WorldCat Local™ connects your users to local, regional and global results through a single discovery-and-delivery experience. It leverages the scale of the Web, the depth of the WorldCat® catalog, and the distinctive resources of your library. One search box replaces multiple interfaces, and several “get it” options are consolidated, as well. WorldCat Local connects users’ search experience with library management systems—today, that means your catalog, WorldCat, local availability and resource sharing. Soon, OCLC® will add modules for circulation, license management, print and electronic acquisitions, and more.

WorldCat Local “quick start” provides a single search result that delivers your library’s resources and those of the world’s libraries. It is included in a WorldCat on FirstSearch® subscription at no extra cost. This is the first, easy step toward the only Web-scale cooperative, library management services on the Web.
I. General

What configuration options are available to a library in WorldCat Local?

Configuration options include the following:

- Unique URL as a subdomain of WorldCat.org
- Branded interface with logo and color options for backgrounds and links
- Branded version of the WorldCat search box for use on your Web site and other Web sites that are familiar to your users
- Definition of institution, branches and/or group to determine the priority position in search results
- Interoperability with a library’s local system and/or consortial borrowing system in areas such as display of item availability, circulation, resource sharing, the ability to place holds and OpenURL resolver
- Definition of the workflow for institution requests, group requests and requests made to other WorldCat libraries.

Can a WorldCat Local search box be added to e-learning tools such as Blackboard?

Yes. Library staff may place their WorldCat Local™ search box on any Web site or in any Web-enabled environment where they want it to be accessible to library users.

Can a library configure the WorldCat Local interface to display only some of the available interface languages?

No. All languages available within the WorldCat.org interface are displayed in WorldCat Local implementations.

How does WorldCat Local differ from OCLC’s group catalogs? Why would my library want to purchase WorldCat Local if we already have a group catalog?

WorldCat Local delivers a locally configured view of your library’s and/or group’s collections through the WorldCat.org environment. This functionality goes beyond what is available in group catalogs today on FirstSearch and the WorldCat.org interface.

Below are many of the key characteristics of group catalogs on FirstSearch, group catalogs on WorldCat.org and WorldCat Local.

Group catalogs on FirstSearch:

- FirstSearch-based databases that contain holdings of a specific library group
- Visible to users of group participants with optional “guest view” for many catalogs
- “Scoped views” of content help users search subsets of the larger group’s holdings

Group catalogs on WorldCat.org:

- WorldCat.org interface
- Group holdings elevated in relevancy ranking
- Scoping available for subgroups
- Group-level branding
- Custom Web links to group-specified sites
- Ability to put search box on any chosen site for access via a number of avenues.

WorldCat Local:

- Local holdings elevated in relevancy ranking
- Option for consortium holdings to be elevated in search results
- Local branding
- Custom Web links to locally specified sites
- Interoperability with local ILS for item availability and placing of holds
- Interoperability with consortial ILS for item availability and placing of holds
- Interoperability with local OpenURL resolver for delivery of online materials
- Interoperability with resource sharing system for placing of interlibrary loan requests
- Opportunity to integrate local collections in search results
- Ability to place search box on any Web site for access via multiple avenues.
- Coming in July 2009—metasearch for non-OCLC resources.

What kinds of statistical reports does OCLC provide to WorldCat Local libraries?

OCLC provides WorldCat Local subscribers with access to a hosted tracking/metrics tool to view all Web usage statistics for their WorldCat Local site. This consists of dozens of reports, most of which are customizable to fit an institution’s needs. The reports include (but are not limited to) search counts, search terms, delivery option clicks and page views for every local page.
How can our library make interface changes or suggestions?

OCLC reviews feedback from library staff and library users as it plans enhancements to the service. In addition, OCLC conducts extensive usability testing with a variety of users to determine needed changes.

Does WorldCat Local use protocols such as NCIP or Z39.50?

WorldCat Local supports the NCIP and Z39.50 communication protocols. Note that these protocols must also be supported by the purchasing library’s ILS or its intra-consortial borrowing system.

Where does a library card fit into the WorldCat Local picture?

WorldCat Local interoperates with existing circulation and interlibrary loan procedures. This means library users continue to use their existing library card(s) to obtain materials from their home library and follow library policies to use other delivery options such as interlibrary loan.

II. Interoperability

ILS

How does WorldCat Local work with a library’s ILS?

WorldCat Local integrates a locally configured version of WorldCat.org with the ILS and delivery services already in place at your library.

WorldCat Local supports a number of activities for authenticated users.

With which ILSs does WorldCat Local work?

OCLC has completed integration of WorldCat Local with several integrated library systems, and is in the final stages of development with other systems. WorldCat Local is currently active at libraries with the following systems:

Innovative Interfaces: Millennium, INNOPAC, INN-Reach
SirsiDynix: Horizon, Symphony, Unicorn
ExLibris: Voyager, Aleph

Expanded access to other ILSs will be added in phases, including an API and NCIP for library staff to create their own interoperability features later in 2009.

