Making Consortial Resource Sharing a Reality: ILLiad and Resource Sharing in the University System of Maryland and Affiliated Institutions Consortium of Libraries (http://usmai.umd.edu/)

Tanner Wray, Jamie Bush, Robin Moskal, & Carol Vaeth

Presented March 15, 2007 at the OCLC ILLiad International Meeting, Virginia Beach, VA

Panelists

- Tanner Wray – Director of Public Services, UM College Park (UMC)
- Robin Moskal – Head of Collection Management/Interlibrary Loan & Accounting & Receiving, UM Baltimore County (MUB)
- Carol Vaeth – ILL Coordinator, University of Baltimore (BAL)
- Jamie Bush – Integrated Library System Manager, USMAI Information Technology Division (ITD)

Overview of Talk

- USMAI Library Consortium
- ILLiad Implementation Background
- Mechanics of Implementing ILLiad for 8 Campuses
- Technical Issues
- Wrap Up

The University System of Maryland and Affiliated Institutions Consortium of Libraries (USMAI)

(http://usmai.umd.edu/)

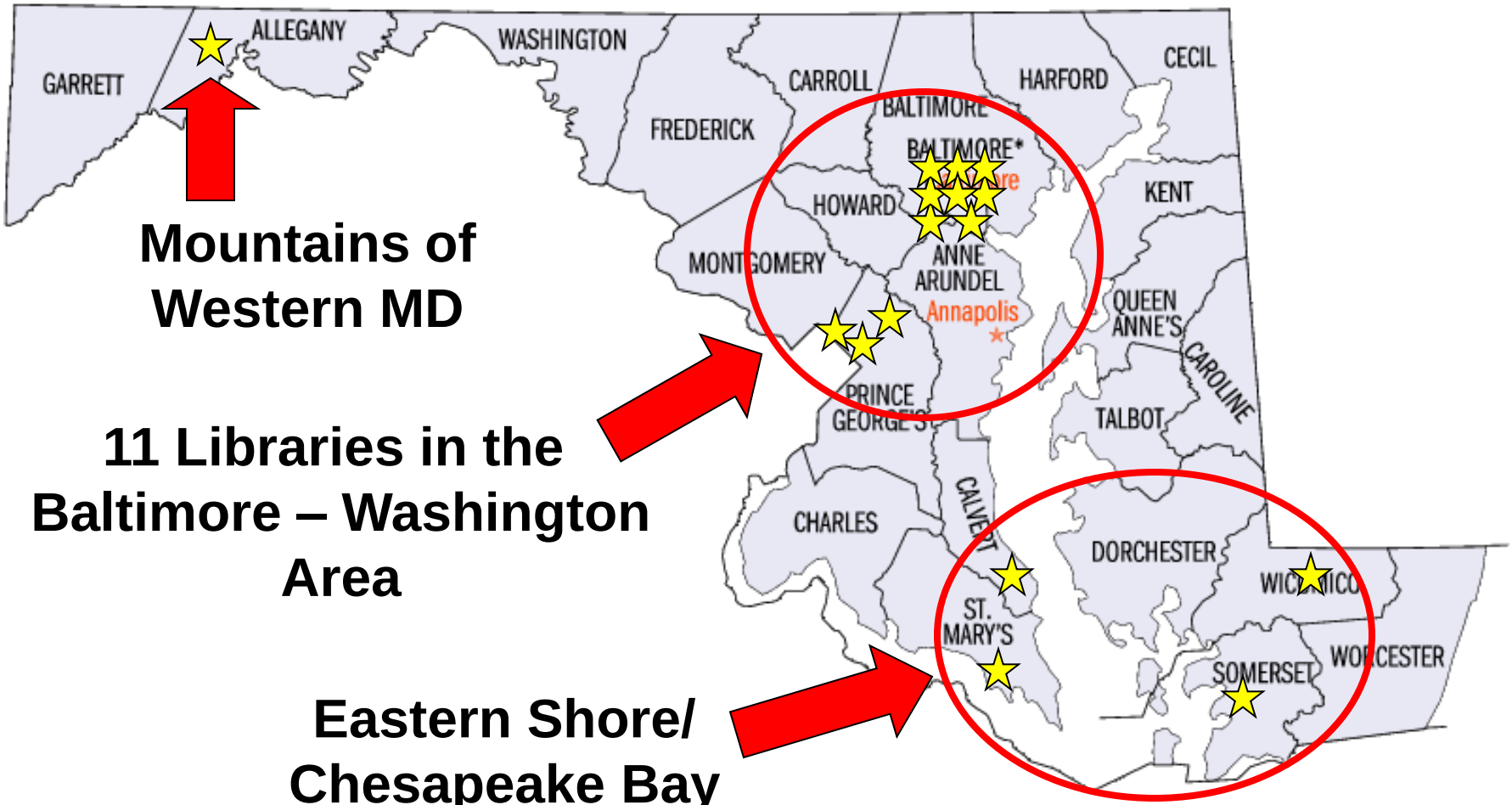
USMAI Consortium

- University System of Maryland and Affiliated Institutions
  - 14 Colleges and Universities of the University System of Maryland
  - St. Mary's College of Maryland and Morgan State University
- Serves Over 140,000 Students in Maryland and Beyond

USMAI Institutions

USMAI

USMAI Institution Locations



USMAI Library Consortium

- Founded in the Late 1990s
- Shared Integrated Library System (ExLibris' ALEPH)
- Global Catalog with a Shared Bibliographic Records
- Patron Placed Holds (PPH) Service
- Metasearching and Linking Capabilities through MetaLib and SFX
- Consortial Implementation of ILLiad

ILLiad Project Background

About the Project – Why ILLiad?

