IDS Logic Update
Designed Through Conversation
• Technology to meet the needs of the community for the benefit of the patron
  – A tool by the members for the members
  – Not a tool by a vendor for the members
• Purpose: To get the resources to the patron as fast and efficient as we can

Analyzing user behavior to help make ILL easier to submit
Search results for Keyword (all) building collections. [Quick delivery libraries]

Results 1 - 10 of 1,921

**Building library collections** by Curley, Arthur.
- Get It
- Book - 1985

**Engineering libraries: building collections and ...** by Conkling, Thomas W.
- Get It
- Book - c2001

**Building area studies collections**
- Get It
- Book - 2007

**Building electronic library collections: the ess...** by Kovacs, Diane K.
- Get It
- Book - c2000

**Building and managing e-book collections a how-to**... by Kaplan, Richard
- Get It
- ebrary
Lending Availability Service still under development

Currently working @ ZGM
What is IDS Logic?
What does this mean for me?

- IDS Logic can insert information into transactions.
- IDS Logic can route transactions.
- IDS Logic can cancel and update transactions in ILLiad and WCRS/Worldshare.
- IDS Logic can send emails to patrons or other libraries based on criteria you give it.
- IDS Logic can read information in transactions and take actions based on criteria.
Lending Availability Service

- Looks at loan requests in Lending
- Pulls in call number, shelving location, item ID, & availability
- Routes to new status based on availability
- Cancels OCLC request if unavailable
What information do I need to provide?

• Which collections to deflect
• Where to route based on availability
• Where to route based on location
Custom Routing Rules

- Custom Ad-Hoc workflow rules
- Highly configurable
  - Search Request Type
  - Search Process Type / Change Process Type
  - Search Status / Change Status
  - Search Flags / Add Flags
  - Custom Query (more than 250 characters)
  - Send Emails
Sample UO Custom Router

CustomTransactionRouterEmailer_8:
  Enabled: "1"
  NVTGC:
    - ORU
  ProcessType: Lending
  RequestType: Loan
  StatusList:
    - "IDS Logic LAS Temp Available Queue"
  RouteTo: "Awaiting Knight Library Printing"
  EmailTemplate: ""
  EmailSubject: ""
Additional IDS Logic Services

Lending Book Chapter Availability Service
Borrowing Book Chapter Availability Service (with Book Chapter Direct Requester)
Borrowing Loan Availability Service

IDS Logic Enhanced Rulekit

Borrowing Loan Due On Shelf
Borrowing Loan Renewal OK
Borrowing Loan Renewal Denied
Borrowing Loan Delay Received
Borrowing Stale Unfilled Flagger
Lending Expiring Soon (LES)
Loan Pickup Reminder
Long Overdue Check Shelves
Lending Book Chapter Availability Lookup

Looks at all article requests in your main lending queues (e.g. Awaiting Lending Request Processing):

- Determines if the request is a book chapter request
- Searches your z39.50 for availability information, and then either:
  - Cancels in OCLC and Illiad if book chapter is requested from something that is not available.
  - If available to scan, Imports call number and location information into transaction in ILLiad.
  - Routes to specified queue, which could be Awaiting Stacks Searching or another custom queue.
Looks at book chapter article requests in your borrowing queues and sends requests out to IDS Project Libraries:

- Determines if the request is a book chapter request (differentiates between issn and isbn)
- Searches your z39.50 for availability information, and can:
  - Routes to Doc Del (importing call number and location) if you own the item and it is available.
  - If not owned or unavailable, sends request out via OCLC/Worldshare ILL with appropriate lender string.
Borrowing Loan Availability Service

• Looks at loan requests in Borrowing
• Pulls in availability from local catalog
• Imports call number, location, & item ID
• Routes to new status based on availability
  – Has the option to route to Doc Del

This was here all along...
Enhanced Rulekit

– Borrowing Loan Due On Shelf
– Borrowing Loan Renewal OK
– Borrowing Loan Renewal Denied
– Borrowing Loan Delay Received
– Borrowing Stale Unfilled Flagger
– Lending Expiring Soon (LES)
– Loan Pickup Reminder
– Long Overdue Check Shelves
Enhancements
Lending Availability Service for OCLC WMS
Loan Pickup Reminder 1 & 2 (10/2014)

- Looks in “Customer Notified by E-Mail”
- Waits the number of days set in config
- Sends patron a reminder email
- Has 2 stages (New)
  First reminder
  Second reminder (for the final countdown)

It’s me. I’ve been waiting.
Logic Rule Enhancements

- Route to Borrowing
- Route to DocumentDelivery
- Deflagging

Build Your Own Today!
ALIAS

Added configuration for:

