



The

OCLC ILLiad Newsletter



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Welcome New OCLC ILLiad Licensees!

SUNY Maritime College
Central Connecticut State University
Auburn University at Montgomery
Niagara County Community College
Buffalo and Erie County Public Library
Columbia-Greene Community College
Marist College
Plymouth State University
Genesee Community College
Monroe Community College
Prairie View A&M College
Keuka College
Central Arkansas Library System
Elmira College
Furman University
Our Lady of Lourdes Memorial Hospital, Inc.
Florida A&M University
Northwestern College
Pittsburg State University
University of Minnesota Duluth
Rollins College
University of Toledo
Bradley University
Sandia National Laboratories
College of Staten Island

Over 320 Attend the 4th OCLC ILLiad Conference

...and they had a great time in Virginia Beach! For the fourth time in four years, OCLC ILLiad users met to network, learn, and generally hobnob with their fellow wizards.

Wednesday was reserved for the Pre-Conference, with six half-day sessions taught by Atlas staff. Then the real festivities began with the Pre-Conference social on Wednesday evening. Those attending enjoyed a variety of games and activities, including a photo booth sponsored by the Copyright Clearance Center (thanks Chuck, Dru, Robert, Chris, and all the folks at the CCC).

The Conference itself opened on Thursday morning with the Keynote address by Jay Jordan, President of OCLC. Then it was off to the sessions. This year saw fifteen sessions by OCLC ILLiad users, a roundtable organized by the Copyright Clearance Center on ILL and

copyright, and an additional nine sessions given by Atlas staff - plenty to go around. And let's not forget the ten poster sessions that were up during Thursday lunch and Friday breakfast. A big thank you goes out from Atlas Systems to all of our presenters; it is you who make this conference what it is!

Thursday night was our traditional wine and cheese social, held this year at the Contemporary Arts Center of Virginia and featuring a fine selection of wines picked by Atlas staff for the occasion.

The conference wrapped up Friday morning with an update from OCLC by John Trares (thanks to OCLC for the delicious breakfast), several sessions, and the Atlas Update by Genie Powell. A busy three days, but a fun three days as well. Thanks to all who came, and we hope to see you next year!

T.I.P.S. - Training Information Per Stephanie

By Stephanie Spires, Training and Technical Support Specialist



OCLC ILLiad Quick Courses - Conference Recap Series

If you missed the 2008 OCLC ILLiad conference, here is an opportunity for you to learn about many of the same topics presented at the beach by Atlas staff. Several conference courses have been re-designed for a new online training series with in-depth coverage of the new 7.3 tools along with other topics - no travel required. Each course is one live web session of 90 minutes to approximately 2 hours in length taught online via WebEx. Dates, times, fees, and details for these and other classes can be found at: <https://www.atlas-sys.com/training/>. The format for all classes is lecture/demonstration.

• Getting the Most Out of Odyssey

This quick course reviews the technical aspects of setting up Odyssey for all three modules, verifying trusted senders work to your advantage (including a new feature in 7.3), and making sure your partner libraries are able to communicate with you regardless of their using Odyssey within ILLiad or the stand-alone version. This course also demonstrates using the Odyssey Helper available in version 7.3 of ILLiad and discusses creating OCLC custom holding groups for Odyssey partners.

• ILLiad Toolbox

Learn about the new ILLiad Version 7.3 tools including the new Customization Manager, the new Web Circ module, new Web Reports, and the Odyssey Helper. (continued on page 4)

Congratulations to Pamela Flinton from SUNY Oneonta!!! She is the 2008 recipient of the STARS/Atlas Systems Mentoring Award.

The OCLC ILLiad Users Forum

A quarterly feature highlighting innovations in the field of Interlibrary Loan



Developing a Disaster Response Plan for Interlibrary Loan Services

Heather Campbell, Special Services. Jacksonville Public Library, Jacksonville, Florida

Experiencing or reading about major disasters serves as a wake-up call for many library administrators; they develop or revisit disaster plans. Often, the special needs of Interlibrary Loan services are overlooked. ILL is unique among the library services. We serve two sets of customers - our own and the customers of other libraries. We are entrusted with the loan of other libraries' materials and responsible for their good condition and safe return - even when disaster strikes. The best time to develop a plan for dealing with a disaster is - of course - before the disaster. There are three parts to a Disaster Response Plan for ILL Services: the Disaster Policy and Procedures, the disaster preparedness plan, and your contingency plan.

