What Should an ILS Do When Everything Continues to Change?

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Potomac Technical Processing Librarians
Discovery & The *Now* Generation ILS:
The Next Generation Is Here!

Muhlenberg College
Trexler Library

Welcome to Trexler Library
Opened in 1988

Muhlenberg College
Trexler Library

Student Population Compared to Library Staffing

Enrollment

- 2,408 student FTE
- 4 year undergraduate liberal arts, disciplinary and interdisciplinary majors/minors
- Primarily residential students

Library Staff

- Director
- 7 FT Librarians
- 2 FT Paraprofessional Managers
- 6 FT, 1 PT Staff Associates
- 46 Student Workers (6-7 hrs./wk. each)
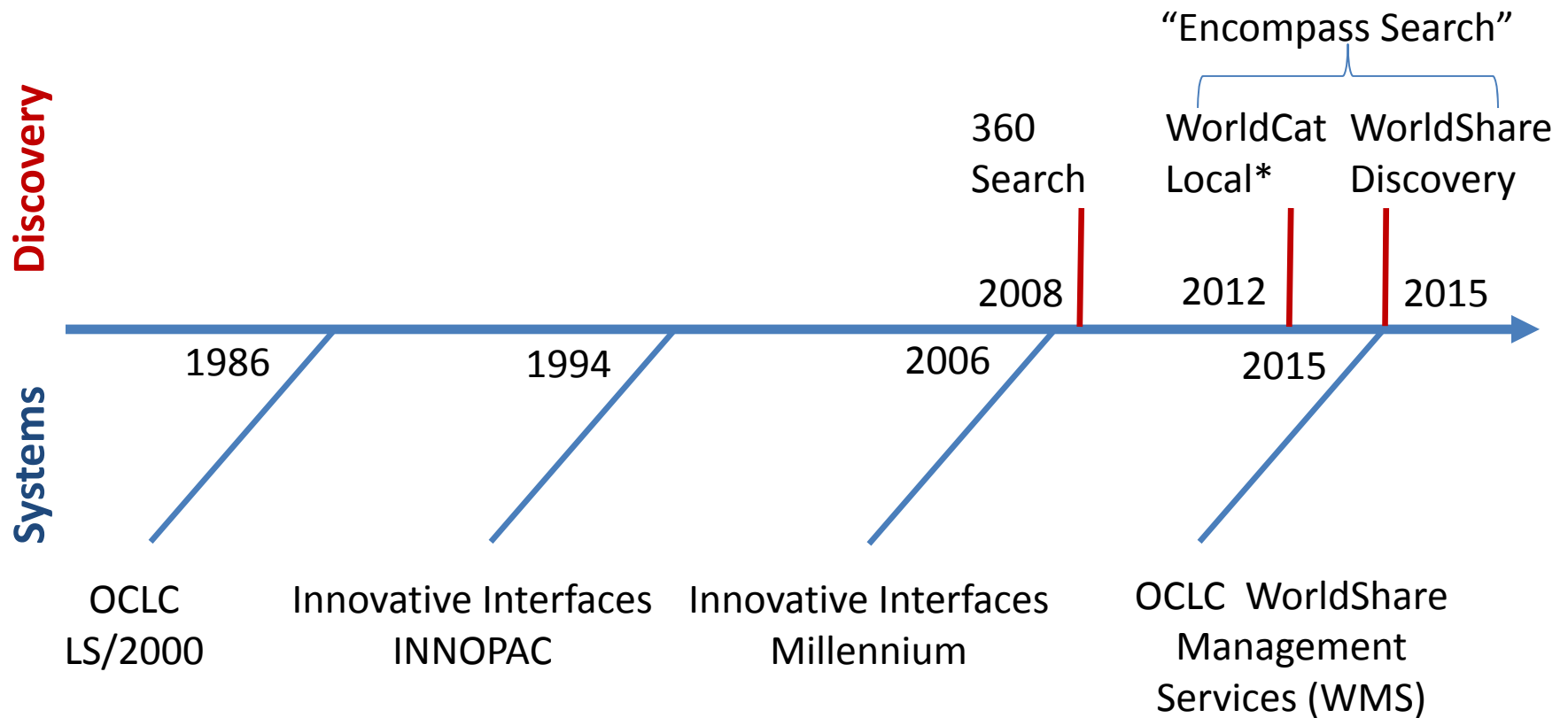
Library Organization

- Collection Resources Management
  - Acquisitions, cataloging, processing, serials, gov't docs (FDLP). Oversight for collection development.

- Lending and Borrowing Services
  - Circulation, Reserves, ILL

- Public Outreach and Information Literacy
  - Reference & instruction, scholarly communication & special collections librarian. Oversight for institutional repository.

