



Connecting ILLiad with OCLC and other Services via Server Addons

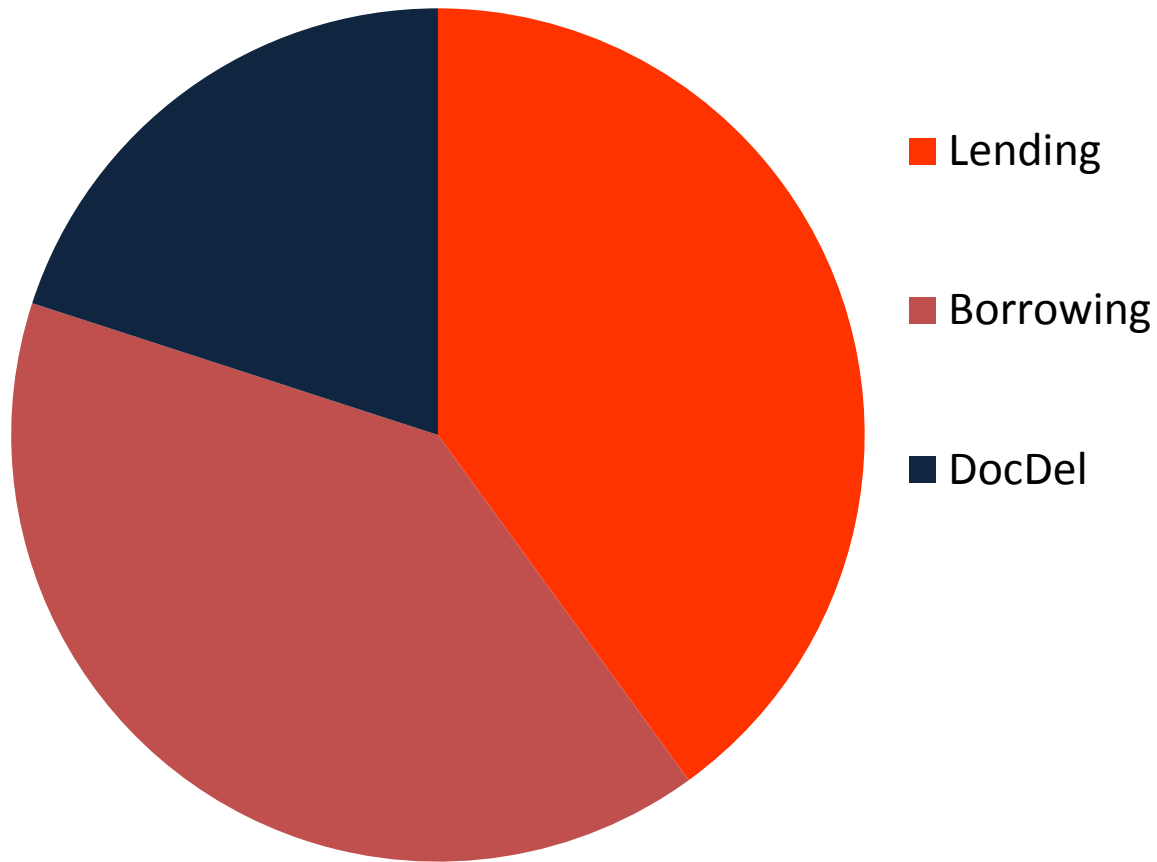
Shannon Pritting, SUNY Polytechnic Institute, Tech Dev. Team Chair, IDS Project

It all started one night in Albany....

