Welcome to the 2016 All-Region User Group!
Wi-fi Info
Agenda

10:00am Coffee & Registration
10:30am Welcome, Updates, and Announcements
10:50am a) ILLiad 8.7 Update/ILL Code Update
11:30am IDS Project contract review
12:00pm Lunch
1:00pm Constant Data/Custom Holdings Groups and Path
1:30pm Learning and Training Opportunities
2:00pm Coffee Break
2:15pm Group Discussion about Training
3:30pm Wrap Up
Update
New Regional User Group Chairs

Coordinator: Jennifer Acker

Western:
- Chair: Heidi Webb
- Co-Chair: Ben Hogben

METRO:
- Chair: Simone Yearwood
- Co-Chair: Rebecca Hyams

Eastern:
- Chair: Jay Kibby
- Co-Chair: Melissa Perez
Current Membership
IDS Logic Subscribers
ILLIiad 8.7

Release Notes

https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.7+Release+Notes
8.7 Installing

- Server upgrade - 3 minutes (self-hosted)
- Client download - 5 minutes

- When updating the client, if you don’t have the latest version of .Net, it gets installed for you - 10 minutes, requires a reboot
8.7 “New” Queue

Web Request Created

- ~ dozen old requests with no title or history information
- Moved these to Request Finished
- Has not re-appeared
8.7 Server Addons

Editable values now in Customization Manager
8.7 End of Support Message

60 days before version support ends

https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.7+Release+Notes
8.7 End of Support Message

Once support ends

https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.7+Release+Notes
8.7 Sampling of Minor Changes

- FAQ.HTML and ElectronicDeliveryInformation.html now served by DLL
- “Open e-mail attachments and other uneditable files in reading view” in Microsoft Word is no big deal
- All forms and buttons display correctly at any display resolution
  - Great for those with larger display text
- Custom search exports as an XLSX file type limited in size only by MS Excel
- Files greater than 2GB can now be downloaded from the Electronically Received Articles web page
ILL Code Update
ILL Code of the U.S. - Update

- ILL materials permitted for special uses such as classroom presentations or course reserves. Any special use must be negotiated with the lender before shipping/canceling. (2.1, 4.4)
- Libraries encouraged to lend internationally. (3.2)
- Borrower must comply with copyright restrictions. (4.8)
- All fees and reimbursement costs must be paid promptly. (Now addressed in its own section.) (4.10)
- **Due date is now defined as the date the item is returned to the borrowing library, not the lending library.** (4.12, 5.7)
- Lender encouraged to provide as generous a loan period as possible. (5.1)
ILL Code (Continued)

- Lending library should make available any fee schedule and bill for replacement or damage promptly. (Now addressed in its own section.) (5.3)
- ILL staff should collaborate with serials management personnel whenever possible to make sure license negotiations are favorable to ILL. (5.4)
- Any special terms, restrictions on use or shipping requirements should be negotiated before the request is updated in OCLC as filled or unfilled. (5.5)
- New section: Lending library should provide electronic copies (of high quality) whenever possible, comply with copyright and resend copies promptly when original is not sufficient. (5.11)
ILL Code Links

Summary of changes to the Interlibrary Loan Code of the United States:

http://connect.ala.org/node/250213

Interlibrary Loan Code of the United States with Explanatory Supplement:

http://www.ala.org/rusa/sites/ala.org.rusa/files/content/sections/stars/resources/ILL_Code_with_Supplement.pdf

ALA - RUSA Interlibrary Loan Code Website:

http://www.ala.org/rusa/resources/guidelines/interlibrary
IDS Project contract review
2016/17 Membership Agreement

This document is a voluntary agreement to govern membership in the Information Delivery Services (IDS) Project cooperative. It is based on the premise that each member institution fully supports the IDS Project’s purpose statement:

“The Information Delivery Services (IDS) Project strives to be an innovative model of library cooperation for effective resource sharing through the promotion of community engagement, staff development, best practices, and research & development.”