WorldCat Local supports a number of activities for authenticated users

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<tr>
<th>WITH THESE TYPES OF ITEMS</th>
<th>USERS CAN PERFORM THESE ACTIONS</th>
<th>ON THESE SYSTEMS</th>
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| Returnable items including but not limited to books, CDs and DVDs | Place a hold | • Innovative: Millennium, INNOPAC  
• ExLibris: Aleph, Voyager  
• SirsiDynix: Horizon, Symphony, Unicorn |
| | Request a selected item | • WorldCat Resource Sharing™  
• OCLC ILLiad™  
• Innovative: INN-Reach  
• OCLC VDX®  
• Voyager Universal Borrowing (shared catalog) |
| Nonreturnable items, such as articles | • Link to full text from FirstSearch or Electronic Collections Online™  
• Link to article full text through a library’s OpenURL resolver via the OpenURL Resolver Gateway | N/A |

* Compatibility with this system is currently under development.
Examples of WorldCat Local sites:

A. University of Washington
   (Innovative Interfaces INN-Reach)
   (www.lib.washington.edu)

B. Lincoln Trail Libraries System
   (SirsiDynix Horizon)
   (http://www.ltls.org)

C. The Ohio State University Libraries
   (Innovative Interfaces INN-Reach)
   (http://library.osu.edu)

D. University of California Santa Barbara
   (Ex Libris Aleph)
   (http://library.ucsb.edu)

E. University of California San Francisco
   (Innovative Interfaces Millennium)
   (http://library.ucsf.edu/db/melvylpilot.html)

F. University of California Los Angeles
   (Ex Libris Voyager)
   (http://ucla.worldcat.org)

G. Zion-Benton Public Library
   (Horizon Unicorn)
   (http://zblibrary.worldcat.org)

H. Northeastern Illinois University
   (Ex Libris Voyager)
   (http://neiulibrary.worldcat.org)

I. Indiana University
   (Sirsi Symphony)
   (http://iublibraries.worldcat.org)

How does OCLC support a library that migrates from one automation system to another?

Libraries are required to give OCLC 90 days notice prior to migrating to a new system. OCLC will then work with library staff to transition their use of WorldCat Local to their new service. When a library adopts a new local system for which WorldCat Local has not been configured, OCLC will make reasonable efforts to develop interoperability with the system.

Authentication

Will WorldCat Local use our library’s authentication system for online services such as NetLibrary® or FirstSearch, or full text from non-OCLC electronic resources?

Yes, WorldCat Local will include a link to your current authentication system for access to licensed content.

At what point does WorldCat Local integrate user authorization?

An authentication log-on will display to users at times when they need to complete authentication in order to take an action such as initiating an interlibrary loan request or linking to licensed online content. In addition, a link to user accounts can be configured to display within the interface for users who wish to log on at any time.

Our users already create accounts in our ILS. Will they now have to create another or can we tie in to the user account?

Users will need to create a WorldCat account in order to take advantage of features such as building lists or contributing content. The minimum requirements for a WorldCat account are name, password and e-mail address. This is a separate account and accesses different information than a user’s ILS account.

OpenURL resolver/content management

How will WorldCat Local work with our OpenURL resolver?

OCLC staff work with you to establish links from WorldCat records to your resolver. If you have already set up the OpenURL resolver link in FirstSearch, you will find the process for establishing this link is similar. WorldCat Local links users to your OpenURL resolver at appropriate times within the search process.

The WorldCat Local service does not access information in your resolver and deliver it through the WorldCat Local interface; rather, it links users to your resolvers.

NOTE: It is essential for your library to add holdings information for its serials titles to WorldCat in order for WorldCat Local to appropriately display a link to your OpenURL resolver. You may wish to use the eSerials Holdings™ service to streamline the work needed to add serials ownership information to WorldCat.

How does WorldCat Local work with an A to Z list?

OCLC can configure a link to your library’s A to Z list during implementation, but we do not recommend it. Usability testing with WorldCat Local has shown that linking to your OpenURL resolver will provide a superior user experience.
Can WorldCat Local be configured to work with repository systems in addition to CONTENTdm®, such as a Fedora repository?

OCLC can harvest records from OAI repositories, crosswalk them to MARC format and load them directly into WorldCat where they become part of a user's search and discovery experience. This is how OCLC handles CONTENTdm and other digital collections.

For collections that are not OAI-harvestable, in July 2009, OCLC will offer metasearch functionality that will allow WorldCat Local libraries to set up connectors to additional collections.

III. Library holdings and cataloging

If I catalog a record today, when will it be visible through WorldCat Local?

New cataloging additions to your collection will be visible in WorldCat Local in real time.

What are the plans for making data from our local catalog available in WorldCat Local?

OCLC is developing the ability to use fields from local holdings records, such as local notes, local URLs, serials coverage, call number and location.

How many tiers of holdings can be configured within a WorldCat Local implementation?

At present, a purchasing library can have three tiers of holdings plus a fourth WorldCat tier as part of its relevancy ranking. The first three tiers are configurably by the library, and the fourth tier is always the global view of resources in all WorldCat libraries.

A WorldCat Local implementation could, for example, have local holdings in the first tier, group/consortial holdings in the second, a state library system's holdings in the third, and then WorldCat libraries.

Can my users limit search results to resources located at a specific branch?

Yes, branch scoping is available. You will include branch configuration as you plan your library's WorldCat Local. Consider the branches you want to scope to as you determine your batchloading or reclamation needs. To allow branch scoping you need to provide Local Holdings Records (LHRs) for all of your materials.