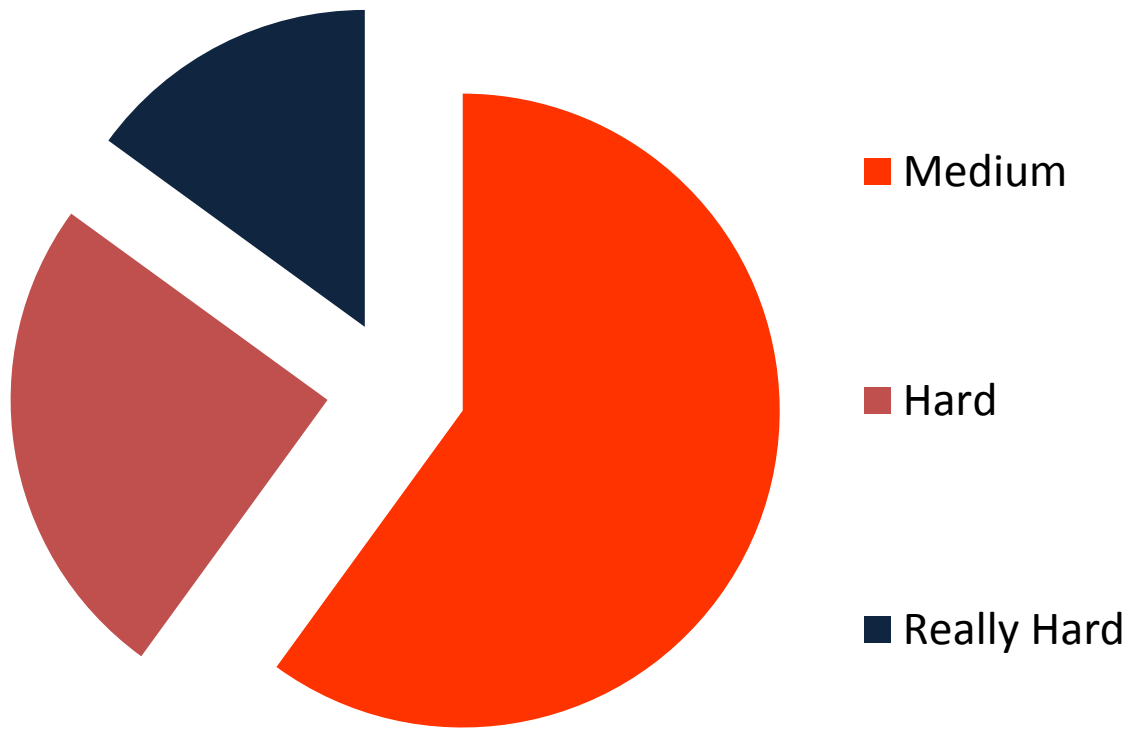


Image from ibm.com—
IBM Watson site

ILL is a big pie, and there are great tools for major functions.

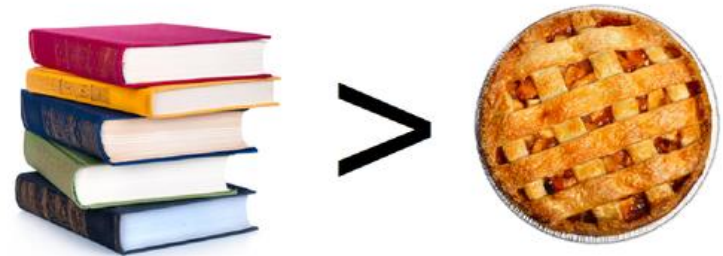


Right now, we're after the medium stuff.



