



ILLiad and Resource Sharing in the University System of Maryland and Affiliated Institutions Consortium of Libraries

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Panelists

- Stephen Miller – Associate Director for Electronic Services, Information & Library Services, UM University College (UC8)
- Carol Vaeth – ILL Coordinator, University of Baltimore (BAL)
- Tanner Wray – Director of Public Services, UM College Park (UMC)
- Robin Moskal – Head of Collection Management/Interlibrary Loan, UM Baltimore County (MUB)
- Jamie Bush – Circulation/Reserves/ILL Systems Librarian, USMAI Information Technology Division (USMAI)



ACRONYMS

- USMAI = University System of Maryland and Affiliated Institutions
- RSTG = Resource Sharing Task Group
- CLD = Council of Library Directors
- ITD = USMAI Information Technology Division
- PPH = Patron Placed Holds
- LDAP = Lightweight Directory Access Protocol
- ILS = Integrated Library System



The University System of Maryland and Affiliated Institutions Consortium of Libraries (USMAI)



USMAI Consortium

- University System of Maryland and Affiliated Institutions
 - 14 Colleges and Universities of the University System of Maryland
 - St. Mary's College of Maryland and Morgan State University
- Serves over 110,000 FTE students in Maryland and beyond



USMAI Institutions

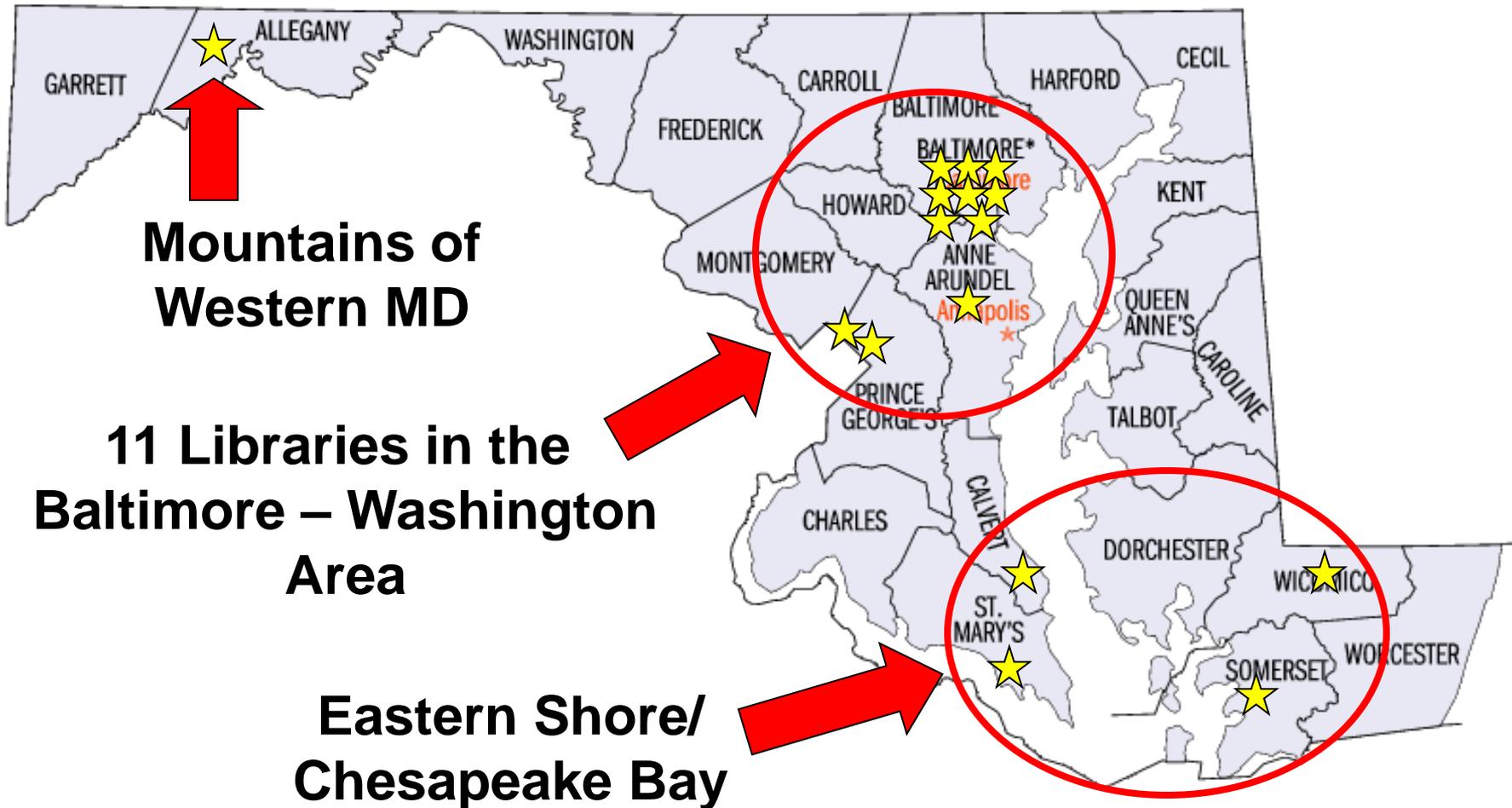


USMAI





USMAI Institution Locations



**Mountains of
Western MD**

**11 Libraries in the
Baltimore – Washington
Area**

**Eastern Shore/
Chesapeake Bay**



USMAI Library Consortium

- Founded in the late 1990s
- Shared Integrated Library System (ExLibris' Aleph)
- Global catalog with a shared bibliographic records
- Patron Placed Holds (PPH) service
- Metasearching and linking capabilities through Metalib and SFX
- Consortial implementation of ILLiad



The USMAI Resource Sharing Task Group (RSTG)



Resource Sharing Task Group

- Council of Library Directors (CLD)
- RSTG founded in August 2004 to:
 - Review issues related to resource sharing arising as a result of the implementation of Aleph version 16
 - Plan for retirement of the OCLC ILL MicroEnhancer and Passport
- RSTG's charge evolved
- RSTG has been extended through 2007



RSTG Vision Reflects USMAI Vision

“USMAI RSTG seeks to integrate a wide range of resource sharing options in order to make accessing resources across all institutions highly seamless and transparent to the user within the context of individual member missions.”