Does branch scoping change the relevancy ranking of the results?

No. Relevancy ranking is based on a library’s OCLC symbol, among other things. The relevancy-based order of a result set doesn’t change when branch scoping is applied. Branch scoping supports scoping of the result set to the items located at a branch.

Can my library configure its own relevancy algorithm for a WorldCat Local installation?

The relevancy of your library’s WorldCat Local implementation is configured primarily by the placing of your library’s holdings in WorldCat, which elevates the resources you own to the top of search results. Relevancy is also affected by the WorldCat-based holdings of the institutions or consortium you select as your second tier. Relevancy cannot be configured further; however, OCLC regularly evaluates and adjusts its algorithm to ensure your users receive the best possible result sets.

Libraries also have the option to display their default search results by relevance and location (current default) or by relevance only.

How can my library make sure its serial holdings information is present in its WorldCat Local implementation?

Make sure that your holdings are set on all your serial records. Staff can save time by using the eSerials Holdings service to add their holdings symbol to WorldCat records. eSerials Holdings automates the process of setting and maintaining holdings, working with partners that include WorldCat Link Manager™, EBSCO LinkSource, Serials Solutions 360Link and theTDNet e-Resource manager.

Adding LHRs for serials will allow you to provide summary and detailed information about your serial holdings. OCLC is working to make use of LHR data in WorldCat Local. You can prepare for these future enhancements by creating LHRs now.

When my library batchloads records in preparation for WorldCat Local, how does this process interact with existing Local Holdings Records?

There are two ways LHRs can be added through batchload. When you send MARC Format for Holdings Data to be loaded as LHRs, the process deletes all of your existing LHRs and replaces them. If you choose to create LHRs from bibliographic records, existing LHRs are not deleted and only new LHRs are added. A library does not need to send its entire database each time it submits a batchload order. The library only needs to send sets of records (one or more) that require updating.

OCLC now supports nightly updates of LHRs.
Are records in the local catalog without OCLC numbers included in search results?

No. The OCLC number must be indexed in all records in your local system in order for WorldCat Local to work. The OCLC number is a unique identifier that connects records in WorldCat with records in your local system that contain location and availability information.

OCLC plans to add local system number as another way for WorldCat Local to communicate with your local system.

Does the use of WorldCat Local require that all records in our catalog be in WorldCat? Does this include our records for licensed content?

WorldCat Local searches records in WorldCat and does not search local systems. This means all records currently in a library’s local system must be in WorldCat.

OCLC recognizes that libraries often obtain bibliographic records from record providers that prohibit loading of those records into WorldCat. To resolve this issue, OCLC has an ongoing program to identify these record sets and their providers and negotiate directly with the record providers on behalf of all our members for permission to load the records into WorldCat. A list of vendors that currently partner with OCLC to provide records of their content is here: www.oclc.org/us/en/worldcatlocal/support/vendor.htm.

Can OCLC customize mapping of IP addresses to ZIP codes? For example, our IP looks like it is coming from Fairbanks, Alaska, but it is really in Anchorage some 500 miles away.

No. This mapping occurs automatically based on information WorldCat Local can perceive about the IP of the incoming machine. In the case where an IP is provided by an Internet Service Provider (ISP) that is not located near the user, location information may not match that of a user. Users always have the option to change the location to the correct ZIP, state, city or country. Once a user makes this change, a cookie is written to that machine and subsequent visits to WorldCat.org or WorldCat Local will reflect that change.

Is the information about print and digital access to a periodical driven by a single record approach? How would that work for the libraries with a separate record approach?

The WorldCat database does not use a single-record approach. OCLC will work with libraries to ensure holdings are on all applicable record formats in WorldCat through a reclamation project.

IV. Consortia

In a consortium in which only a few libraries use WorldCat Local but share bibliographic records, how would this work so that the results are correct?

WorldCat Local uses the WorldCat database for discovery. As long as your holdings are set and up-to-date in WorldCat and the OCLC number is indexed in your local catalog, users will find your library’s resources. When each library is identified in the local catalog as holding the item, then sharing of bibliographic records is not an issue.

What does WorldCat Local offer to a consortium that has no union catalog other than an OCLC borrowing group?

WorldCat Local can be configured to surface holdings of a group of libraries—even those that do not share a union catalog—in search results. The libraries would determine how to best link users to their resource sharing options.

Will WorldCat Local work in a shared library system if only one institution wants to participate?

Yes. Libraries have implemented WorldCat Local with the display of their resources first and the resources from libraries in their consortium as the second tier in their search results displays.

In a consortium, must all libraries use the same system in order to implement WorldCat Local?

No, all libraries in a consortium are not required to use the same system in order to implement WorldCat Local.

My library system has a shared collection that does not provide information about items located in individual libraries. How will we provide information about collections of individual libraries?

Library staff should work with an OCLC representative to discuss a reclamation project to assign a unique OCLC symbol to records on an individual library basis.

My library is not part of a consortium. Can I choose a consortium I know is familiar to my users as the second tier of holdings displayed in my WorldCat Local implementation?

Yes, even though your library is not in a formal consortial agreement with other libraries, you may still select a group of libraries with which you are most interested in sharing as one of your tiers.
We are one of several libraries in a large research library system. What does “local library” mean in this context? Are settings at the campus or system level rather than our library level?

