

Welcome New OCLC
ILLiad Licensees!

Vanderbilt University
Lenoir-Rhyne College
University of Arkansas at
Little Rock
Mount Holyoke College
California State University
at Long Beach
Illinois State University
Northern Arizona University
Harvard University, Widener
Library
Fayetteville State University
Purdue University
San Diego State University
University of Texas at Austin
University of Southern
California Medical Library
University of Central
Oklahoma
Massanutten Regional
Library
Vassar College
SUNY College at Oneonta
Lingnan University
Brandeis University
Widener University
Indiana University Purdue
University Indianapolis
Southern Illinois University
California State University,
San Marcos
University of Minnesota
Bio-Medical Library
CUNY Graduate Center
Ball State University
Hong Kong Institute of
Education
State Library of Pennsylvania
University of Memphis
University of Kansas
Oakland University
Villanova University
Northern Kentucky
University

For a complete listing of
OCLC ILLiad users go to:
[www.oclc.org/illiad/about/
users/](http://www.oclc.org/illiad/about/users/)

**Congratulations to
Cherie Weible, Assistant
Librarian at the
University of Illinois
Urbana-Champaign. She
is the new Chair of the
OCLC ILLiad Users
Group for 2003-2004!**

The

OCLC ILLiad Newsletter

Volume 1, Issue 2

Summer, 2003

New OPAC and Z39.50 Searching in Capabilities ILLiad

OCLC ILLiad version 6.3 will be released in the coming weeks and the major change is the addition of a new OPAC/Z39.50 Search form.

Z39.50-compliant Searching

The new OPAC Search Form allows you to link to your local Z39.50 compliant OPAC and retrieve holdings for items in the Borrowing, Document Delivery and Lending modules of ILLiad. We've successfully tested with Inopac, Sirsi, Voyager, Aleph, DRA, Dynix, and Notis.

Automatic Searching

ILLiad will automatically search the default search target (normally your local OPAC) as well as the type of default search you'd like to use (Record Number, ISSN/ISBN, Title, etc). The search results are displayed as soon as the form is opened.

Ability to Search Multiple Sources with a Single Search

You can set up as many different searching targets as you'd like, and you can combine them in as many combination of searches as

necessary. You can have a single target that is just your local OPAC, or have one that searches your OPAC first then several other OPACS of nearby or frequently-used locations.

Auto-Importing of Holdings

Once you have selected the record that you wish to import into ILLiad, just close the Search Form - that's it. The importing of the call number, location, and availability are all automatic and instant.



Q and A on Atlas Server Hosting with Paula King

Atlas Systems currently provides server hosting for over 60 sites. Recently, Dan Specht of Atlas Systems asked Paula King of The Scripps Research Institute to share her experience with server hosting.

Tell us briefly about your operation.

The Kresge Library serves the information needs of the faculty, students, and employees of The Scripps Research Institute, the physicians, nurses and other health professionals at Scripps Green Hospital, and Scripps Clinic, and their patients and invited visitors. The Kresge Library staff includes four librarians (three full time and one part-time), four full time support staff, plus a weekend support person and an interlibrary loan courier. The Library includes a strong serials collection, with approximately 1,000 current subscriptions and substantial print and electronic backfiles of journals in the fields of clinical medicine,

molecular biology, cell biology, chemistry, biochemistry, immunology, and neurobiology. Since no collection can meet all the needs of its users, the Library also manages a vigorous interlibrary loan service, processing well over 11,000 borrowing requests each year from its customers (as well as over 7,000 lending requests from other libraries).

Why did you choose OCLC ILLiad?

The Library wanted to make the interlibrary loan service more convenient and more efficient for both the requesters and the library staff. To this end, we began investigating the various interlibrary loan products that have appeared on the market in recent years. After conducting our own evaluations and comparisons, and consulting with colleagues at other institutions, we selected OCLC ILLiad. It was important to us to choose a system that provided

strong borrowing and lending operations for both the OCLC and DOCLINE systems. In addition, we liked the interface on both the user side (e.g., ILLiad's ability to remember user details and preferences without the need to re-enter them for each request; offering the user the ability to monitor the status of their requests), and on the staff side (e.g., eliminating the need to re-key citation details when forwarding requests; eliminating burdensome paper files).