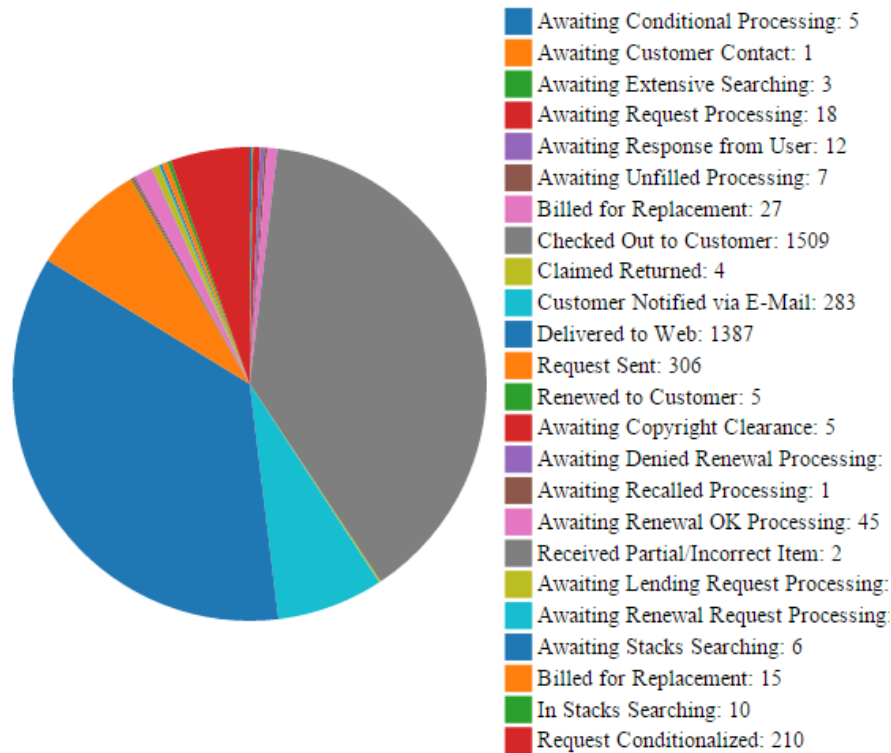
Finding unexpectedly large pieces of your ILL pie.

- Different types of libraries will have different issues.
- SYB—27% of all ILL activity required availability look-up.



The slices we'll go after will be smaller and smaller.

Pie Chart: Pie Slice Hover Tooltip



And then, the slices will get more and more refined.

- Find the medium stuff in a more complex process or queue.
- Define your perfect and review everything else.



Hi, my Name is System.
I like to do the mundane things.



Transactions are followed through workflows to reduce touches through Logic.

- Treat a tn like a pie that shouldn't be disturbed until it's done.
- TN's have, for the most part, recipes, that can be followed.

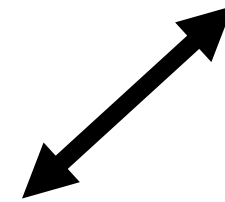


How Does IDS Logic Work?

ILLiad



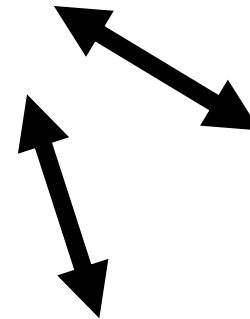
Libraries Configure Logic Rules and Services to best automate workflows, getting data from APIs, web services, and other sources



Z39.50



ALIAS



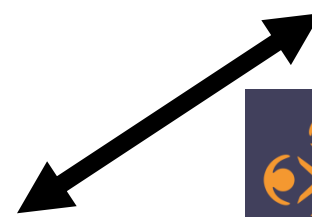
IDS Logic Connection to ILLiad



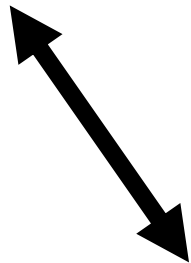
Server Addon
allows Read-
Write Access to
ILLiad database



IDS Logic Server
Addon installed in
ILLiad Customization
Manager



IDS Logic Server



OCLC™

ILLiad will then send
selected commands to
OCLC (i.e. cancel, etc)

Server Addons

- Run in System Manager
- Like a system/form addon, store lua and config.

Supported Commands:

- Route
- Add Flags
- Send Emails
- Set Flags
- Add ESP Update
- Write Sys. Log

How we're using Server Addons

- A main server addon
- Lua is written on the fly for the addon to execute based on your needs.
- No need for dozens or hundreds of addons.



