IDS Project (idsproject.org)

Promoting library excellence through community & technology
What will we be talking about today?

• What we do?
• How we do it?
• Why?
Spring 2013
75 Libraries

Student Head-Count: ~ 425,000
Faculty Head-Count: ~ 37,000
Total Volumes: ~ 44,000,000
What do we do?
A unified community of trust and support built around a critical and clearly understood common purpose: effective resource sharing.
Mentor Program
• Preparing new member libraries
• Helping current member libraries
• Actively learning and promoting ILLiad best practices

Workflow Toolkit
• http://toolkit.idsproject.org
• Best practices wiki

Mentor Institute

Best Practices Community
• Regional User Groups
• Workflow Toolkit Blog
• WorkflowToolkit-L listserv
• Twitter feed
Mentor Training Institute

• Prepares new volunteers to become mentors
  ➢ Formal application process
  ➢ Each volunteer must have their director's endorsement

• 8 sessions culminating in a graduation ceremony at the annual IDS Project Conference
  ➢ Borrowing & lending best practices
  ➢ Implementation of IDS technologies
  ➢ Training skills & mentoring preparation

• Fellows become Certified IDS Project Mentors
IDS Project Mentor Program

Helping staff at newly joining IDS Project libraries configure ILLiad, optimize workflows, and implement the technical requirements of the IDS Project.
IDS Project Mentor Program

Help staff at newly joining IDS Project libraries configure ILLiad, optimize workflows, and implement the technical requirements of the IDS Project.

Successes

• New Member Libraries optimized!
• Mentors and Mentees partnerships

Challenges

• Staffing turnover at Member Libraries
• ILLiad Upgrades & Enhancements
• Mentors remain constant
• Teaching to the masses
Certified Mentors

- Jennifer Acker, Hudson Valley Community College
- Tim Bowersox, SUNY Geneseo
- Karen Gardner-Athey, SUNY Library & Information Services
- Micquel Little, St. John Fisher College
- Lynne Marus, Nazareth College
- Philip Mui, New York Public Library
- Karen Okamoto, John Jay College
- Beth Posner, CUNY Graduate Center
- Logan Rath, SUNY Brockport
- Chris Sisak, Nazareth College
Creation of the IDS Project Regional User Groups

User Group Philosophy:

To build strong local communities that support each other and collaborative hands on experience for resource sharing best practices.
Goals

• Strengthen the community
• Promote collaborative learning and relationships
• Aid in the adoption of best practices for all areas of resource sharing
Using Interstate Highway to create User Group Regions
Route 81 (runs vertically)
Route 84 (run horizontally)
Strengthen the Community

• Smaller groups
• Quarterly User Group meetings vs. once a year allowing for easier follow-up
• Support of your peers
Promote collaborative learning and relationships

- **Learning** - User Group participation
- Make sure the group works for you
- Presentation/publishing opportunities
- Professional development
- Work closely with mentors & peers
Workflow Toolkit

• Repository of ILLiad best practices used by some 1,200 libraries internationally.

• Helps you...
  o Simplify your workflows
  o Save staff time
  o Cut ILL costs
Open Monograph Press

The IDS Project is a mutually supportive resource-sharing cooperative within New York State whose members include public and private academic libraries, the New York Public Library, and the New York State Library (now a total of 16 libraries). The Project is based on a strong sense of community among its members and a unified collection perspective. The major goal of the Project is to continually implement and objectively evaluate innovative resource-sharing strategies, policies, and procedures that will optimize mutual access to the information resources of all IDS Project libraries. The IDS Project Press provides a platform for the promotion of resource sharing best practices.
Project funded partially by Regional Bibliographic Databases and Interlibrary Resources Sharing Program and supported by the Rochester Regional Library Council.

The toolkit is a united effort between Milne Library at SUNY Geneseo and the Monroe County Library System.