- In 2005
  - 8 USMAI Libraries Had ILLiad
  - 8 USMAI Libraries Lacked ILLiad

- *ILLiad Includes Integrated Electronic Article Delivery Services*

- Opportunity to Create Level Playing Field

Why ILLiad for USMAI?

- *Desktop Article Delivery*
- Odyssey – For Intercampus Article Delivery
- Patron Self Service
  - 24/7 Access
  - Request Tracking → Fewer Calls to ILL Office
  - Request History
  - Confidentiality: Can Break Patron—Request Links
- Compatible with MetaLib & SFX Used by USMAI
- Auto-generated Patron Emails
- Web-based Management Statistics
- Simple One-time Patron Registration
- Staff Efficiencies
- Works with Major ILL Service Providers
- Handles Billing Processes

Resource Sharing Model

- ALEPH PPH Used to Move Books Among USMAI
- ILLiad/Odyssey/ARIEL Used to Move Articles Among USMAI
- ILLiad/Odyssey/ARIEL Used for Out-of-consortium Resource Sharing

USMAI ILLiad Sites

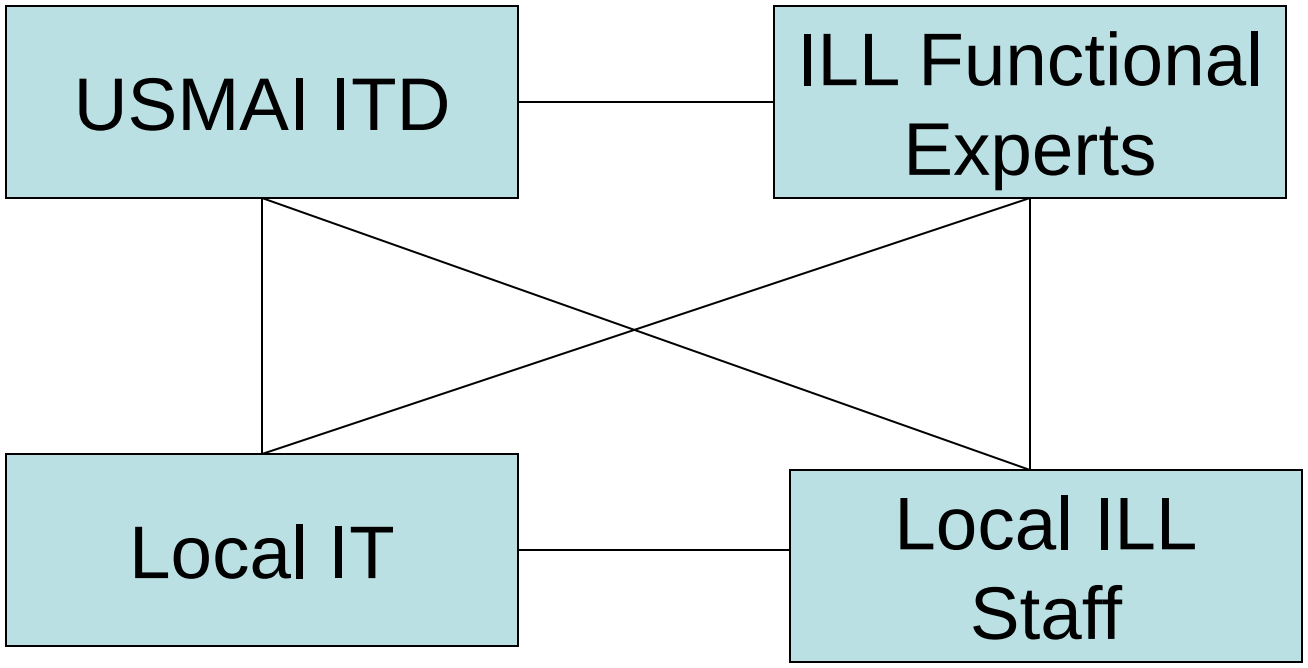
Standalone Sites

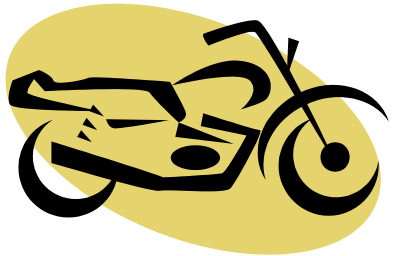
- Towson University
- University of Baltimore
- University of Baltimore Law Library
- UM Health Sciences and Human Services Library
- UM Baltimore County
- UM College Park
- UM Law Library
- UM University College

Shared Sites

- Bowie State University
- Center for Environmental Science
- Coppin State University
- Frostburg State University
- Morgan State University
- Salisbury University
- St. Mary's College of Maryland
- UM Eastern Shore

