

UNIVERSITY OF
WISCONSIN SYSTEM



ILLiad and ILL data: Making the case for consortial eBook purchases

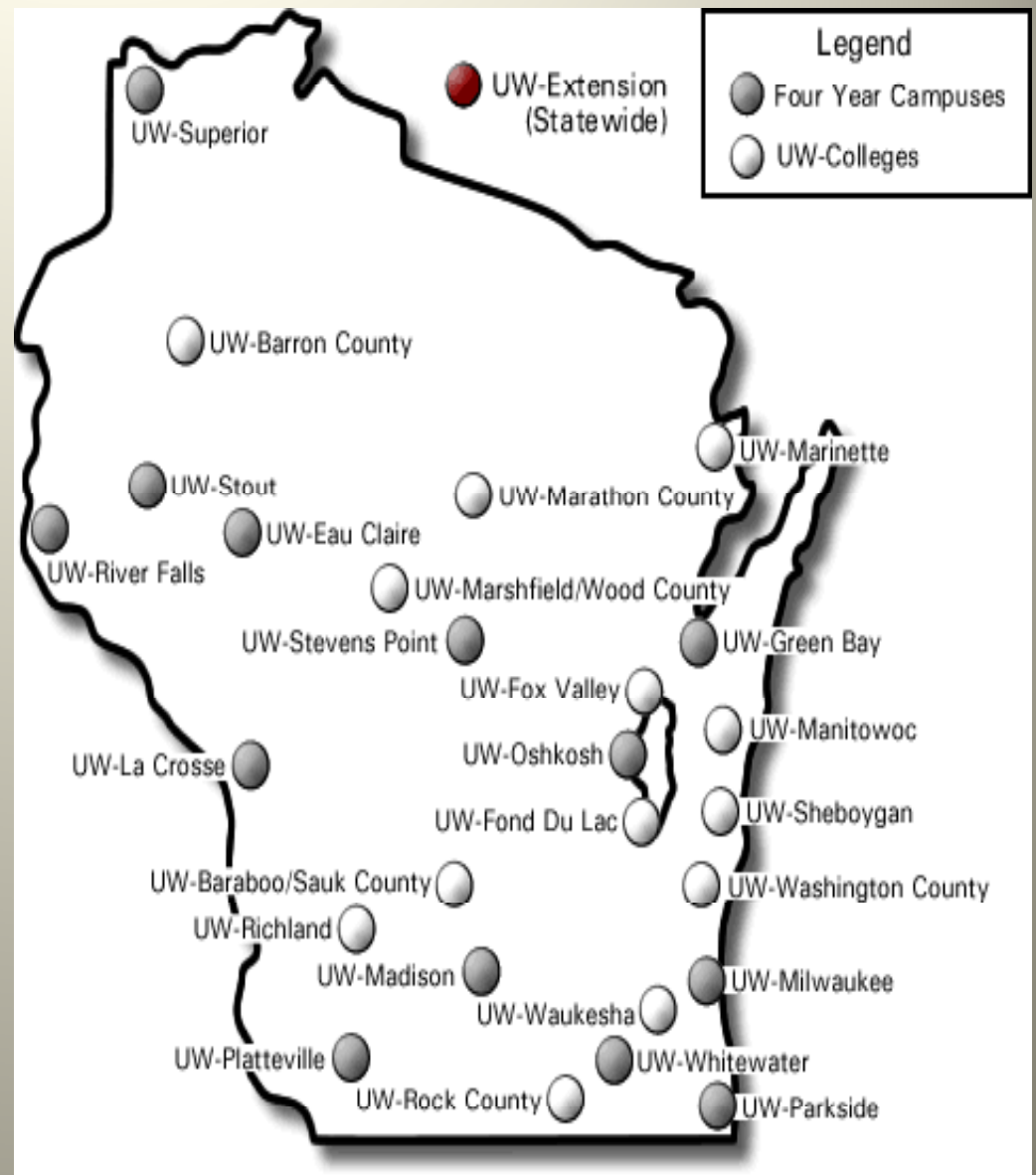
Presented by Mitchell Scott, Beth Kucera, and Jennifer Huffman

- Overview
- Project Design
- Using ILLiad
- Collection of data
- Combining and analyzing the data
- Using the data

UNIVERSITY OF
WISCONSIN SYSTEM



- UW-SYSTEM
- CUWL, CDC, SEC
- Universal Borrowing
- Ebooks



- CDC committee
- Consortial ebook need
- Wiley ebook project




Project idea

- Born out of POD program and data collection
- Loans going outside of the system when ebook is owned within system
- Can this fit simply in our workflows?

F	G
UW holdings monograph	UW holdings e book
1	1
0	1
0	1
1	1
0	1
1	1
1	1
0	1
1	1
0	1

libraries with Item: "Climate Change, Agricultu..." ([Record for Item](#) | [Get This Item](#))

Location	Library	Local Holdings
US,WI	 UNIV OF WISCONSIN, EAU CLAIRE	
US,CA	CALIFORNIA INST OF THE ARTS	
US,CA	PEPPERDINE UNIV	
US,CA	UNIV OF CALIFORNIA, MERCED	Local Holdings Availa...
US,CA	WOODBURY UNIV LIBR	
US,GA	BERRY COL	
US,ID	BOISE STATE UNIV	
US,IL	NORTHEASTERN ILLINOIS UNIV	
US,MA	UNIV OF MASSACHUSETTS AMHERST	
US,NE	UNIV OF NEBRASKA AT OMAHA	
US,OH	DEMO TEST WMS 4	
US,OH	OPS TEST WMS EMEA 1	
US,OR	MULTNOMAH CNTY LIBR	
US,OR	PORTLAND STATE UNIV LIBR	
US,VT	NORWICH UNIV	
Australia	EBOOK LIBR	



EXLIBRIS

Primo Central

Show Recommended Articles

Results 1 - 10 of 15 for UW Libraries Books, media & more

Sorted by: Relevance

1 2

Show only Full Text Online (13)



Book

Climate Change, Agriculture and Rural Livelihoods in Developing Countries

Maharjan, Keshav Lall. ;Niraj Prakash Joshi ;2013

Online access. Check Locations tab for physical copies

View Online Request Locations Details

Send to

Availability and locations in other institutions

+ UW Madison Available from Ebook Library (EBL)	(Use Internet link(s) in this record.)	● May be available
+ UW-Eau Claire EBL Click 'View Online'		● May be available
+ E-Book (UW-Platteville users only)	(QC902.8-903.2)	● May be available



Multiple Versions

Agriculture for development / the World Bank.

World Bank.

Multiple versions found

To view, click on the title or the link to the right

View 3 versions

2021232 - Borrowing Request

Borrowing Processing OCLC ExLibris

Back Forward Stop Refresh Search ISxN Search Title Input Location/ Call Number

Search@UW Location Info

Detail History OCLC Z39.50 PubMed/Docline OPAC Search SFX Look up Search@UW GIST Purchase Addon:

Guest e-Shelf My Account Sign in

COFRIN LIBRARY
SEARCH@UW

New Search Databases A-Z Search by Subject Find Journals Research Guides Help

Counseling Hispanics Through Loss, Grief, And Bereavement UW Libraries Books, media & more Search Advanced Search

Show only

Full Text Online (2)

Refine My Results

Author/Contributor

Houben, L (2)

Martinez-Houben (1)

ebrary, Inc (1)

More options

Campus

Superior (SUP) (2)

Oshkosh (OSH) (1)

Stout (STOUT) (1)

Whitewater (WW) (1)

Eau Claire (EC) (1)

More options

Location


SUP Available Online (2)

OSH Available Online (1)

Show Recommended Articles

3 Results for UW Libraries Books, media & more Sorted by: Relevance

Show only Full Text Online (2)

Book  ☆ Counseling Hispanics Through Loss, Grief, And Bereavement A Guide for Mental Health Professionals.
Houben, Ligia M. ;2011
● Online access. Check Locations tab for physical copies

