



The

OCLC ILLiad Newsletter

Welcome New OCLC ILLiad Licensees!

Northcentral University

SUNY Downstate Medical Center

Army Research Laboratory

Swarthmore College

Centre College

College of New Rochelle, Gill Library

Empire State College

Sterling and Francine Clark Art Institute

Western University of Health Sciences

New York State Library

New York Public Library

New York University

University of Massachusetts, Boston

For a complete listing of OCLC ILLiad Licensees, go to www.atlas-sys.com and click on *ILLiad Licensee List*.

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Use the Copyright Feature in OCLC ILLiad® and Be Entered to Win a \$500 Gift Certificate from Vernon Library Supplies

From December 15th through March 13th 2007—we backdated the promotion for year end reporters—when you report your ILL permissions through the copyright permissions feature within OCLC ILLiad your library will be automatically entered into a drawing to win* one of three \$500 Vernon gift certificates.

In addition, Vernon Supplies will give the three winners a 10% discount, making each prize worth \$550! As you know, Vernon is a leading provider of supplies, equipment, furniture and technology solutions to libraries across the country.

The winners will be posted on the ILLiad listserv on March 15th and announced at the OCLC ILLiad International Conference, March 15-17, in Virginia Beach, Virginia.

Questions? Contact CCC Partner Manager, Charles Hemenway at chuck@copyright.com or call 978-646-2713.

* *Drawing is open to new and existing users of the CCC copyright integration. Each library that reports through OCLC ILLiad during the incentive timeframe will be entered in to the drawing one time.*

ILLiad Version 7.2 Is Now Available

The latest version of OCLC ILLiad, Version 7.2, is now available for downloading. A number of new features and enhancements have been incorporated into 7.2, including:

- A completely redesigned web interface, done in CSS to allow you more control in deciding how the web pages look for your customers
- Redesigned web authentication that offers LDAP, RemoteAuth, PatronAPI, ILLiad Exclusive, and standard ILLiad authentication methods
- Enhanced lender address updating that allows for better tracking of current library addresses as well as making it easier to add new addresses
- Automatic switching of loan and article information to cut down on copying and pasting when switching request type
- Email notification for Lending cancellations and overdues

- Redesigned custom searching in the ILLiad Client to allow for more complex queries
- A new ILLiad Email Manager that will send all of your emails from your server, rather than from the individual client machines
- An updated Database Manager that will allow you to remove old transaction and user data from your database.

And of course, there's much more! But before you update, make sure you read the OCLC ILLiad 7.2 Overview and Release Notes. You can find these, and more information on Version 7.2, on our web site at:

<http://www.atlas-sys.com/ILLiad72Update/>

As always, you will want to update soon to take full advantage of all the new features in OCLC ILLiad Version 7.2.

Congratulations to Danielle Cournoyer of Northern Arizona University! Danielle is this year's recipient of the STARS-Atlas Systems Mentoring Award.

The OCLC ILLiad Users Forum

A quarterly feature highlighting innovations in the field of Interlibrary Loan



Preparing for ILLiad Transaction Archiving

Janetta Waterhouse, Systems Librarian, University of Kansas

KU Libraries started with ILLiad lending during October 2003 and borrowing and document delivery during February 2004. There are now 130,000 loan requests and nearly 300,000 article and document delivery requests in the system, including activity from the KU Libraries and the KU Medical Center Library who share the database. Unlike the Voyager integrated library system used by KU Libraries, which archives circulation transactions once an item is discharged, interlibrary loan and document delivery transactions remain in the database indefinitely. Simply removing the transactions is not an acceptable solution since the libraries need to retain some requests for copyright information for three years and would like to retain other information related to transactions for bibliographic reports and workflow analysis.