By entering into this membership agreement, your institution agrees to the following:

1. Resource Sharing
   1.1 Reciprocal Lending
      1.1.1 Member institutions will not charge each other fees related to the handling of interlibrary loan requests, including per-request lending charges and shipping or postage fees.
      1.1.2 All member institutions agree to abide by the responsibilities outlined in the American Library Association (ALA) Interlibrary Loan Code for the United States.
      1.1.3 Each member institution agrees to respond to the requests of other members as expeditiously as possible.
      1.1.4 Article Preferred members will receive and provide reciprocal benefits for Loans in addition to Articles, though they are not required to send loans via Empire Library Delivery, or other local or regional delivery systems.

   1.2 Interlibrary Loan Platform
      1.2.1 All member institutions will use the OCLC ILLiad® Resource Sharing Management Software as their interlibrary loan platform.
      1.2.2 Each member institution will make their best effort to optimize their ILLiad® implementation through the adoption of the IDS Project’s Recommended Best Practices.
      1.2.3 All software on your local computers for the purposes of interlibrary loan should
ELD has how many hubs?
Empire Library Delivery

- Label Maker
- Current Roster
- Request Bags
- Report Lost Books
- Report a Missed Stop

https://www.esln.org/services/empire-library-delivery/
Find the proper label information for ELD participants by choosing the institution from the dropdown menu:

Oneonta, SUNY James M. Milne Library
Oneonta, NY 13820-4014
ZBM
Hub: BNG
<table>
<thead>
<tr>
<th>Temporary filter 1</th>
<th>Range: A1:J125</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
</tr>
<tr>
<td>ALB</td>
<td>HUB</td>
</tr>
<tr>
<td>ALB</td>
<td>YZA Albany Law School</td>
</tr>
<tr>
<td>ALB</td>
<td>NAM Albany U, SUNY</td>
</tr>
<tr>
<td>ALB</td>
<td>VVP Bard College</td>
</tr>
<tr>
<td>ALB</td>
<td>VVD Capital District Library Council</td>
</tr>
<tr>
<td>ALB</td>
<td>YLC Clinton Community College, SUNY</td>
</tr>
<tr>
<td>ALB</td>
<td>VZC Clinton Essex Franklin Library System</td>
</tr>
<tr>
<td>ALB</td>
<td>WKM Cobleskill, SUNY</td>
</tr>
<tr>
<td>ALB</td>
<td>VJN College of Saint Rose</td>
</tr>
<tr>
<td>ALB</td>
<td>VDH Fulton-Montgomery Community College, SUNY</td>
</tr>
<tr>
<td>ALB</td>
<td>YJM The</td>
</tr>
</tbody>
</table>
The only constant in life is change.
How to get to your Constant Data Records

System Tab -> Resource Sharing Settings

Constant Data Tab -> Click on the down arrow on the right side
### What is it?

<table>
<thead>
<tr>
<th>Name</th>
<th>DEFAULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliation</td>
<td>IDS Project, SUNY/DCLC Reciprocal ILL Code, LVIS, and CDLC</td>
</tr>
<tr>
<td>Bill To Attention</td>
<td>Interlibrary Loan (MRV-117)</td>
</tr>
<tr>
<td>Bill To Address</td>
<td>Hudson Valley Community College</td>
</tr>
<tr>
<td>Bill To Address 2</td>
<td>80 Vanderburgh Avenue</td>
</tr>
<tr>
<td>Bill To City</td>
<td>Troy</td>
</tr>
<tr>
<td>Bill To Postal Code</td>
<td>12180</td>
</tr>
<tr>
<td>Bill To State/Province</td>
<td>New York</td>
</tr>
<tr>
<td>Bill To Country</td>
<td>United States</td>
</tr>
<tr>
<td>Patron</td>
<td>Patron ID</td>
</tr>
<tr>
<td>Patron Status</td>
<td>Patron Department</td>
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<td>Patron Fax</td>
<td>Patron Fax</td>
</tr>
<tr>
<td>Patron Address</td>
<td>Patron Address 2</td>
</tr>
<tr>
<td>Patron City</td>
<td>Patron City</td>
</tr>
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<td>Patron State/Province</td>
<td>Patron State/Province</td>
</tr>
<tr>
<td>Patron Country</td>
<td>Patron Country</td>
</tr>
<tr>
<td>Return To Attention</td>
<td>Interlibrary Loan (MRV-117)</td>
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<td>Return To Postal Code</td>
<td>12180</td>
</tr>
</tbody>
</table>