Collaborative Implementation





Getting Organized for Implementation

Implementation Model

- ILLiad Implementation for 8 Libraries without ILLiad
  - Centralized Training
  - Centralized ITD Support and OCLC Contact
  - Shared, Locally Hosted Server at ITD
  - Centralized Financial Support
  - Standard Look and Feel/Implementation
  - Authentication Against Existing Library Patron Database Used by All Campuses

- 8 Sites Already on ILLiad Maintain Separate Installations for Now

Implementation Team

- Initial Team: 3 RSTG Members + 3 More
  - 4 from Standalone ILLiad Sites
  - 1 from ITD
  - 1 from Satellite Site
- Final Team
  - 2 from Standalone ILLiad Sites
  - 1 from ITD
- Buddies

Information Gathering

- Surveys
  - Workstation Hardware/Software
  - ILL Volume and Staffing
  - Campus IT Cooperation
- Customization Manager Spreadsheet
- Equipment Needed

ILLiad Workstations Survey

Please answer the questions below and if you cannot answer the questions, refer them to the appropriate person. If you have any questions, please use the ILUG email reflector.

- How many workstations do you plan to have set up with ILLiad?
- Of the number stated above, how many of these workstations will be set up with both ILLiad and ALEPH? (circulation)
- Please supply the IP address for each workstation and identify them as ILLiad or both ILLiad/ALEPH
- Where will each workstation be located and identify them as ILLiad or both ILLiad/ALEPH? (Room number)
- Of the number of workstations stated in question 1, how many will be set up with ARIEL, and indicate if it will be on an ILLiad or an ILLiad/ALEPH workstation? (include room number)
- Please indicate if you are currently running a VPN client (networking) on these workstations and identify which one(s). If you cannot answer this question, please ask your IT support person.

Pre-Implementation

- Annual USMAI ILL Meeting
  - Consortial ILL Agreements
  - Buddies
  - ILL Staff Contacts Lists
- Atlas Training
  - Multiple Campus Training
  - Community Building and Networking
- Communication
  - Regular Email & Phone Communication
  - ILUG Reflector

Bringing Up the Test Site

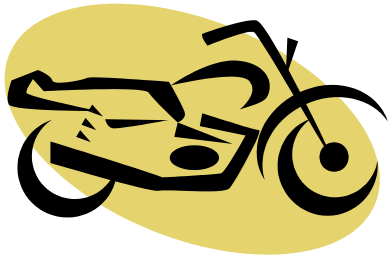
- ITD Tested ILLiad Environment
- Delivered Client to 1st Satellite Site
- Broad Training Plan Developed

- ITD & Local Library IT Configured System
- Trainers Began with Customization Manager
- Staff Trained in Functionality
- Day's Events Documented

Planning Subsequent Implementations

- Reinforced What was Needed as Core Equipment and Software
  - Reminders Lists and Communication
- Revamp Implementation Plan
- ITD Downloads
- Training Outline
- Logistics

And So the Implementation Began…



- On the Road
- Implementation Team
- Training Plan
  - Customization Manager
  - Test Requests

Each Site Visit Was Different

- Equipment
  - ARIEL Problems
  - Scanners not Connected, etc.
  - Word Docs
- IT
  - Local IT
  - Desktop Configurations and Software
  - Firewalls
  - Network Problems

Each Site Visit Was Different – pt. 2

- Training the Staff
  - Trepidation and Excitement
  - Problems, Problems, Problems

Post Visit Support

- Supporting New Sites
  - Consortial Tips and Tricks Manual
  - Trouble-shooting and Continuing Support
  - Rx System
  - Access to Consortial ILLiad Outside ITD
  - Atlas On-line Training for Borrowing
  - Annual ILL Meeting

Things We've Learned

- Training Team
  - Who Will Travel?
  - Who Will Pay?
- Teaching Outline for Consistent Training
- Take Notes!
- Impact Elsewhere
- Be Kind to Your Trainers!

Technical Issues

Technical Issues

- ITD Team
- Remote Installations
- Specific Issues - VPN, Shibboleth, etc.
- Technical Support

ITD Implementation Team

- Systems Librarian
  - 1st Level
- Programmer
  - Applications (ILLiad, Odyssey)
  - Shibboleth
- Network Administrator
  - VPN
  - System Administration
  - Networking Support

Remote Sites

- Pre-visit Work
  - Install VPN Client
  - Install Applications
  - Web Environment Setup
- Site Visit
  - Verify Install
  - Minor Customization in Web
    - Borrower Types
    - Request Types

Main Menu of ILLiad for Lea Messman

Status: *Choose an option from the choices below.*

Request Types

Request a Photocopy

Use this button to request a photocopy of an article within a larger work, or to req
a journal, a paper within a conference proceedings, or a single chapter within an a

Request a Book

Use this button to request the loan of an entire work. Examples include books, enti
microfilm reels and microfiche.

Request a Thesis or Dissertation

This will request a thesis or dissertation.

Review Requests

View/Modify Outstanding Requests

Use this button to view and edit your outstanding requests, including detailed reque

View/Download Electronically Received Articles

Use this button to view items that you have received for web delivery.

View/Renew Checked Out Items

Use this button to view items that you have checked out along with due dates and a

View Request History

Use this button to view your completed requests.