If your library has its own unique OCLC symbol in WorldCat, you may determine that WorldCat Local will display your library’s resources first in results, followed by those of the other libraries in your system. If your users are familiar with searching across all system libraries, you may prefer to rank system holdings first in results lists.

Is it possible to build a local ILL consortium with WorldCat Local where no current ILL system with a union catalog exists?

WorldCat Navigator is OCLC’s solution for consortial borrowing. WorldCat Navigator is a new service that provides seamless resource sharing within your library group and beyond. The discovery interface is based on the WorldCat.org platform; institutions within a consortium can choose between WorldCat Local and a group catalog view of WorldCat.org.

Will WorldCat Local let our users request consortial materials if no other libraries in the consortium use WorldCat Local?

Yes. WorldCat Local can be set up so your users can easily identify items owned by other members of your consortium, as long as their ownership information is in the WorldCat database. Your WorldCat Local service will be configured to enable users to obtain the materials they need using the familiar delivery services you already provide to them.

V. Search

How does relevancy ranking work in WorldCat Local?

WorldCat Local determines relevancy in the same way as WorldCat.org, but also factors in the holdings of your library to elevate items in search results.

WorldCat.org’s proprietary algorithm produces relevancy ranking for a standard, non-index-specific search by evaluating the appearance and proximity of the search terms in fields within WorldCat records. Primary weight is given to title; secondary and tertiary weights are given respectively to author and subject. The algorithm also matches against other bibliographic fields, but these three receive the most emphasis. Also considered is how recently an item was published or released and how many WorldCat institutions hold the item.

Does WorldCat Local searching support search of eBook full text?

No. eBook searching is performed at the metadata level.

Can users limit search results to only available items?

No. WorldCat Local does not currently have the ability to limit to only available items.

Is there a way to limit search results to one location?

Yes. WorldCat Local supports scoping of search results. Scoping is based on how a library has set up ranking of search results. For example, libraries can set the default scope to display just items held by their library or by their consortium (which would include their holdings) or all libraries in WorldCat.

In addition, WorldCat Local supports branch-level scoping. OCLC will work with libraries during their retrospective batch project to set Local Holdings Records to identify items held in their branches.

How does the FRBR algorithm used in WorldCat.org affect a library’s local holdings display in WorldCat Local?

Items derived from a source work are combined into work sets using the FRBR algorithm developed by OCLC Research. Multiple-language items are placed into their own work sets so that they may be represented separately within the search results.

On WorldCat.org, the representative records for the work sets are those items that are the most widely held; in WorldCat Local, the representative records for the work sets are those items that are the most widely held or the most widely held that are also held by the institution/group.

All items in a work set may be discovered under the Editions link in the detailed WorldCat record.

What are OCLC’s plans to expand searching to include non-OCLC databases?

OCLC plans to expand the eContent that users reach when they search WorldCat Local to include additional sources.

Some content will be indexed within WorldCat. Examples of this are article-level records for GPO, ArticleFirst®, MEDLINE, ERIC and the British Library Inside Serials that are already included in WorldCat. OCLC has also announced plans to index article-level records from MLA, H. W. Wilson, and EBSCOHost published databases in WorldCat. Some content may be accessible through a planned metasearch option.
OCLC and Index Data are working together to extend the discovery capabilities of WorldCat Local to include licensed and full-text resources of a library. This functionality will be available July 2009.

Register for e-mail updates about enhancements to the service at www.oclc.org/email/subscribe.htm.

Can library staff control the order or composition of the faceted results? For example, could staff remove or rearrange facets?

Facets related to result sets are not configurable. OCLC may revise, add or remove facets depending on user feedback and usability testing on the use of the WorldCat.org service. Facets are currently presented by frequency of use.

VI. Delivery

How do users gain access to eBooks via WorldCat Local?

Access to eBooks from NetLibrary and other services is achieved through:

- IP authentication
- Remote authentication through a proxy server
- Links in the 856 field of WorldCat Records connect users to eBooks from NetLibrary and other services.

Is it possible to block the ILL option for items that we own, but do not lend (such as multimedia materials)?

Yes, libraries can define as part of their workflow fulfillment options when they allow users to place ILL requests.

With which resource sharing systems does WorldCat Local operate?

WorldCat Local currently interoperates with OCLC’s WorldCat Resource Sharing, ILLiad and VDX services, in addition to the INN-Reach service from Innovative Interfaces, Universal Borrowing (shared catalog) from ExLiris and RELAIS ILL. WorldCat Local can be configured to interoperate with other OpenURL 1.0-compliant resource sharing services.

Our ILL requests are done through a form that sends an e-mail to a dedicated e-mail address. Will WorldCat Local allow us to continue to receive our ILL requests at this address?

This ILL option is supported if requests are sent via OpenURL.

VII. Social tools

All social tools in WorldCat.org are available to WorldCat Local users. This means that users of WorldCat Local benefit from social features at the local, group and global levels.

Can library staff block access to social tools? We block MySpace for children, etc.

As part of the terms and conditions of the WorldCat.org site, all users must be over the age of 13. OCLC does not have the capability to block social tools because they are designed for the benefit of the entire community (i.e., all users can benefit from the reviews, ratings or recommendations provided by others).