#### How many Constant Data records do you have?

1. Default
2. Direct request
3. Overseas (Anyone?)
Selecting a Constant Data profile
Custom Holdings Groups & Paths
What is a Custom Holdings Group

Custom Holdings Groups

A custom holdings group is a record that contains the OCLC symbols of preferred lenders for a particular category of borrowing activities.

https://prometheus.atlas-sys.com/display/illiad/OCLC+Custom+Holdings
How are your groups set up?

**Material you need:**
Books, articles, music scores, or DVDs

**Location:**
Hubs, state, local libraries, or time zones

**Group Affiliation:**
IDS Project, LVIS, Capital Dist Libr Coun, or Reciprocal Agreements

**Cost/Billing Method:**
Free, IFM or IFLA Voucher

**Delivery Method:**
Odyssey, Article Exchange, or Air Mail

You can have as many groups as you want but..

Who created your groups? How often do you review or change your custom holdings groups?
Where to get groups?

IDS Project Page

http://idsproject.org/Index.aspx
OCLC Policy Directory

1 LVIS Group
Group Affiliation: LVIS
Delivery Method: Odyssey
Article Exchange
By ELD Hub?

**Albany:** NAM NYG VDH VJK VJN VKM VVP VXV VYD VZC VZS WKM XJM YJM YLC YPM YRM YZA ZNO ZRS ZWU

**Binghamton:** BNG XDM YSY ZBM

**Buffalo:** BUF BUFSVP VKC XFM YBM YJL YJT YKJ YKU

**Newburgh:** VDN VGA VGK VGN VVR VXW VZU YWM ZLM

**New York City:** BKL CTX JOURN NYNCC NYP SDE UVV VDB VJA VMY VSI VVB VVD VVJ VVS VVX VWB VXP VYE VYL VZB VZL VZP VZQ WCC XMC XME XQL XQM YFM YKC YSM ZGM ZHC ZHM ZMM ZNC ZOW ZPM ZQC ZXC

**Rochester:** RRR RVE VQT VZJ XBM XNC YAH YDM YGM YJA ZAM ZEM ZFM

**Syracuse:** RTN SYB VFL VND VOC VVC VVV VXF VXH VXT VYQ VYT XLM XMM YCM YHM YOM YTM ZCM ZCZ ZDG ZQM ZVM ZZY

**Article Only:** BBH DRB EAU IXA MBB MDY TXJ UCW VRU VRO VYA WEL XIM
Add initials and/or date to description

<table>
<thead>
<tr>
<th>Name</th>
<th>ARTONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>IDS Project Article Only Libraries JJA 7/2015</td>
</tr>
</tbody>
</table>
Paths

Custom Holdings Paths

A custom holdings **path** is a record that contains the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference.

https://prometheus.atlas-sys.com/display/illiad/OCLC+Custom+Holdings
At HVCC we have 3

● ARTICLES
● BOOKS
● DIRECREQ
Learning and Training Opportunities
OCLC Support

Contact: Phone, Email, or Online Form

OCLC WorldShare Interlibrary Loan

Support & Training home

WorldShare Interlibrary Loan
- Documentation
- Known Issues
- Release Notes
- Frequently asked questions
- Training

OCLC Hosted Services

Migration
Server Configuration
Issues with your Server

https://www.oclc.org/support/services/worldshare-ill.en.html
Train on your schedule with the Video Training Library

There certainly are times when you and staff benefit from the interactivity of live online classes. But there are also times when video tutorials will work just fine.