View Online Request **Locations** Details

Send to

Availability and locations in other institutions

<input type="checkbox"/>	UW-Eau Claire EBL Click 'View Online'	(RC455.4.L67 M37 2011)	● May be available
<input type="checkbox"/>	UW Superior E-Book. Use Internet link(s) in this record.		● May be available

Project Design

- Need to Track:
 - Number of requests of loans outside the UW system, by campus, when an ebook was held in the System
 - Number of ebook titles available in UW system by vendor
 - Number of titles by vendor when ≥ 4 ebooks in UW system
- Data to be collected by 3 representative ILL Departments in the UW System

Campuses Participating in Study

A - UW-Green Bay

- Green Bay, Wisconsin
- Representative of “Small” Campus in UW-System

B - UW-Stevens Point

- Stevens Point, Wisconsin
- Representative of “Medium” Campus in UW-System

C - UW-Milwaukee

- Milwaukee, Wisconsin
- Representative of “Large” Campus in UW-System



Participating Campus Statistics Fiscal Year 2012

	Enrollment FTE	Carnegie Class	Collection Size	Ebooks Held	Total ILL Provided	Total ILL Received	Circulation Transaction /Student FTE
UWGB	5,487	Master's Smaller	343,859	15,242	2,229	10,203	4
UWSP	8,968	Master's Medium	598,708	30,389	4,773	5,382	8
UWM	25,537	Research- High	2,214,926	147,654	14,617	34,543	11

Source: U.S. Department of Education, National Center for Education Statistics, Library Statistics Program, available at <http://nces.ed.gov>

Primo Addon for ILLiad



[Atlas Addons](#) / [Addons Home Page](#) / [ILLiad Addons Directory](#)

Tools

ExLibris Alma Primo

Added by Curtis Poston, last edited by Caitlin Hafen on Jan 10, 2014 (view change)

Overview

The ExLibris Alma Primo addon searches ExLibris Alma/Primo Catalog for ISSN or Title for loans and articles and allows for input of Call Number and Location for Loans into the Details tab of the request.

Download

Current Version of this addon is: 1.1

Download zip file: [ExLibris Alma Primo.zip](#)

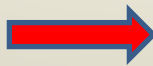
Configuration

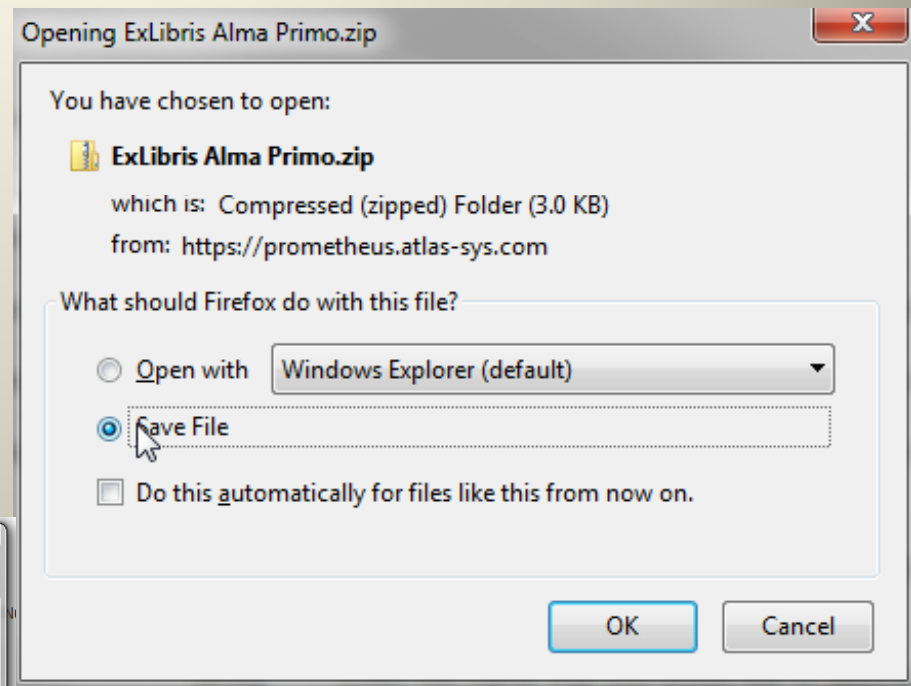
Addon settings are configured in the Manage Addons form.


Setting Name	Default Value	Type	Description
AutoSearch	True	Boolean	Determines whether or not the search should be done automatically when the request is opened.
StartwithISxN	False	Boolean	Determines whether or not the Addon should start the search with item ISxN.
Popup	False	Boolean	Determines whether or not you would like confirmation messages for location and call number input into the request form.
localurl		String	Enter in your shortened URL for your catalog (e.g. http://search.library.northwestern.edu/). Include the colon and port number if part of the string.

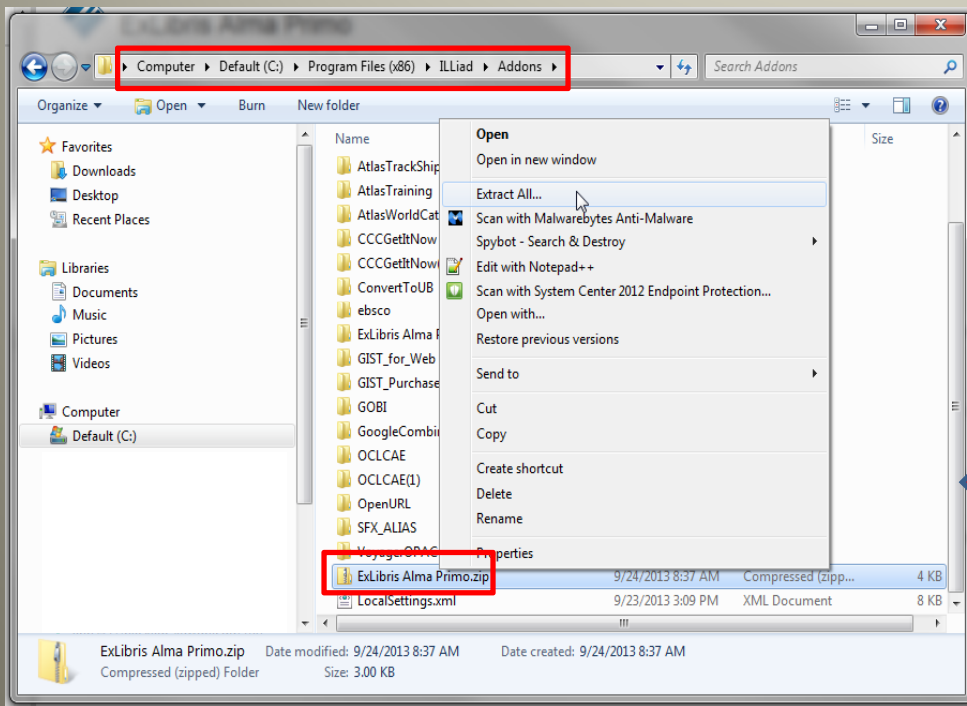
Available at <https://prometheus.atlas-sys.com/display/ILLiadAddons/ExLibris+Alma+Primo>