OCLC has implemented mechanisms to enable the community to police itself. Each page that supports user-contributed content enables users to flag inappropriate content on that page. Once a page is flagged, OCLC staff reviews it and takes appropriate action.

Will WorldCat Local add the ability for users to add content to the system (i.e., books and other materials not already in the system, as well as tags, subjects, etc.)?

OCLC provides additional ways for users to contribute content to WorldCat.org that will also display in WorldCat Local. Users can tag bibliographic records, reviews and lists. The service aggregates tags into clouds based on users and bibliographic records.

VIII. Content

What types of content can a library integrate into WorldCat Local?

In addition to indexing content in a library’s catalog or a group’s union catalog, OCLC is working to index other library collections such as databases that a library manages outside its catalog.

Resources already indexed in WorldCat.org that are included by extension in WorldCat Local are:

- Article-level records from five databases (GPO, ArticleFirst, MEDLINE, ERIC, British Library Inside Serials)
- Licensed eSerials collections (via the OCLC eSerials Holdings service)
- Locally digitized materials created with CONTENTdm that have been added to WorldCat
- “Open access” content cataloged into WorldCat by librarians at participating institutions; This includes public domain eBooks and authoritative Web sites.
Does OCLC plan to add links to open-access articles or eBooks available via Project Gutenberg or other open-access sites to WorldCat.org and WorldCat Local?

OCLC plans to add a search of open-access material. When implemented, this open-access material search will surface any data that indicates an item is available openly on the Web.

Is OCLC working with Google to provide access to books in the digitization project?

OCLC presents the link to the preview or full-text version of Google’s digitized items on the detailed record through use of the Google Book Search API. Google has provided OCLC with the records that represent the items it has digitized. These records are currently in the process of being loaded to WorldCat.

In addition, Google has added a “Find this book in a library” link in Google Scholar to digitized books for which records exist in WorldCat. This option displays near the “Buy this book” button on the right side of the Google Scholar screen.

Does WorldCat Local contain reviews from sources other than Amazon and user-contributed content?

Yes, in addition to reviews from Amazon and those contributed by users, WorldCat Local includes reviews from Educational Media Reviews Online (EMRO) and WeRead.

IX. Pricing

How is WorldCat Local priced?

WorldCat Local pricing includes an annual subscription fee and a one-time implementation fee. The subscription fee is based on the size of a library’s user population. Contact an OCLC representative at libservices@oclc.org to obtain pricing for your library.

NOTE: WorldCat Local “quick start” is included in a subscription to WorldCat on FirstSearch at no additional cost to subscribing libraries.

The costs of WorldCat Local are in addition to those of an ILS. How can a library justify this additional cost?

When a library subscribes to WorldCat Local, it pays for a Web-based service that expands discovery of its collection on the Web and better integrates the disparate resources it provides into that discovery experience. Users search collections through a single, simple Web interface and find:

- Items in the traditional library catalog.
- Materials (increasingly, digital assets) in special collections outside the catalog.
- Article records from a growing number of familiar databases.

In addition, integration of WorldCat Local with a library’s delivery options ensures that users can get the resources they identify through the service. The service displays delivery options that are appropriate to the needed resource, eliminating the need for users to move among multiple services to obtain the items they need.

The breadth of the OCLC cooperative lets a library that implements WorldCat Local deliver a world of physical and electronic library-owned content to its users while still keeping the focus on the library’s collections. WorldCat Local search results list local holdings first, followed by those of a consortium or group, and then those of all WorldCat libraries globally.

Libraries that manage timely updates of their holdings into WorldCat for discovery through WorldCat Local also ensure that resources in their collections will be discoverable on the open Web through WorldCat partners such as Google and Yahoo! Search, and social tools such as link sharing and list making.

In the future, circulation, print and electronic acquisitions, and license management modules will increase the utility of WorldCat Local even further, allowing for more integration of library management services with library discovery—the next-generation ILS.

So, for an incremental cost, WorldCat Local libraries receive benefits far beyond any system they could have implemented independently. WorldCat Local absorbs the complexity of providing single-search and makes physical and electronic collections more discoverable and thus more easily accessed by library users.

X. WorldCat Local “quick start”

General

How can my library qualify to receive WorldCat Local “quick start”?

WorldCat Local “quick start” is now included in library subscriptions to the WorldCat database on the FirstSearch service at no additional cost.

Your WorldCat subscription now gives your library:

- Access to the WorldCat database on the FirstSearch service
- Visibility of your library’s collections on the Web through WorldCat.org
- The first steps toward a cooperative, next-generation integrated library system (ILS) with WorldCat Local “quick start.”

Subscriptions to the FirstSearch Base Package or OCLC Collection also qualify for WorldCat Local “quick start.”
Does WorldCat Local “quick start” replace my FirstSearch subscription?

No. WorldCat Local “quick start” is provided to your library as part of its subscription to WorldCat (through FirstSearch). It complements your current FirstSearch subscription by adding even more visibility of your library’s resources than you now receive through WorldCat.org. If you discontinue your WorldCat subscription via FirstSearch, you will no longer receive WorldCat Local “quick start.”

Relationship with other WorldCat services

How does the functionality in WorldCat Local “quick start” compare with what my users see today in WorldCat.org?