- Administration
  - Includes library technology

What Should an ILS Do When Everything Continues to Change?

The history of library technology tracks alongside the prevailing technologies available in the general business and consumer sectors. Methods employed by libraries have constantly evolved.

--Marshall Breeding in *Library Services Platforms: A Maturing Genre of Products, p.6*

Timeline for Systems & Discovery at Trexler Library

"Encompass Search"

Discovery

360 Search

WorldCat Local*

WorldShare Discovery

2008

2012

2015

1986

1994

2006

2015

Systems

OCLC LS/2000

Innovative Interfaces INNOPAC

Innovative Interfaces Millennium

OCLC WorldShare Management Services (WMS)

*Hosted OCLC Ezproxy added 2012

Current WorldCat Holdings

- 1.25 million titles
  - Physical/ in-library: 360,341
    - Includes 59,020 Gov Docs (excluding microform)
    - Includes 82,118 Gov Docs in microform
  - Online : 896,078
- Resource types: Books, Journals, Films, Music, Scores, Maps, Databases, Images, Kits, etc.

What Should an ILS Do?

Traditional ILS role

Integrate all aspects of managing library collections and collection services

At Trexler Library, we use all modules of the ILS – Circulation, ILL, Acquisitions, Cataloging, Inventory. No campus-wide accounting system (yet).

Library Collections Issues

- Balancing Access vs. Ownership
- Stability/continuity/quality of title list
- Acquisition models increasing, evolving
- Open access expanding, hybrid journals
- Stewardship
  - Digitization
  - Tracking perpetual access/licensed content
  - The scholarly record

Improvements Desired in a New System

- Comprehensive user discovery experience
- More efficient record management with reduced redundancy in data entry
- Electronic resource management for collections, databases and licenses integrated within the acquisition and resource maintenance workflow
- Open platform that supports APIs and cooperative development among user community
- Free up staff time for other projects
- Manageable cost

Technology at Work

Each phase of libraries brings new operational tasks that benefit from technology, leading to new products to meet those needs.

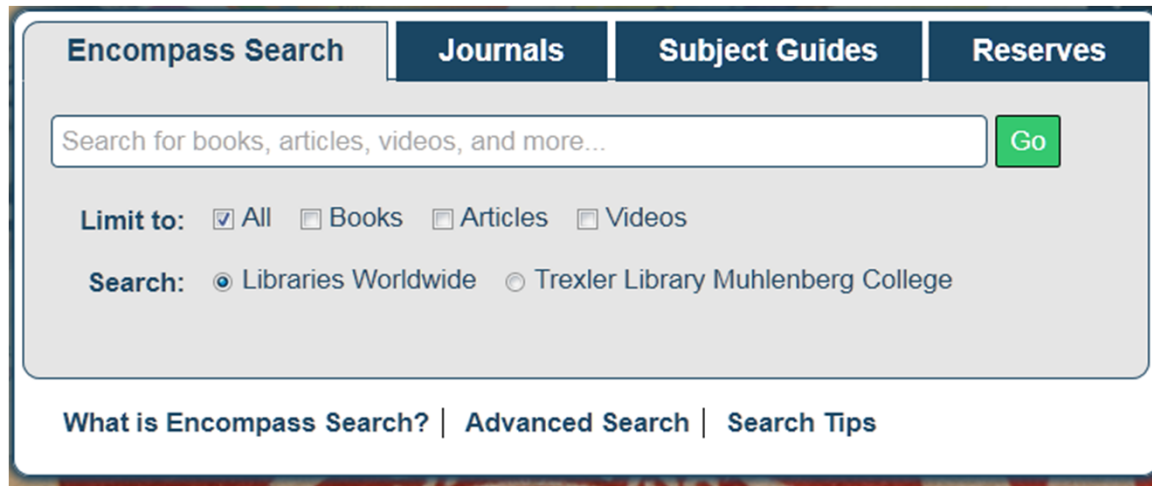--Marshall Breeding in *Library Services Platforms: A Maturing Genre of Products*

Connecting Library Users with Resources

Starting with WorldCat Local (maintained separate catalog)

- Search includes current OCLC records, subject headings, and authorities.

- Direct access to articles/chapters in addition to traditional bibliographic level access.

- Faceted search results refinement.

- Labels that use common terms.

- Linked data brings together information from WorldCat, KB, and central index.

- For items not held, alternate access offered.

- Did not include all holdings.