Lars Leon, Head of Access Services and Resource Sharing, proposed a project to archive non-patron transaction data and subsequently remove the transactions from the ILLiad database. This database, external to ILLiad, will allow us to pull together information from a variety of sources to maximize support for collection development as well as workflow analysis. He specified which data were needed and outlined procedures for selecting and deleting the records. After clarifying some details for this project, I designed a simple database structure for an archive based on the table structure in the ILLiad database, ILLData. The archive database includes the following tables:

- ReasonsForCancellation and LendingReasonsForCancellation, which need to be populated once and updated only when reasons are added
- Tracking, History and Notes without modification
- Transactions with modification

Additional fields from the Users table that are pulled into the Transactions table in the archive for reporting purposes are Status, Department and NVTGC, which represents the pickup location for KU Libraries. The date archived is also added to the Transaction table.

Data for populating the archives database is captured with select statements that restrict by TransactionDate and a TransactionStatus of either "Request Finished" or "Cancelled by ILL Staff" and saved to a file that can be imported to the archive. Currently the date range is for a specific period that must be changed manually in SQL.

When a determination has been made on how often transactions will be automatically archived, a more generic criteria will select non-active transactions from more than x number of days ago. Once the selection and import process is automated, whatever records populate the archive will then be deleted from the main ILLiad database, so we don't want to select transactions that are new, active, or have unfinished billing. KU Libraries does not use the billing module at this time and we are still working on how to identify those records.

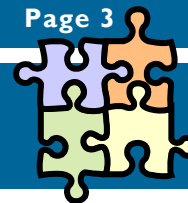
Deleting transactions from the ILLData database once the records are archived needs to be done with care because the TransactionNumber, the primary key for the Transactions table, is used as a foreign key in several other tables. If the related records aren't removed from the secondary tables prior to being removed from the Transactions table, they will be 'orphaned' and difficult to find and remove. The "Table Fields" chapter of the ILLiad Administrative Suite: Reference Guide, located at <http://www.atlas-sys.com/documentation/illiad/>, lists all of the tables that use the TransactionNumber. The delete code removes records from the secondary tables listed in the guide with a join based on TransactionNumber using the same date and status criteria as the select statement before deleting records from the Transactions table.

By definition all projects have an ending; the end-goal for this one is to have a clearly defined date range for selecting, archiving and deleting the records from the ILLiad database so that the process can be automated on the server. Once the archive database is populated regularly, Lars can begin the next project: converting his current MS Access reports for copyright payment and compliance, bibliographic reports and workflow analysis used against the main ILLiad database to run against the transaction archive. Working with the archive in this way will undoubtedly result in some modifications to the database structure and perhaps changes to the way data is selected for import. For example, it may not be necessary to capture all of the records in the Notes, History or Tracking tables or some fields from one table may be collapsed into the Transaction table and not need to be retained in a separate table. It's also possible that some calculations created for reporting could be retained in a field for future reference.

There are a few issues yet to be resolved, such as identifying transactions with outstanding billing issues, but we plan to have a functional interlibrary loan and document delivery transaction archive for KU Libraries at the beginning of 2007.

At Your Service - Helping You Put the Pieces Together

By Kevin Ford, Customer Support Technician and New Licensee Coordinator



Greetings all. In my last column, due to a lack of space and a dearth of potential column subjects, I opted to kill two birds with the proverbial single stone and devoted my column to shamelessly soliciting potential topic suggestions for future "At Your Service" endeavors. Oddly enough, I actually received a few suggestions in response, which leads me to believe that, contrary to conventional thought, some of you folks are actually reading this column. This of course comes as something of a tremendous surprise to me, but I'll get over it eventually.

In any event, one such suggestion came to me from a long-time ILLiad user who was considering moving from a locally-hosted ILLiad system to a system hosted by the folks at OCLC. With that in mind, he wanted some information on the potential advantages and disadvantages of doing so.

