



The

OCLC ILLiad Newsletter



Welcome New OCLC
ILLiad Licensees!

Metropolitan Museum
of Art
Stonehill College
College of Wooster
Getty Research Institute
George Mason University
Queens University of
Charlotte
Rutgers University
Niagara University Library
Art Institute of Chicago
Pennsylvania College of
Technology
North Carolina Central
University
New York University
Law Library
Stanford University
University of Illinois
Chicago
Allegheny College
Colby College
Reed Institute
Temple University
University of Oklahoma
Clarion University of
Pennsylvania
Ropes and Gray
National-Louis University
American Justice School
of Law
Long Island University,
C.W. Post Campus
Jefferson Community
College
Clarkson University

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ALA Update Previews Versions 7.3 and 8.0

The OCLC Illiad Users Group met at ALA Annual in Washington, D.C. and, as always, there were plenty of things to be excited about:

OCLC ILLiad Version 7.2

- Over 300 libraries have updated to Version 7.2 since January.
- Atlas offers Custom Services to help you edit your web pages. Contact training@atlas-sys.com for a price quote.

OCLC ILLiad Version 7.3

- The Odyssey Helper will be released as a part of Version 7.3. This separate component allows staff to scan documents outside of ILLiad and then send those documents via Odyssey.
- Version 7.3 also has a new Rapid Manager service that allows libraries participating in RAPID to send unmediated requests to RAPID in Borrowing as well as seamlessly receive and update RAPID requests in Lending.
- Version 7.3 will serve as a maintenance release in preparation for Version 8. Atlas will be releasing a preview version of ILLiad before the full release.

OCLC ILLiad Version 8

- Version 8 has a “ribbon” interface, similar to Office 2007, that displays common tasks in an easy-to-navigate bar.
- The tabbed interface allows staff to open several queues at once and flip between them on the same form.
- The Main Menu shows both literal statuses (i.e. Awaiting Request Processing) based on Transaction Status and virtual statuses (i.e. Users to Clear) of items needing attention.
- The DOCLINE interface has been integrated into the client for easier searching and sending, and a new option has been added to search and send with one click.
- Citation information can be imported from Z39.50, Pubmed, or other sources into the ILLiad record before sending for fulfillment.

OCLC ILLiad User Conference 2008

- The OCLC ILLiad International User Meeting will be held in Virginia Beach March 13-14, 2008.
- Pre-conference training will be offered on March 12 for an additional fee.

Watch the listserv and the community portal for future updates!

Blackboard Building Block™ for Ares

The newest release of the Ares Reserves Management Software will allow you to integrate Ares into your Blackboard installation. Once integrated your faculty and students will be able to access Ares functionality directly from within Blackboard with no further authentication. This allows your faculty and students to access reserves from their current Blackboard class locations, while maintaining the copyright, request processing, reporting, and other staff functionality of the Ares staff client. To see the Building Block in action request an Ares demo at ares@atlas-sys.com.

Congratulation to Genie and Rich!

Genie and Rich were married on June 9th in a ceremony at Norfolk Academy. After a brief honeymoon in San Francisco and the Napa area they are back in the office. All of us here at Atlas extend our best wishes to the happy couple.

Please join us in
welcoming Dustin
Stokes who has
joined the
development team
at Atlas!

The OCLC ILLiad Users Forum

A quarterly feature highlighting innovations in the field of Interlibrary Loan



Applying Fourth Generation Management to Access Services: Reinventing Customer Service and Process Management

Douglas F. Hasty Head, Access Services Department, Green Library, University Park Campus
Florida International University

Fourth Generation Management provides new insight for librarians as we compete with customers, our patrons, to offer new services at an ever increasing rate. Barriers to service and the resulting customer service problems originate from the **process** involved, not from changes in the environment or new technologies. Do we really know what the customer's viewpoint is? If not, how do we know what to provide? This is the first and most important step in successfully understanding the **process management of customer services** that begins long before a point-of-service interaction with the customer. Focusing individual and organizational strategies, goals, and services directly to those needs as defined by the customer is the basis of **Fourth Generation Management**.

In an Access Services environment, many of these services are a series of steps originating from a process that is based upon historical practice or instructions in a computer manual. But customer services should not be provided by only doing (First Generation), directing people (Second Generation), or getting results (Third Generation). **Fourth Generation Management** is the art of managing by linking customer needs, process management, and service knowledge into one practice. Fourth Generation Management teaches us that there are three key elements of implementing real improvements in customer services: **Quality** as defined by the customer, **Scientific Approach** by regarding and managing the organization as one unit, and **All-One-Team** by believing and having faith in the customer you serve and staff with whom you work.