Install & Configure the Primo Addon

- Download Zip file 

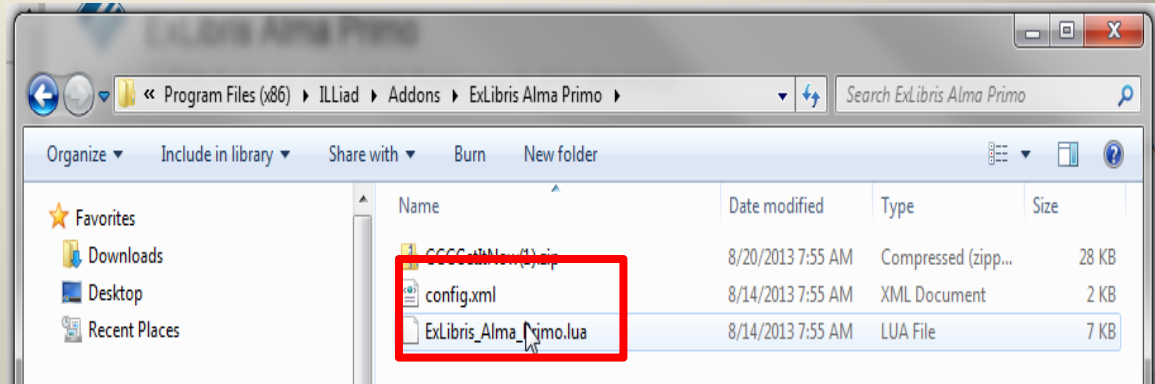


- Save the file and extract it into the ILLiad Addon folder 

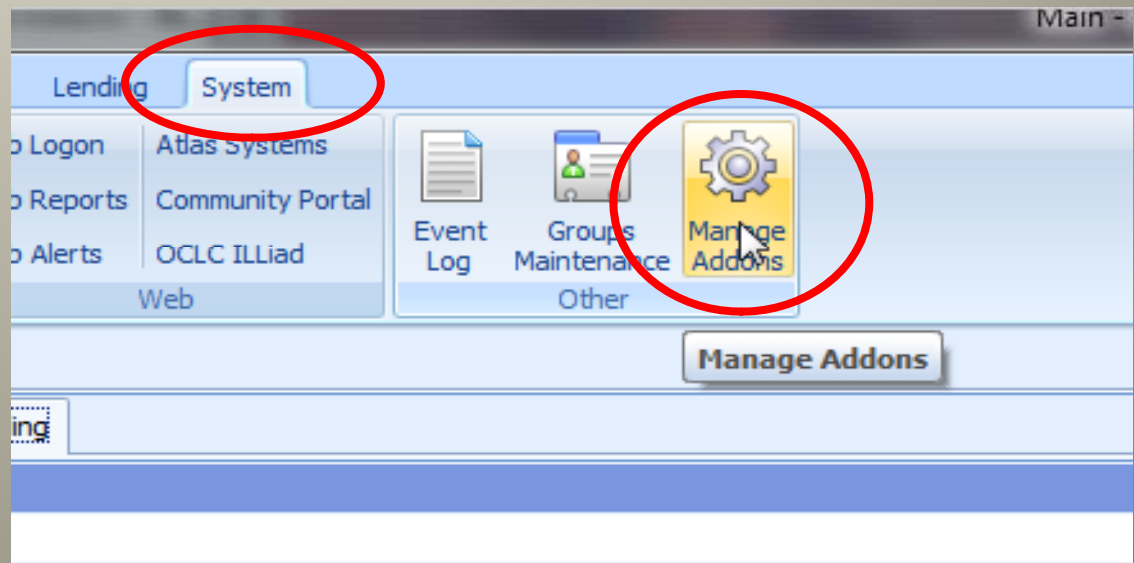


Configure and Customize in ILLiad

- Once extracted, the content is loaded in 2 files



- Set up in ILLiad under:
System > Manage Addons

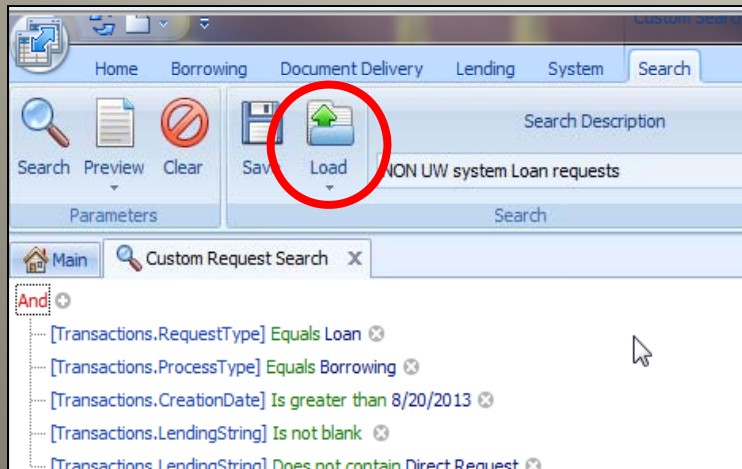
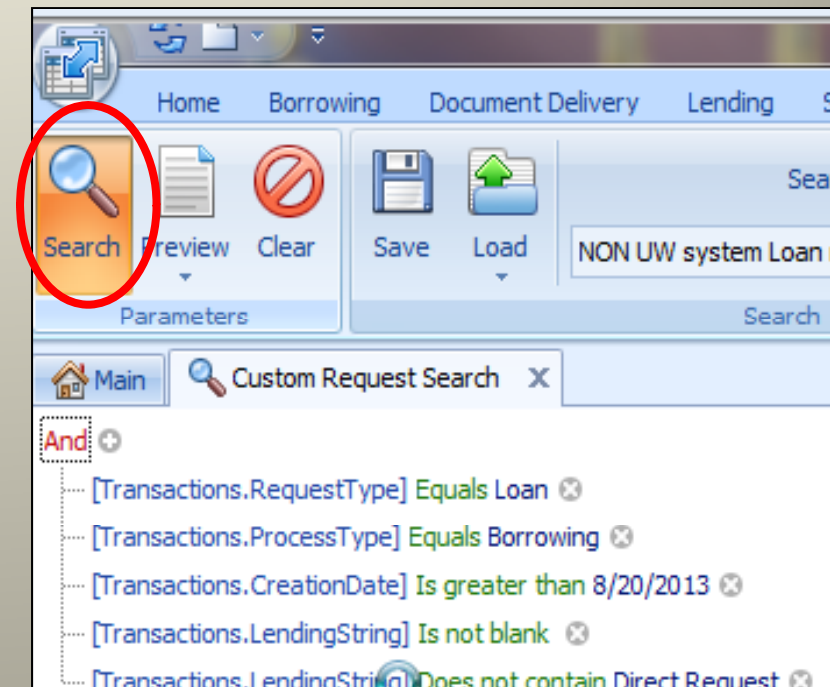
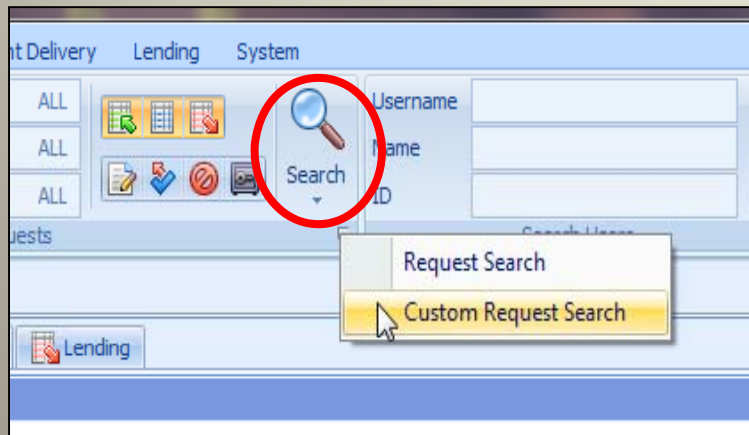


- Select addon
- Enable autosearch
- Activate addon
- Add Primo URL
- Name the addon

Name	Author	Version	Active	Description	Settings	Value
ExLibris_Alma_Primo	IDS Project	1.1	<input checked="" type="radio"/> Yes <input type="radio"/> No	Searches ExLibris Alma/Primo Catalog for ISSN or Title for loans and articles and allows for input of Call Number and Location for Loans into the Details tab of the request.	AutoS...	<input checked="" type="checkbox"/>
localurl					http://uw-primo.hosted.exlibrisgroup.com/primo_library/libweb/action/dlSearch.do?dsct=1&search_scope=UW	
Addon...					Search@UW	

Using the Addon in Custom Search

- Search for and load your custom request search
- Then click “Search” and generate your results list