Having a disaster policy and writing out the procedures in detail is helpful to staff who are also dealing with the emotional and physical tolls of a disaster. It allows the staff to focus on what needs to be done. In developing your disaster response policy for your library, you need to find the answers to the following questions:

- What is your rationale for developing a disaster response plan?
- What are your responsibilities according to the ILL Code and local, network/consortium, state, or regional policies?
- What is your definition of a disaster?
- What is the current fiscal atmosphere at your library? In a disaster, who assumes financial responsibility? If a lender charges your library for missing or damaged material, do you pass those charges on to the customer who checked out the material?
- What is the place of ILL services in your library's great scheme of things? As participants in Resource Sharing, we do a wonderful job making a lot of materials available to a lot of people who would otherwise not have any access to them. But - when recovering from a disaster - ILL may not be considered a priority or a core service. Find out from your library administration what role - if any - is planned for Interlibrary Loan in the aftermath of a disaster.
- How empowered are you as an ILL manager?
- Do you have any current emergency procedures for your area? What works? What doesn't?
- What barriers might you encounter to resuming service?
- How will you inform your lenders and suppliers of your status? Are there procedures in place in your library, local network, or state where an outside agency will do this for you?

- What procedures will you follow as you try to determine the status of ILL materials out on loan as well as the status of materials that were at library units? How can your ILL management software help you? For example, when a portion of your pick-up locations are damaged, ILLiad can help you identify the materials out on loan for those locations. Messages sent via RSS can target customers who used the damaged branches as ILL pick up locations, providing your customers with information about closed library branches and general library news whether they're accessing their accounts locally or from remote evacuation centers
- How will you contact your lenders about damaged or missing materials?

There are other considerations apart from your Disaster Response policy. With hurricanes, we usually have a period of warning before a hurricane makes landfall. A disaster preparedness plan helps you temporarily close down Interlibrary Loan services in your library and address your responsibilities as a borrowing library. It may include elements of your library's disaster preparedness plan. Prior warning of a disaster gives you an opportunity to lessen the impact of the losses of loaned materials and the financial impact on your library.

- Make the plan easy to understand and comprehensive, including everything that's necessary to do. Consider putting it in the form of a checklist.
- Include what you need to do that's unique to your work area. How vulnerable is your area to damage? Do you have windows or outside doors? What can you do to lessen potential damage?
- Include what you need to do to shut down Interlibrary Loan operations. Who do you need to inform? Make sure you change your supplier status with OCLC.
- Insure the safety and security of materials as much as possible. Will you have to move anything to a safer area? Where is that area? How will you move it there and secure it?

We won't always have warning of a disaster. Part of thinking about how your services will cope if disaster strikes is looking at your current situation and considering how you would run Interlibrary Loan if you weren't able to access your workspace due to a disaster. A contingency plan can help prepare you and your staff for this eventuality.

- Look at the location of the ILL work area - including the location within the building and the geographic location. How vulnerable are you? Are you located in a flood zone? Near a body of water? Near any buildings that may be vulnerable to a terrorist attack? On or near an earthquake fault line?
- Does your work area have windows and outside walls? Is it located directly under a roof or in a basement?
- What are the locations of your computer servers and routers? Are they located in a flood prone area? If the computer equipment on your most vulnerable floor is compromised, will any of your computers work? What back-ups are in place? If you host your own server for ILL services, what safeguards are in place?
- If you are unable to use your workspace after a disaster, what other workspaces are available to you? If your building is partially usable, is there another place for ILL within your building? What places are available if your building is compromised?
- Will your ILL management system be available after the disaster? Do you have anything you can use instead? Can you install the ILLiad Client on non-ILL PCs or on a laptop in advance of an emergency?
- In emergency situations, staff members are often reallocated. Will you or your staff be shifted from ILL duties and be used elsewhere?

While it's wise to plan ahead, your plan of action may change in the aftermath of a disaster. While your plan must be comprehensive, it must also be flexible. You can't anticipate everything that could happen.

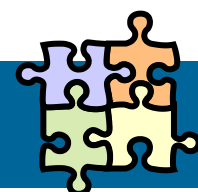
The role of the library in your community may change. In the aftermath of the hurricanes of 2004 and 2005, libraries served as refuge sites, disaster information centers, and communication centers while library staffs assisted FEMA and

the Red Cross, helped run shelters, were reassigned to Emergency services, staffed phones, and assisted the displaced people.

The severity of the disaster and your library administration's response to it will affect the implementation of your plan of action. Your library's priorities may supersede the implementation of your plan. You or your staff may be reassigned to deal with the effects of the disaster or members of the ILL staff may be among the injured, have evacuated out of town, etc. Having written plans will help staff temporarily assigned to ILL complete needed duties in the absence of the regular ILL staff.

Resumption of ILL services is dependent on the damage to your local infrastructure, your library collection, and upon the needs of your clientele. You may be able resume borrowing. While Interlibrary Loan may not be considered a core service, it may be a valued tool in your community's recovery.