- Identify trends in library publishing
- Seek out best practices to implement and support
- Share the best tools and resources
Adherence to contractual performance standards

Articles: 48 hours
Loans: 72 hours

(Weekends and Holidays Excluded)
User-centric Definition of IDS Transaction

From the time the user places a request until the time the user is notified the loan is ready for pickup or the article is ready to be retrieved from the Web
IDS Transaction Performance Analysis Module (TPAM)
Hello

Welcome to IDS Project

Logout

Analysis of IDS Request Process

Parameters Required for Project Analysis Chart

- Request Type: Article
- Start Date: 1/1/2009
- End Date: 3/10/2009
- Extreme Data Points (Over 150 hours): Exclude
- Generate Project Overview Chart

Library Pair for Transaction Analysis and Reporting

- Borrowing Library: Alfred Ceramics (SUNY)
- Lending Library: Alfred University
- Report to Generate: Transaction Analysis
- Generate Report
### Project Overview Chart

**Articles for 09/01/2007 to 12/31/2007 Extremes Excluded**

<table>
<thead>
<tr>
<th>Borrowing Library : 10</th>
<th>Lending Library: 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.1 hours for 5 Article(s)</td>
<td></td>
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</table>

**LENDING LIBRARIES**

<table>
<thead>
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<tr>
<td><strong>Borrowing Library</strong>: 10</td>
<td><strong>Lending Library</strong>: 13</td>
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</table>
Transaction Analysis

29 Article Requests to
From 07/01/2008 to 11/17/2008

Transaction Report
## IDS Transaction Report

29 Article Requests Borrowed from [Redacted] by [Redacted]

From 07/01/2008 to 11/7/2008

Extremes always included

<table>
<thead>
<tr>
<th>TN (ILL #)</th>
<th>Patron Requested</th>
<th>Sent to OCLC</th>
<th>Imported from OCLC</th>
<th>Began Search</th>
<th>Item Sent</th>
<th>Request Received</th>
<th>Patron Notified</th>
<th>Total Time for Request</th>
<th>Lending Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing Library</td>
<td>Lending Library</td>
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<tr>
<td>Submitted by Customer</td>
<td>Imported from OCLC</td>
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<tr>
<td>1/22/2008 3:45:25 PM</td>
<td>1/23/2008 8:45:11 AM</td>
<td></td>
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<tr>
<td>Awaiting Copyright Clearance</td>
<td>Awaiting IDS Pilot Project Lending Request</td>
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<tr>
<td>Awaiting Request Processing</td>
<td>Request in Processing</td>
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<tr>
<td>Awaiting Faculty Request Processing</td>
<td>Awaiting Stacks Searching</td>
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<tr>
<td>Processing</td>
<td>In Stacks Searching</td>
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<tr>
<td>1/23/2008</td>
<td>1/23/2008 8:51:37 AM</td>
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<tr>
<td>Request in Processing</td>
<td>Awaiting Odyssey Scanning</td>
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<tr>
<td>Request Sent</td>
<td>Awaiting Odyssey Sending</td>
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<tr>
<td>Odyssey Document Received</td>
<td>Odyssey Complete</td>
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<tr>
<td>Delivered to Web</td>
<td>Request Finished</td>
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<tr>
<td>Request Finished</td>
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<tr>
<td>3/24/2008 4:18:09 PM</td>
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</tbody>
</table>
### Plattsburgh (YPM)'s 27 Loan Requests to Nazareth (XNC)
**From 9/1/2008 to 12/31/2008**

