OCLC Contactdag 2019
Feiten en verhalen
Focus on WMS

Maximilien Sangoi
Product Manager
Today’s WMS focus

- Recently released features
- Coming soon
- Work in progress
WMS update: Areas of focus

- Patron Service
- Resource Management
- Consortia and Collaboration
- Discovery
Patron Service: available

- Online payment of fines and fees
- License Manager: Trial survey widget
- Patron suspension
- Patron purchase requests
Patron Service: coming soon

- Special pick-up locations
- Integration with university-level financial system for outstanding fines
- Annual fee for patron type
- View availability for multiple locations and copies on search results
RESOURCE MANAGEMENT
Resource Management: available

- Currency Exchange Rate
- Edit Placed Order
- Disencumbering by amount
- Bulk Edit of LBD (10,000 at a time)
- Enrichment of Analytics with additional fields
- COUNTER 5 support – PR_P1, TR_J1 and TR_B1 available now; 90+ vendors testing
C5 is only one part of the value OCLC can add to measure library success
Resource Management: coming soon

- Sending invoices to campus accounting system
- Bindery functionality
- Bulk update of LHR data
- Monographic series – phase 2
CONSORTIA AND COLLABORATION
Consortia and collaboration: available

Report Designer

• Libraries can share reports queries/templates from Report Designer with the rest of the Report Designer Community

• Your library can pick up any of these templates and run them against your own data
Consortia and collaboration: coming soon

Multiple library cards

- Patrons could access their accounts to view checked out items, renew material, view and cancel holds etc. from a single set of credentials.

Inherited roles and policies

- Allow templates to be defined at group level and inherited by all libraries within the group.
Consortia and collaboration: coming soon

Multi-institutional roles

• A single set of credentials will let you operate against any one of a group of libraries
• Any role: Cataloguer, Electronic Resources Librarian, Knowledge Base Administrator, Circulation Desk Worker, etc.
Discovery

Some of the recent deliveries…

April
- Open Access filter
- Improved filtering on author names

May
- Browse shelf feature
- Search on remote databases
- Accessibility updates for improved discovery

June
- Additional databases available

July
- Improved access for screenreaders

August
- Localization improvements
- Improvement on the LBD notes display
- New databases accesses

September
- Disable grouping option of search results
- Additional format information displayed in the detailed record
- Keep filter selection on searches

…

And more to come!

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Discovery: coming soon…

- Configuration of location/display of facets
- Multiple selection of values in facets
- Improve indicators of search relevance
- "Parent-child" linking
- Indicators of relevancy in the search results
- View availability for multiple locations and copies on search results
WORKS IN PROGRESS
API Program

• Continuous investment on our API strategy
• One set of APIs produced
  o For internal usage
  o Services exposed to libraries and commercial partners
• API experience will be unified for the external developers
  o Creating a seamless experience across APIs, and between UIs and APIs, will make it easier for library developers to build solutions
• Progressive delivery
  o Circulation, Discovery among first priorities
Open Access

- Works from OCLC Research, dedicated OCLC Open Content Working group
- Increasing diverse open content
- Integration of open content in WorldCat.org, WMS, WorldCat Discovery and other OCLC services
- Supporting libraries and including library open content
Open Access

- WorldCat Discovery
  - OA filter searches ~ 50M records (and growing…)
  - Impactstory/Unpaywall partnership supports OA full text link validation
- Knowledge Base
  - 400 open access collections (and growing…)
- WorldCat.org
  - OA filter
- CONTENTdm
Enhancing the visibility and accessibility of open content.

OCLC works with governing bodies, publishers, aggregators, libraries, and the communities they serve to enhance the visibility and accessibility of open content.
Other work in progress

Sandbox

- Main purposes: training and testing (configuration, API integrations)
- Finalization of the first phase: US, then Canada, EMEA in the next 12 months
Questions?
Bedankt!

Maximilien Sangoi
Product Manager EMEA
EZproxy Analytics

Frank van Klaveren
Team Lead Customer Projects
WAAROM EZPROXY
Overall toegang

Voorkom misbruik

Gebruik inzichtelijk
HET INLOGPROCES
1. Discover/request item

INSTITUTION NETWORK

EZPROXY SERVER

USER IP

IDP
Because an EZproxy IP address is passed to the content provider instead of the user’s IP address, the user’s identity is protected.
Ezproxy server logs usage data across all the library’s e-resource subscriptions. This provides the library with rich, complete, and unbiased usage data.
“Menselijke fouten bij 95% IT-incidenten.”

Cyber Solutions

Ezproxy kan dit niet voorkomen, inloggegevens worden op andere plekken verkregen.
EZproxy helpt op twee manieren de beveiliging te verbeteren.

Elke inlog gecontroleerd met de security API

Opgeslagen data maken misbruik inzichtelijk
ONTWIKKELING EN PILOT
EZproxy Analytics ondersteunt besluitvorming.

Waardevan de bibliotheek

Aanschaffen & opzeggen

Monitor misbruik

Ondersteuning gebruikers
EZproxy Analytics Partnership

Samenwerking met Couperin.org

Visualiseer alle data met EZproxy Analytics

logbestand → extractie, bewerking → maak dashboards

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EZproxy Analytics geeft inzicht.

Voor

Na
EZproxy Analytics Pilot

6 bibliotheken – 3 in Amerika, 3 in Europa

THE CLAREMONT COLLEGES
SONOMA STATE UNIVERSITY
UNE UNIVERSITY OF NEW ENGLAND
MANCHESTER 1824
VU VRIJE UNIVERSITEIT AMSTERDAM
Audencia BUSINESS SCHOOL

The University of Manchester
EZproxy Analytics functionaliteit

- Data over het gebruik eenvoudig bekijken en sorteren
- Geeft een totaaloverzicht van alle platformen
- De mogelijkheid COUNTER rapporten te controleren
EZproxy Analytics functionaliteit

- Kan alle data visueel weergeven
- Mogelijk zelf rapportages op te stellen met queries
- Deel rapportages met collega's en management
Gebruik per 3 uur van de afgelopen 30 dagen.

Kan helpen bij inplannen van ondersteuning eindgebruikers.
Gebruik in een oogopslag
Gebruik per platform, van hoogst naar laagst.
Totaaloverzicht, ook de platformen zonder COUNTER rapporten.
Gebruik van verschillende soorten content per platform. Kan ter afweging worden gebruikt bij verleningen of opzeggen.
Monitor logins

Geeft een heat-map van logins per geografische locatie.

Bekijk waar gebruikers inloggen en met welke frequentie.
Zelf queries invoeren
Link direct naar zelf opgestelde rapporten of exporteer de visuele weergave.
EZproxy Analytics standaard dashboards

- Access Events by Date/Time
- Access Event Map
- Count of Access Events
- Usage by Publisher
- Usage by Journal
- Usage by Platform and Resource Type (e.g. article, search, table of contents)

- Usage by Platform and MIME Type (e.g. PDF, HTML)
- Successful Logins from Multiple Geographic Regions
- Audit Event Map
- Audit Events by Country
- Repeated Login Failures
Bedankt!

Frank van Klaveren
Team Lead Customer Projects