Code that writes code...



Sometimes in life, it's about the queue, not the transaction.



Buttons are much more powerful when you can act on many transactions at the same time.

Create customizations without too much work under the hood.



What exactly does this mean to me?

- IDS Logic can insert information into transactions.
- IDS Logic can route transactions.
- IDS Logic can cancel and update transactions in ILLiad and WCRS/Worldshare.
- IDS Logic can send emails to patrons or other libraries based on criteria you give it.
- IDS Logic can read information in transactions and take actions based on criteria.

Who's Using Logic Now?

61 Libraries

Most are IDS Project Members, and all types of libraries are represented in this group.

IDS Logic Rules

ILLiad



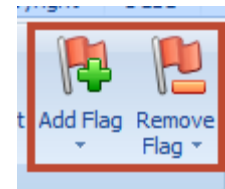
Can key off date information

IDS Logic looks for information that is reliably acted upon and takes actions, including notifying patrons



Emails Patron

Updates/Routes Transaction



Add/Remove Flags



How are Logic Rules different than Client Routing Rules?



Rules can make finding, fixing, and working on your workflow problems much easier.



Release the MicroManagers! (In a Good Way).



In Stacks Searching - iLLiad Client 8.4.3.0

Home Borrowing Document Delivery Lending System Process

Open Cancel Route Send E-mail Export Print

Man OCLC WorldShare In Stacks Searching X

Drag a column header here to group by that column

Creation Date	Transaction Date	Transa...	Photo Journal Title	Ched Title	Location	Call Number	Photo Article Title
4/18/2014 4:51 PM	4/23/2014 12:20 PM	750619	Kenchiku to shi = Architecture and urbanis...		Architecture Reading Room - Re...	NA4900 .A3	General Electric Building (originally RCA Victor Building). 570 Leav...
4/21/2014 11:26 AM	4/22/2014 7:46 AM	750772			Architecture Reading Room, 5th...	GN445 .J066 1998	Behavior Observations in Ethnography
4/22/2014 12:35 AM	4/22/2014 7:46 AM	750945	Handbook of methods in cultural anthropology /		Brd-3rd Floor	GV1060 .S. 1759	Jon Hendershott; Beth Bonner Pioneers Sub-3 Hour Marathon
4/22/2014 12:55 AM	4/22/2014 8:08 AM	751021	Track & field news.		Brd-3rd Floor (does not circulate)	DC66 .7 .F47 A313 2014	
4/22/2014 9:54 AM	4/22/2014 11:05 AM	751048			Brd-2nd Floor	BP163 .M365 1997	
4/22/2014 11:17 AM	4/22/2014 1:10 PM	751178			Brd-2nd Floor	BF592 .F33 W43 1997	
4/22/2014 3:46 PM	4/22/2014 4:16 PM	751243			Brd-5th Floor	PS310 .M57 F57 2011	
4/23/2014 10:58 AM	4/23/2014 11:15 AM	751243			Brd-3rd Floor (does not circulate)	F576 .K3321	A HOLY BATTLEGROUND; METHODIST, BAPTIST, AND QUAKER M...
4/23/2014 10:58 AM	4/23/2014 11:32 AM	751353	Kansas history.		Brd-3rd Floor (does not circulate)	M511 .E19	Nazi Propaganda
4/23/2014 11:49 AM	4/23/2014 12:20 PM	751372	The economist.		Brd-4th Floor	ND3363 .A1 B67 2013	
4/23/2014 2:54 PM	4/23/2014 3:07 PM	751444			Architecture Reading Room, 5th...	NA123 .B38 2011	
4/23/2014 4:27 PM	4/25/2014 9:12 AM	751472			Brd-5th Floor	PS3515 .A944 B66 1957	
4/23/2014 5:39 PM	4/23/2014 6:14 PM	751487			Brd-5th Floor	PN4900 .L55 R3 OVERSIZE	
4/23/2014 5:49 PM	4/23/2014 6:14 PM	751490			Brd-5th Floor (does not circulate)	P91 .3 .H85	SOME EXPLORATIONS IN INITIAL INTERACTION AND BEYOND; T...
4/23/2014 7:21 PM	4/24/2014 8:16 AM	751500	Human Communication Research		Brd-4th Floor	HM656 .S53 2014	
4/24/2014 2:29 AM	4/24/2014 8:16 AM	751526			Brd-4th Floor	M6200 .M83	VISUAL COSMOPOLITANISM AND CREATIVE TRANSLATION; ARTI...
4/24/2014 9:14 AM	4/24/2014 9:32 AM	751556	Muzamas = Muzamas.		Brd-4th Floor	HM656 .S53 2014	Introduction; Tempo Tantrums; Chapter 1; 3rd-Lag Luxury
4/24/2014 9:45 AM	4/24/2014 11:47 AM	751573	In the neantime ; temporality and cultural po...		Brd-4th Floor		

