Implementing WMS and WCL at Tilburg University

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In advance…

- Tilburg experience
  - Early adopter
  - Local choices
  - LBS3
  - Cataloguing in GGC
  - Combination with WCL
- Lecture is snapshot
  - WMS is developing (quarterly releases)
  - OCLC EMEA is gaining more experience
Tilburg University and its library

• Tilburg University
  o 5 schools: economics and management, law, social and behavioral sciences, humanities, catholic theology
  o Graduate schools and a business school
  o 12,500 students (85 nationalities)

• The library
  o Combined with IT Services
  o 61 f.t.e. library staff
  o One building (950 study places; 580 with PC)
  o 1,390,000 volumes; 44,600 circulations (2011)
  o History of innovation
<table>
<thead>
<tr>
<th>Service Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloguing</td>
<td>GGC</td>
</tr>
<tr>
<td>Circulation and Acquisition</td>
<td>OCLC’s LBS3</td>
</tr>
<tr>
<td>Discovery &amp; delivery systems</td>
<td>In-house developed iPort and GetIt!</td>
</tr>
<tr>
<td>Local databases</td>
<td>Like: repository, theses, image databases, journal article metadata, chapter metadata</td>
</tr>
<tr>
<td>Document server</td>
<td>Locally stored full text</td>
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<tr>
<td>Link database</td>
<td></td>
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<tr>
<td>Locally developed services</td>
<td>OpenURL resolver, loan server, place locator, etc.</td>
</tr>
<tr>
<td>Integration</td>
<td>METIS research information system</td>
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Selection process
## Rationale for new LMS / discovery service

### Why?

<table>
<thead>
<tr>
<th>Category</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital library landscape</td>
<td>Complex</td>
</tr>
<tr>
<td>Hardware</td>
<td>Outdated, unstable and no longer supported</td>
</tr>
<tr>
<td>Library management system</td>
<td>LBS3 outdated and no longer supported as from 1/1/2013 onwards</td>
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<tr>
<td>In-house developed discovery &amp; delivery system</td>
<td>In-house developed – unable to keep up with developments</td>
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<tr>
<td>Staff issues</td>
<td>Driving force behind in-house systems about to retire</td>
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<td>Increasing pressure to reduce costs</td>
<td>Maintaining same service level, with less IT staff</td>
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</tbody>
</table>
Why WMS and WCL? (2011!)

- Suppliers considered: OCLC and ExLibris
- WorldShare – working solution, good interface and promising new functionality
- WorldCat Local – good integration with WMS, GGC and Google
- WorldCat as underlying catalogue – more content for end users
Implementation project
Project aims

- Implementation WCL
- Functional requirements
- Implementation WMS

Early adopter
**TiU project team**

- Head acquisition and cataloguing
- Head circulation
- Future functional managers WMS/WCL
- IT specialist LBS3
- IT specialist local databases
- License manager
- Technical project manager (middleware)
- Head communication
Project schedule

- **Project initiation**

- **Analysis**

- **Implementation WCL**
  - 3/2012 - 8/2012

- **Implementation WMS**
  - 9/2012 - 2/2013

- **Aftercare**
  - 9/2012 - 5/2013
12. Verbundkonferenz des GBV
28 August 2013

Analysis
Workflow testing

Workflow analysis → Workflow testing → Gap analysis

Go / no go decision ← Impact analysis
Gap analysis (status March 2012)

152 WMS/WCL gaps by priority

- Blocking
- Very needed
- Needed
- Wish
- Not prioritized

152 WMS/WCL gaps by solution

- Solved!
- Workaround
- Release planning
- Unknown
WCL → Go!

