
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 Institution Locations

Mountains of Western MD

11 Libraries in the Baltimore – Washington Area

Eastern Shore/Chesapeake Bay
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
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
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
**Request Types**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request a Photocopy</td>
<td>Use this button to request a photocopy of an article within a larger work, or to request a journal, a paper within a conference proceedings, or a single chapter within an article.</td>
</tr>
<tr>
<td>Request a Book</td>
<td>Use this button to request the loan of an entire work. Examples include books, entire microfilm reels and microfiche.</td>
</tr>
<tr>
<td>Request a Thesis or Dissertation</td>
<td>This will request a thesis or dissertation.</td>
</tr>
</tbody>
</table>

**Review Requests**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Modify Outstanding Requests</td>
<td>Use this button to view and edit your outstanding requests, including detailed request information.</td>
</tr>
<tr>
<td>View/Download Electronically Received Articles</td>
<td>Use this button to view items that you have received for web delivery.</td>
</tr>
<tr>
<td>View/Renew Checked Out Items</td>
<td>Use this button to view items that you have checked out along with due dates and any associated information.</td>
</tr>
<tr>
<td>View Request History</td>
<td>Use this button to view your completed requests.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Request Cancelled Requests</td>
<td>Use this button to view items that have been cancelled either by you or the InterLibrary Loan office.</td>
</tr>
</tbody>
</table>
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
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
• 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
<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Functional Area</th>
<th>Name</th>
<th>Campus</th>
<th>Status</th>
<th>Date</th>
<th>Replies</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2692</td>
<td>E-mail from Illiad not working</td>
<td>ILL</td>
<td>Kathy Heil</td>
<td>CES</td>
<td>user input needed</td>
<td>02/28/07</td>
<td>10</td>
</tr>
<tr>
<td>#2654</td>
<td>ILLIAD Email delivery failure</td>
<td>ILL</td>
<td>Kathy Showalter</td>
<td>FSU</td>
<td>closed</td>
<td>02/16/07</td>
<td></td>
</tr>
<tr>
<td>#2634</td>
<td>Odyssey</td>
<td>ILL</td>
<td>Sharon Payne</td>
<td>SU</td>
<td>pending</td>
<td>02/07/07</td>
<td>4</td>
</tr>
<tr>
<td>#2636</td>
<td>Admin Report IFM</td>
<td>ILL</td>
<td>Kathy Payne</td>
<td>CES</td>
<td>new</td>
<td>02/06/07</td>
<td></td>
</tr>
<tr>
<td>#2619</td>
<td>Statistics</td>
<td>ILL</td>
<td>Kathy Heil</td>
<td>CES</td>
<td>closed</td>
<td>02/05/07</td>
<td>1</td>
</tr>
<tr>
<td>#2595</td>
<td>Odyssey problem</td>
<td>ILL</td>
<td>Sharon Payne</td>
<td>SU</td>
<td>pending</td>
<td>01/24/07</td>
<td>3</td>
</tr>
<tr>
<td>#2555</td>
<td>Shibboleth Error</td>
<td>ILL</td>
<td>Celia Rabinowitz</td>
<td>SMCM</td>
<td>pending</td>
<td>01/10/07</td>
<td>1</td>
</tr>
<tr>
<td>#2486</td>
<td>VPN disconnecting</td>
<td>ILL</td>
<td>Brenda Rodgers</td>
<td>SMCM</td>
<td>closed</td>
<td>12/06/06</td>
<td>2</td>
</tr>
<tr>
<td>#2465</td>
<td>It's back - TN6122</td>
<td>ILL</td>
<td>Kathy Heil</td>
<td>CES</td>
<td>closed</td>
<td>11/29/06</td>
<td>7</td>
</tr>
<tr>
<td>#2459</td>
<td>need TN deleted</td>
<td>ILL</td>
<td>Kathy Heil</td>
<td>CES</td>
<td>closed</td>
<td>11/28/06</td>
<td>2</td>
</tr>
<tr>
<td>#2455</td>
<td>Unable to access ILLiad web reports</td>
<td>ILL</td>
<td>Robemette Smith</td>
<td>CSC</td>
<td>closed</td>
<td>11/22/06</td>
<td></td>
</tr>
<tr>
<td>#2452</td>
<td>Change access</td>
<td>ILL</td>
<td>Kathy Heil</td>
<td>CES</td>
<td>closed</td>
<td>11/21/06</td>
<td></td>
</tr>
</tbody>
</table>
Wrap Up
What Would We Do Differently?

USMAI ITD

Library Directors

ILL Functional Experts

Local IT

Local ILL Staff
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

Tanner Wray - UMC
twray@umd.edu
http://www.lib.umd.edu/

Robin Moskal - MUB
moskal@umbc.edu
http://www.umbc.edu/aok/main/index.html

Jamie Bush - USMAI
gjbush@umd.edu
http://usmai.umd.edu/itd/

Carol Vaeth - BAL
cvaeth@ubalt.edu
http://langsdale.ubalt.edu/

Resource Sharing Task Group (RSTG) Website:
http://usmai.umd.edu/resshare/
Questions?
Copyright Tanner Wray, Jamie Bush, Robin Moskal, & Carol Vaeth, 2007. This work is the intellectual property of the authors. Permission is granted for this material to be shared for non-commercial, educational purposes, provided that this copyright statement appears on the reproduced materials and notice is given that the copying is by permission of the authors. To disseminate otherwise or to republish requires written permission from the authors.