Custom Search Results List

Transacti...	Username	Request ...	Loan Aut...	Loan Title	Loan Pub...	Loan Place	Loan Date	Loan Ed
1926208	10030320...	Loan		Situating the history of science...				
1927577	10030320...	Loan	Gregory, ...	The Darwinian revolution	the great ...			
1928686	11284867...	Loan	Howells, ...	Songs with piano accompanim...	H. Leonar...	London ; ...	1986	
1936229	11278420...	Loan	Eshleman...	Juniper fuse : upper paleolithi...				
1922981	10005305...	Loan	Howard, ...	Freshwater fishing for kids /			2012	
1936027	10013800...	Loan		Opportunity for all the North A...	Rocky Mo...	Missoula, ...	2006	
1929886	11293450...	Loan	Hatten, In...	The effects of urbanization on ...			2000	
1930144	10028721...	Loan	McTaggar...	The field : the quest for the se...				
1926422	10013800...	Loan	Lyon, Larry.	The community in urban socie...	Waveland...		2012	2
1927535	10016960...	Loan	Rappapor...	Mazel tov : celebrities' bar an...				
1928859	10004251...	Loan	Coffey, R...	Negotiating tradition and techn...			2001	
1935095	10001142...	Loan	Kraft, Geo...	Fate of aldicarb residues in a ...			1990	
1933642	10005981...	Loan		Tourism and gastronomy /	Routledge		2002	
1935061	10013800...	Loan	Mayesky, ...	Creative activities for young ch...	Wadswor...		2008	9
1935194	11278146...	Loan	Zimmerm...	ESL, EFL, and bilingual educati...	Informati...	Charlotte ...	2010	
1936110	11301350...	Loan	Hess, Rud...	Reden /	Zentralve...	Munich	1937	
1923336	10014340...	Loan	Duke, Ire...	The everything sign language ...	Adams M...		2003	
1923399	10005388...	Loan	Callan, Ja...	Ooh la la! : French women's s...	Citadel Pr...	New York	2013	
1928742	11309941...	Loan	Lagassé, ...	The Columbia Encyclopedia	Columbia ...		2013	
1939833	11269195...	Loan	Clark, Tol...	Photopolymerization and char...			2008	
1923986	10030402...	Loan		State of the world's cities 201...	UN			
1928872	10004251...	Loan		Harness and harness parts. : ...	Distribute...	Eau Clair...	1900	
1932644	10025141...	Loan	Leech, Na...	IBM SPSS for intermediate sta...	Routledge		2011	4

Searching Primo for the Record

The screenshot displays the Primo search interface for the University of Wisconsin - Stevens Point library. At the top, there are navigation tabs for 'Borrowing Processing', 'OCLC', and 'ExLibris'. Below these are icons for 'Forward', 'Stop', 'Refresh', and search options for 'ISxN', 'Title', and 'Input Location/Call Number'. A 'Search@UW' button is circled in red. The search results are for 'Reconciliation : healing the inner child' in the 'Books & Media (UW System)' category. The results show 3 items, with 'Full Text Online' available for 1. The first result is 'Reconciliation healing the inner child / Thich Nhat Hanh. Nhất Hạnh, Thích. ;2010'. The 'Locations' tab is circled in red, and the text below it states 'UW Superior E-Book. Use Internet link(s) in this record.'

University Library
University of Wisconsin - Stevens Point

Reconciliation : healing the inner child Books & Media (UW System) Search Advanced Search Browse Search

Show only
Full Text Online (1)

Refine My Results
Subject
Buddhism (1)
Death (1)
Social action (1)
Women social reformers (1)
Sudden death (1)
More options ▾

3 Results for Books & Media (UW System)
Show only Full Text Online (1)

Reconciliation healing the inner child / Thich Nhat Hanh.
Nhất Hạnh, Thích. ;2010
● Online access. Check Locations tab for physical copies

View Online Request **Locations** Details

Availability and locations in other institutions
UW Superior E-Book. Use Internet link(s) in this record.

Compiling the Data

The image shows a screenshot of the Microsoft Excel interface. The ribbon at the top includes tabs for Home, Insert, Page Layout, Formulas, Data, Review, View, and Acrobat. The Home tab is active, showing options for Clipboard, Font, Alignment, Number, and Styles. The formula bar shows 'J112'. The data table below is highlighted with a red border. The table has six columns: 'Your Library Symbol', 'Title', 'ISBN', 'Pub Date', 'Vendor', and 'UW e book holdings'. The data rows list various books with their respective library symbols, titles, ISBNs, publication dates, vendors, and holding counts.

Your Library Symbol	Title	ISBN	Pub Date:	Vendor	UW e book holdings
WIS	The spade as mighty as the sword the story of world war two's dig for victory camp	9781781311295	2013	EBL	1
WIS	Handbook of structural equation modeling	9781462504466	2012	EBL	1
WIS	Fit, fifty and fired up : one man's witty and inspiring account of taking a risk to chas	9781742699981	2012	EBL	1
WIS	To die in Mexico dispatches from inside the drug war	9780872865761	2011	EBL	1
WIS	Becky Shaw	9781408156001	2011	EBL	1
WIS	How to spot a dangerous man workbook : a survival guide for women	9780897936040	2011	EBL	1
WIS	Killing without heart : limits on robotic warfare in an age of persistent conflict	9781612346137	2013	EBL	2
WIS	Belonging : solidarity and division in modern societies	9780745678924	2013	EBL	2
WIS	Python for Kids A Playful Introduction To Programming	9781593274948	2012	FBI	1

Data Entry

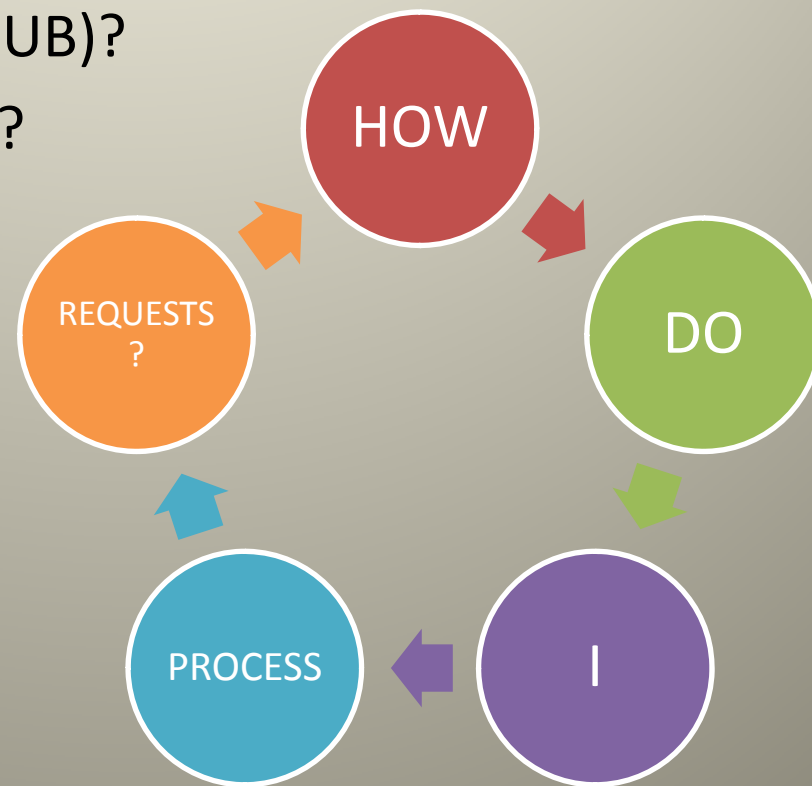
- Raw Data – 6 fields
 - Library Symbol
 - Title
 - ISBN
 - Publication Date
 - Vendor
 - UW ebook holdings