In the spirit of client routing rules and addons, we're releasing DIY Logic Rules.

- You supply the ingredients, Logic will be the oven.
- We'll just check that the Rules won't cause problems for others.



We'll try to build rules that everyone can benefit from (especially the patron) based on the principles of the Workflow Toolkit.



IDS PROJECT

A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

Workflow Toolkit Links

- Download Full Workflow Toolkit
- Intro Materials
- Quick Reference
- Notes from Your Library Visit
- Collaborative Technologies

Borrowing

- Buy vs. Borrow
- Copyright
- Custom Holdings
- Direct Request
- Email Notifications
- Lender Address Maintenance
- Observer Tracked Sender
- Patron Authentication
- Web Circulation

Document Delivery

- Delivering Items in Your Physical Collection
- Delivering Locally Held E-Journal Articles

Lending Best Practices

- Article Exchange
- Effective Billing: IFM & Billing Manager

The goal of the Workflow Toolkit is to help ILL staff implement best practices that will save valuable turnaround time, while also cutting the costs of doing business. Maintained by the IDS Project's Mentors, in partnership with Atlas Systems, the Toolkit provides best practices that can enhance all aspects of borrowing, lending, and document delivery services through ILLiad customizations, resource sharing strategies, and workflow improvements.

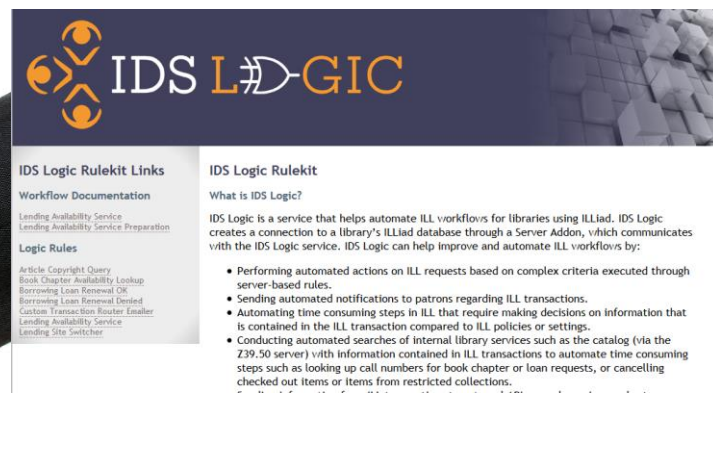
Join the conversation on WorkflowToolkit-L

The IDS Project is proud to host the WorkflowToolkit-L listserv, the ILLiad community's hub for sharing news, support, ideas, and best practices. Sign up today and join the conversation!