Use this button to view items that have been cancelled either by you or the InterLib

Done

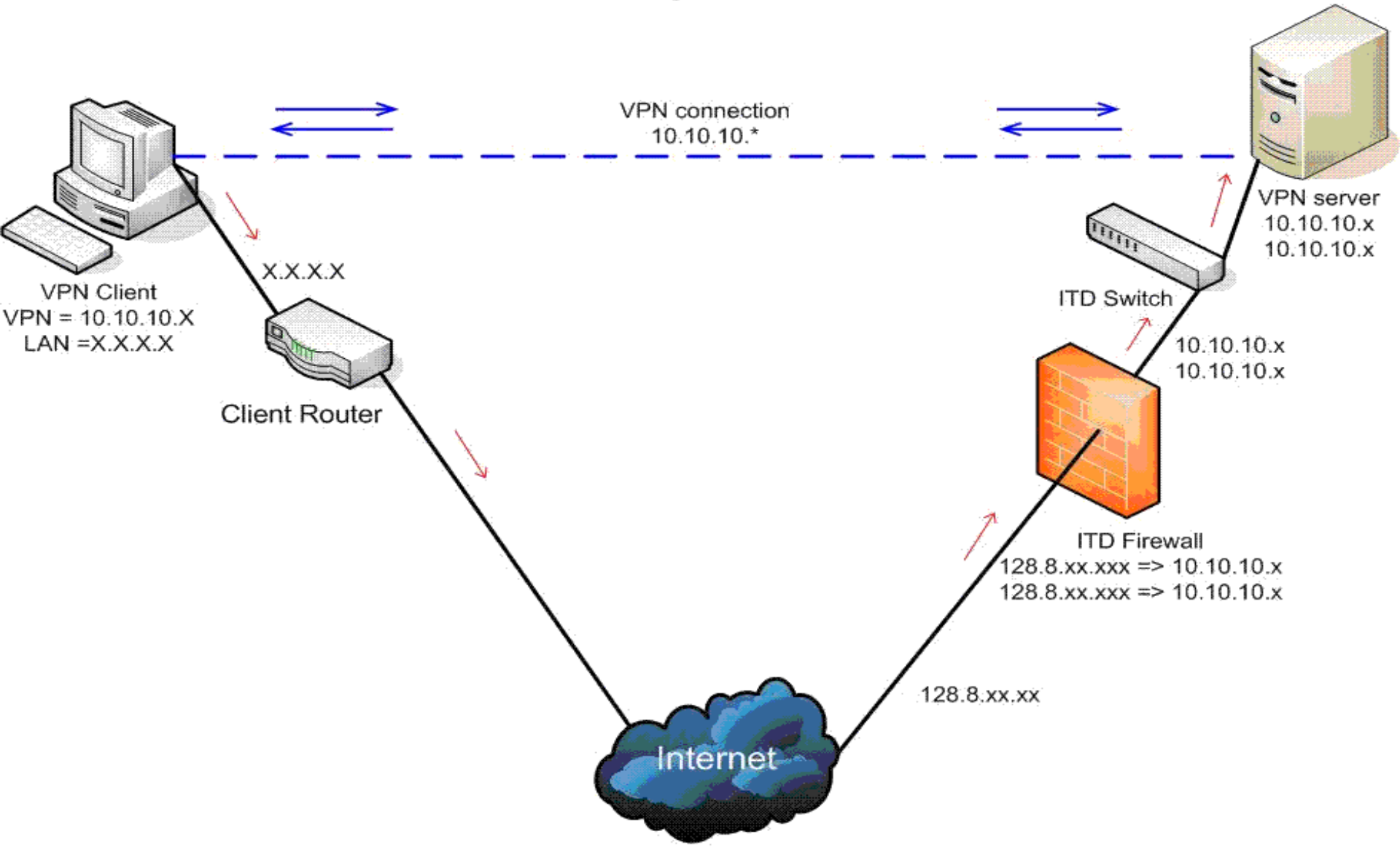
Start

RxWeb - Windows Inter... | ILLiad Main Menu - Wi... | rx1.doc - Microsoft Word | Local Disk (C:) | Microsoft PowerPoint - [... | ALEPH Circ

Virtual Private Network (VPN)

- Allows Access Through Campus Firewalls
- Customized USMAI VPN
  - Only Routes ILLiad/Odyssey Traffic
  - Ease of Setup to Avoid User Having System Administrator Account
  - Needed to be “Plug and Play”
  - Secure