Turnaround Time For All Materials

- CLD continued to request improved turnaround for borrowed materials
- CARL and then Aleph supplied Patron Placed Holds for books in our combined catalog
- Needed a system to improve article turnaround
 - some USMAI libraries used CLIO or ILLiad, but not all
 - didn't address article delivery



Worldcat Resource Sharing

- RSTG founded right before the sunset of ILLME and Passport
- Insure all consortial sites were prepared
- Distributed info on minimum requirements for software and equipment
- Conducted surveys on available equipment, staffing, available technical expertise
- All staff meeting to share survey results and discuss individual campus needs



Investigated ILL Management Services

- Equality of services within the consortium became a top priority
- Reviewed ILLiad, Aleph ILL, and URSA
- Eight of the sixteen campuses current ILLiad users
- ILLiad/Odyssey was recommended to CLD
 - Requested USMAI Consortium support for 8 remaining libraries
 - ITD technical support on one server for 8 satellites



Why ILLiad?

Issues Presented to
USMAI Council of Library
Directors (CLD) on June 16, 2005



CLD Meeting

- Product Review: URSA, Aleph ILL, ILLiad
- ILLiad demo
 - Staff side
 - Patron side
 - Web management reports
 - Technical and support issues



Why ILLiad for USMAI?

- Desktop article delivery – Odyssey!
 - Reduced supplies, postage
 - Facilitates unmediated lender delivery to patron
- Integrated ILL/campus DD service possible
- Patrons self-service
 - 24/7 access
 - Request tracking → Fewer calls to ILL office
 - Requesting history
 - Confidentiality: Can break patron—request links
- openURL/SFX compatible → Research Port (i.e. Metalib) citations transfer automatically to ILLiad
- Auto-generated patron emails



Why ILLiad for USMAI? – pt. 2

- Web-based management statistics
- Authentication via LDAP
- One time patron registration
- Staff efficiencies → can handle increases in request volume
- ISO ILL development in process
- Works with OCLC and DOCLINE
- Billing module available



Director's Concerns

- Potential increased patron demand
 - ILL workloads
 - ILL budgets (IFM, copyright, etc.)
- Lack of local technical staff to support system
- ILLiad too complex for staff?
- Would consortium provide \$ support to 8 original ILLiad sites?
- Equipment needed



But... They Loved It!