Why did you choose server hosting for your OCLC ILLiad implementation?

We are a small library and are hard pressed to justify hiring a full-time computer professional to maintain library servers. We must depend on the Institute's general computing department for all our computer support. While those individuals are very talented and helpful, they are unfamiliar with proprietary library software.

(continued on page 4)



The OCLC ILLiad Users Forum

A monthly feature highlighting innovations in the field of Interlibrary Loan

Implementing ILLiad for the University of Wisconsin System by Paul Moriarty

The University of Wisconsin System (UWS) is comprised of 26 campuses statewide including two doctoral universities, 11 comprehensive universities, and 13 freshman-sophomore colleges serving approximately 160,000 enrolled students. The total ILL activity each year exceeds 400,000 requests.

During 2001-02, the UWS library directors charged a representative task force (chaired by Tanner Wray, UW-Madison) to develop goals and objectives for enhanced resource sharing and explore potential software solutions to meet these goals. After a thorough review and bid process, the decision was made to purchase the ILLiad system since it was best suited to meet the following UW goals:

- Standards-based software
- Rapid desktop journal article delivery across UW System
- Unmediated requesting of both returnables and non-returnables with status tracking
- Facilitate lending with UW and non-UW libraries
- Effective interface with Voyager, OCLC, DocLine and Ariel
- Patron authentication from existing Voyager or campus directory systems
- Replace multiple ILL systems currently in use with common system for all libraries
- Handle billing/invoicing for on campus and ILL transactions

It quickly became apparent that it would be cost effective to have Atlas Systems host the ILLiad system with one server for UW-Madison and a second server for the other 25 campuses. (WiLS, the state OCLC network, also implemented ILLiad on a locally maintained server). There were several unique challenges to the Wisconsin ILLiad implementation including loading patron data, ILLiad customizations, and training.

From the beginning, the decision was made that in lieu of patron registration each campus would load their patron data records from either their Endeavor Voyager system or the local campus directory system. While this was initially a technical challenge for both the libraries and Atlas staff, we believe that having accurate patron records for all potential users outweighs the startup effort.

Each library FTP's their patron records to Atlas on a regular basis (usually monthly).

While ILLiad is a powerful ILL and document delivery system, a number of customizations were also required to meet the special needs of the Wisconsin libraries, including:

- Ability to direct UW-Madison users to one of seven library web pages
- Security for User and Customization Managers and ILLiad canned reports
- Provision for on-campus document delivery at UW-Madison for certain categories of users.
- Increase the size of certain fields in the patron record
- A mechanism to identify and serve distance education students

Several of these Wisconsin customizations have made their way into the standard ILLiad release.

Training was a critical part of the ILLiad implementation. Last fall Atlas staff provided regional introductory workshops around the state as libraries prepared for the implementation. Since that time, ILL staff and technical contacts have participated in several PlaceWare sessions where Atlas staff have been able to demonstrate the software online and answer questions. In addition, UW System has established a listserv for Wisconsin ILL staff to discuss ILLiad issues and suggest ways to make the best use possible of ILLiad. Both Atlas and OCLC support staff are included on this listserv.

ILLiad has proved to be a very sophisticated software package that required a moderate learning curve to master. It is a real tribute to all of the UW System ILL staff that they have been able to implement the system at the same time that they handle their ever increasing number of ILL and document delivery requests. It has also been helpful having a single point of contact at UW System and at Atlas to coordinate the implementation. All UW libraries will be fully implemented by this summer with most of them using ILLiad since early spring.

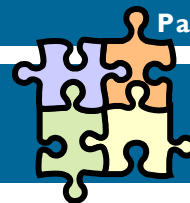
Paul is a Senior Library Consultant at UW System and one of his projects has been to coordinate the implementation of ILLiad in all of the UW libraries. He can be reached at pmoriarty@uwsa.edu

The OCLC ILLiad Users Form is a monthly column featuring submissions by innovators in the field of interlibrary loan. If you would like to submit an article, please contact John R. Brunswick at jbrunswick@atlas-sys.com. Thank you.



