will end customer support for ILLiad versions 8.1 and 8.2 on June 30, 2013
Now and February
February: LOGIN
The world's libraries. Connected.

Now
February
Now
February
Now: Summary Search

WorldCat results for: kw: dog. (Save Search)
Records found: 262,216 (English: 202,264) Rank by: Number of Libraries

1. Diary of a wimpy kid: dog days /
   Author: Kinney, Jeff.
   Libraries Worldwide: 5086 | Regional Holdings | State Holdings
   Group Holdings | Custom Holdings Path
   More Like This: Search for versions with same title and author | Advanced options
   See more details for locating this Item

2. Harry Potter and the prisoner of Azkaban /
   Author: Rowling, J. K.
   Libraries Worldwide: 4608 | Regional Holdings | State Holdings
   Group Holdings | Custom Holdings Path
   More Like This: Search for versions with same title and author | Advanced options
   See more details for locating this Item
February: Summary Search
The world's libraries. Connected.

Now: Display Holdings

<table>
<thead>
<tr>
<th>Location</th>
<th>Library</th>
<th>Local Holdings</th>
<th>Supplier</th>
<th>Code</th>
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<tr>
<td>US,OH</td>
<td>AKRON-SUMMIT CNTRY PUB LIBR</td>
<td>yes</td>
<td>APL</td>
<td>?</td>
</tr>
<tr>
<td>US,OH</td>
<td>ALBERT CHAPMAN ELEM LMC</td>
<td></td>
<td>ACHES</td>
<td>?</td>
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<tr>
<td>US,OH</td>
<td>ALL SAINTS OF ST JOHN VINNEY SCH</td>
<td></td>
<td>ASAAL</td>
<td>?</td>
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<td>US,OH</td>
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<td>US,OH</td>
<td>ALUM CREEK ELEM SCH</td>
<td></td>
<td>ACEX</td>
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<tr>
<td>US,OH</td>
<td>AMHERST PUB LIBR</td>
<td></td>
<td>AMHPL</td>
<td>?</td>
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<tr>
<td>US,OH</td>
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<tr>
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<td>?</td>
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<tr>
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<td>TS247</td>
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<tr>
<td>US,OH</td>
<td>BOWLING GREEN STATE UNIV</td>
<td>yes</td>
<td>BGU</td>
<td>?</td>
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<tr>
<td>US,OH</td>
<td>BROWN MIDDLE SCH</td>
<td></td>
<td>BMSIL</td>
<td>?</td>
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<tr>
<td>US,OH</td>
<td>CANAL WINCHESTER MIDDLE SCH</td>
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<td>CWZIL</td>
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<tr>
<td>US,OH</td>
<td>CAPITAL UNIV LIBR</td>
<td></td>
<td>CAU</td>
<td>?</td>
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</table>
February: Display Holdings

The world's libraries. Connected.
Now: ILL workform
February: ILL Workform

<table>
<thead>
<tr>
<th>Request Details (Request ID NEW)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title / Journal:</strong> Dog heaven</td>
</tr>
<tr>
<td><strong>Author:</strong> Graham Salisbury, Jacqueline Rogers</td>
</tr>
<tr>
<td><strong>Publisher / Date / Place:</strong> New York: Wendy</td>
</tr>
<tr>
<td><strong>ISBN:</strong> 9780385737036 (hc) 0385737033 (hc) 9780385986418 (eb)</td>
</tr>
<tr>
<td><strong>OCLC:</strong> 276514911</td>
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<tr>
<td><strong>Type:</strong> Book</td>
</tr>
<tr>
<td><strong>Format:</strong> Book</td>
</tr>
<tr>
<td><strong>Edition:</strong> 1st ed.</td>
</tr>
<tr>
<td><strong>Preferred edition:</strong> Most recent edition</td>
</tr>
<tr>
<td><strong>Needed By:</strong></td>
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<tr>
<td><strong>External ILL:</strong> WORLD CAT</td>
</tr>
<tr>
<td><strong>Lending Libraries:</strong> (acq,lm,ser,jldad,mno,hl,leill,leill,leill,leill,leill,leill,leill)</td>
</tr>
<tr>
<td><strong>Buy It Options:</strong></td>
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FirstSearch Administration
The lender workflow
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## Lending Requests: New (6)

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<thead>
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<th>ID</th>
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<td>166204</td>
<td>📖</td>
<td>Race to nowhere</td>
<td>NDCLV</td>
<td>06/14/12</td>
<td>07/14/12</td>
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<tr>
<td>166200</td>
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<td>NDCLV</td>
<td>06/13/12</td>
<td>07/13/12</td>
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<tr>
<td>165803</td>
<td>📖</td>
<td>Shark vs. train</td>
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<td>06/12/12</td>
<td>07/12/12</td>
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<tr>
<td>165013</td>
<td>📖</td>
<td>Scooby Doo / Pirates ahoy!</td>
<td>NDCLV</td>
<td>06/12/12</td>
<td>07/12/12</td>
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<tr>
<td>164835</td>
<td>📖</td>
<td>Global positioning system (GPS) time dissemination for real-time applications</td>
<td>NDCLV</td>
<td>06/11/12</td>
<td>07/11/12</td>
</tr>
</tbody>
</table>
The world's libraries. Connected.

