



# UC-WorldCatLocal Pilot and Circulation Transactions

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*The* UNIVERSITY *of* CALIFORNIA LIBRARIES

# August 2007 CAG Survey

A	B	C	D	E	F
	<p>Please respond to each question below for your location in the appropriate column to the right. Feel free to expand any cell's dimensions to accommodate your response. Be concise but complete in your responses.</p>	<p><b>UC/OCLC Implementation Team, Circulation Transaction Group survey and recalls. Please send your completed response to <a href="mailto:johnson@lib">johnson@lib</a> p.m. Wednesday, August 8, 2007.</b></p>			
		UCD	UCB	UCSF	UCSC
	ExLibris/Aleph	Homegrown		III Millennium	III Millennium
1	<p>How do you define "hold" for circulation transactions?</p>	<p>Holds are passive requests</p>	<p>A hold is done when a patron wants something currently checked out to another patron. The hold gives the material to the second patron when the first patron returns the item. A hold automatically generates a recall of the item. In addition, a patron can page an HRLF item, whether currently checked out or not. If the patron has BAKER privilege, he/she can page any item for a fee. Paging an item retrieves it for the patron, if not currently checked out, and delivers it to the library pickup point of their choice. If it is currently checked out, the item will be recalled by a library staff member and delivered on return. If an item is not at HRLF, is not checked out, and patron does not have BAKER privilege, he/she must retrieve</p>	<p>Patron wishing to be the 'next in line' for a book that is checked out. Patron willing to wait until the due date.</p>	<p>Holds are passive requests. Patron wishing to be next in line for an item that is currently checked out, but willing to wait until due date. Holds may not be placed on items that are currently on hold.</p>
2	<p>How do you define "recall" for circulation transactions?</p>	<p>Recalls are active - they result in a system-generated request for the early return of a book</p>	<p>A hold can only be placed on an item currently checked out. A hold automatically generates a recall of the item. The patron who has it checked out receives notification to return the material for another borrower. At the time of the recall, if the item was due more than 8 days in the future, the recall due date is</p>	<p>Patron wishing to be the 'next in line' for a book that is checked out, but would</p>	<p>Recalls are active - they result in a system-generated request for the early return of a book</p>

# Outline

- UC-WorldCat Local (WCL) origins
- Circulation Transactions Task Group Charge
- Relationship to NCIP
- CDL Request and campus DDS with WCL
- PlaceHold Example in WCL
- Next steps...

# UC-WorldCatLocal (WCL) Origins

- Bibliographic Services Task Force Report
  - Published December 2005
  - 79 pages long
  - Recommendations for delivering services

# Some BSTF Recommendations

- Enhancing search and retrieval
- Rearchitecting the OPAC
- Adopting new cataloging practices
- Supporting continuous improvement

[BSTF Final Report](http://libraries.universityofcalifornia.edu/sopag/BSTF/Final.pdf)

<http://libraries.universityofcalifornia.edu/sopag/BSTF/Final.pdf>

# BSTF and Circulation

## **I. Enhancing Search and Retrieval**

**I.1 Provide users with direct access to item**

I.1b: Provide an “I-want-this” button that is present when the context warrants, with the goal of always offering a fulfillment option. No dead ends.

## **II. Rearchitecting the OPAC**

**II.1 Create a single catalog interface for all of UC**

II.1a: Create a single catalog interface for both local and system wide collections.

# Implementing the BSTF Recommendations

- UC System wide collaboration
  - 1 Executive Team (5 members)
  - 1 Implementation Team (9 members)
  - 18 UC Task Groups
  - 3 Joint UC-OCLC Work Groups
  - 1 Pending Task Group

[http://libraries.universityofcalifornia.edu/about/uc\\_oclc.html#launch](http://libraries.universityofcalifornia.edu/about/uc_oclc.html#launch)



# Circulation Transactions Task Group

- Penny Bertrang (UCB, **GLADIS**)
- Kymberly Goodson (UCSD, **III**)
- Carl Hunt (UCLA, **Voyager**)
- Gary Johnson (UCSB, **ExLibris**)

[Circulation Transactions Task Group Charge](http://libraries.universityofcalifornia.edu/about/uc_oclc.html#bstf)

[http://libraries.universityofcalifornia.edu/about/uc\\_oclc.html#bstf](http://libraries.universityofcalifornia.edu/about/uc_oclc.html#bstf)