	A	B	C	D	E	F
	Your Library Symbol	Title	ISBN	Pub Date:	Vendor	UW ebook holding
1	GZN	Anatomy of criticism : four essays	978-0691069999	2000	ACLS Humanities	2
2	GZN	The AMA handbook of due diligence	978-0814413852	2010	merican Management Associatic	1
3	GZN	Demigods and monsters : your favorite	978-1937856373	2013	BenBella Books	1
4	GZN	In detail work environments : spatial concepts,	978-3034615204	2011	Birkhäuser	1
5	GZN	Bring your own devices (BYOD) survival guide	978-1466565043	2013	Books24x7	3
6	GZN	Information security law : the emerging	978-1904356676	2008	Books24x7	3
7	GZN	50 activities for diversity training	978-1599965154	1994	Books24x7	1
8	GZN	Programmed therapy for stuttering in children	978-0398083076	2001	Charles C. Thomas	1
9	GZN	Sox and the city : a fan's love affair with the	978-1556526886	2006	Chicago Review Press	1
10	GZN	Topology and geometry in dimension three : triangulations, invariants, and geometric	978-0821852958	2011	Contemporary Mathematics	1
11	GZN	Loanwords in the world's languages : a	978-3110218442	2009	De Gruyter Mouton	1
12	GZN	Reciprocals and reflexives : theoretical and	978-3110199147	2008	De Gruyter Mouton	1
13	GZW	A True and Just Recorde of the Information, Examination and Confes		1582	Early English Books	2
14	GZN	Corpus and sociolinguistics : investigating age	978-9027288615	2010	EBL	6
15	GZW	Ink-stained amazons and cinematic warriors : su	1-84511-965-7	2010	EBL	6
16	GZN	Exit : endings and new beginnings in literature	978-9042032521	2011	EBL	5
17	GZN	Service-oriented architecture: an integration	978-1849681056	2010	EBL	5
18	GZW	Social justice in the U.S.-Mexico border region	94-007-4149-9	2012	EBL	4
19	GZW	Analyzing Social Media Networks with NodeXL Insights from a Conn		2011	EBL	4
20	GZW	Teaching the humanities online : a practical guide	0-7866-2081-2	2010	EBL	4

- Excel spreadsheet for data entry and analysis

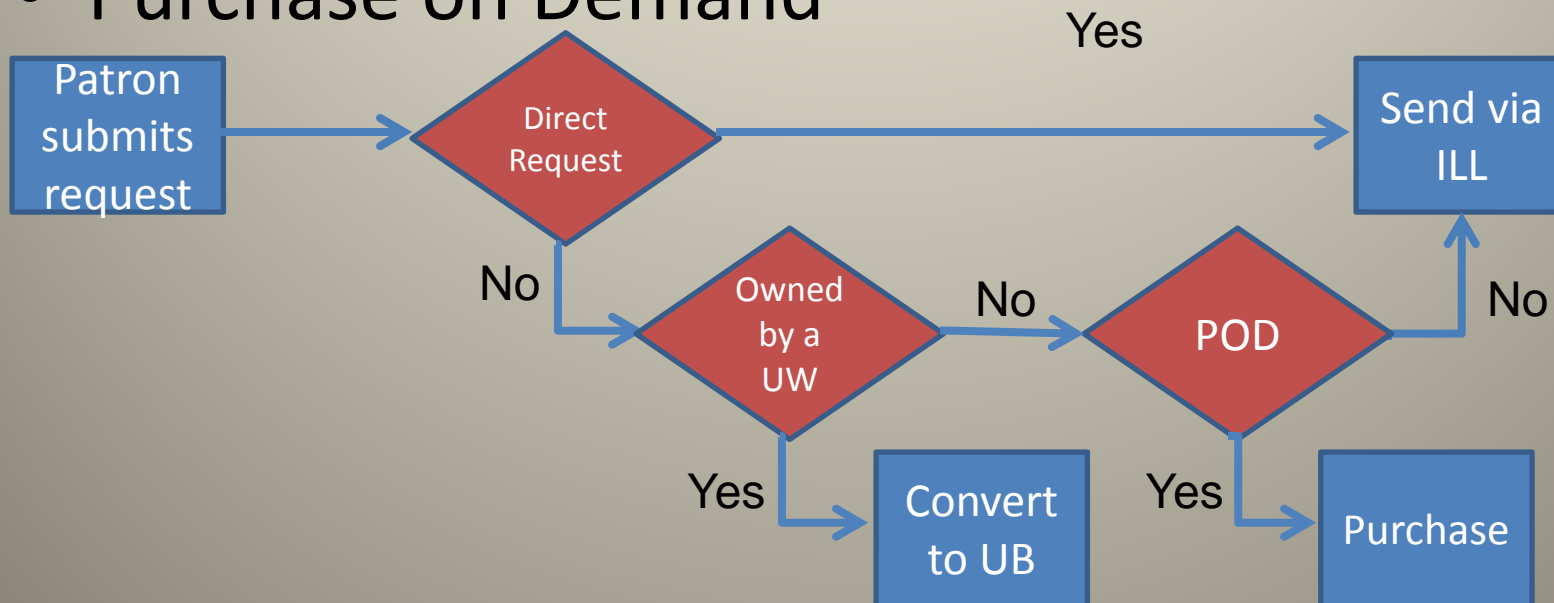
Things we considered when setting up a Custom Search

- What is the workflow?
 - Direct Request?
 - Universal Borrowing (UB)?
 - Purchase on Demand?