At Your Service - Helping You Put the Pieces Together

By Kevin Ford, Documentation and Technical Support Specialist



Well, here I am again, your friendly neighborhood ILLiad Service columnist (with profound apologies to Stan Lee), flailing about for a worthy column topic like a confused spider in a web made of radioactive pickle relish from outer space.

But it occurs to me after some thought that I've been seeing quite a few billing-related configuration issues in the service queues of late that just might bear some re-examination in this type of forum. So in the interest of perhaps aiding some of our newer ILL-billing sidekicks, who might be in need of a heads up in this regard, I believe that will be our topic this issue.

The first thing to remember here is that ILLiad billing can be as simple or as complicated as you wish to make it. You don't have to make it so complicated that it takes a Braniac to figure this stuff out. If at all possible, true believers, keep things simple.

In order to set up ILLiad Billing properly, there are five tables to consider. Bear in mind that you don't necessarily have to use all of these supporting characters. Start with the hero and work from there. Team-ups come later, once the main character's basic storyline is established. Whether you wish to play with the other tables at all will depend on the complexity of your institution's billing policies. (Editor's Note: These billing tables are all located in the ILLiad Customization Manager under System Billing - Setup.)

The most important of the ILLiad billing tables is BillingDefaults. This will be the focus of part one of Billing. All the other

billing tables build on the information stored in this one, kind of like secondary plot threads, so setting up BillingDefaults correctly is half the battle.

The **BillingDefaults** table is where you set your basic normal charges for each billing category and type of request. Each entry in the BillingDefaults table will include the following information: **ProcessType**, **DocumentType**, **DefaultAmount**, and **Category**. There are also fields in there for page ranges charges, but we can deal with that later in the sequel.

- **ProcessType** refers to the ILLiad process to which you wish to add billing charges. Acceptable values for **ProcessType** are Borrowing, Lending, or Doc Del (for Document Delivery). Don't make up your own values here. This isn't the time or place for creator-owned characters. For each **ProcessType**, there will likely be multiple entries.
- **DocumentType** refers to the type of request to which you are attaching the charges. This could be something like Article, Book, Loan, Thesis, Comic Book, etc. Regardless, it should match the document type attached to the transaction by the web page request form that creates it. For each **DocumentType**, there will also likely be multiple entries.
- **DefaultAmount** is of course the amount you wish to bill for the requested item based on the other fields in the table, sort of like a cover price that changes depending on what group (US or Canadian) the consumer belongs to.

- **Category** is the billing category to which the charge should be applied. Examples of billing categories include, Default, Exempt, In-State, Reciprocal, etc. Although Default and Exempt are built into the standard ILLiad Server setup, you can create ANY additional Billing Categories you wish.

So by way of example, in creating a BillingDefaults entry, you'll want to set it up something like this: **ProcessType** = Lending, **Document Type** = Article, **Default Amount** = \$10.00, and **Category** = Default. This will charge any borrowing institutions that belong to your Default Billing Category \$10.00 for every article that they successfully borrow.

For every billing category you wish to create, you will need an entry for each document type you use. If the system sees the billing category and fails to find an entry for that document type in the table, you will get an error something like this: Billing Default not found for Document Type 'Article.'

This effectively stops the story before you get to see what happens, just like when you run out of space in the issue, like now.

To be continued next issue.....

Join us next time for further adventures in ILLiad Billing. See Per Page fees in action. See the team-up of the decade as Billing Additions join the battle. Same OCLC ILLiad-Time, same OCLC ILLiad-Newsletter. Nuff Said.



A Note From the Chair...