Your users will search the world’s libraries through the familiar WorldCat.org interface, with its current search features, social networking tools, personal profiles and links to library services that you have already set up in the WorldCat Registry.

With WorldCat Local “quick start,” your users will see a URL, search box and interface that reflect your library’s branding. They will also see the resources your library has cataloged in WorldCat listed first in search results.

When you place your branded WorldCat Local “quick start” search box on Web sites and pages your users consult frequently, your library’s name displays on the box, intuitively connecting your library to the search experience.

Additional features visible to your users through WorldCat Local “quick start” will primarily depend on the Web-based ILS, resource sharing and full-text delivery solutions in use at your library.

If your library uses an ILS for which OCLC has established interoperability (Innovative Interfaces Millennium or INNOPAC; Ex Libris Voyager or Aleph; SirsiDynix Unicorn, Horizon or Symphony), the service will:

- Display item location, call number, circulation status and links found in your OPAC
- Pass ILL requests to your WorldCat Resource Sharing or ILLiad request form if your library allows user-initiated interlibrary loan requests
- Support placing holds on needed materials.

If your library uses an ILS for which OCLC has not established interoperability, beginning in July 2009 your users will see the library-branded URL, search box and interface and search results that feature your library’s holdings. Expanded access to other ILS systems will be added in phases, including prominent links to library catalogs and APIs and support for NCIP your staff can use to develop additional integration between WorldCat Local and your local system.

NOTE: The OCLC control number must be consistently indexed and prefixed in your library’s catalog in order for item location and availability status to display.

What is the difference between WorldCat Local “quick start” and WorldCat Local?

Libraries with materials in WorldCat can use WorldCat Local as the primary access point for their materials, resources from selected groups and libraries worldwide with items in the WorldCat database.

- WorldCat Local users see their library’s brand in the URL, search box and user interface.
- Local library resources are displayed first in search results.
- Users can directly access materials, place requests to hold items, and connect to full text (when available) from within the WorldCat Local interface.
- Users can place requests for materials in their library, libraries within their consortium or any WorldCat library using OCLC resource sharing services.
- Interoperates with local ILS and consortial ILS.
- Users can get the resources they need due to smart integration with a library’s existing delivery services at the library and consortium or group levels.
- Users can refine their research to a specific branch within a library system when Local Holdings Records are present.
- Article-level records from well-known databases link to full text where available.
- Users connect to the global WorldCat community with the same social networking tools available on WorldCat.org.
- In July 2009, WorldCat Local libraries will have the ability to create a single, integrated, relevancy-ranked search experience for their physical, electronic and digital resources. Initially, 100 of the most widely used, licensed resources from multiple providers will be active on the service, with more databases and other materials being added each month.
- WorldCat Local libraries receive full-featured, custom statistical reports.
- Library staff at WorldCat Local libraries participate in the WorldCat Local User Group community that provides direction for future development of the service.

The first step toward a fully localized view of library materials is WorldCat Local “quick start.” Included at no extra charge with a WorldCat on FirstSearch subscription, this service offers many of the benefits of WorldCat Local and includes:

- The library’s brand in the URL, search box and user interface
- Library resources represented in your ILS displayed first in search results
- Interoperability with a single ILS
- Interoperability with OCLC Resource Sharing services (WorldCat Resource Sharing or ILLiad)
- Smart integration with a library’s existing delivery services
- Access to the same social networking tools available on WorldCat.org
- Article-level records from well-known databases with links to full text where available

WorldCat Local currently interoperates with several ILS vendors including: Ex Libris Aleph (via Z39.50), Ex Libris Voyager, SirsiDynix Horizon, SirsiDynix Unicorn, SirsiDynix Symphony,
Innovative Interfaces Millennium and Innovative Interfaces INNOPAC. Libraries using these ILS systems will benefit from additional interoperability features, including real-time availability and the ability to place holds.

OCLC is developing additional ILS system integration with WorldCat Local. Upcoming plans include prominent links to library catalogs in the WorldCat Local interface and the release of APIs that library staff can use to enable interaction with additional ILSs for the display of item availability and let users place holds.

My library group has a group catalog from OCLC that lets us see a view of only our collections in both FirstSearch and WorldCat.org. Will my group see this view of its collections in WorldCat Local “quick start”?

Yes. While the main goal of WorldCat Local “quick start” is designed to add visibility and access for individual library collections, your library’s group catalog will be searchable as a database.

Your group can add more group visibility and interoperability with your existing shared catalog and consortial borrowing system by upgrading to a subscription to the WorldCat Local service.

Relationship with OCLC electronic resource services

I understand OCLC plans to add access through WorldCat.org to its electronic resource services (FirstSearch, NetLibrary, CAMIO®, ArchiveGrid® and Electronic Collections Online). Is this related in any way to WorldCat Local “quick start” access through the WorldCat.org interface?

Yes. When OCLC integrates access to its electronic resource services through WorldCat.org in July 2009, your users will be able to reach all of your library’s collections in WorldCat plus all the electronic resources you license from OCLC through a single search in your library’s branded search box.