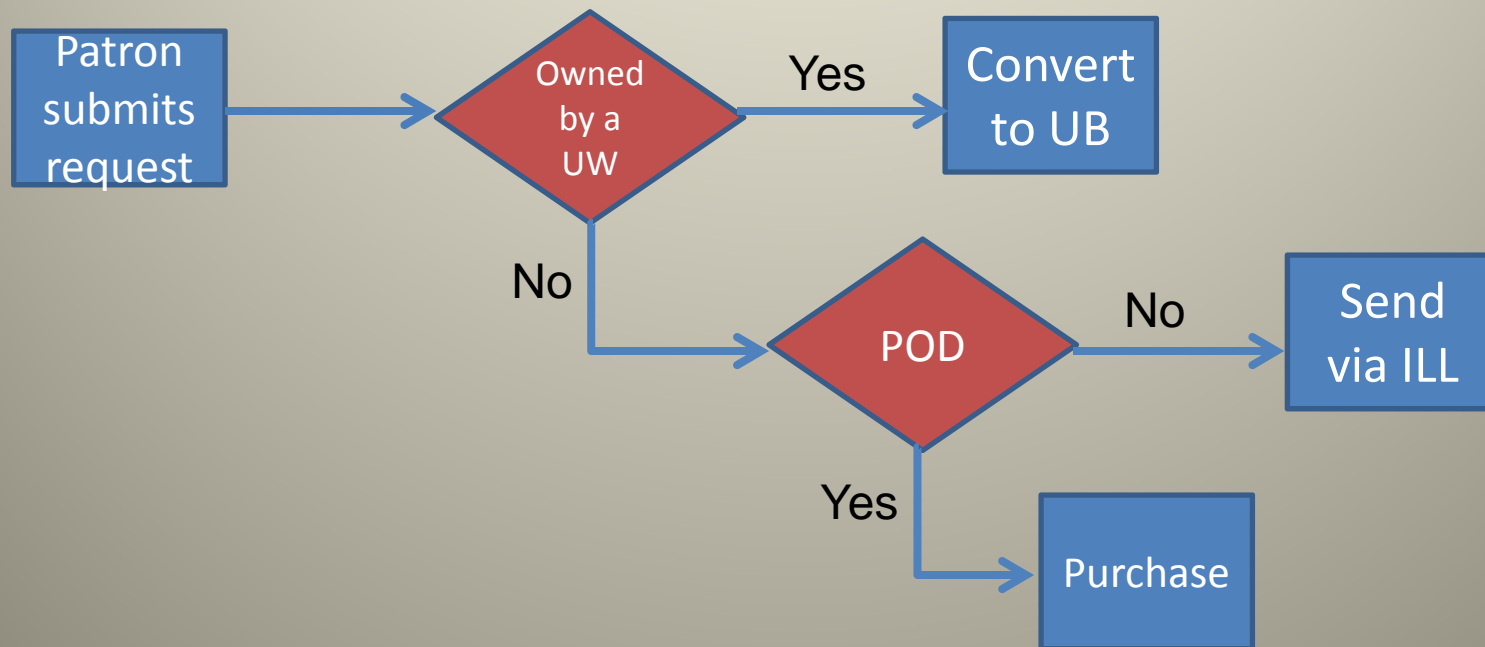
Green Bay Workflow

- Uses Direct Request
- Converts to UB
- Purchase on Demand



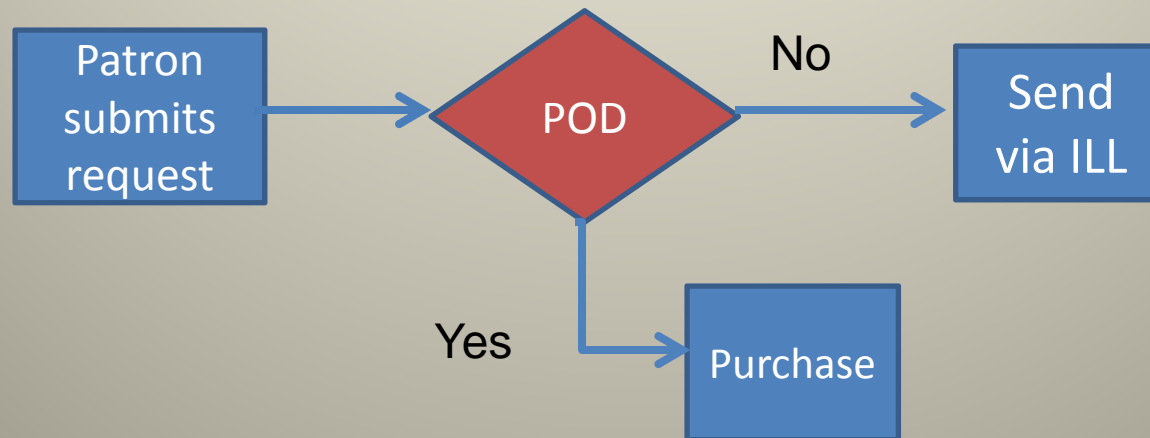
Milwaukee Workflow

- Converts to UB
- Purchase on Demand



Stevens Point Workflow

- Purchase on Demand
- Sends via ILL



Direct Request

- Profiles and routing rules
 - Bibliographic formats
 - Age of material
 - Review file options
 - Minimum number in lending string

[Main](#) OCLC Resource Sharing Settings ✕
[Custom Holdings Paths](#) [Custom Holdings Group](#) [Constant Data](#) [Direct Request Profiles](#) [Saved Field Request Order](#)

Name: DIRECTIL
Description: Direct Request Loans

Name: DIRECTIL
Description: Direct Request Loans

Request Sources

Patron Statuses

Patron Departments

Patron Will Pay Up To

Need At Earliest

But No Later Than

Age of Material: 7

But No Older Than: 100

WorldCat Direct: Unassigned

Request Types

Copy

Loan

Bibliographic Formats

Archival/Mixed Materials

Books

Computer Files

E-Audio

E-Serials

E-Texts

Government Documents

Integrated Resources

Internet Resources

Kits

Manuscripts

Maps

Microforms

Music Scores

Route To Review File Options

If Potential Duplicate Request

If Held By Your Institution

If WorldCat Direct Requested

If Held By Custom Holdings Group

UWDR

Additional Profile Options

Constant Data Record: DEFAULT

Minimum Number in Lender String: 5

Custom Holdings Path: LOANS

Prefers E Article Processing: No

Produce The Request: Yes

Date	Note	Type	Added By
9/10/2013 8:17 PM	1. Request matched profile DIRECTIL./2. Held by group UWDR	System	System

ILLiad Routing Rules

- ILLiad Routing Rules supersede Direct Request rules
 - Published last 5 years – collection development opportunities
 - Suggested as a purchase on ILL form – ItemInfo1

ILLiad Routing Rule

- If certain criteria is met, the request is sent to Direct Request

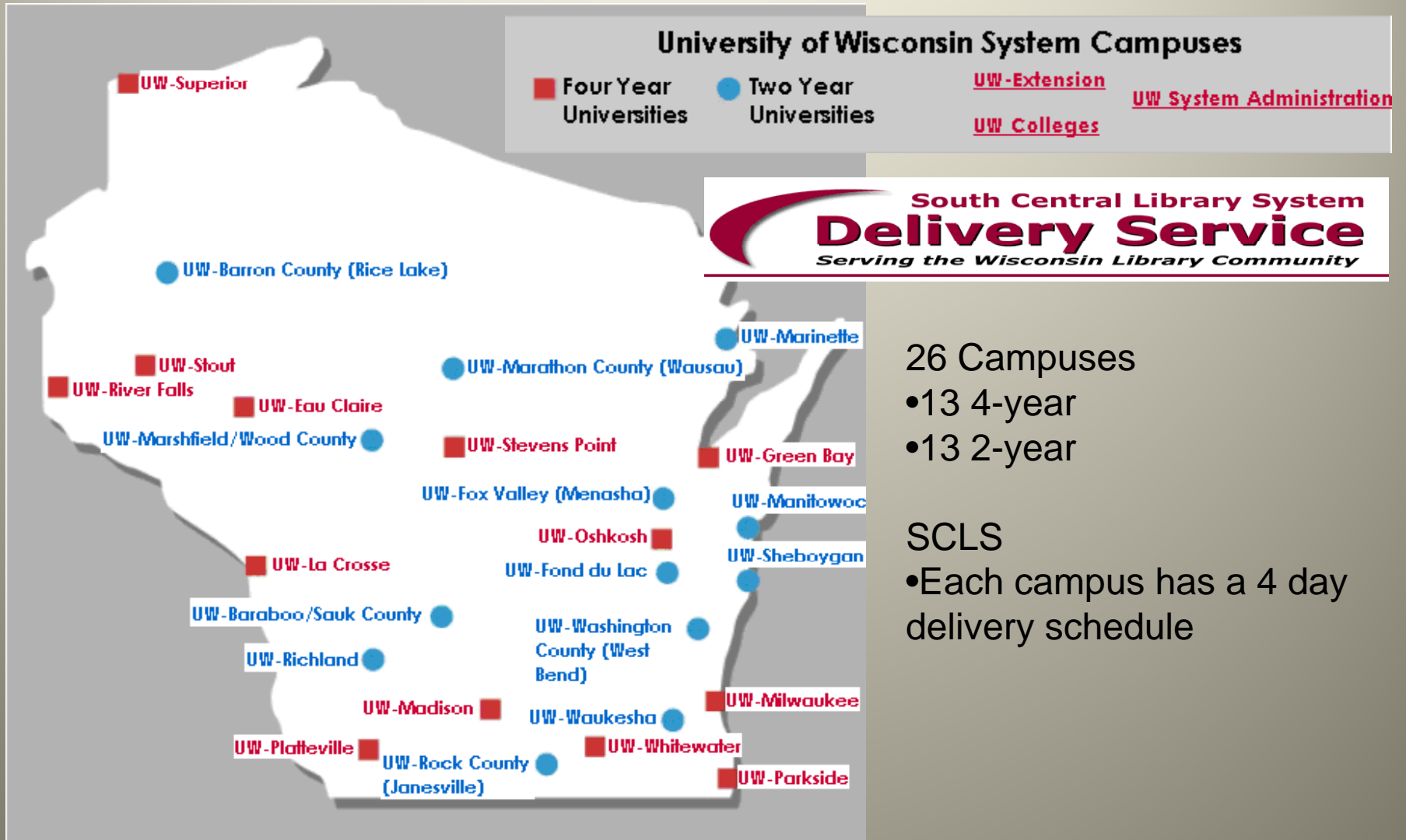
Routing

...	R...	Process...	TransactionStatus	MatchString
1	Yes	Borrowing	Awaiting Request Processing	t.DocumentType = 'Rush' and u.NVTGC = 'GZN'
2	Yes	Borrowing	Awaiting Request Processing	u.Status='FacultyStaff' and t.RequestType='Article' and u.NVTGC = 'WIS'
3	Yes	Borrowing	Awaiting Request Processing	u.Status='FacultyStaff' and t.RequestType='Loan' and u.NVTGC = 'WIS'
4	Yes	Borrowing	Awaiting Request Processing	(u.NVTGC = 'GZU') and (t.LoanDate = '2011' or t.LoanDate = '2012' or t.LoanDate = '2013') and (t.LoanPublisher <> 'Books LLC')
5	No	Borrowing	Awaiting Request Processing	t.ISSN > " and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL)