VPN Configuration Diagram



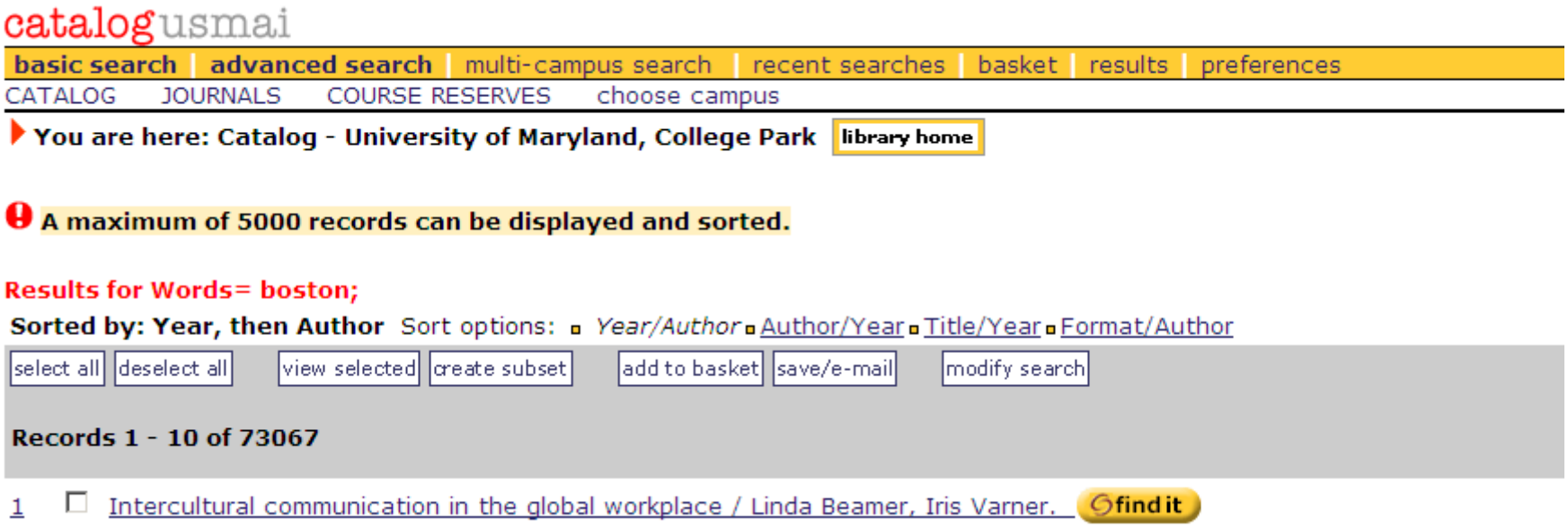
Modified: June 7, 2006

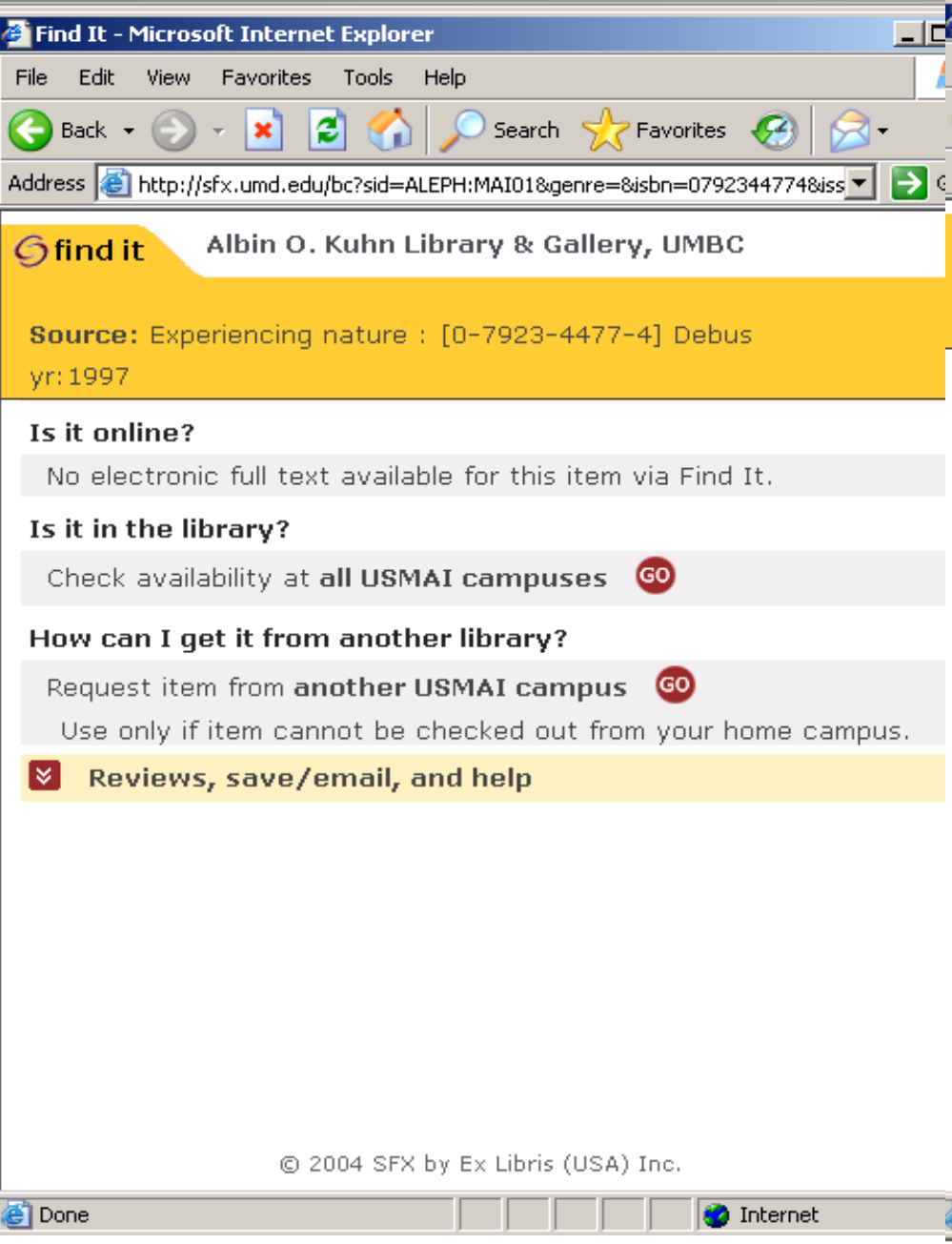
Shibboleth

- Provides Authentication Across Library Applications
  - Single Login
  - Supplies Users Attributes
  - Already in Place for Access to Databases (MetaLib)
- Programmer and Atlas Worked Closely Together

SFX and OpenURL

- SFX Passes Citation to ILLiad
- “Find It” Menu is Conditional Based on Format of Item

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Back Search Favorites
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No electronic full text available for this item via Find It.
Is it in the library?
Check availability at all USMAI campuses
GO
How can I get it from another library?
Request item from another USMAI campus
GO