The same library-branded URL, search box and interface you receive with WorldCat Local “quick start” will be used to access the OCLC databases, eBooks, eAudiobooks, digital objects and ejournals you make available to your users. As you introduce your library’s view of WorldCat.org as part of your WorldCat Local “quick start” site, you may wish to let users know in advance that this will soon be an additional way they can reach many of the electronic resources you provide for them. Single-search access should save time for searchers because it will reduce the number of separate services and interfaces currently required for comprehensive research.

### Key features in WorldCat Local and WorldCat Local “quick start”

<table>
<thead>
<tr>
<th>Feature</th>
<th>WorldCat Local “quick start”</th>
<th>WorldCat Local</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical Collection Discovery</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institution relevance ranking</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Group relevance ranking</td>
<td>*</td>
<td>✓</td>
</tr>
<tr>
<td>Branch-level scoping</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Local information displays (e.g., local notes, local URLs)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>Delivery</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource sharing through WorldCat Resource Sharing or ILLiad</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Resource sharing through other services that accept Open URL</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Interoperability with link resolvers</td>
<td>1</td>
<td>more than 1</td>
</tr>
<tr>
<td>Use information from Local Holdings Records (LHRs)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>Database Metasearch Discovery</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metadata visible without authentication (currently includes: GPO, ArticleFirst, MEDLINE, ERIC and British Library Inside Serials)</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>CONTENTdm or other digital collections</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>OCLC-licensed third-party database content</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Metasearch integration</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>Place Hold</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ILS interoperability</td>
<td>1 system</td>
<td>2 systems</td>
</tr>
<tr>
<td>Redirect</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>NCIP</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

*For libraries that share an ILS, WorldCat Local “quick start” supports three levels of relevance: individual library, group view of other libraries that share the ILS, and all WorldCat libraries. A “shared ILS” is an ILS in which all participating libraries share a single bibliographic record of a single set of circulation policies.
Also in July, a subscription to the WorldCat Local service will expand to include a new comprehensive search capability that will search your library’s OCLC and non-OCLC library resources in a single search with integrated search results.

**Will we receive a library-branded URL and search box for both “quick start” and the upcoming integrated access to electronic resource content through WorldCat.org in July?**

No, as part of its subscription to WorldCat on FirstSearch, your library will receive only one library-branded URL and search box that will enable users to connect to your library’s WorldCat Local “quick start” site and to the electronic resources you license from OCLC.

## Interoperability

**With which ILSs does WorldCat Local “quick start” interoperate?**

ILSs with which WorldCat Local “quick start” currently interopereates are:

- Innovative Interfaces Millennium
- Innovative Interfaces INNOPAC
- Ex Libris Aleph (with Z39.50 server)
- Ex Libris Voyager
- SirsiDynix Horizon
- SirsiDynix Unicorn
- SirsiDynix Symphony

Interoperability with these ILSs means that your users will be able to see details such as location, call number, circulation status and links from your library’s OPAC. This availability is primarily attained via the screen scraping method. Users may also place holds on needed materials. “Smart delivery” means that users will see the most appropriate delivery option for items in search results, based on your library’s existing services. They can connect with resources using links to your existing OpenURL resolver and to your library’s WorldCat Resource Sharing or ILLiad.

OCLC plans to release access to WorldCat Local “quick start” in phases by ILS.

- Libraries with the ILSs for which OCLC has established interoperability (see list above) can complete their configurations and begin to use WorldCat Local “quick start” now.

- Libraries with other ILSs will receive access to their branded URL and search box in July 2009, with the release of integrated access to OCLC eContent on the WorldCat.org interface. If your library falls into this group, there are preparations you can make now for use of your new site in July. Visit [www.oclc.org/us/en/worldcatlocal/support/welcome.htm](http://www.oclc.org/us/en/worldcatlocal/support/welcome.htm) for information about planning for your library’s “quick start” to WorldCat Local.

**What if I don’t have one of those ILSs? How do I benefit?**

Your library will benefit from WorldCat Local features such as local branding and URLs, links to OpenURL resolvers and existing services, and locally ranked search results beginning in July 2009. Expanded access to other ILS systems will be added in phases, including prominent links to library catalogs and APIs and NCIP for library staffs to create their own interoperability features later in 2009.

**Will this work with my open URL resolver? With which OpenURL resolvers does WorldCat Local “quick start” work?**

You may set up a link from WorldCat records to your existing OpenURL 1.0-compliant resolver.

WorldCat Local “quick start” does not access information in your resolver knowledge base. Rather, it links users to your resolver and provides users with a list of resources available from your library at the article and title levels.

**NOTE:** It is essential for your library to add holdings information for its serial titles to WorldCat in order for WorldCat Local to appropriately display a link to your OpenURL resolver. You may wish to use OCLC’s eSerials Holdings service to streamline the work needed to add serials ownership information to WorldCat.

**How does OCLC obtain circulation information from my ILS?**

Circulation information including item location, call number, status and OPAC links is retrieved using screen scraping or Z39.50. The method used depends on information available to OCLC about your library’s current services.

WorldCat Local “quick start” and WorldCat Local communicate with ILSs using the OCLC control number in catalog records. For this reason, your library must index the OCLC control number in a consistent manner with consistent prefixes in order for the system-to-system communication to occur.

OCLC plans to add local system numbers as a future way for WorldCat Local to communicate with your local system.