`u.NVTGC = 'GZW' and (t.ISSN > " or t.ESPNumber > ") and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL) and u.cleared = 'Yes'`


This rule moves all Loan requests with a status of Awaiting Request Processing and an entry in the ISSN or OCLC number field to Awaiting Direct Request Sending


Universal Borrowing- One System, One Library



One System, One Library

- UW Items are more discoverable with Primo

 ☆ **Climate change and cultural dynamics a global perspective on mid-Holocene transitions /** edited by David G. Anderson, Kirk A. Maasch, Daniel H. Sandweiss.
David G Anderson (David George), 1965-; Kirk A Maasch (Kirk Allen); Daniel H Sandweiss ;2007
● **Online access. Check Locations tab for physical copies**

[View Online](#) [Request](#) **[Locations](#)** [Details](#) [Send to](#) 

Availability and locations in other institutions		
<input type="checkbox"/> +	UW Whitewater Main Collection, 3rd Floor	(QC981.8.C5 C555 2007) ● Available
<input type="checkbox"/> +	UW Superior E-Book. Use Internet link(s) in this record.	● May be available
<input type="checkbox"/> +	UW Superior E-Book. Use Internet link(s) in this record.	● May be available
<input type="checkbox"/> +	E-Book (UW-La Crosse users only)	● May be available

4 copies-
3 are ebooks

UW-Green Bay Custom Search

And 

..... [Transactions.RequestType] Equals Loan 

..... [Transactions.ProcessType] Equals Borrowing 

..... [Transactions.CreationDate] Is greater than 08/20/2013 






..... [Transactions.LendingString] Is not blank 

..... [Transactions.LendingString] Does not contain Direct Request 

..... [Transactions.DocumentType] Equals Books 

UW-Milwaukee Custom Search

And 

- [Transactions.RequestType] Equals Loan 
- [Transactions.ProcessType] Equals Borrowing 
- [Transactions.CreationDate] Is between 08/20/2013 and 12/21/2013 
- [Transactions.DocumentType] Equals Book 
- [Transactions.LendingString] Is not blank 












Doc Type	Book
Status	Failed
Request Type	Imported Request

- Article
- Book
- Book Chapter
- CD Music
- Conference
- DVD Video
- Graphic Novel

Item Information	
Call Number	
Location	UB
Due Date	
Reason For Cancellation	
Item Num/Ref Num	
ISxN	
Special Instructions	
Max Cost/Pieces	

UW-Stevens Point

And 

- [Transactions.RequestType] Equals Loan 
- [Transactions.ProcessType] Equals Borrowing 
- [Transactions.CreationDate] Is between 08/20/2013 and 12/21/2013 
- [Transactions.DocumentType] Equals Book 
- [Transactions.LendingString] Does not contain GZM 
- [Transactions.LendingString] Does not contain GZN 
- [Transactions.LendingString] Does not contain GZO 
- [Transactions.LendingString] Does not contain GZE 
- [Transactions.LendingString] Does not contain WUO 
- [Transactions.LendingString] Does not contain WCZ 
- [Transactions.LendingString] Does not contain GZU 

Collecting the Data

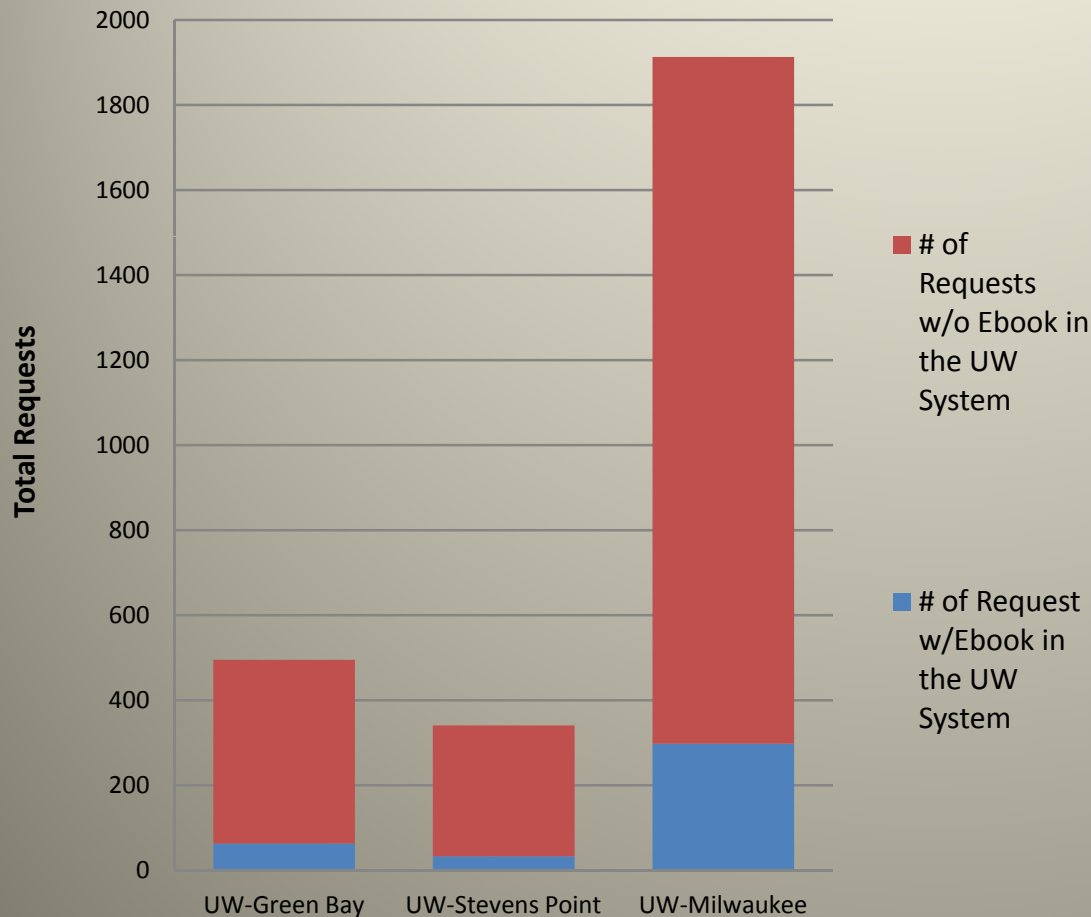
- Who collected it?
 - Green Bay had two students work on it in pieces
 - Milwaukee had one staff person work on it in batches and a big bunch after the semester
 - Stevens Point had one staff person in pieces
- Issues with accuracy
 - Retro active
 - Are we seeing everything?
 - PDA program

Data Analysis

- Combined data from all 3 campuses
- Looking for:
 - Number of requests of loans outside the UW system, by campus, when an ebook was held in the System
 - Number of ebook titles available in UW system by vendor
 - Number of titles by vendor when ≥ 4 ebooks in UW system
- Used MS Excel PivotTable report to generate statistics