First, the customer, not the organization, should define the **Quality** of service. Fourth Generation emphasizes that **Quality** should be defined by the customer, not the staff or the industry standard. By understanding customer perceptions, managers are able to make improvements in reliability that customers notice and appreciate. There must be a **Scientific Approach** to learning about the customer. The customer's viewpoints must be thoroughly investigated, and if the customer has not been asked, then the customer must be asked. Complaints and criticisms are sometimes difficult to hear and read, but they are our friends – they tell us how to do our job better. Their responses, including criticism, are vital pieces of information for planning customer services.

The third key element of Fourth Generation Management is the **All-One-Team** approach. An effective staff is trusted and valued by management. Because everyone in the library is involved in customer service, they must be made to feel that

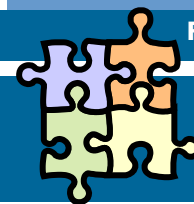
they are genuinely part of the customer service team. Fourth Generation stresses that organizations must work as a whole unit, a team, in order to be effective. Quality and productivity are partners in customer service. Organizations are systems, and can be changed to accommodate customer needs. Improvements in customer services are the result of learning customer needs.

An organization should function as one unit, as one team. Competition between departments and units is as common in libraries as in other organizations. Divisions, borders, territories, and political infighting are formidable barriers to the goals of the organization. **Customer First** collaborative relationships within the library should be strengthened, presuming they exist in the first place. Work flow does not need to remain within one department. **Customer First** should extend throughout the library, blinded to department borders and territorial issues.

Employee performance can be largely determined by the organization's managerial environment. Staff are invaluable resources. They understand their jobs the best, have experience with the processes they perform, and if involved can offer useful suggestions for **process improvement**. Most problems are the fault of errors in the organization, and in the way that the errors are handled or avoided. Being at fault is not necessarily wrong, but allowing the error to continue is certainly wrong. Fourth Generation outlays a three-stage process by which processes can be examined, changed, and improved. Stage One: fix the immediate problem at hand. Stage Two: examine the process and identify the origin of the problem, then change the process. Stage Three: evaluate the larger system of which the process is a member, following the process as it leads across departmental lines if necessary, and work to change the larger system. By using the All-One-Team approach, staff will play a major role in evaluating and changing faulty processes since it is they whom are most likely to perform the job regularly and most knowledgably.

Once the problem has been identified, a solution must be developed and implemented. Fourth Generation calls this **PDCA** – Plan, Do, Check, and Act. The manager must Plan what is to be done, Do it according to the plan, Check and evaluate the outcome while learning from the results, and then Act upon these results.

Inevitably, the librarian will examine the work performances of employees as a routine evaluation (continued on page 3)



At Your Service - Helping You Put the Pieces Together

By Kevin Ford, Customer Support Technician and New Licensee Coordinator

Don't Panic: Basic ILLiad Troubleshooting Part 2

Greetings All. Not a lot of available space this time around, so let's jump right into the thick of it. When we broke last time, we were discussing using those pesky little Error Messages that we sometimes get to determine the nature of a given ILLiad related problem. (See Tip #1 from last time. There's a #2 coming eventually. I promise.) For each of these errors, you must ask yourself: What does the error tell you? What system generated it? At what point in the process did the error appear (in other words, what is it trying to do when it errors out)? Does the error indicate anything specific? If so, what? Take this error for example:

Vendor Initialization Failed; Can not load IDAPI service library file NTWDBLIB.DLL.

This error, though somewhat rare these days, is typically seen on client machines when the client is being opened. It tells us several things:

- 1) Something in that client opening process is trying (and failing) to initialize SOMETHING. Actually telling us WHAT that something is would be useful, but we have what we have. We'll have to make do.
- 2) As a part of that failed initialization process it's looking for an IDAPI service library file, whatever that may be.
- 3) The name of that missing/misplaced/inaccessible file is NTWDBLIB.DLL.

To interpret the error, it helps to know what the system is attempting to do at this point. In the simplest terms, when the ILLiad Client icon is activated, the system follows the desktop shortcut to the actual ILLiadClient.exe file. It opens that file, which in turn starts the process of connecting to the ILLiad database via the Borland Database Engine (BDE). When that database connection is made, the client logon screen appears and you can log on.

