GETTING IT SYSTEM TOOLKIT

IDS Project Conference
August 1\textsuperscript{st} and 2\textsuperscript{nd}, 2013
GIST for ILLiad components benefit your Patron Driven Acquisitions collection building by streamlining and leveraging buy-borrow strategies. It also can serve as a cooperative collection development tool – you select the strategy that fits your needs, with the possibility for as much cooperative strategies as you want.

GIST GDM benefits your collection evaluation, gift acquisitions and deselection on an individual library level, or cooperatively – how much duplication is needed?
**Item Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Title</td>
<td>A princess of Mars</td>
</tr>
<tr>
<td>Author</td>
<td>Burroughs, Edgar Rice, 1875-1950</td>
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<tr>
<td>Publisher</td>
<td>Wilder Publications</td>
</tr>
<tr>
<td>Pub. Date</td>
<td>2011</td>
</tr>
<tr>
<td>Edition</td>
<td></td>
</tr>
<tr>
<td>* Format</td>
<td>Book</td>
</tr>
<tr>
<td>ISBN</td>
<td>976161720300</td>
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</table>

**Description**

John Carter of Mars Volume Six: John Carter & the Giants of Mars and Skeleton Men of Jupiter was published in 1916 and is a sequel to the popular novels of the same name. The story follows the adventures of John Carter as he travels to Mars and encounters various alien species and challenges. The novel is part of the John Carter series, which is set in the Barsoom universe created by Edgar Rice Burroughs.

**From Book Sellers**

- BetterWorld Books: $11.92 (shipping included)

**From IDS**

- By when do you need this? 08/10/2012
- Should I purchase or borrow this? Not sure
- How would you like this delivered? Hold at Service Desk
- Will you accept:
  - Non-English versions? No
  - Alternate editions? Yes
  - Alternate formats? Yes
- How essential is this to your studies? [ ]

**Features**

- Amazon Reviews
- Google Descriptions
- Discovers full-text from Google Books, Hathi Trust, Internet Archive & more
- Local holdings discovery with link to catalog
- Pricing options for end-users
- Custom user questions
- Worldcat group holdings data
- Potential Strategies...
  - Route requests with Full-Text to special queues
  - Route requests with no consortia holdings to purchasing evaluation queues
  - User (status specific) purchase requests
- Other ideas...
# Queues & Routing Strategies

[http://www.gistlibrary.org/illiad/gist-for-web/customization](http://www.gistlibrary.org/illiad/gist-for-web/customization)

**Examples of other routing rules**

If you created other custom queues to which you’d like incoming requests routed, below are some examples of how to create them.

<table>
<thead>
<tr>
<th>RuleNo</th>
<th>RuleActive</th>
<th>ProcessType</th>
<th>Transaction Status</th>
<th>Match String</th>
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<tbody>
<tr>
<td>2</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw WHERE gw.TransactionNumber = t.TransactionNumber AND LocallyHeld = 'Yes') = 1 AND t.TransactionNumber Not In (Select TransactionNumber from Tracking where ChangedTo='Awaiting Document Delivery Processing')</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3</td>
<td>Yes</td>
<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw WHERE gw.TransactionNumber = t.TransactionNumber AND Group2Libraries &gt; 3) = 1</td>
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<tr>
<td>4</td>
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<td>Borrowing</td>
<td>Awaiting Request Processing</td>
<td>(select 1 FROM GISTWeb gw WHERE gw.TransactionNumber = t.TransactionNumber AND PurchaseRecommendation='Yes') = 1 AND u.status='Faculty' AND (u.Department='math' OR u.department='computer science' OR u.department='Performing Arts')</td>
</tr>
</tbody>
</table>

**RuleDescription**

- Rule 2: Routes incoming patron requests that are locally held to Document Delivery for processing.
- Rule 3: Routes requests with too many Group 2 holdings. Used if you participate in Coordinated Collection Development (CCD).
- Rule 4: Routes requests based on specific criteria related to department and status.
System Level Addon

- Will replace Routing Rules
- Simplify installation and speed processing
- Automate some processes
Getting It System Toolkit: Purchase & Connexion Addons
GIST with Acquisitions Manager: adds funds, conspectus, and more...