# NISO Circulation Interchange Protocol (Z39.83-2002)

- This standard will define the various transactions needed to support circulation activities among independent library systems. Circulation activities include **patron** and **item inquiry** and **update transactions**, such as **hold or reserve**, **check-out**, **renew**, and **check-in**.  
([http://findarticles.com/p/articles/mi\\_hb5777/is\\_200209/ai\\_n23786197](http://findarticles.com/p/articles/mi_hb5777/is_200209/ai_n23786197) )

- [Z39.83 Protocol](http://www.niso.org/home) (<http://www.niso.org/home>)

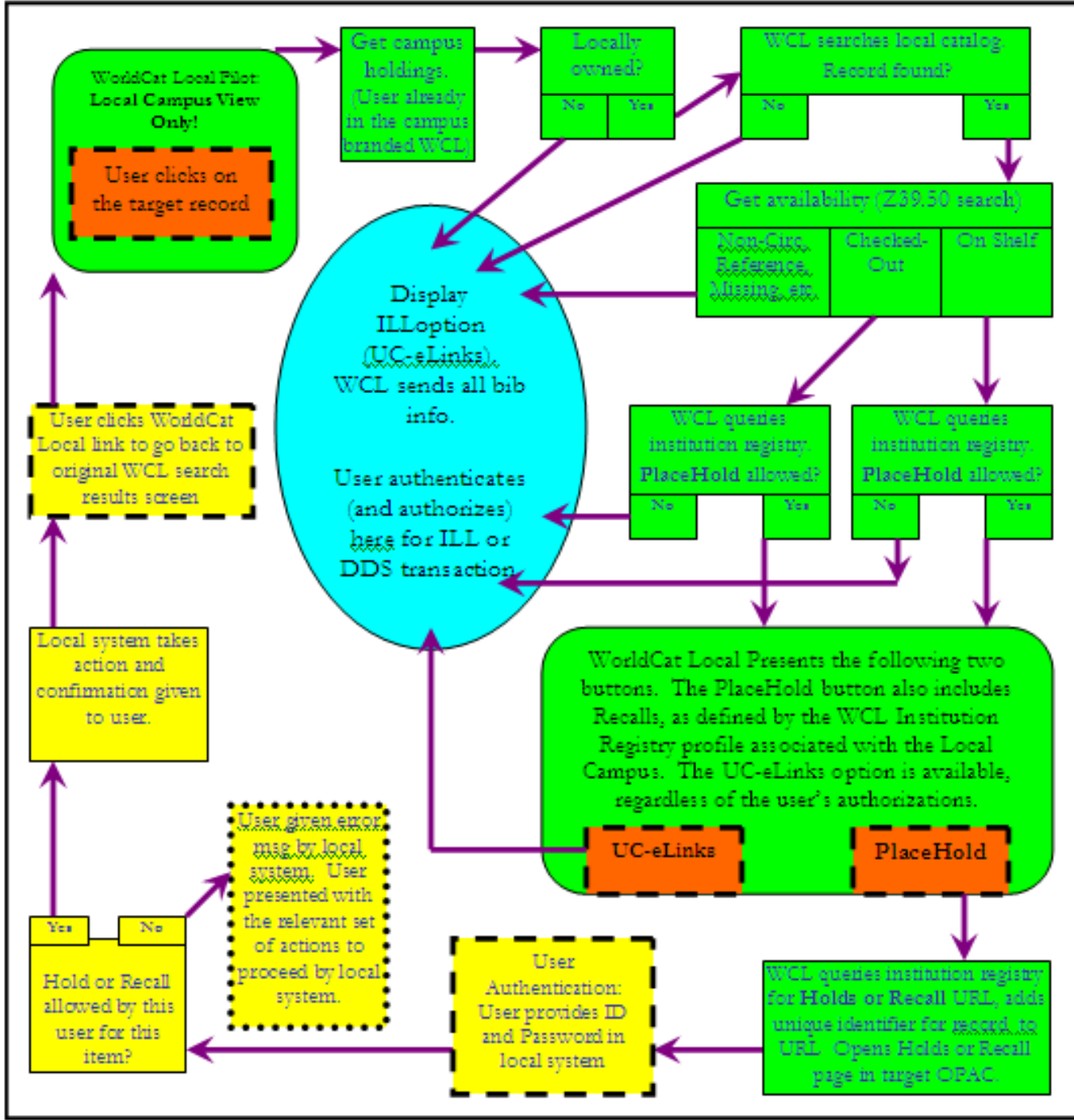
# UC CDL Request (and DDS)

- CDL Request utilizes ...
  - Authentication (user validation)
  - Authorization (user privileges)
- Users authenticated in local system  
(active account, no blocks, no expiry)
- Users authorized in CDL Request “fulfillment service” (ex: user eligible for campus DDS)

# UC-WCL Principles

- Do No Harm (preserve services!)
  - CDL Request
  - UC-eLinks
  - Campus DDS
- Expand services to include Circ Transactions
  - Holds & recalls (but for local stuff only!)
- User authentication on UC side only!
  - But....NCIP not yet implemented by UC's ILSs!