As to the plus side of OCLC ILLiad Server Hosting, your hosted ILLiad server is actually located within the OCLC facility itself. This results in the following advantages:

- You have 24hour/7day a week server support from OCLC's team of server administrators.
- OCLC Customer Support will have easier access to your server to provide faster and more streamlined support for everyday ILLiad questions and enhancements.
- Atlas Service will also have easier access to your server to provide faster and more streamlined support for the NOT-so-everyday ILLiad questions and enhancements.
- Your OCLC ILLiad server shares the same server space with OCLC WorldCat, giving your server the fastest connection possible to OCLC WorldCat Resource Sharing.

- The same backup systems and recovery plans used for maintaining WorldCat will all cover your ILLiad server.

In my mind, however, the real advantage to server hosting is that OCLC does all of your system updates, database backups, and hardware maintenance for you.

As to disadvantages, the only real disadvantage I can think of would be the loss of direct control of your ILLiad system. If you're one of those folks (like me) who likes to be in direct control of everything, then server hosting probably isn't for you. But that's ok. Diversity is good.

For the record, Hosted ILLiad Server Licensing (as well as the hosting itself) is handled by the folks at OCLC, so for anyone interested in pursuing this, the person to talk to is Tony Melvyn at OCLC. His contact info is as follows:

phone: (800) 848-5878 ext. 5091

email: melvynt@oclc.org

If you're already an ILLiad user, make sure he's aware that you already have a self-hosted ILLiad system in production and you wish to look into the possibility of server hosting.

Your existing database can of course be preserved and migrated to the new hosted system. The same is true for any customized web pages etc. that you might need to migrate to the hosted system. The migration process is pretty quick once the hosted server exists and is installed with ILLiad. That's all we have time for, so until next time.....

Kevin

Upcoming Events With Atlas Systems

Following are some of the events where Atlas staff will be in the near future:

OCLC ILLiad International Conference in Virginia Beach, VA

March 15-16, 2007.

We have over 250 people registered for the 3rd annual OCLC ILLiad International Conference, and it promises to be our best conference yet! Registration will close on Friday, February 9. Visit www.atlas-sys.com/conference/index.html for more details.

ACRL National Conference in Baltimore

March 29-April 1, 2007.

Atlas staff will be in the exhibit hall in booth 153 providing demos of Ares, our new Reserves Management solution. The Ares system is designed to automate library reserve services and provide fast effective use for faculty, students and reserve staff. Ares provides around-the-clock access to your reserves collection and saves time for your faculty members and library staff. Stop by and check it out.



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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 Classes Are Coming to the Atlas Web Site!

Descriptions and dates are available at <https://www.atlas-sys.com/training/>

OCLC ILLiad International Meeting pre-conference onsite classes in Virginia Beach March 14:

- Maximum ILLiad NEW!
- Customizing the OCLC ILLiad 7.2 Web Interface

- Custom Searching in the OCLC ILLiad 7.2 Client NEW!
- Introduction to OCLC ILLiad: Document Delivery
- Introduction to OCLC ILLiad: Lending
- Maximum Z: making the most of Z39.50 searching in OCLC ILLiad Borrowing, Document Delivery and Lending modules NEW!

Please see <http://www.atlas-sys.com/conference/PreConferenceClasses.html> for descriptions and details.

** Completion of this class counts toward the "Certified OCLC ILLiad Operator" program. Contact Stephanie at training@atlas-sys.com for more details on this program.

Online:

- Billing**
- Customizing the OCLC ILLiad 7.2 Web Interface
- Introduction to OCLC ILLiad: Version 7.2**
- OCLC ILLiad Administrative Tools NEW!
- OCLC ILLiad Electronic Delivery Using Odyssey**
- Unmediated ILL in OCLC ILLiad NEW!**

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. Subscription training is also now available.

If you have ideas for future training topics or have other training needs, please send them to training@atlas-sys.com.

Quick Courses:

- Copyright Processing in OCLC ILLiad

Stephanie is Online Training and Custom Services Specialist for Atlas Systems. If you would like to suggest a topic for T.I.P.S., please e-mail her at training@atlas-sys.com.