GIST Toolkit

ILLiad Web → ILLiad Addons → Acquisitions Manager → Service Delivery

Addons Directory

<table>
<thead>
<tr>
<th>Addon Name</th>
<th>Version</th>
<th>Author</th>
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<tbody>
<tr>
<td>Alpah Catalog</td>
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<td>IDS Project</td>
</tr>
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<td>1.1</td>
<td>Atlas Systems, Inc.</td>
</tr>
<tr>
<td>Aquatic Commons Search</td>
<td>1.0</td>
<td>Simon Brown, Moss Landing Marine Laboratories</td>
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<tr>
<td>Barnes &amp; Noble</td>
<td>1.2</td>
<td>IDS Project</td>
</tr>
<tr>
<td>Better World Books</td>
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<td>IDS Project</td>
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<td>CCC GetNow Service</td>
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<tr>
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<td>Innovative Catalog</td>
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<tr>
<td>Open URL Linker</td>
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</table>

Purchase recommendation based on your collection building profile.
GIST Acquisitions Manager: Conspectus

Your automated customizable collection building profile for Acquisitions & ILL

Purchase recommendation based on your collection building profile
GIST – all you need is...

- ILLiad 8.3 or above
- Required API keys
- IT/Web Support &/or Tech Skills to:
  - configure ILLiad web pages
  - run a SQL script to create GIST Tables in ILLiad – OCLC does this for hosted sites
  - configure customization manager and addon settings
- Read and follow documentation GISTLibrary.org & related ILLiad documentation carefully to test, then customize.
- And join GIST-L to discuss on GIST Community: http://www.gistlibrary.org/community/
Let Atlas Systems Plan and Manage Your GIST Implementation

You’ve heard about it, read about it, seen it and want it for your library. But not all libraries have the technical expertise to implement GIST, a customizable suite of tools to leverage systems and streamline acquisitions and ILL workflow, working within ILLiad.

That’s why Atlas has partnered with the GIST Team to incorporate GIST Implementation Services into the Atlas training curriculum. As part of our service, we help libraries develop a project plan and then implement and support it.

What is GIST?

The Getting It System Toolkit (GIST) merges and streamlines Acquisitions and ILL request workflows using ILLiad, leveraging systems to do more work while reducing the staff time necessary to make informed decisions and process materials. GIST was developed by the GIST Team at SUNY Geneseo and is partially funded by a grant from the Rochester Regional Library Council.

GIST for ILLiad consists of three components that enhance the ILLiad interlibrary loan request management software: addons, webpage customizations, and the acquisitions manager. By combining all three and customizing these components for your library, you achieve significant benefits and optimize the combination of Acquisitions and ILL services.

Atlas Implementation Package

Our Training and Library Solutions staff will work with you to ensure the GIST implementation meets your needs. In general, the implementation package will include:

- Project planning and kickoff to identify stakeholders, gather ideas, and discuss the scope of the project.
- Establish milestones to keep your project on track.
- Software implementation. This is generally a full day of remote work installing GIST functionality on the server and making web page edits as needed.
- Onsite training and client setup to install needed addons, templates, etc.

See other side for detailed workflow planning.
GIST Gift and Deselection Manager

COLLECTION MANAGEMENT AND EVALUATION USING GDM
GIST Gift Manager

Select Donor

Wand in ISBN, or OCLC#, or do a Title Search for donation

Item Information: Author, title, series title, imprint, LC Call no. & Dewey

Item Information: Amazon Price; Full-text: Google & Hathi Trust; Better World Books acceptance of Library discard

Holdings Information:
- Held Locally – do you hold work (FRBR-ized)
- “IDS” or Group 2 is a configurable set of OCLC symbols like consortia or local area. (not FRBR-ized)
- “NY OCLC ILL Libraries” or Group 3 is a configurable set of OCLC symbols like a state. (not FRBR-ized)
- Local Catalog link and imprint to compare editions of gift & holdings.
- Worldcat Link to the right

