EVERY CONNECTION has a starting point.

WorldCat Navigator Solution

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Agenda

• OCLC Discovery to Delivery Strategy
• WorldCat Navigator
• Patron User Interface
• Navigator Request Engine
• Circulation Integration
OCLC Discovery Services strategy

- Help libraries expose their holdings on the Web
- Help users more easily discover and access library holdings
  - Physical
  - Digital
  - Licensed
- Do this at the level a member library needs
  - Local
  - Group
  - Global

Helping libraries expose their holdings on the Web

- Open WorldCat syndication program
- Google
- Yahoo
- Microsoft
- Partners and Affiliates - embed WorldCat.org searching into their Web sites
Help users more easily discover and access library holdings

- Physical - over 100 million records with 1.3 billion holdings
- Digital - Harvesting digital collections and syncing with Google mass digitization projects
- Licensed - Indexing article level meta-data and entire licensed databases into WorldCat.org
Do this at level member library needs

- Global - WorldCat.org as a destination site to be a switch to library collections around the world
- Navigator - Group view of WorldCat.org with tight delivery integration for the group expanding to global
- Local - WorldCat Local as a complete discovery to delivery user interface for a single institution’s libraries
### What WorldCat.org brings to Local and Group solutions

- Web scale entry point to libraries with massively aggregated data and user traffic
  - All of WorldCat plus evaluative content, both commercially created and user created
  - 2.5 million unique visitors monthly
- Constant usability testing, user experience studies, surveys and data analysis
- Monthly installs for rapid adaptation to user needs and expectations
- Web 2.0 social functions that users expect

### WorldCat Navigator

- **WorldCat Navigator (WCN):** is a consortial delivery system that allows for seamless load balanced sharing among group members with built in integration among circulation systems developed by library vendors.
WorldCat Navigator

PATRON USER INTERFACE
- Local Scoping
- View Requests

REQUEST MANAGEMENT
- Automatically...
  - Applies local, group, global policies
  - Builds Lending String
  - Retrieves Availability

CIRCULATION INTEGRATION
- Automatically...
  - Check Out
  - Check In
  - Place Hold

Patron Experience
The Patron Experience

- Orbis Cascade Alliance

http://summit.worldcat.org

The Patron Experience - Meta-search

- Two pronged approach
  - Index as many databases as possible into single index
  - Add broadcast searching into WorldCat.org platform for non-indexed databases
- Not part of Navigator
- Will be included for MnLink licensed databases
- Can create collections of databases
WorldCat Navigator Request Engine

Navigator Request Engine – Benefits

- Build an Unlimited Lender String
- Automatically conduct circulation functions if found within the group,
- Search the Resource Sharing Network to find a lender outside the group
Circulation integration is a key service component for several OCLC Discovery and Delivery Products.
WorldCat Navigator – Spring Changes

• Utilizing EZProxy on the patron user interface patrons will be prompted at the point of request for their institution’s affiliation. Once the patrons select their affiliated institution then that institution’s authentication system will prompt them for credentials.
WorldCat Navigator - Spring Changes

- Request forms will become standardized which will give a consistent look and feel to the patron. The request form will contain bibliographic details, affiliated library information, as well as patron provided information that can be customized by the affiliated library. For example: pick-up-location and need-before-date.

WorldCat Navigator - Spring Additions

- Integrated patron request management screens that will allow patrons to view all their consortia and interlibrary loan requests regardless of delivery method for example NRE or ILLiad
WorldCat Navigator - Spring Additions

• When resource sharing staff updates the status of an item in NRE, the circulation integration service will automatically take the appropriate action in the ILS, using NCIP protocol where possible.

WorldCat Navigator

Patron Interface
• WorldCat Group with the Navigator Request Engine as the delivery method for group held and non held items

Request Management
• Automatically building lender strings based off of real time availability

Circulation Integration
• Communicating with ILS regardless through NCIP/ESIP/SIP
ILLiad

- Individual libraries can choose which requests are sent to ILLiad and NRE based on bibliographic type.

<table>
<thead>
<tr>
<th>Bibliographic type</th>
<th>Library A- ILLiad</th>
<th>Library A- NRE</th>
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<tbody>
<tr>
<td>Articles</td>
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