**SystemID List** (ALIAS will now work with TNs that have a SystemID other than “<BLANK>” or OCLC)

**LendingLibraryString** (ALIAS will now work with TNs that have a predefined LendingLibrary)
ALIAS Print Ingester

• ALIAS can now take MaRC catalog exports for your article holdings and add them to your Article Holdings Data
ALIAS & Empire Shared Collections

10 Member Libraries Across NY State:
Collaborative Management of Print Materials

GOVERNANCE OVER THE PROGRAM
Collaborate in the decision-making regarding the disposition of the Empire Shared Collection

Broadening Access to Library Collections:
31,459 Journals Comprised of 640,353 Volumes
Dynamic Due Dates:

• **Choose** specific DueDateDays in Lending for specific collections (and some media types depending on the information contained in the MaRC Record)

• **Choose** specific DueDateDays for defined groups of libraries
https://my.idsproject.org
Current IDS Logic Subscribers

1. Boston College
2. Boston University
3. Cornell University
4. New York University
5. Northwestern University
6. Tufts University
7. University of Connecticut
8. University of Delaware
9. University of Maryland
10. University of Maryland Baltimore County
11. University of Massachusetts Amherst
12. University of New Hampshire
13. University of Oregon
14. University of Washington
15. University of Wisconsin - Green Bay
16. Washington University in St. Louis
17. Yale University
Technology: What’s on the horizon?

Article Gateway
CCD API
Item Shipment Tracking
What does Article Gateway do?

- Automates checking intellectual property fees
- Finds least expensive provider based on data driven informed decision making
- Data driven request analysis finds least expensive provider
- Finds alternate options for delivery (Article Rentals)
- Customizable profiles for patron types
- Delivers requests in minutes
Flowchart for processing Awaiting Staff ISSN/Year:

1. **Awaiting ISBN Article Processing**
   - No ISSN Found
     - Awaiting Staff ISSN Identification
   - ISSN Found
     - Is # an ISBN?
     - Yes: ISSN Be Found?
     - No: No Copyright
       - Check ISSN for CONTU
       - CONTU Limit Met
         - Copy No inserted into copyright field
         - Note Inserted: ALIAS Processed
       - Copy Yes inserted into copyright field
         - Check for Option w/ Lowest Cost
         - Copy Yes inserted into copyright field
         - Note Inserted: Cost of all providers
         - GIN Lowest—Route to Awaiting GIN Proc.
         - Staff Purchase and Process via GIN
       - RPD Lowest—Route to Awaiting RPD Proc.
         - Staff Purchase and Process via RPD
     - Owned Locally?
       - No: Check Copyright
         - CONTU Limit Met
         - Copy No inserted into copyright field
         - Note Inserted: ALIAS Processed
       - Copy Yes inserted into copyright field
         - Note Inserted: Cost of all providers
         - CCC Royalty Lowest—Route to Awaiting CCC Proc.
         - Staff (optionally system) save cc and send via OCLC, Rapid, etc.
   - Yes: Awaiting Owned Article Processing
2. **Year Found**
   - ISSN routes to Awaiting IDS ISSN Identification
   - JN checked for ISSN, Valid Year, and newer than 5 years
   - Can Year be found?
     - Yes: Awaiting Staff ISSN/Year Processing
     - No Year Found
       - Awaiting Staff Year Processing

***For Awaiting Staff ISSN/Year Processing, staff insert ISSN or year, and save and route to Awaiting CC Processing

Blue processes=System
Orange=Staff or sometimes optional System
The Solution:

- **Patron receives loan**
- **Borrowing library sends loan**
- **Patron submits ILL request**
- **Lending library has option to send out request**

**CCD API determines:**
1. Library where collection development criteria fits request
2. How many times item has been requested by IDS libraries
3. If it is available in IDS libraries or if holdings are below 3 items

**Borrowing library can either:**
1. Purchase the item
2. Send the ILL request to Lending Library while CCD API communicates purchase recommendation to libraries that meet collection development criteria

Request does not meet collection development criteria for Borrowing library and fits IDS Project library.

This project is (partially) supported by Regional Bibliographic Databases and Interlibrary Resources Sharing Program funds which are administered by the Rochester Regional Library Council.
The need:

- Reduce duplication
- Increase communication
- Support NYS CCDA program
- Remove barriers

The benefits:

- Matches requested items to library collection strengths in regional collections
- Reduces staff time and effort
- Utilizes existing resources: ILLiad, WorldCat, GIST, GDM, IDS Logic
- Capitalizes on best practices in acquisitions and resource sharing to best serve users

Join us!
ccd@idsproject.org
Item Shipment Tracking?
Automation is not about replacing jobs.

We develop people through professional development, show them what is possible, and then free up their time so that they can provide exemplary service.
Question for you:

What can Logic do for you?
Questions?
THANK YOU!

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