**How is shelf status displayed in an ILS shared by a group of libraries?**

During configuration, you may identify the locations that should be sorted to appear at the top of results lists in order to appropriately separate your library’s holdings from the rest of the holdings in the shared catalog. Your staff will specify location names that will appear first in detailed record displays.

**My library’s catalog supports Z39.50. How does this interact with WorldCat Local “quick start”?**

Your library’s WorldCat Local “quick start” site has been set up using either screen scraping or Z39.50, based on information
OCLC obtained about your library using public sources. If your library has an Ex Libris Aleph system, Z39.50 was used to establish interoperability. For most other library systems, OCLC used screen scraping.

Your “quick start” site will be maintained using the method originally set up for it.

**Local configuration**

**Which features can I configure for my WorldCat Local “quick start” site?**

Staff at your library can configure a number of features in your library’s WorldCat Local “quick start” site.

You can:
- Customize your WorldCat.org URL
- Brand your site with your library's logo and colors
- Add links to local services including your OpenURL full-text resolver and virtual reference service
- Specify relevance ranking preferences
- Set up IP address access to library’s resources
- Set up the service to reflect your library’s circulation policies including indication of noncirculating or checked out items, place hold options
- Specify which items are available through your OpenURL resolver
- Establish links to your library’s current OCLC resource sharing options, WorldCat Resource Sharing or ILLiad.

Additional configuration options such as interoperability with a second ILS, relevance ranking of resources from collections of other libraries in your group or consortium, and integration of delivery through a consortial borrowing service are supported by a subscription to the WorldCat Local service.

**How do I complete the configuration?**

Staff at your library will first complete a registration form at https://www3.oclc.org/app/local/quickstart to initialize your service.

OCLC staff will contact you to request any additional information needed to establish your site.

OCLC provides a number of resources to help you configure your WorldCat Local “quick start,” including:
- Web information sessions.
- Brief online tutorials that provide detailed information about use of the Configuration Form
- A “Readiness Checklist”
- Daily live chat sessions with WorldCat Local staff who will answer your questions.

A complete list of resources available to support your library through the configuration process is available at: www.oclc.org/worldcatlocal/support/welcome.htm

**NOTE:** Libraries that subscribe to WorldCat Local also receive guided configuration support as part of their subscription to the service.

**Which features can I configure if interoperability with my ILS is not currently available?**

There are a number of features your library can configure for your WorldCat Local “quick start” site, including:
- The way your library's name and branding displays in your branded URL, search box and interface
- The link to your library's OpenURL full-text resolver
- IP address ranges for user access to licensed content
- The link to your library's virtual reference service
- Links to other library resources such as your library Web site

**Display of library holdings**

**Not all of my holdings are in WorldCat—how do I update them?**

You may request a no-charge, one-time batchload of current records in your library catalog into WorldCat. See additional information about OCLC batch processing services at: www.oclc.org/us/en/batchprocessing/

**I don’t catalog my holdings with OCLC. How will my library benefit from WorldCat Local “quick start”?**

Your library will benefit from WorldCat Local “quick start” once you add your holdings to the WorldCat database.

WorldCat Local “quick start” provides a user-centric entry point to your library that increases the visibility of your resources on the Web. OCLC’s partnerships with popular search engines such as Google, Yahoo! Search and MSN help connect more Web users to your library’s quality collections.

WorldCat Local “quick start” will also facilitate seamless delivery of library resources to your users through smart delivery technology. This technology determines the most appropriate delivery option for needed items based on your library’s policies, eliminating the need for users to consult multiple delivery “silos.”
Other management issues

Will I receive usage statistics about my library’s WorldCat Local “quick start” activity?

Yes. When you have scheduled the public release of your WorldCat Local “quick start” site, contact orders@oclc.org to activate an account you can use to generate reports of usage statistics.

What is OCLC’s plan for a cooperative, next-generation ILS and how will it interoperate with my OCLC services?

A cooperative, next-generation ILS will provide a network-level platform for the management of local library collections. The cooperative ILS will interoperate directly with OCLC services, including WorldCat Local, and will have several features that distinguish it from a traditional library management service.

The network-level ILS will:

- Significantly reduce the total cost of ownership for managing library resources
- Embrace a service-oriented architecture for interoperability with other business process systems, such as financial systems, HR systems, course management systems and authentication services
- Provide services at Web scale (the ability to support thousands of libraries on a single platform)
- Create immediate, cooperative, network effects through shared metadata, group identity management, discovery, materials sharing, financial transactions, socialization, service resolution, collection management, reporting and business intelligence
- Discovery of all of your library’s resources through a single search using WorldCat Local.

When does OCLC plan to offer a cooperative, next-generation ILS?

OCLC will begin to test circulation functionality with test sites in June 2009. Following several months of testing, functionality will be evaluated and refined to meet the needs of different types of libraries.

Can my library participate in testing of the cooperative, next-generation ILS?

Pilot sites have been selected and work is underway to determine library needs and functionality. OCLC does not plan to add new participants for testing.
OCLC helps libraries in more than 100 countries. Please contact us to learn more about OCLC in your part of the world.

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For more information about WorldCat Local, please visit: www.oclc.org/worldcatlocal or contact your OCLC Library Services representative: libservices@oclc.org

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