The Video Training Library brings videos, from beginner to advanced topics to your device of choice—desktop computer, laptop, iPhone or iPad.

- 24/7 on-demand access to online class recordings, self-paced training modules, and tutorials
- iPhone and iPad playback
- Enhanced video quality
- Class descriptions and links to handouts included
- New classes added regularly

https://training.atlas-sys.com/
Atlas Systems - Access Services Concierge

- Personalized consultation and training on new ILLiad and Ares versions.
- Customized care from an Atlas team who knows your library.
- One on-site Tune-up every two years.
- Technical and editing help with Web pages, Word documents and email messages.
- Customized training plan for your staff.
- Unlimited access to the online Video Training Library and live online classes.
- Targeted project plan designed for your service goals.
- On-going communication and collaboration to make your services the best they can be.
- Coverage for ILLiad and Ares.
- Custom pricing is available for multi-library systems and/or consortia.

For more information, email concierge@atlas-sys.com.
The ILLiad International Conference offers high-level sessions as well as “in the trenches” programs for all levels of staff involved in Access Services and Resource Sharing.

The conference is typically held in Virginia Beach, VA the 3rd week of March; Hilton Virginia Beach Oceanfront Hotel

Call for Proposals are generally in late October of the year preceding the conference.

Registration Fees: Pre-conference Fee: $350 (Before March 1: $325)
Conference Registration fee: $200 (Before March 1: $175)
Total for Preconference and Conference: $550 (Before March 1: $500)

Topics Include: DIY Add-Ons, Get It Now, Integrating ILLs, Text Message Notifications, Office Delivery, Updating Web Pages

Most sessions are recorded and conference attendees are allowed access to view through the Atlas Video Training Library
Mentor Program:
The benefits of having an IDS Mentor

- General on-call assistance
- Go-to-Assist online support
- Polishing-up after installation
- Workflow evaluation & optimization
- Workflow Toolkit updates & additions
- Site visits
When to contact an IDS Mentor:

● **Navigating Change**
  ○ New staff
  ○ Current staff, new duties
  ○ Visiting, re-visiting and revising workflows

● **ILLiad customization**
  ○ routing rules
  ○ email routing
  ○ print templates
  ○ custom queues
  ○ custom holdings groups
  ○ Addons

Nancy Abashian : Mentor Coordinator
abashian@binghamton.edu 607-777-6356
Mentor contact info: [http://idsproject.org/About/Mentors.aspx](http://idsproject.org/About/Mentors.aspx)
Call a mentor:

- When you need a friend
- Need immediate assistance
- Problem solving: IDS or OCLC
- Questions about your IDS membership
- Best Practices & the Workflow Toolkit
- Have a suggestion for IDS to consider for development
Meet your Mentors:

- Jennifer Acker, j.acker1@hvcc.edu (Hudson Valley Community College)
- Silvia Cho, jcho@gc.cuny.edu (CUNY Graduate Center)
- Rebecca Hyams, rhyams@sunymaritime.edu (SUNY Maritime)
- Jay Kibby, kibbyj@mail.strose.edu (The College of St. Rose)
- Will Koch, WKoch@brooklyn.cuny.edu (CUNY Brooklyn College)
- Micquel Little, micquel_little@cuc.claremont.edu (Claremont Colleges Library)
- Travis Olivera, tloliver@utica.edu (Utica College)
- Melissa Perez, mperez@binghamton.edu (Binghamton University)
- Beth Posner, BPosner@gc.cuny.edu (CUNY Graduate Center)
- Chris Sisak, csisak5@naz.edu (Nazareth College)
- Simone Yearwood, Simone.Yearwood@qc.cuny.edu (Queens College)
Opening again this Fall!
Mentor Program:
The benefits of becoming an IDS Mentor