Moving to WorldShare Discovery (Encompass Search)

- Single search with all resources & formats included

- Focus groups on single search

- Added optional facets to library search box

Encompass Search in Context

http://trexler.muhlenberg.edu

Connecting Library Users with Resources

WMS+WSD discovery advantage

- Comprehensive inclusion of resources. Minimizes silos. Previously, over 120,000 eBooks and streaming media were not in the local catalog. Many mismatches between WCL + local holdings.

- Single set of OCLC records. No separate local catalog that is not reconciled with WorldCat.

- Multiple formats combined in one search result.

- Item location/status embedded in search result.

- Acquisition order status displays on firm orders.

- Resource Sharing is integrated with Circ.

Workflows

Moving to WMS simplified most workflows

Public Services

- Circulation
- ILL/Resource Sharing
- Reserves

Technical Services

- Acquisitions
- Cataloging
- Serials
- Government Documents

Success depended on staff willingness to experiment with new possibilities.

Major Impacts on Collection Management Workflows

- MARC record loading eliminated.
- Acquisitions and cataloging more interconnected.
- Need to consider that bibliographic/KB data is shared.
- All staff learned to think about ER and physical resource organization separately. Facilitated by WMS structure.
- Using knowledge base only for all electronic - no LHRs.
  - Increased work: vendor supplied data, and updating.
- We are part of a collaborative effort.

Acquisitions & Cataloging

- Physical resources are ordered by title using WorldCat records. Holdings marked.
  - If no record available, must create. Our Acquisitions Manager creates a brief bib.
- Electronic resources are ordered by title or collection using the OCLC Knowledge Base.
  - If no title, add to existing custom collection.
  - If no collection, cataloger creates collection.

Acquisitions & Cataloging Gains

- Use KBART comparisons to manage collections for PDA/EBA
  - To determine the value that a new collection will add
  - To remove overlap in PDA/EBA/subscription collections which controls STL/ATO costs.
- Time for major collection projects
  - Missing items evaluation and replacement
  - VHS to DVD evaluation / ordering / withdrawal

Acquisitions

System flexibility

- An invoice can be paid without an associated order, if desired.
  - Used for non-collection invoicing
  - Used first year with large/difficult collection orders to keep things moving.
- Subscription renewal is separate from but linked to order and invoice records.
  - Accommodates vendor changes, renewal period changes, supplemental invoices.

Acquisitions Gains

- Streamlined workflows plus linked data shortened time spent processing.

- Have time to handle more acquisition methods and evaluate/participate in consortial collective collecting agreements.

- The system continues to be improved.

Cataloging

- Standard WMS workflow folds processing and cataloging tasks into acquisitions receiving workflow.
  - We adapted the workflow to our staffing and kept final cataloging activity separate.

- Less time spent on customizing locally.
  - Focus on special collections, original records.

- More time spent on metadata standards to support acquisitions data entry & provide standardized metadata for user.

Cataloging Constraints

- Bibliographic records are shared and any changes to them must be considered carefully.

- Some MARC fields are not displayed in discovery.

- Global changes by OCLC are out of our control. Impact on discovery mostly + but some -.

- Format/resource type errors in leader data or specific fields can impact discovery.

Metadata Constraints

- Knowledge Base title level records operate best in discovery when they include an OCLC number.

- Some custom changes you make may be overwritten by vendor data feeds/updates.

- Some vendors are slow to provide or can't provide metadata.
  - MARC records > MARCedit > KBART

Knowledge Base Benefits

- Collection – Title – KBART format provides great flexibility to customize collections to match our particular license/subscription.

- Data feeds between vendors and OCLC limits need for us to update manually.

- Easy to select open access collections.

- Connects to license manager.

Metadata Librarian

Role changes

- Coordinating with vendors to get new collections set up or records to build a collection.

- Creating new KB collections.

- OCLC number reconciliation, adding new.

- Collection overlap.

- Troubleshooting electronic resource access.

Impact on Collection Development

- Fewer physical books being ordered because ebooks are easily accessed.

- More time spent thinking about possible impact of different acquisition options
  - Supporting discovery
  - User confusion
  - Stewardship

- Open access
  - Supporting hybrid journals

Statistics

- Preformatted reports support assessment of WMS activity
  - Collection use, Discovery, Acquisitions, Cataloging
- Add-on module: Report Designer allows us to create custom reports, including linking together fields from different data universes.
  - Early days: Still depend on technology librarian to create complex reports.
- Metadata does not always match our needs.

Developments in Use

- Ebook use has exploded.
  - http://bit.ly/2xS8luE
- Significant increase in number of journal titles being used.

	Journal Titles Used
2013-14	8,578
2014-15	9,013
2015-16	10,546
2016-17	11,400

- Use of Google Scholar has increased.

Thank you

Questions?

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