The response of other libraries to your plight may differ. After the Florida hurricanes in 2004, lenders were less sympathetic to libraries affected by disasters. Hurricane Katrina changed many attitudes and lenders showed more compassion. However, with the passing of time and changes in ILL units' leadership, the attitudes could shift back. The lack of standards addressing disaster response in national, regional, state, or local ILL codes and agreements, coupled with local fiscal concerns, insure that the responses of lending libraries to disasters affecting other libraries will vary. Having a written disaster response plan consisting of disaster preparedness, policy, procedures, and contingency plans for Interlibrary Loan services will help safeguard materials and provide consistency in your institution's ILL services through changes in leadership, and will guide others in dealing with disasters in the future.



At Your Service - Helping You Put the Pieces Together

By Kevin Ford, Customer Support Manager

Greetings All. Limited space available this time around, so I'm going to keep this short and talk just a little bit about the infamous Connection Manager Stop Sign errors/warnings that you sometimes see in the ILLiad Client.

 Whenever you see this kind of thing, either click the Stop Sign icon itself, or go to the Maintenance Menu from the ILLiad Client Main Menu and select System Information from the dropdown. Either way, you end up on the System Information screen.

From here, the most important thing important thing is the upper right corner of the form, where you can see the errors themselves.

Depending on the nature of any given error, you'll need to fix them if possible on OCLC (either in ILLiad directly or in

WorldCat Resource Sharing as appropriate) and clear the error (right click & clear).

Record Not Found means that the record has either moved on or been cancelled. (not much you can do.) Depending on the current OCLC status and what needs to happen, you MAY be able to manually update it in ILLiad from the transaction's General Update Form. Remember that what you are able to do in terms of manual updating here is dependant upon the OCLC status and what OCLC allows you to do with it. Some errors may actually require contacting the other library involved to have THEM update the transaction.

That's probably all we have space for this quarter, so we'll see you next time. Until then, always remember to have a day. Kevin



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The OCLC ILLiad Newsletter is published quarterly by Atlas Systems, Inc. and edited by John R. Brunswick. Please send comments and suggestions to jbrunswick@atlas-sys.com.

Atlas Systems is a software development company founded in July 1995 with the mission of developing library automation to "Promote library excellence through efficiency." Atlas is best known for the creation and development of the ILLiad interlibrary loan management software, in use in over 900 libraries and now exclusively distributed by OCLC. However, Atlas has a growing stable of library automation products designed to meet library needs not currently addressed by standard library software services.

Atlas is a process driven software development company. This means working with librarians to first understand the underlying environment to be automated and then designing the software to automate the process. Once the software has been created, Atlas provides implementation assistance, training, and ongoing support of the product, continually upgrading the software in response to our clients needs and suggestions. This workflow review approach to software design sets Atlas apart in the library automation market.

Atlas Systems is based in Virginia Beach and currently has a staff of 15, split almost equally between development, customer support/training, and administration/marketing. If you are interested in joining the growing Atlas team, send an email to hr@atlas-sys.com.

OCLC is a nonprofit membership organization serving 42,489 libraries in 86 countries and territories around the world. Membership in OCLC is a unique cooperative venture, giving your library global access to all our services and databases, including WorldCat. Together OCLC member libraries make up the world's largest consortium.

Founded in 1967 by university presidents to share library resources and reduce library costs, OCLC introduced an online shared cataloging system for libraries in 1971 that today is used by libraries around the world. The Interlibrary Loan service was introduced in 1979 and since then has been used for more than 122 million loans among 6,928 libraries around the world.

OCLC ILLiad Quick Courses - Conference Recap Series (cont.)

Learn how the new tools available in version 7.3 of the ILLiad web reports offer more options for your regular statistical reports.

- **Customizing OCLC ILLiad: System Routing**

This quick course focuses on creating and implementing system routing rules to maximize ILLiad automated request routing features. Learn to create, test, and modify system routing rules, email routing, and custom queues using the Customization Manager and the OCLC ILLiad client. Some practical uses include:

- Routing Distance Education student requests for special processing
- Routing rush requests for immediate processing
- Routing Document Delivery requests from Borrowing to Document Delivery module automatically

- Routing requests for specific document types to special queues
- Schedule Borrowing notification email for a specific time of day (ex. 5 PM) OR schedule for a certain amount of time from when it was sent in ILLiad (2 hour delay)
- **ILLiad Reporting using Microsoft Excel**

Use Microsoft Excel to extract data from the ILLiad database and publish reports. Learn to setup the ODBC link to access your ILLiad SQL database from Microsoft Office Access and Excel, design and run queries in Microsoft Excel, and generate charts/graphs/pivot tables. Examples include customer demographics, transaction statistics, and collection development data.

Watch the ILLiad-L list and Atlas Community Portal for training schedule announcements. Please join us in a class soon and make the most of your investment in OCLC ILLiad. Registration is available online at www.atlas-sys.com. If you have ideas for future training topics or have other training needs, please send them to training@atlas-sys.com. Stephanie is Training Coordinator for Atlas Systems.