Use only if item cannot be checked out from your home campus.
Reviews, save/email, and help
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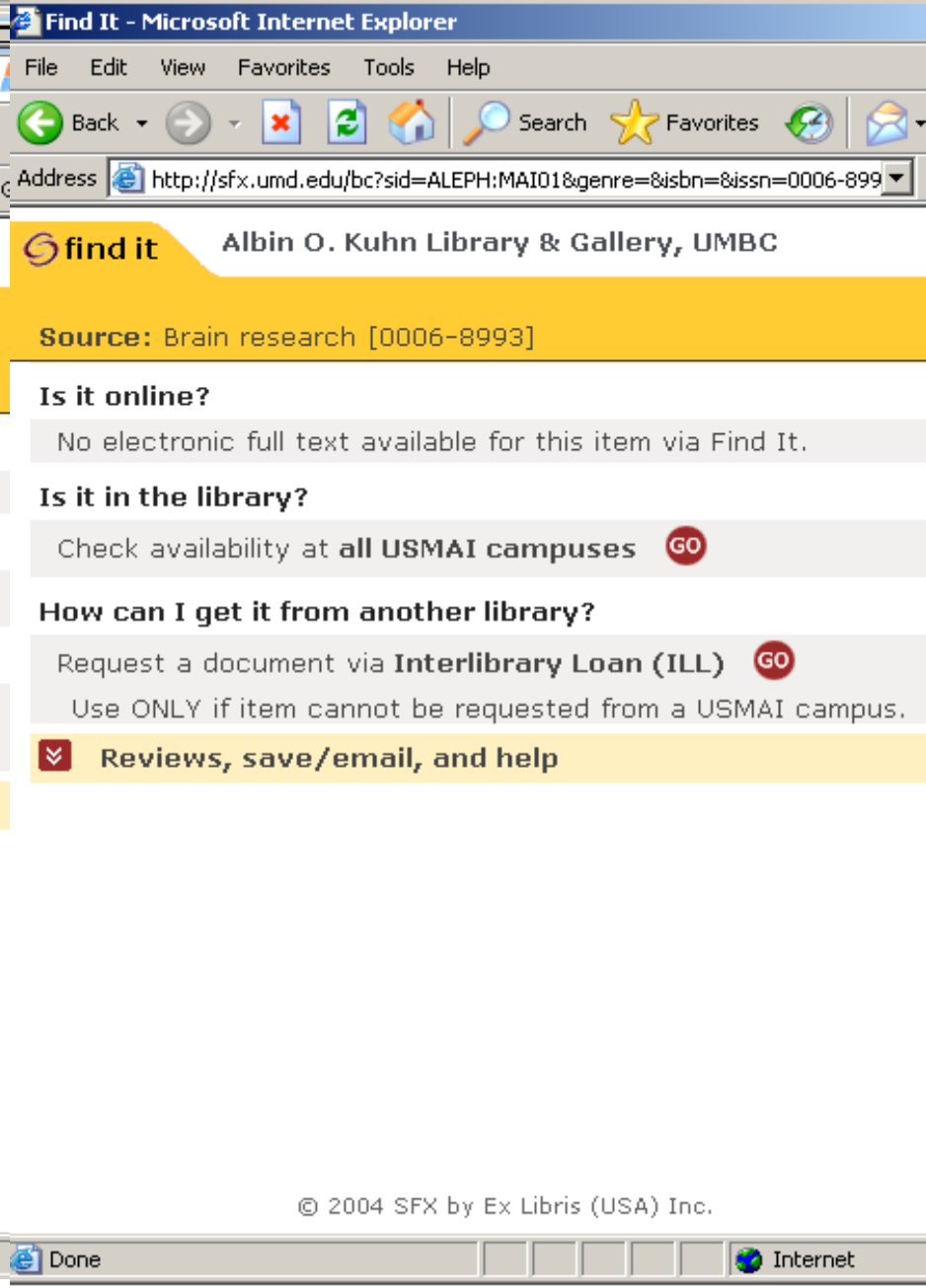
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File Edit View Favorites Tools Help
Back Search Favorites
Address http://sfx.umd.edu/bc?sid=ALEPH:MAI01&genre=&isbn=&issn=0006-899
find it
Albin O. Kuhn Library & Gallery, UMBC
Source: Brain research [0006-8993]
Is it online?
No electronic full text available for this item via Find It.
Is it in the library?
Check availability at all USMAI campuses
GO
How can I get it from another library?
Request a document via Interlibrary Loan (ILL)
GO
Use ONLY if item cannot be requested from a USMAI campus.
Reviews, save/email, and help
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Internet