So to use a little deductive reasoning, since the error is appearing right after double-clicking the ILLiad Client icon, (continued on page 4)

Applying Fourth Generation Management (continued)

of the process and resulting failure.

Work performances should be examined not with the intent of punishment but with the need to effect changes, offer additional training, or redesign the process. Consider the possibility that the employee is not wrong, that the process is wrong, and the manager has not realized this. Having faith and trust in the staff is essential to successful customer service. Therefore, three guidelines about the process can be made. Blame the process, not the employee. Fix the process, and the problem is fixed. Fix the problem, and the system can be changed.

Who is the customer? The answer to this question may appear to be simple. It is important to know the types of customers, and to which customers services are offered. Fourth Generation teaches us that there are more customers in an organization than one would first believe. **Service Customers** are the core set of customers for whom we exist, otherwise known as library patrons. **Staff Customers** are those with whom we work, supervise, and by whom we are supervised by. **Immediate Customers** are those whom we are helping at a particular moment or period in time at a service desk or via electronic access.

Quality may well mean something completely different to the customer. **Quality** to customers means more than only the services offered or characteristics of the library. Satisfaction and dissatisfaction are constantly at odds with each other.

Must Be services are those that are expected. **More Is Better** services are those that expected but not delivered. **Delighter** services are those that are unexpected and happy events. Customers belong to all library staff, regardless of status or job. By involving the entire library in customer services and contact, by treating employees as peers and partners in customer service, and by helping staff to look beyond the borders of their job descriptions, real changes in customer service can happen. When it does, the library knows that the customer has truly become the service focus.

Achieving a minimum level of service standard should not be the goal of planning. The goal should be one of exceeding the minimum level of service. The primary responsibility of administering customer services lies with the people whom actually provide these services. Although all staff in the library are involved in customer services to a small or great degree, the responsibility for management must be focused as are the services. These service managers, librarians or support staff, must be treated as **service leaders**. With this responsibility, they will be in a position to effect change, ask questions, and review processes. With a clear understanding of customer needs, the service leaders can become service specialists whose understanding of the supporting process is critical. Fourth Generation Management is a viable, challenging tool for change in libraries. Libraries are as pure of a service organization as one can become. Our focus is each customer whom enters the building. Their information needs, whatever they may be, are our primary concern.



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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 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.

T.I.P.S. - Training Information Per Stephanie
By Stephanie Spires, Training and Technical Support Specialist



New OCLC ILLiad Web Tutorials in the Works

We want your suggestions! Due to popular demand, a new series of web-based tutorials is under development to supplement documentation and training for OCLC ILLiad sites. These tutorials will offer step-by-step demonstrations for processes in OCLC ILLiad and will include audio narration. All new tutorials will be created for the latest version of ILLiad starting with version 7.2 and will be delivered via the Atlas Systems web site. A preview (with audio) of the first tutorial covering borrowing copyright processing is available here:

<http://www.atlas-sys.com/training/tutorials/72copyright.htm>

We would love to hear what you think of the preview tutorial and will use your suggestions and feedback as we create additional tutorials to add to the series. Let us know what you think of the preview and please suggest potential topics to training@atlas-sys.com. We hope to have the first series focusing on Borrowing processes available by the end of the summer with Document Delivery and Lending tutorials to follow. Watch the ILLiad-L list and Atlas Community Portal for training schedule announcements. Please join us in an online class soon and make the most of your investment in OCLC ILLiad. Registration is available online at www.atlas-sys.com

Don't Panic (continued)

prior to the appearance of that logon screen, it's probably safe to assume that the missing/misplaced/inaccessible file is used by the BDE in its process of connecting the client to the database.

Essentially, the problem is that the Borland Database Engine (BDE) cannot find the Microsoft SQL Server drivers that it needs in order to access the database. And this brings us to that **Tip #2** that I promised you. **Use the tools available to you.** The shortcut to the above (possibly somewhat painful) deductive realization would have been to

search the ILLiad Knowledge Base (or even Google for that matter) for the error. Doing so yields this article:

<http://www.atlas-sys.com/kb/illiad/10795.html>

which explains the cause (missing BDE drivers) and offers 2 possible solutions to fix the problem. Handy, ain't it? And if you wanted to know for example what exactly a DLL file was, try this site:

<http://webopedia.internet.com/>

All kinds of fun to be had there. Ok, that's it for this time. We'll pick this up again in the next issue. Until then, always remember to have a day. - Kevin