#### Transaction Report

<table>
<thead>
<tr>
<th>Process</th>
<th>Time (Hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron Request to OCLC</td>
<td>3% 2.92 hrs</td>
</tr>
<tr>
<td>Request Sent to OCLC</td>
<td>0% 0.7 hrs</td>
</tr>
<tr>
<td>Request Imported from OCLC - Searching in Queue</td>
<td>5% 5.29 hrs</td>
</tr>
<tr>
<td>Searching in Queue - Item Prepared for Sending</td>
<td>6% 6.15 hrs</td>
</tr>
<tr>
<td>Item Sent - Item Received</td>
<td>83% 78.35 hrs</td>
</tr>
<tr>
<td>Item Received - Patron Notified</td>
<td>0% 0 hrs</td>
</tr>
<tr>
<td>Total Time</td>
<td>93.48 hrs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Library</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing Library</td>
<td></td>
</tr>
<tr>
<td>Connector Times/OCLC</td>
<td></td>
</tr>
<tr>
<td>Lending Library</td>
<td></td>
</tr>
<tr>
<td>Electronic Delivery/LAND</td>
<td></td>
</tr>
<tr>
<td>Borrowing Library</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The diagram illustrates the time distribution for each step in the loan request process.
Article Licensing Information Availability Service (ALIAS)

Patron Request

ILLIAD

Awaiting Request Processing – Manual Process

Article Direct Request – Automatic Process

Request Sent to OCLC

Local Holdings Queue

IDS Service

Query ISSN, date

ALIAS: Licensing Database

Library Codes for valid dates and licenses
Pre-ALIAS Article Borrowing

- 25 hours (avg.) before requests sent to Lending Library
- Total turnaround time: 30 hours (avg.)
- ALIAS can reduce sending time to: 8 hours (avg.)

Unmediated requesting eliminates 1 day delay

1. User submits request

2. The lending library downloads from eJournal and sends through Odyssey. The staff never photocopies or goes to the stacks...
Over 20 librarians from 12 libraries cooperatively update this system each year. *Data also available to ILLiad addons.*
ALIAS: Saves User & Staff Time
Jan 1, 2011 – June 15, 2011
Selected SUNY Libraries

7,314 Article Requests
Processed by ALIAS
1,106 hours FASTER & FREE

Total Time Saved for Staff (hrs)

Total Time Saved for Patrons (hrs)
# List of ILLiad Addons created by IDS Project