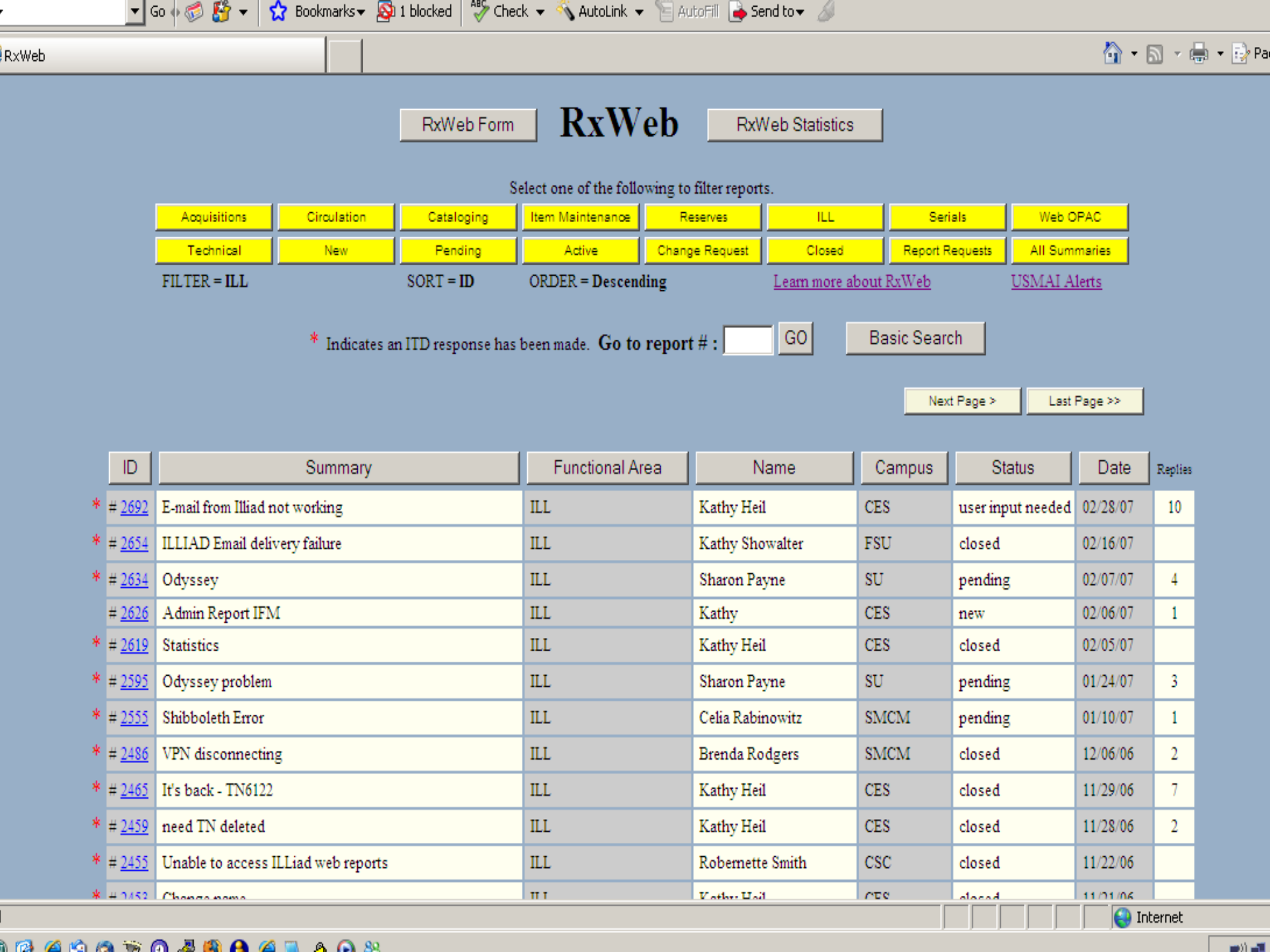
USMAI Technical Support

- Diversity In Experience and Resources
  - Have's vs. Have Not's
  - Technology and Human Resources
- Determining Factors
  - Organization Structure of Library
  - Size of ILL Staff
  - Internal and External IT Support

USMAI Technical Support

- ITD ILLiad Support Model
  - USMAI Sites Report Problems to ITD
  - ITD Communicates with OCLC Support

- Rx System
  - Web Based Reporting and Tracking Tool Used for ILS and ILLiad
  - Reports Distributed to Email Reflectors
  - Users Reply Using Rx Forms