Number of Loans Outside UW System

Requests by Campus



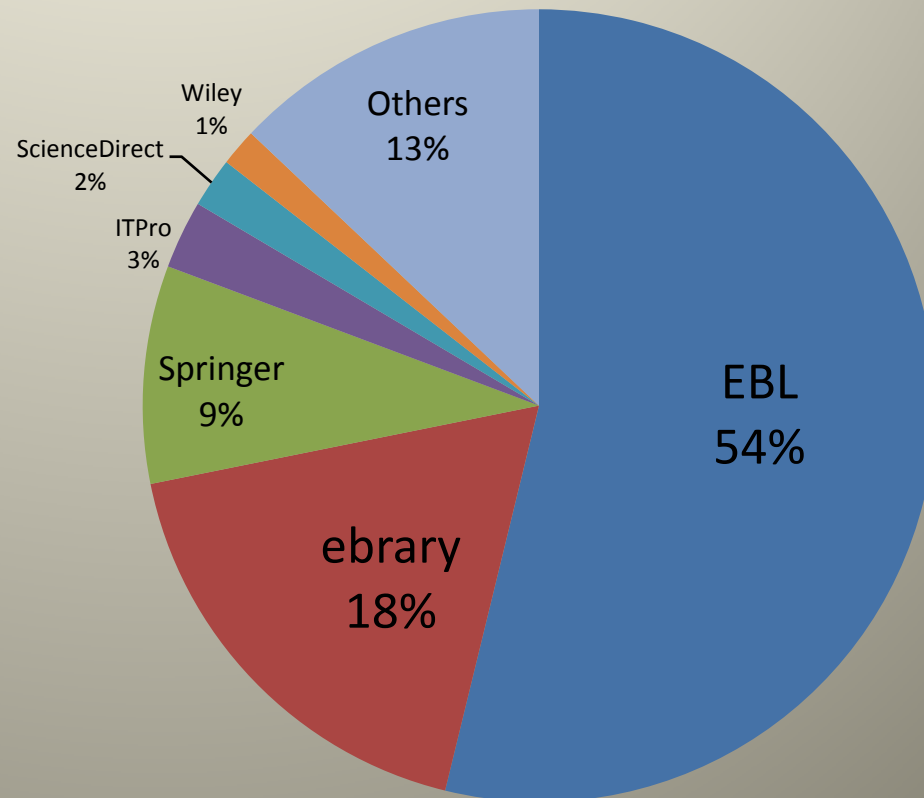
- By campus, the number of loans requested outside the UW system when an ebook was available in the system
 - UW-Green Bay
 $63/495 = 13\%$
 - UW-Stevens Point
 $33/341 = 10\%$
 - UW-Milwaukee
 $298/1913 = 16\%$
 - 3 Campus Total
 $394/2749 = 14\%$

Ebook Titles By Vendor

- Approximately 80% of the ebook titles that were available in the UW system were from the following 3 vendors

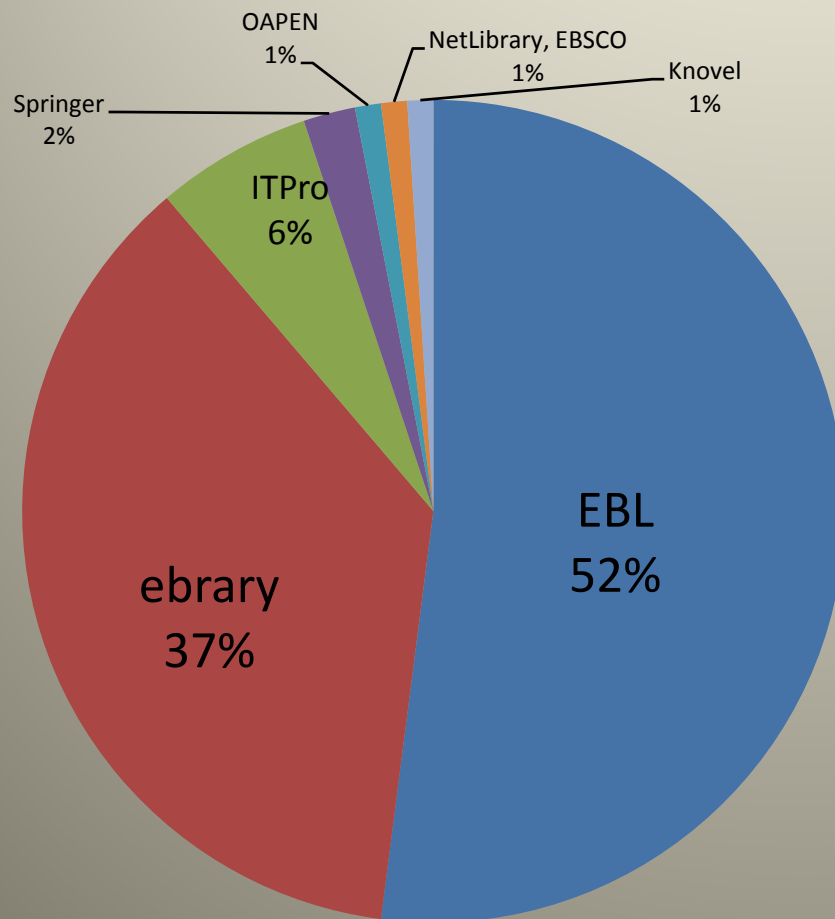
- EBL
212/394 = **54%**
- Ebrary
71/394 = **18%**
- Springer
35/394 = **9%**

Ebook Titles By Vendor



Number of Titles by Vendor When ≥ 4 Ebooks in UW System

Ebook Titles by Vendor

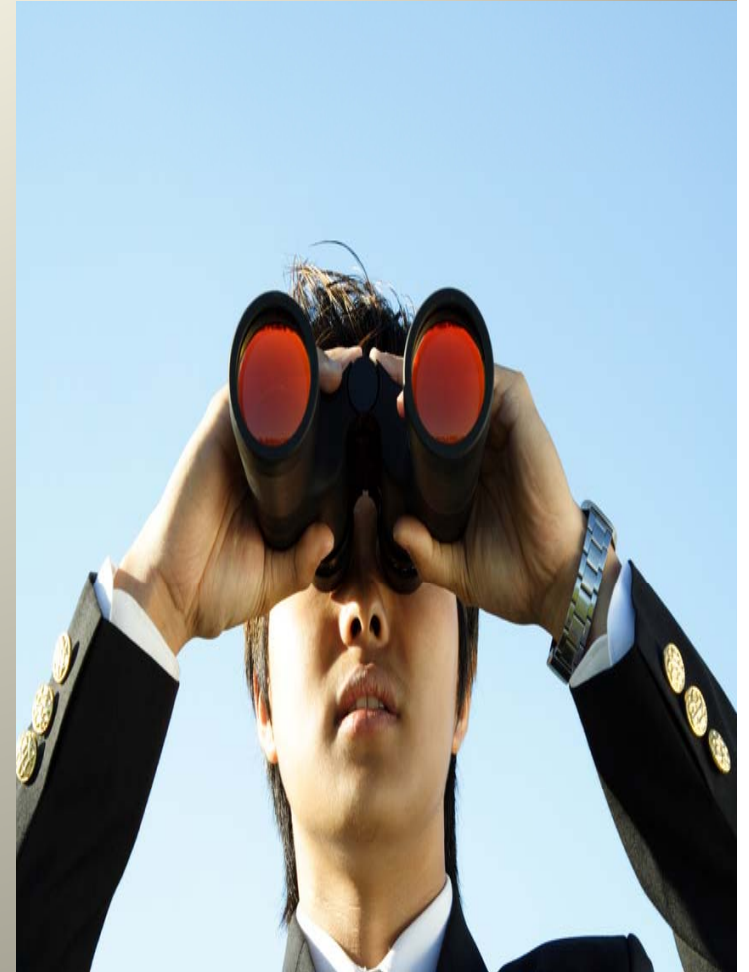


- UW system has a policy of not purchasing a title if it is owned by 4 or more campuses
- **25%** (98/394) of the titles identified were available as an ebook by 4 or more libraries in the UW system. Of these:
 - EBL
51/98 = **52%**
 - Ebrary
36/98 = **37%**

- Problem + Data = money (sometimes)
- CUWL – Council of University of Wisconsin Libraries & UW System Administration
- Shared collection – meet all users needs, contain costs, increase buying power
- Coupled ILL data with publisher turn- aways



- Publishers and aggregators – multipliers and negotiations
- \$600,000 in one-time funding
- Received \$500,000 – ebooks will be addressed
- Future role



Questions



Thank you!



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