# Over The Wall



# WCL Advanced Search

## Advanced Search

Enter search terms in at least one of the fields below

**Keyword:**

Return items with these words appearing anywhere

e.g. The Old Man and the Sea DVD

**Title:**

Return items with these words in the title

e.g. The Old Man and the Sea

**Author:**

Return items by author

e.g. Ernest Hemingway

**Subject:**

Return items in this subject area

e.g. Fishing

**ISBN or ISSN or OCLC Number:**

Return item associated with the standard number

e.g. 0684830493

### Limit results by (optional)

**Library:**

Return only items owned by selected library(ies)

**Format:**

Return only items in the format

**Publication Date:**

Return only items published from

 to: 

e.g. 1971 e.g. 1977

**Content:**

Return only items with the content

**Audience:**

Return only items for the audience

**Language:**


Return only items in the language

# Availability Retrieved


Search:

Libraries Worldwide (WorldCat)

## **Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc.** by Studies in the Third World Inc.

Type:  Book; English  
Publisher: [Indianapolis, Bobbs-Merrill, 1971]  
OCLC: 137559  
Related Subjects: [Political posters, Mexican.](#) | [Students -- Mexico -- Political activity.](#)  
Citations: [Cite this Item](#) | [Export to EndNote](#) | [Export to RefWorks](#)

**Get this Item**

 Getting this item's location and availability in your library...

# Place Hold Button Presented

Search: no:137559

Libraries Worldwide (WorldCat)

Go

[Advanced Search](#)

## Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc.

by [Studies in the Third World Inc.](#)

Type:  Book; English

Publisher: [Indianapolis, Bobbs-Merrill, 1971]

OCLC: 137559

Related Subjects: [Political posters, Mexican.](#) | [Students -- Mexico -- Political activity.](#)

Citations: [Cite this Item](#) | [Export to EndNote](#) | [Export to RefWorks](#)

### Get this Item

Place Hold

UC-eLinks

UC San Diego Libraries (1 of 1 copies available)

SSH/Annex Controlled Circulation


SSH/Annex Controlled Circulation

F1235 .M4

AVAILABLE

# Over The Wall

Return to Item Information Request Item through Interlibrary Loan

 Roger UCSD Libraries Catalog  
You are searching all collections

**Please enter the following information:**

Enter barcode on back of your ID card

For example, type "21822..."

Enter your PIN (password)

Enter your PIN (password) - leave blank if this is your first time using the system

[Creating a PIN](#) | [Forgot your PIN?](#) | [Getting an error message?](#)

SUBMIT

**Note:** If you are using a computer in the library or a shared computer in another location, some of your personal information may be saved on the browser when you finish to prevent this

Clear form

[Have a problem, need help?](#) | **Start Over**



# User Selects Pick Up Loc

WorldCat.org

[Return to Item Information](#) [Request Item through Interlibrary Loan](#)

 Roger UCSD Libraries Catalog  
You are searching all collections

Requesting **Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc**

» For **BML Annex**, use [Biomedical Library Annex Request Form](#).  
» For **SRLF**, use [Melvyl](#)  
*Allow about 4 working days to receive SRLF items after requesting them.*

Please enter the following information (fields with red labels are required)

**Pick up location:** (Choose a Pickup Location) ▼

Include any special instructions

SUBMIT

Clear form

Start Over Log Out My Patron Record

# Local OPAC Item Record Displays

The screenshot shows a web browser window with the address bar containing [WorldCat.org]. The page header includes navigation links: "Return to Item Information" and "Request Item through Interlibrary Loan". The user's name "Roger" is displayed in a green banner, along with the "UCSD Libraries Catalog" logo and the text "You are searching all collections". On the right side of the header, there are links for "Circuit" and "Melvyl". Below the header, there are buttons for "Return To Catalog", "Start Over", "Log Out", and "My Patron Record". The main content area displays the search request: "Requesting Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc". Below this, it says "Choose one item from the list below:". A table with one row of item information is shown:

Mark	Location	Call number	Status
	<a href="#">SSH Concirc Annx</a>	F1235 .M4	AVAILABLE

Below the table is a button labeled "REQUEST SELECTED ITEM". A yellow callout bubble points to this button.