Get the Toolkit

The Workflow Toolkit is available from the IDS Project Press as a downloadable PDF. View it on your PC or tablet, though we highly recommend printing it for use in a 3-ring binder. This will allow you to bookmark sections, take notes, and complete the planning activities through the Toolkit. New sections will be released as loose leaf updates, allowing you to easily keep your Toolkit up-to-date.

toolkit.idsproject.org



IDS LOGIC

IDS Logic Rulekit Links

- Workflow Documentation
- Lending Availability Service
- Lending Availability Service Preparation

Logic Rules

- Article Copyright Query
- Book Chapter Availability Lookup
- Borrowing Loan Renewal OK
- Borrowing Loan Renewal Denied
- Custom Transaction Router: Smaller
- Lending Availability Service
- Lending Site Switcher

IDS Logic Rulekit

What is IDS Logic?

IDS Logic is a service that helps automate ILL workflows for libraries using ILLiad. IDS Logic creates a connection to a library's ILLiad database through a Server Addon, which communicates with the IDS Logic service. IDS Logic can help improve and automate ILL workflows by:

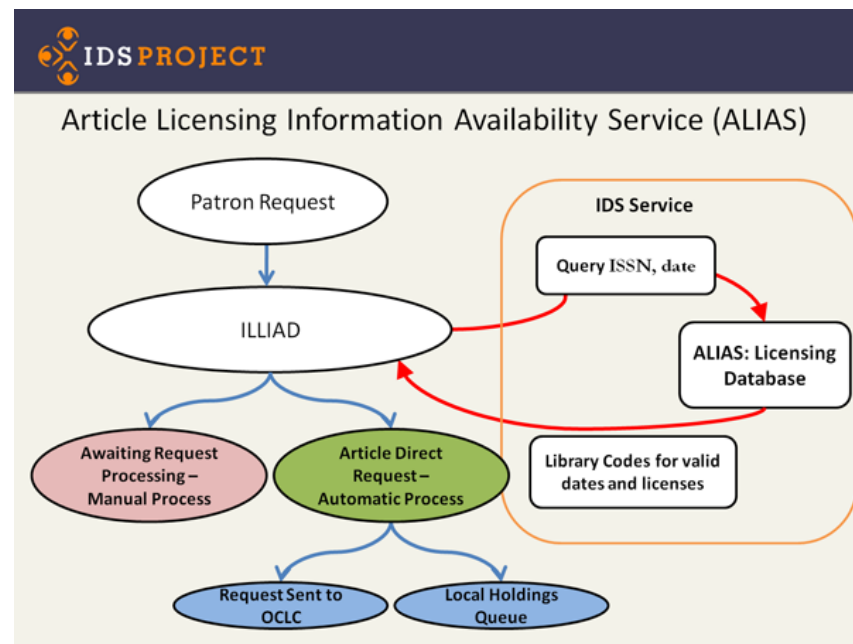
- Performing automated actions on ILL requests based on complex criteria executed through server-based rules.
- Sending automated notifications to patrons regarding ILL transactions.
- Automating time consuming steps in ILL that require making decisions on information that is contained in the ILL transaction compared to ILL policies or settings.
- Conducting automated searches of internal library services such as the catalog (via the Z39.50 server) with information contained in ILL transactions to automate time consuming steps such as looking up call numbers for book chapter or loan requests, or cancelling checked out items or items from restricted collections.

rulekit.idsproject.org

Toolkit, meet Rulekit.

Logic Services--Big Pie Slices Made Easy: ALIAS

- ALIAS—Direct Request Article Service.
- Centrally Managed Licensing
- Holdings Updated Weekly from Link Resolver.