Conspectus View: is your subject and configurable decision weighting tool
- Subject analysis matches on LC and Dewey, best matching conspectus values utilized.
- Collecting level evaluates item against configurable level of interest in growing the collection in this subject area.
- Uniqueness evaluates item against configurable level of interest in how widely held is this item based on your group 2 and 3 holdings.
- “If Newer Than” limits, by a factor or strictly, by the publication dates of donated works.
- “If Older Than” limits, by a factor or strictly, by the publication dates of donated works.
- As you process gifts, you can adjust factors and re-calculate the weighting to see the effect on the recommendation.
- The navigation bar at the footer allows you to view multiple conspectus values, if applicable.

Recommendation based on Conspectus and Weighting
- Do not keep
- Keep
- Options: Override and Review

Item Views:
- Conspectus (subject analysis)
- Collection (donation collection)
- MaRC record
- Book Lists – awards & custom book list alert service
Outcomes

**Free** standalone open-source software released August 2010... now used by 200 libraries. At Milne Library...

**Gifts** Received Nov. 09 – Feb. 11: 4,324 items
- **713 items or 16% acquired, total value at about $49K**
- Items not acquired are sent to Better World Books, and revenue returned from sales go into collection building.

Library Acquisitions:
- Work is streamlined, including connector to OCLC connexion, automatic donor letters, review processing, etc.
1. Import ISBN &/or OCLC# using an ILS report (e.g. 0 or low use report as a simple delimited file)
3. Review GDM data: Free full text, price, accepted by Better World Books, regional holdings, & more.
4. Sort by values, make decisions, then…
5. Batch remove from OCLC using Connexion (or convert records for full-text holdings?)

Possible Uses:
• Book and journal overlap analysis
• Identifying works to digitize
• Identifying materials for special collections
13% of titles in storage are available FULL-TEXT through Hathi Trust digital repository

SUNY Geneseo weeding project

- Total titles: 31,436
- Hathi Trust: 4,136

n=35,572
Holdings found in IDS Project libraries

- 1 Library: 5%
- 2 Libraries: 6%
- 3 Libraries: 6%
- 4+ IDS Libraries: 83%
GIST Gift and Deselection Manager Online

COLLECTION MANAGEMENT AND EVALUATION USING GDM ONLINE
Linked Data

Catalogs, conspectuses, ILL request data, book lists, pricing data...
Enhanced Collection Management

• Complete request and usage data from:
  – ILLiad systems
  – book lists
  – circulation statistics

For all libraries in IDS, other consortia or the state!
Consortial Weeding and Exchange

• Would provide for a simple way to determine if one library’s discards would fit another library’s subject area
• Conspectuses would allow for automatic notification
Last Copy

• Last Copy could be easily determined
• Would prevent the loss of a unique item
• Possibility of using a shared storage location  
  – Empire Shared Collection
• Use of conspectuses to determine if a library
  would want the last copy in a certain subject
  area
Textbook Detection

• Textbook detection at each library would reduce the financial burden for students and families

• Possibility of negotiating for semester long loans for textbooks to enable reserves at the borrowing library
<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Start</th>
<th>Finish</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Conversion of GDM code to Online</td>
<td>7/1/2013</td>
<td>8/1/2013</td>
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<tr>
<td>2</td>
<td>Test Code Release</td>
<td>8/1/2013</td>
<td>8/14/2013</td>
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<tr>
<td>3</td>
<td>Update Online Code to v 0.2</td>
<td>8/15/2013</td>
<td>9/13/2013</td>
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<td>5</td>
<td>Conversion to SQL Server/Consortial Database</td>
<td>9/24/2013</td>
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<td>6</td>
<td>Create Consortial Code</td>
<td>10/25/2013</td>
<td>1/24/2014</td>
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<td>7</td>
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<td>8</td>
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<td>10</td>
<td>Release Beta</td>
<td>5/30/2014</td>
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</table>
Questions about GDM?

Questions about the GIST Project?

Thank you.

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Kate Pitcher, pitcher@geneseo.edu
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http://www.gistlibrary.org
IDS Project (idsproject.org)

Promoting library excellence through community & technology