Go
Bookmarks
1 blocked
Check
AutoLink
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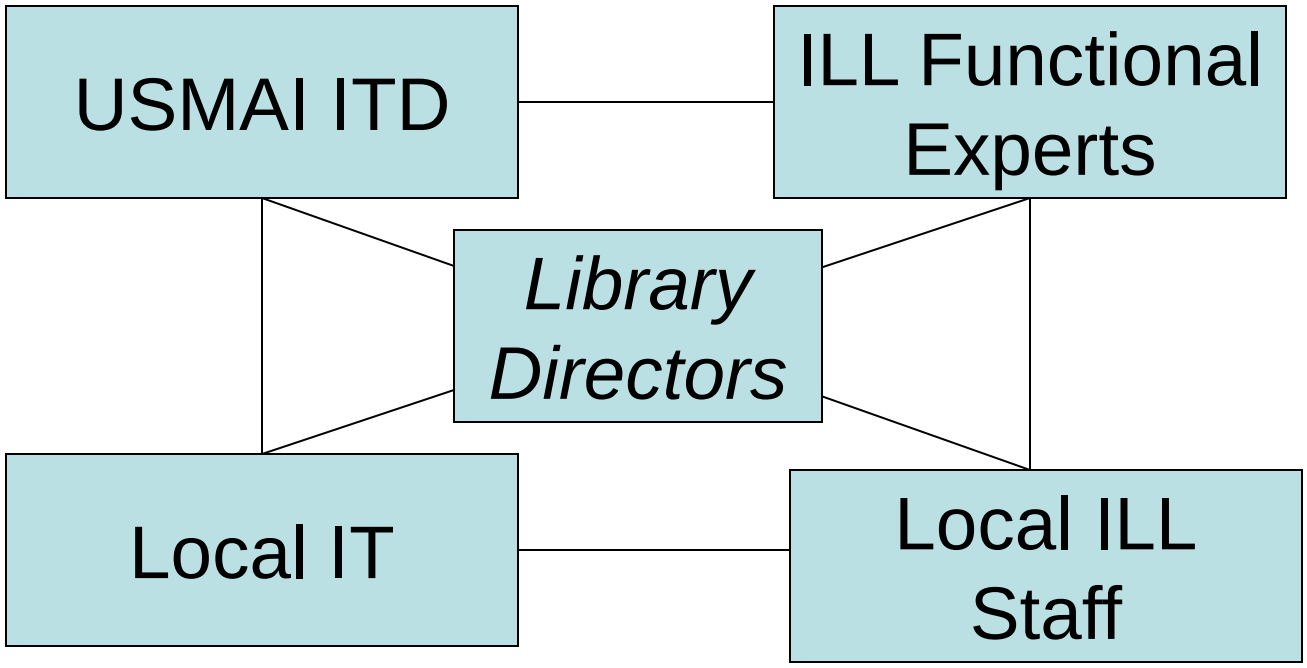
Send to
RxWeb
RxWeb Form
RxWeb
RxWeb Statistics
Select one of the following to filter reports.
Acquisitions
Circulation
Cataloging
Item Maintenance
Reserves
ILL
Serials
Web OPAC
Technical
New
Pending
Active
Change Request
Closed
Report Requests
All Summaries
FILTER = ILL
SORT = ID
ORDER = Descending
Learn more about RxWeb
USMAI Alerts
* Indicates an ITD response has been made.
Go to report # :
GO
Basic Search
Next Page >
Last Page >>
ID
Summary
Functional Area
Name
Campus
Status
Date
Replies
* # 2692 E-mail from Illiad not working ILL Kathy Heil CES user input needed 02/28/07 10
* # 2654 ILLIAD Email delivery failure ILL Kathy Showalter FSU closed 02/16/07
* # 2634 Odyssey ILL Sharon Payne SU pending 02/07/07 4
# 2626 Admin Report IFM ILL Kathy CES new 02/06/07 1
* # 2619 Statistics ILL Kathy Heil CES closed 02/05/07
* # 2595 Odyssey problem ILL Sharon Payne SU pending 01/24/07 3
* # 2555 Shibboleth Error ILL Celia Rabinowitz SMCM pending 01/10/07 1
* # 2486 VPN disconnecting ILL Brenda Rodgers SMCM closed 12/06/06 2
* # 2465 It's back - TN6122 ILL Kathy Heil CES closed 11/29/06 7
* # 2459 need TN deleted ILL Kathy Heil CES closed 11/28/06 2
* # 2455 Unable to access ILLiad web reports ILL Robernette Smith CSC closed 11/22/06
Internet

Wrap Up

What Would We Do Differently?



Implementation Team Considerations

- Impact at Sites Managing Implementation
  - Staff Are Busy or Away Supporting Other Campuses
  - Potential Patron Service Impact
- Travel Support
- Implementation Team

Future & Next Steps

- Communication, Communication, Communication
- Help Last Site Come Up Fully
- Expand Odyssey to All 16 Sites
- Support Libraries in Improving Work Processes
- Plan for Version 7.2 Upgrade
- As Needed, USMAI Members Develop Documentation

- Improve Workflows Between Systems (PPH←→ILLiad)
- Improve Resource Sharing Systems Messaging at Critical Junctures
- Explore Other Resource Sharing Opportunities in State
- Future Relationship of Standalones and Satellites?

Contacts

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Resource Sharing Task Group (RSTG) Website:
http://usmai.umd.edu/resshare/

Questions?

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