What began as an informal gathering of a few ILLiad licensees and all three Atlas/VTIP staff has become one of the larger ILL-related meetings at each ALA conference. For the past several conferences, about 100 ILLiad users and prospective users have gathered on Sunday evening to share information about ILLiad. The format of the

meetings varies, but generally includes ILLiad news from Atlas and OCLC staff, a presentation or two from fellow ILLiad users, sprinkled with Q&A's and lively discussion about a wide range of ILLiad-related topics.

The OCLC ILLiad Users Group is still evolving and welcomes the active participation of any

and all who are interested in the ILLiad ILL management system. Each summer, a new chair is elected from among the members.

The traditional meeting time for the Users Group has become 4:30-6:00 on the Sunday evening of the ALA Annual and Midwinter conferences.

The meeting in Toronto was a

joint meeting of the OCLC ILL, Union Listing and ILLiad user groups. We plan to return to an ILLiad-only format in the usual timeslot during the midwinter conference in San Diego. We hope to see you soon!

Margaret Ellingson
Outgoing OCLC ILLiad Users Group Chair





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Atlas Systems was founded in July of 1995 primarily to work with computerized parking systems. While the company continues to do special projects in this area, after the launch of ILLiad in 1999, Atlas has been primarily focused on the development and support of the ILLiad Interlibrary Loan System. In October of 2000, OCLC licensed the ILLiad software from Atlas and Virginia Tech (where it was originally designed). Atlas continues to be the authorized service, support, and development arm of OCLC ILLiad.

Atlas Systems also does specialty database development projects, mainly related to workflow automation. Atlas's development background of utilizing pre-design operational flowcharting and analysis, as well as our common sense approach to programming produce easy to understand and maintain applications.

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.

Server Hosting (continued from page 1)

Asking them to support specialized library software and servers for us in the past has proved difficult and time consuming. Having the ILLiad experts at Atlas maintain the server for us is a much more effective solution.

How did your OCLC ILLiad implementation go and what comments/suggestions would you offer to other sites considering implementing in a hosted server environment?

Relieved of the burden of installing and configuring hardware, our implementation proceeded quite rapidly and smoothly. Because our methods of filling interlibrary loan requests are not entirely conventional, we "tweaked" the ILLiad software in some ways to more closely match our local procedures. We found it was very helpful to have someone on our staff with expertise in web authoring and design who could work closely with the experts at Atlas to perform this customization and optimize the software for our environment. Libraries with more conventional interlibrary loan procedures will probably find the ILLiad software works excellently "out of the box," with little customization required.

We were concerned that accessing the software on a server located off campus, across the country, might result in slow response times by the system, causing frustration to the staff and our customers. We have had this problem briefly on one or two occasions, but overall this has not been a problem.

How has OCLC ILLiad impacted your operations?

Because there is no delay in receiving our customers requests (unlike the paper request forms that came to us in interoffice mail in the past), requests can be processed immediately. This, in turn, means we receive and deliver the requested materials sooner for our customers. Because there is no re-keying of citation details, and no need to maintain paper files, the clerical burden on Library staff is reduced. Because library users can monitor the status of their requests on their computers, inquiries to the Library requesting these details are greatly reduced.

What would you consider the key advantages of server hosting?

The chief advantage is that the server is maintained by experts, eliminating downtime. It relieves the Institute's computing staff of the burden of maintaining a system that is unfamiliar to them.

What would you consider as the disadvantages of server hosting?

It is sometimes necessary to remind the Atlas staff to perform updates and upgrades. Without complete permissions on the server, we don't have the ability to perform certain changes immediately ourselves, but must ask Atlas to perform them for us, causing minor delays. Atlas staff, however, are very helpful and responsive whenever we seek their assistance.

How has your first year with the hosting gone?

With a full year of experience behind us now, we are confident that implementing ILLiad on a hosted server was a good decision. It has proven to be a benefit to both our customers and our staff. It is transparent to them that the server is not local. Together with Atlas and Ex Libris, we recently succeeded in offering ILLiad as a menu option in the SFX software integrated with our bibliographic databases, further enhancing the usefulness of the ILLiad software.

Paula is the Director of the Kresge Library at The Scripps Research Institute. She can be reached at pking@scripps.edu.