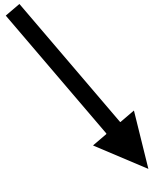
Lending Availability Service

ILLiad



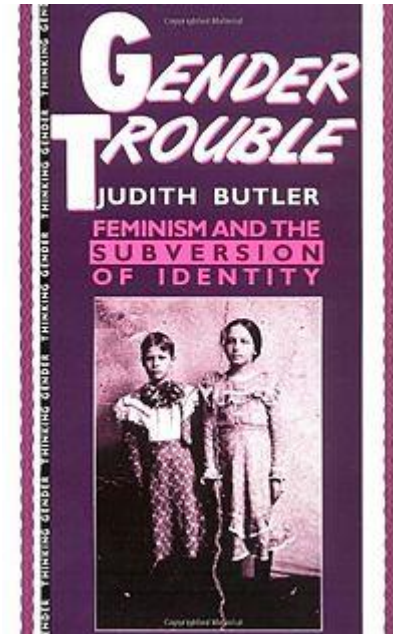
Z39.50

Logic stores complex availability settings and rules and interacts between ILLiad and the libraries Z39.50 server to check availability and import all needed information.



Borrowing Availability Service

- Set your direct request free.
- If you have a copy that's close, you can find that too.



Direct Request With Ice Cream (DR Enhancer)



Rule Examples: Max Cost Reviewer

- Normalizes max cost field data.
- Auto conditional or cancel based on criteria.
- Removes negotiation from payments based on human error



Rule Examples: Stale Requests in Request Sent

- Finds requests in queues that you'd like to monitor closely—but may not have the time to.



Rule Example: Book Chapter Direct Requester (It Happened One Night in Syracuse)

- Article requests shouldn't be ignored just because they're book chapters.
- And OCLC shouldn't be ignored either.



Turning the Mic over to the You...

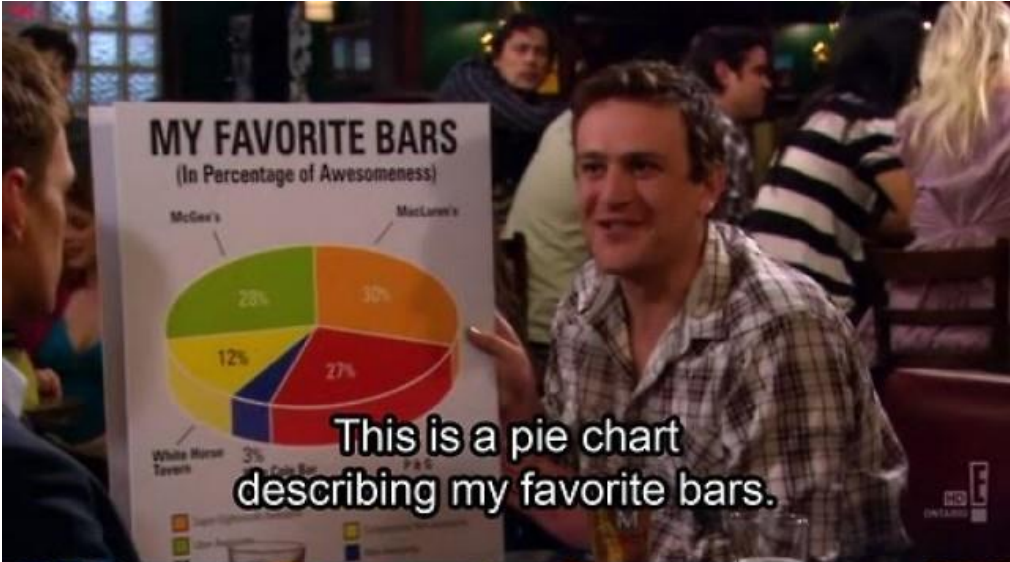
- Any ideas for rules you'd like to see us develop in Logic?



Logic is a platform that will continue to be built to facilitate the most effective resource sharing possible through ILLiad automation and enhancements.