User clicks the  
"Request" button

# Confirmation Screen & Exit Option

User clicks the "Return to Item Information" link

The screenshot shows a web browser window with the address bar displaying [WorldCat.org]. A red circle highlights the "Return to Item Information" link in the breadcrumb navigation. Below the navigation bar, the user's name "Roger" is displayed next to a profile picture. The page title is "UCSD Libraries Catalog" with the subtitle "You are searching all collections". A link for "Course Reserves" is visible on the right. The main content area shows a confirmation message: "Your request for Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc was successful." Below this, a table displays the request details: "SSH Concirc Annx" in a blue box, "F1235 .M4" in a white box, and "AVAILABLE" in a grey box. The pickup location is "SSH Circulation Desk" with a note that the user will be notified by email. A red circle highlights this entire section. At the bottom, there is a search bar with "OCLC #" set to "137559", "All Collections" selected, and "System Sorted" selected. There are "Search" and "Save Search" buttons. A checkbox for "Only show available items" is present. At the very bottom, there are buttons for "Start Over", "Log Out", "My Patron Record", and "Regular Display".

Return to Item Information

Roger

UCSD Libraries Catalog  
You are searching all collections

» Course Reserves

Your request for **Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc** was successful.

SSH Concirc Annx	F1235 .M4	AVAILABLE
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**Pickup at:** SSH Circulation Desk - you will be notified by email when this title is available.  
To change pick-up location or to cancel this request, click on the "My Patron Record" button and then click on "Holds"

OCLC # 137559 All Collections System Sorted Search Save Search

Only show available items (check box, click search)

Start Over Log Out My Patron Record Regular Display

# User Returned to WCL Record

 **elvyl** @ UC San Diego **Pilot** [Get Help](#) [Off-Campus Access](#) [UCSD Library Catalog](#)


Home Search You are not signed in ([Sign In to WorldCat](#) or [Register](#))

Search:  Libraries Worldwide (WorldCat)  [Advanced Search](#)

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## Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc.

by [Studies in the Third World Inc.](#)

Type:  Book; English  
Publisher: [Indianapolis, Bobbs-Merrill, 1971]  
OCLC: 137559  
Related Subjects: [Political posters, Mexican.](#) | [Students -- Mexico -- Political activity.](#)  
Citations: [Cite this Item](#) | [Export to EndNote](#) | [Export to RefWorks](#)

**Get this Item**


UC San Diego Libraries (1 of 1 copies available)

SSH/Annex Controlled Circulation	F1235 .M4	AVAILABLE
SSH/Annex Controlled Circulation		

**Get It**  
[UC-eLinks](#)  
[Place Hold](#)  
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[Libraries](#) | **[Details](#)** | [Subjects](#) | [Reviews](#)

### Item Details

- **Document Type:** Book
- **Notes:** Title from portfolio. A folder ([8] p. 23 x 10 cm.) in Spanish, English, and French, inserted.
- **Description:** 1 portfolio (16 plates (part col.)) 45 cm.

### Notes

[Be the first person to add notes for this item](#)

### Table of Contents

[Be the first person to add table of contents for this item](#)

Search for [Mexican student posters; posters from the uprising 1968. Studies in the Third World Inc.](#) from Amazon.com

Languages: [Deutsch](#) | [English](#) | [Español](#) | [Français](#) | [Nederlands](#) | [中文](#)  
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# WCL Institution Registry & PlaceHold

- WCL Registry does not know if user is authorized to take intended action in the local OPAC
- Some users may be dropped “Over the Wall” and learn that their intended action cannot be done
- Institution Registry for PlaceHolds dependent on:
  - Successfully finding the local record
  - Retrieving the item’s availability
  - Configuration of Status Message Table for campus
  - Configuration of Library Policies Table for campus

# Next-Generation Melvyl Timeline

Pilot begins in April 2008 and lasts at least six months

During the pilot, staff will conduct formal usability testing gathering input from UC students, faculty, staff, and other users to determine how well the system meets their needs

In fall, a more fully developed Request system will be in place—fewer clicks for users to get to the item

Following the completion of the pilot, a decision will be made about whether to move forward or to pursue other options

*This slide from CDL information mailing sent to UC public services in mid-March, 2008 and entitled, "Next-Generation Melvyl Pilot supported by WorldCat Local: The Future of Searching," slide # 7*

Questions?