### How the Grinch Stole Christmas

**Can you supply?**
- Yes
- No - No Reason Given
- Conditional - Additional Info Needed
- Mark Unread

**Request Details (Request ID: 166017)**

- **Status:** Considering
- **Source:** WorldCat
- **OCLC:** 178325
- **Lenders:** *ND77PAANNDOLPNDWAN*
- **External ILL:** 68455904

**Title:** How the Grinch Stole Christmas

**ISBN:** 03074800709 97803074800790 0394900790 9780394900797

**Author:** Joshua Bloch

**Publisher:** Addison-Wesley

**Media Type:** Book

**Borrower:** NDCLV

**Due Before:** 07/13/12

**Shipped Date:** 06/20/12

**Availability (11 of 25 available):**

<table>
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<th>Status</th>
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<td>JUVENILE EASY SEUSS</td>
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<td>Cody juvenile books</td>
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</tbody>
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Branch: Krum Public Library (BETA) Branch
What browser do you use?

- Supported
- Supported
- IE9 √
  IE8 – Feb 2013
  IE7 – Not supported
Migration options

Self-starters

• Look out for “Get Started” notices!

Managed

• Look out for training dates
FY14 - 3 Goals

1. In-group functionality
2. Transforming ILL
3. Platform services
Tentative timeline for non-WCRS services

Developing in-group functionality

- **FY13**
  - Aug 2012
  - survey + analyse results

- **FY14**
  - From July 2013
  - Prepare groundwork

- **FY15**
  - From July 2014
  - Pilot with Region (1)

- **January 2015**
  - start migration by region

- **End of FY16**
  - Mid-2016
  - Migration complete

The roadmap for VDX and other services will be fleshed out in FY13

OCLC  The world’s libraries. Connected.
VDX – WorldShare ILL

Real time

NCIP

WorldCat vs. ZPORTAL

More in Spring 2013
WorldShare Interlibrary Loan

OCLC WorldShare™ Interlibrary Loan is a new service that will replace WorldCat Resource Sharing, as part of libraries’ existing subscriptions. The service centralizes workflows now managed in multiple systems, and will provide new functionality that speeds fulfillment of interlibrary loan requests and saves time for library staff and library users.

WorldShare™ Interlibrary Loan is included at no additional charge in existing OCLC resource sharing subscriptions. WorldShare Interlibrary Loan will go beyond traditional interlibrary loan to provide a truly integrated delivery solution for libraries. The service will integrate discovery and delivery of electronic, digital and print materials within a single interface. It will also support evolving workflow changes in libraries, such as the option to purchase needed items rather than borrow them.

The new WorldShare Platform supports new features in WorldShare ILL that require interoperation with other applications, such as the display of lender costs from the Policies Directory and display of item availability from a library’s ILS.

The migration from WorldCat Resource Sharing to WorldShare Interlibrary Loan will allow us to transform traditional interlibrary loan into a much broader fulfillment service with associated workflows. In the new service, interlibrary loan will be one of any number of fulfillment options a library may select according to the needs of its users and library policies.

http://www.oclc.org/migrate-worldshare-ill/
Keep up to date

OCLC-SHARING-L - https://www3.oclc.org/app/listserv/

*Action
○ Subscribe ○ Unsubscribe
Please check below any lists to which you would like to subscribe or unsubscribe, then submit to OCLC.

*Available Lists (check all that apply)

- OCLC-CANADA
  This list was created to be a forum for you to feel free to ask questions, share information, pass along advice, and exchange ideas among OCLC Canada libraries.
- OCLC-JAT
  OCLC-Jat is a discussion forum for library staff using or considering any OCLC cataloging and metadata services.
- OCLC-AP-L
  OCLC Asia Pacific announcements, information, and news releases.
- DOCUPDATE-L
  Announcements of new and revised documentation added to OCLC's website.
- OCLC-FIRSTSEARCH-L
  FirstSearch announcements, information, and documentation.
- MARCADA-L
  The MARCADA-L listserv is a discussion forum for users of the MARCADA service which is a joint service of OCLC and Backstage Library Works. MARCADA offers the automation of many cataloging tasks with the option for customization for libraries' local system needs.
- OCLC-CJK
  OCLC CJK Users Group (discussion)
- OCLC-NON-LATIN-SCRIPTS-L
  A discussion forum for users of OCLC non-Latin scripts, including Arabic, Bengali, Chinese, Cyrillic, Devanagari, Greek, Hebrew, Japanese, Korean, Tamil, and Thai.
- OCLC-SHARING-L
  Announcements, changes and enhancements to OCLC resource sharing services.
- OCLC-WCA
  OCLC-WCA is a discussion forum for library staff using or considering using the WorldCat Collection analysis service.
- Batchload-L
  A forum for Batchload users, including Local Holdings Record Updating Service (LHRUS) users to help each other share ideas and get practical advice for using Batchload service.
- OCLC-WORDLCAT-SELECTION-L
  OCLC-WorldCat-Selection-L is a discussion forum for people using or considering the WorldCat Selection service.
- OCLC-WCAT-PARTNERS-L
  OCLC-WCAT-PARTNERS-L is a discussion forum for libraries, library material vendors, OCLC, and anyone else interested in WorldCat.
Transforming ILL
What OCLC's WorldShare will mean to you

Katie Birch
Portfolio Director
birchk@oclc.org