ILLiad Approved – 6/16/05

- Shared, locally hosted server ILLiad implementation for 8 (satellite) sites without ILLiad
 - Centralized training
 - Centralized ITD support and OCLC contact
 - Centralized financial support
 - Standard look and feel/implementation
 - Authentication against Aleph patron file
 - Odyssey implementation a key feature
- RSTG communicated minimum equipment needs to campuses
- 8 sites that previously purchased ILLiad separately remain on separate servers for now



USMAI Resource Sharing Model

RETURNABLES - USMAI

- Aleph Patron Placed Hold (PPH) for consortial circulation

NON-RETURNABLES - USMAI

- ILLiad/Odyssey for article delivery in consortium
- ILLiad for campus document delivery when offered

OUTSIDE USMAI CONSORTIUM

- ILLiad, ARIEL, Odyssey
- ILLiad for non-book returnables



USMAI ILLiad Implementation

8 Satellite Sites



USMAI ILLiad Sites

Satellite Sites

- Bowie State University
- Center for Environmental Science
- Coppin State University
- Frostburg State University
- Morgan State University
- Salisbury University
- St. Mary's College of Maryland
- UM Eastern Shore

Independent Sites

- Towson University
- University of Baltimore
- University of Baltimore Law Library
- UM Health Sciences and Human Services Library
- UM Baltimore County
- UM College Park
- UM Law Library
- UM University College



Consortial Purchase of ILLiad

- CLD agreed to fund consortial purchase of ILLiad for the 8 campuses, June 2005
- ITD began negotiations with Atlas for pricing, implementation, server, August 2005
- Creation of an implementation timeline



Timeline

June 2005

ILLiad implementation approved by CLD

July 2005 – January 2006

RSTG/USMILL meeting at MAILL

RSTG ILLiad implementation subgroup established and meets frequently

USMAI ILLiad Users Group and ILLiad contacts list established

Negotiated training model with Atlas Systems

Firm pricing negotiated; License signed with OCLC

ITD ordered servers, server and software configured, test database set up

February 2006

ITD, ILL staff trained to use ILLiad (2 1-day sessions, everyone trained together)

March-June 2006

Subgroup test software and configuration

Site visits by ITD and buddy for configuration and switch to LIVE

Eight campuses go live on ILLiad lending/borrowing; starting with St Mary's

Summer 2006

ILLiad Users Group post-implementation meetings

Odyssey implemented



Support for Satellite Libraries

- Subcommittee - training, documentation, and customization of the consortial ILLiad
- ILLiad introductory session for all USM ILL departments
- Support for staff in satellite libraries
- Consortial ILL agreement



USMAI Training Locations





Satellite Training

- Group training scheduled
- 1 day each at 2 live ILLiad sites (Feb 2006)
- Training begins!
- ILLiad Buddies
- Site visits to each satellite library by library buddy and ITD representative



Move Toward Implementation

- Subcommittee work with ITD to customize system for satellites
- Develop documentation and handy tips
- St. Mary's College will come up as the first adopter (April)
- Full ILLiad implementation due to come up by the end of June



Implementation Model

- Shared server hosted by ITD
- 8 satellite locations
- Standard look and feel
- Centralized support
- Centralized training
- Test and live servers



Implementation Committee

- Coordinated training
- ITD establishes relationship with Atlas
- Querying satellites for initial customization/setup
- Balance of functional needs of staff users vs. ITD's ability to provide support



Consortial Tech Support

- Varying levels of technical experience and resources of satellites
- ITD's tech support experience and resources
- Aleph support model "AlephRx"
- Building technical expertise from current USMAI ILLiad sites
- ILLiad becomes a core application for ITD



Current Development Issues

- Customization Manager
- User Manager
- File sharing
- Authentication: LDAP, Shibboleth
- Z39.50



Next Steps/The Future

- What are the next ILLiad steps?
 - Local training documentation being developed
 - ILLiad comes up at first satellite in April
 - Strengthen buddy system
 - Expanding and promoting Odyssey
- From RSTG charge:
 - “I Want It” functionality
 - Improve workflows between systems (PPH \leftrightarrow ILLiad)
 - Enhanced resource sharing systems messaging at critical junctures
 - Explore other resource sharing opportunities in state
 - Creation of Circulation Subgroup for RSTG
 - Future relationship of independents and satellites?



Questions?



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