- Access to Atlas Training Suite ($999.00 annual subscription)
- Conference fee to *International ILLiad Conference* covered ($200)
- Conference & hotel to *Annual IDS Conference* covered ($175+ hotel)
- Professional development opportunities available
- Collaborate with other mentors
- Travel & accommodations for site visits covered
- Opportunities to learn from others & bring new ideas back to your library
Fall Courses:
Borrowing 101  |  Lending 101  |  Copyright 101

Additional Courses Coming Spring 2017:
Purchase on Demand | Statistics and Assessment | Workflow Assessment

Seats limited to 30 students
Lending 101:
Fall Course Dates: September 5 - September 30, 2016
Live Sessions happening on Tuesdays @ 2pm EST
For more course information visit: https://www.idsproject.org/OLI/lending101.aspx

Copyright 101:
Fall Course Dates: October 3 - October 28, 2016
Live Sessions happening on Mondays @ 11am EST
For more course information visit: https://www.idsproject.org/OLI/copyright101.aspx

Borrowing 101:
Fall Course Dates: October 24 - November 18th, 2016
Live Sessions happening on Wednesdays @ 3pm EST
For more course information visit: https://www.idsproject.org/OLI/borrowing101.aspx

Additional courses coming Spring 2017! Check back at: https://www.idsproject.org/OLI/coursedescriptions.aspx
2016 RRS Innovation Award Winner!
Community

- IDS
  - Partners
    - Informal and Formal
  - IDS-L
- Other local, regional, national and international ILL groups
  - LACUNY ILL Roundtable
  - METRO ILL SIG
  - ILL-L
  - Workflow Toolkit-L
  - ALA
  - IFLA
  - Rethinking Resource Sharing Initiative
Look at past Conference and User Group presentations

- Spring 2016 Agenda
- Spring 2016 Presentation: IDS Project Member Update
- Spring 2016 Presentation: IDS Logic Update
- Spring 2016 Presentation: iPads in ILL
- Spring 2016 Presentation: ILLiad Routing Rules and IDS Logic Rules
- Spring 2016 Handout: ILLiad Client Side Routing Rule Template
- Spring 2016 Handout: What does a Logic Rule Look Like?
- Summer 2015 All User Group Meeting Presentation
- Spring 2014 Agenda
- Spring 2014 Presentation: IDS Logic
- Fall 2013 Agenda
- Fall 2013 Handout: ILLiad Webpages Resources
- Fall 2013 IDSD Member Library ILLiad Webpage Shareboard
- Fall 2013 Presentation: ILLiad Webpages - How to Talk About Changes
- Fall 2013 Presentation: ILLiad Webpages - Why You Should Customize
- Fall 2013 Presentation: How to Find Your ILLiad Webpages
- Fall 2013 Presentation: Introduction to Coding
- Fall 2013 Presentation: Step by Step Header Changes
- Summer 2013 Agenda
- Summer 2013 Presentation: Customization Manager 101

Workflow Toolkit
Regional User Group Meetings

Meet with fellow members in your user group

Spring and Fall Meetings held in rotating locations

Get Updates on the Project

- Routing Rules
- Using Ipads in ILL
- ILLiad Webpages
- Customization
- Email Templates

Professional Development
IDS Conference

Discussion of common problems & solutions

Networking among peers

Learn new skills

Interesting topics:
* Purging Data
* Remote Authentication
* Webpage

Get updates from vendors like OCLC and Atlas
Discussion

• How were you – or were you not – trained?
• How do you train new ILL colleagues in your library?
• What could IDS do to help you more with training?
IDS Project wants to visit you!!!

We need locations for our Fall and Spring RUG Meetings?
Dinner
King Street Ballroom
6:00pm - 8:00pm
Thank you to our IDS Conference Sponsors!