**Have an idea for an ILLiad Addon? Let us know!**

<table>
<thead>
<tr>
<th>Addon Name</th>
<th>Addon Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Aleph Catalog</td>
<td>Execute a search of the library's Aleph Web OPAC Catalog. Tested on Aleph v18.01.</td>
</tr>
<tr>
<td>2. Barnes &amp; Noble</td>
<td>This Addon does an ISBN or Title search. ISBN will be run if one is available.</td>
</tr>
<tr>
<td>3. Better World Books</td>
<td>This Addon does an ISBN or Title search. ISBN will be run if one is available.</td>
</tr>
<tr>
<td>4. Bing</td>
<td>Searches Bing for ISBN or Title for loans and articles.</td>
</tr>
<tr>
<td>5. Bing Images</td>
<td>Searches Bing Images for ISBN or Title.</td>
</tr>
<tr>
<td>6. BN College Textbook Search</td>
<td>This Addon does an ISBN or Title search. ISBN will be run if one is available.</td>
</tr>
<tr>
<td>7. CCC GetItNow Service</td>
<td>Performs a price lookup of the article using the CCC GetItNow Service.</td>
</tr>
<tr>
<td>8. Clusty</td>
<td>Searches Clusty for Title or ISBN for loans and articles.</td>
</tr>
<tr>
<td>9. Connection</td>
<td>Opens the OCLC Connexion within ILLiad.</td>
</tr>
<tr>
<td>10. ExLibris Alma Primo</td>
<td>The ExLibris Alma Primo addon searches ExLibris Alma/Primo Catalog for ISBN or Title for loans and articles and allows for input of Call Number and Location for Loans into the Details tab of the request.</td>
</tr>
<tr>
<td>11. GOBI</td>
<td>The GST addon does a GST search for an ISBN based on the Loan/Title.</td>
</tr>
<tr>
<td>12. GST Purchase</td>
<td>This GST addon does an ISBN or Title search: ISBN will be run if one is available. Contains the following resources: AbeBooks, Absolute Backorder Service, AddAll, Alibris, Amazon, Barnes and Noble, Better World Books, BookHouse, Bookscor, BBSCA, Cassandra, FastSearch, GOBI, HBR, Infoline, MidWest Tape, Oaktree, PaperbackSwap, Rittenhouse, SwapaCD, SwapaDVD, TitleSource3.</td>
</tr>
<tr>
<td>13. GOBI</td>
<td>This GOBI Addon does an ISBN or Title search: ISBN will be run if one is available.</td>
</tr>
<tr>
<td>15. Hathi Trust Catalog</td>
<td>This Addon does an ISBN or Title search: ISBN will be run if one is available.</td>
</tr>
<tr>
<td>17. Microsoft Academic Search</td>
<td>Searches Microsoft Academic Research for ISBN or Title to find freely available Articles.</td>
</tr>
<tr>
<td>18. OpenURL Linker</td>
<td>Does a full OpenURL query for a given ILLiad Request. Can be used with the SFX Link Resolver. Should work with any OpenURL resolver.</td>
</tr>
<tr>
<td>19. Powell's</td>
<td>This Addon does an ISBN or Title search: ISBN will be run if one is available.</td>
</tr>
<tr>
<td>20. RCL</td>
<td>This Addon does an ISBN or Title search on RCLWeb: ISBN will be run if one is available.</td>
</tr>
<tr>
<td>21. Serials Solutions Citation Linker</td>
<td>Does a full Serials Solutions Citation search for an article and processes the ILL licensing data through the ALIAS API.</td>
</tr>
<tr>
<td>22. SFX Linker with ALIAS</td>
<td>Does a full SFX search for an article and processes the ILL licensing data through the ALIAS API and also performs a price lookup of the article using the CCC GetItNow Service.</td>
</tr>
<tr>
<td>23. SpringerLink</td>
<td>This Addon does an ISBN or Title search: ISBN will be run if one is available.</td>
</tr>
<tr>
<td>24. TitleSource3 Search</td>
<td>Performs a TitleSource3 search using ISBN or Title/Author.</td>
</tr>
<tr>
<td>25. WebMall</td>
<td>The WebMall addon opens a webmail account.</td>
</tr>
<tr>
<td>26. Workflow Toolkit</td>
<td>This Addon is for the Workflow Toolkit Module.</td>
</tr>
</tbody>
</table>
One search box... millions of resources
IDS Search - overview

- Integrates **discovery** and ILL **borrowing**
- OCLC **WorldCat** API results plus **local** ILS call number/circ status
- Search **scope**: local, IDS, world-wide, or custom groups (CUNY)
- Bells and whistles: spell check, Google Books info, RSS feeds, etc.
- Web-based, centrally **hosted** commercial server
IDS Search - easy set up

- Remotely **hosted** service
  - No specialized/devoted staff to maintain
  - Minimal set up, no system maintenance
- Only a **WorldCat API** key is necessary
- Z39.50 set up
  - Same as Z39.50 in ILLiad Customization Manager
- Visual style/branding within minutes
IDS Search - development

- Extensive **usability** testing
  - Student usability studies at the University of Rochester
  - Eye tracking at SUNY Geneseo
  - Faculty usability studies at SUNY Oswego

- Test pilot library **focus groups**

- **Unit testing** of code base

- **Progressive disclosure** of search options and item detail

- **Context sensitive** functions: FRBR, autosearch, minimum holding libraries, filters, etc.

- **Assessment** of actual usage data
Features of IDS Search

- Collapsible left column
- Differentiated Author link styling
- User controlled # of results
- Upcoming:
  - New Dashboard Stats Package
  - Browsable Similar Items
  - Search results containing eBooks
IDS Search - intuitive availability

Owned and shared items displayed together

Global warming: understanding the forecast by Archer, David

The down-to-earth guide to global warming by David, Laurie.

The discovery of global warming by Weart, Spencer R.