• End-user service
  o Go live only possible at beginning academic year

• Condition: availability info (from LBS3) can be made available in WCL

➢ Start of implementation phase
WMS → No go

- Business case not (yet) valid
  - Host TiU’s LBS3
- Confidence in OCLC
  - Visit OCLC Dublin, OH
  - Await new releases
  - Remain in analysis phase
WCL implementation
Some WCL implementation challenges

- Loading metadata of local databases
  - Finding right data load method and route
  - Some local databases not loaded
- Activating e-collections
  - No tools to compare TiU link database to OCLC WCKBase
  - Collections PubGet/WCKBase not always identical to TiU’s licenses
  - E-books must also be activated
Go live

JUNE 2012

» soft launch for library staff

AUGUST 2012

» live for the world
WMS implementation
Requirements analysis (status Nov 2012)

152 requirements (March 2012)
- Met
- Workaround
- Release planning
- Unknown

152 requirements (November 2012)
- Met after Feb 2013 release
- Workaround
- Release planning
- Unknown
Decision end November 2012

LIVE AFTER

FEBRUARY 2013

RELEASE
WMS Implementation challenges (1)

- Acquisitions
  - Serials management – workarounds and staff care
  - Adapting workflow
  - Staff training

- Circulation
  - Connection to our self-service circulation machines
  - Depot requests (WCL and workflow changes)
  - Configure regulations
  - Adapting workflow
  - Staff training
WMS Implementation challenges (2)

- Interface TiU’s identity management system – WMS
  - Manage patron data at TiU and **not** in cloud
    - Student data in SIS
    - Staff data in HR system
    - Guest data in GuestDB
  - Daily update and weekly reload to WMS
  - Impossibility to delete patron/circulation data (legal issues)
WMS Implementation challenges (3)

- Interface TiU’s financial system SAP – WMS
  - WMS: order and receive transactions
  - SAP: financial transactions
  - Interface is ready, but not in use
  - Not possible to enter SAP ID in WMS
WMS Implementation challenges (4)

- Data load of Local Holding Records
  - Duration of process at OCLC (90 days)
  - Difficult to test at TiU (WCL connected to LBS3)
  - Limiting test set had profound effect on size transaction test sets

- Data load of vendors, orders, patrons, circulation transactions
  - Grab opportunity to clean up data in your old LMS
  - Test exceptions
Compared to LBS3

Experiences so far
Biggest workflow changes

- Cataloguing
- Acquisition (especially serials and book series)
- Depot requests
- Interlibrary loan
- Patron registration
- Finance
Circulation

+:
- Check-out: faster
- Check-in: faster
- Check-out holds: faster
- Depot requests: notification of patrons
- Local ILL titles: creating titles is faster; more flexible

-:
- Renewal: bulk not possible
- Fines: calculation only after check-in
- Holds: limited print functionality; configuration collection notice
- Patron registration: WMS user interface could be improved
Acquisition

- Vendor management
- Not possible to change placed orders
- Receive orders without invoice not possible for approval plans; received orders are transferred to next year
- Limited publication frequencies in serial administration
- Claim list is possible, but claiming itself not yet within WMS
- Not possible to get list of orders placed within a budget
- Erroneous matching & merging

Order process at TiU
- Catalogue in GGC and add local holding record
- Realtime, TiU symbol is added to WMS/WCL
- Switch to WMS, select title and place order
WorldCat Local

+・Large WorldCat database
・Easy to use interface for inexperienced users
・Integration with Google Books
・Third-party databases can be integrated in searching
・Integration with social media
・Export to reference managers
・Multi-language interface
・Interface for mobile devices

−・Duplicates and matching & merging problems
・Expert search is limited
・Classification systems biased toward US systems
・Third-party databases often only through Z39.50 (slow and unpredictable)
・No RSS or alerting service
・Problems with depot requests
Functional administration

+ 
- 

• Technical and application administration by OCLC

• Interface

• No test system, always connected to production system

• Fewer configuration possibilities

• Changes to WMS/WCL not always consistently communicated
Lessons learned
Lessons learned (1)

• Analyzing your workflow is useful. Grab the opportunity to improve
• It is difficult to quantify impact of gaps
• Activating e-collections takes lot of time
• Agree with OCLC on (iterative!) process of data load: specs, tests, acceptance load, production load
Lessons learned (2)

• Spend a lot of time on data load specs!
• Enrich local metadata with PPN/OCN, IBSN/ISSN
• Plan time to develop workarounds
• Combine migration to WCL and WMS
• Developing interfaces takes time and requires experts at both the library and OCLC
• Accept and plan for manual correction work after migration
Expectations

- Savings in system administration resources
- Temporarily: additional resources in Acquisitions
  - Claiming
  - LHR changes to be entered in GGC and WMS
  - E-books in GGC and WCKBase
Questions? More information?

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