Future Developments: Data Services



Future Developments: Unique Identifier Predictor

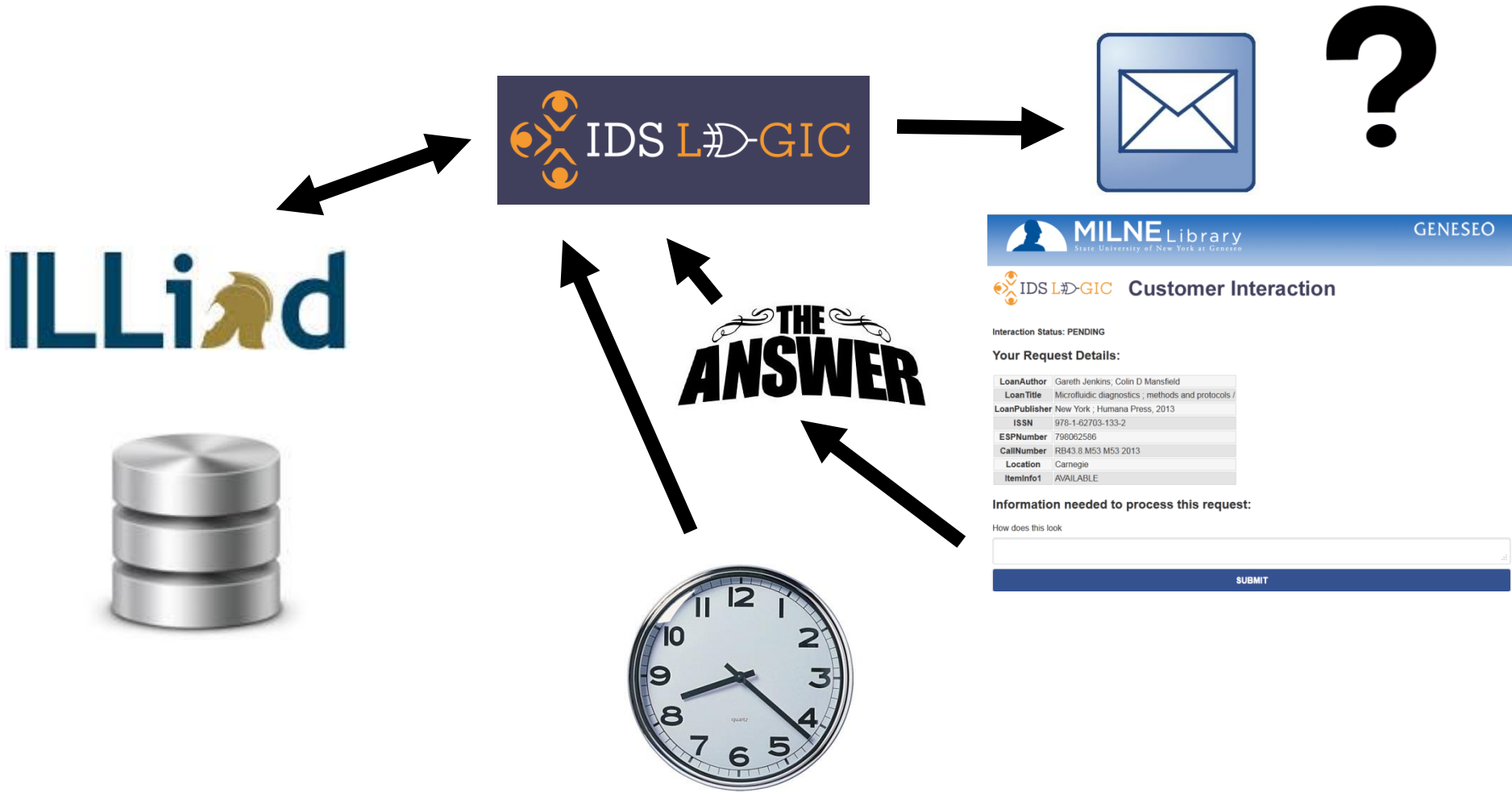
- Based on OCLC APIs and ILL evidence from actual tn data.



Future Developments-- Connecting systems together: Show me the Barcode?



Future Developments: GIST Rules



Questions?

Come See us

@ the IDS Poster Session