Local availability from ILS via z39.50 connection

ILL request links for un-owned/unavailable results
Mobile Friendly Version
IDS Search - customization

Visual style to match your home page
**IDS Search - customization**

Add custom groups to holdings scope

<table>
<thead>
<tr>
<th>Default</th>
<th>Custom group added to list</th>
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<tbody>
<tr>
<td><strong>Change libraries:</strong></td>
<td><strong>Change libraries:</strong></td>
</tr>
<tr>
<td>- Milne Library (3,520)</td>
<td>- TC3 Library (548)</td>
</tr>
<tr>
<td>- Quick delivery libraries (36,415)</td>
<td>- TC3 &amp; Cortland (1,588)</td>
</tr>
<tr>
<td>- Worldwide libraries (599,724)</td>
<td>- Quick delivery libraries (30,182)</td>
</tr>
<tr>
<td></td>
<td>- Worldwide libraries (593,446)</td>
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</tbody>
</table>
Seamless scoping through world-wide collections

Leverage your library partnerships!
IDS Search - customization

Control the availability language for One click linking to ILL request form

The warming papers: the scientific foundation for the climate change forecast by Archer, David

Request from Another Library

Check availability

Not in the BCC library, but we can GetIt for you from another library
IDS Search - customization

Online dashboard control panel

<table>
<thead>
<tr>
<th>Branding</th>
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<tbody>
<tr>
<td>Library Name</td>
<td>Health Sciences Library</td>
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<tr>
<td>Library URL</td>
<td><a href="http://library.upstate.edu/">http://library.upstate.edu/</a></td>
</tr>
<tr>
<td>Library Logo URL</td>
<td><a href="http://library.upstate.edu/ids_search_header.gif">http://library.upstate.edu/ids_search_header.gif</a></td>
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</table>

<table>
<thead>
<tr>
<th>Search Form Elements</th>
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<tbody>
<tr>
<td>Form Background Color</td>
<td>#1360B0</td>
</tr>
<tr>
<td>Form Button Color</td>
<td>#9B7A55</td>
</tr>
<tr>
<td>Form Button Text Color</td>
<td>#A52A2A</td>
</tr>
<tr>
<td>Form Links Color</td>
<td></td>
</tr>
<tr>
<td>GetItNow (OpenURL link)</td>
<td></td>
</tr>
<tr>
<td>GetItNow Background Color</td>
<td>#1360B0</td>
</tr>
</tbody>
</table>
IDS Search - evaluation

See how your users are searching your catalog:

- Pie charts, bar charts, heat maps, etc.
IDS Search - try it out!

- **Live search site:**
  - http://search.idsproject.org/cuny/

- **Documentation:**
  - http://idssearch.wordpress.com

- **Contact**
  - Mike Curtis, IDS Search Project Manager
  - IDSSSearchManager@IDSProject.org
GIST Strategies & Tools

- **What?**
  - Tools developed with support of NY RBDB grant and distributed under creative commons for free

- **Why?**
  - Streamline acquisitions, collection development, and resource sharing
  - Save staff time and library budgets
  - Diversify collection building
  - Data driven and user driven collections
  - Transform libraries individually and collectively
How?
And of course... email, telephone, text messaging
A unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing.

Welcome SUNY Downstate Medical Center (VVD) to the IDS Project! (7/15/2013)
Welcome Queens College (XQM) to the IDS Project! (6/17/2013)
Welcome Nassau County Community College (VXV) to the IDS Project! (6/13/2013)
Welcome Erie Community College (YLI) to the IDS Project! (4/23/13)
Welcome SUNY State College of Optometry (XVP) to the IDS Project! (4/17/13)

Subscription to IDS Project Blog

IDS Search is a new searching tool for books and media. IDS Search helps users find and get items fast. More...
Attendance & Participation
Dedicated Team of Professional Volunteers with a Commitment to Strong Communication and Support.
Why?
Our Mission:

A unified community of trust and support built around a critical and clearly understood common purpose: effective resource sharing.
People Project:

Community & Innovation
go hand in hand
Questions?
THANK YOU

For more information, visit: http://idsproject.org/
Or contact
Bill Jones, IDS Project Creative Technologist: jonesw@geneseo.edu
Mark Sullivan, IDS Project Executive Director: director@idsproject.org
Phone: 585-245-5172