IDS Logic Update

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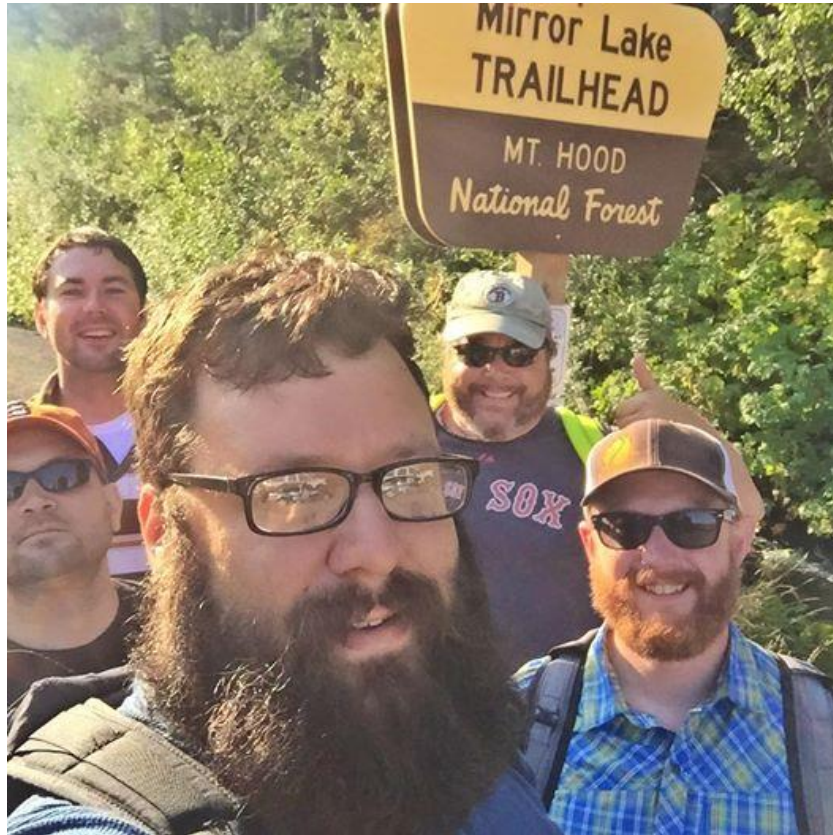
- Technology to meet the needs of the community for the benefit of the patron
  - A tool by the members for the members
  - Not a tool by a vendor for the members
- Purpose: To get the resources to the patron as fast and efficient as we can

Analyzing user behavior to help make
ILL easier to submit

IDS PROJECT

Search results for Keyword (all) building collections. [Quick delivery libraries]

Items per page: 10 | relevance

Change libraries:

○ Milne Library
  (60)
● **Quick delivery libraries**
  (1,921)
○ Worldwide libraries
  (35,008)

Limit search to:

Books *(1,459)*
CD *(3)*
DVD *(4)*
VHS *(7)*
Recent *(98)*
English *(1,877)*

More Search Options

Results **1 - 10** of **1,921**

Building library collections by Curley, Arthur.

Get It

📖 Book – 1985

CiteThis | Ref/Works | EndNote | Permalink

Engineering libraries : building collections and ... by Conkling, Thomas W.

Get It

📖 Book – ©2001

CiteThis | Ref/Works | EndNote | Permalink

Building area studies collections

Get It

📖 Book – 2007

CiteThis | Ref/Works | EndNote | Permalink

Building electronic library collections : the ess... by Kovacs, Diane K.

Get It

📖 Book – ©2000

CiteThis | Ref/Works | EndNote | Permalink

Building and managing e-book collections a how-to... by Kaplan, Richard

Get It eBook

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 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.
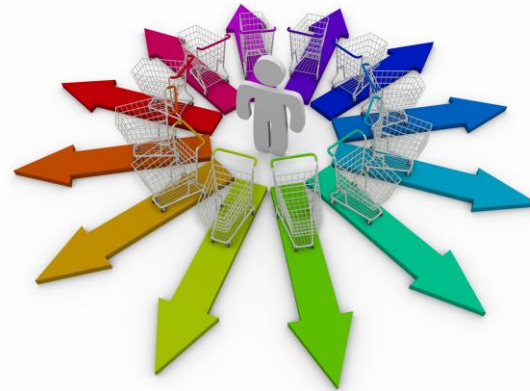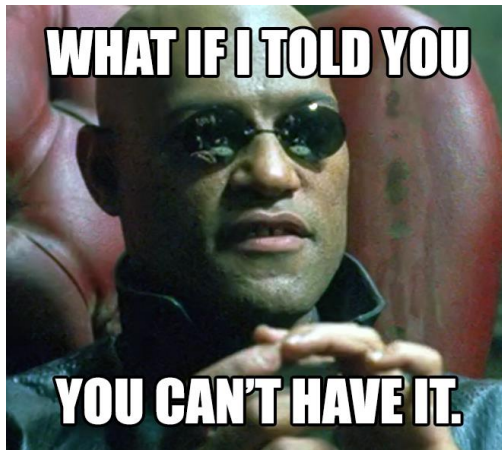
Custom Routing Rules

- 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

```
###########################################
## Custom Transaction Router Emailer: Knight Stage 2 ##
###########################################
CustomTransactionRouterEmailer_8:
  Enabled: "1"
  NVTGC:
  - ORU
  ProcessType: Lending
  RequestType: Loan
  StatusList:
  - "IDS Logic LAS Temp Available Queue"
  Query: t.Location in ('Knight Library Knight', 'Knight Library Music miniature', 'Knight Library Thai short', 'Knight Library
Knight Dewey', 'Knight Library Knight double oversize', 'Knight Library Japanese reference', 'Knight Library WEST Archives',
'Knight Library Knight oversize', 'Knight Library Vietnamese', 'Knight Library Thai reference', 'Knight Library Knight storage
Room 38 short loan', 'Knight Library Music', 'Knight Library Chinese', 'Knight Library Chinese Oversize', 'Knight Library Chinese
Double Oversize', 'Knight Library Vietnamese short', 'Knight Library Japanese', 'Knight Library Japanese Oversize', 'Knight
Library Japanese Double Oversize', 'Knight Library Music oversize', 'Knight Library Thai', 'Knight Library Thai Oversize', 'Knight
Library Knight popular', 'Knight Library Knight Dewey oversize', 'Knight Library Korean reference', 'Knight Library Chinese
reference', 'Knight Library Knight storage Room 38', 'Knight Library Music reference', 'Knight Library Korean', 'Knight Library
Korean Oversize', 'Knight Library Maps folded', 'Knight Library Music index table', 'Knight Library Vietnamese reference')
  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.

Borrowing Book Chapter Availability Lookup

(with Book Chapter Direct Requester)

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
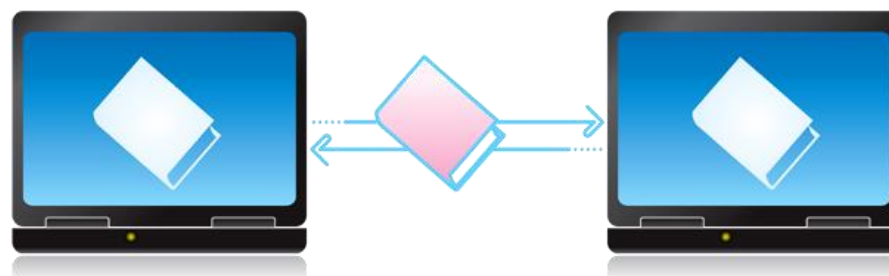- Deflagging

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

CHOOSE joy

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
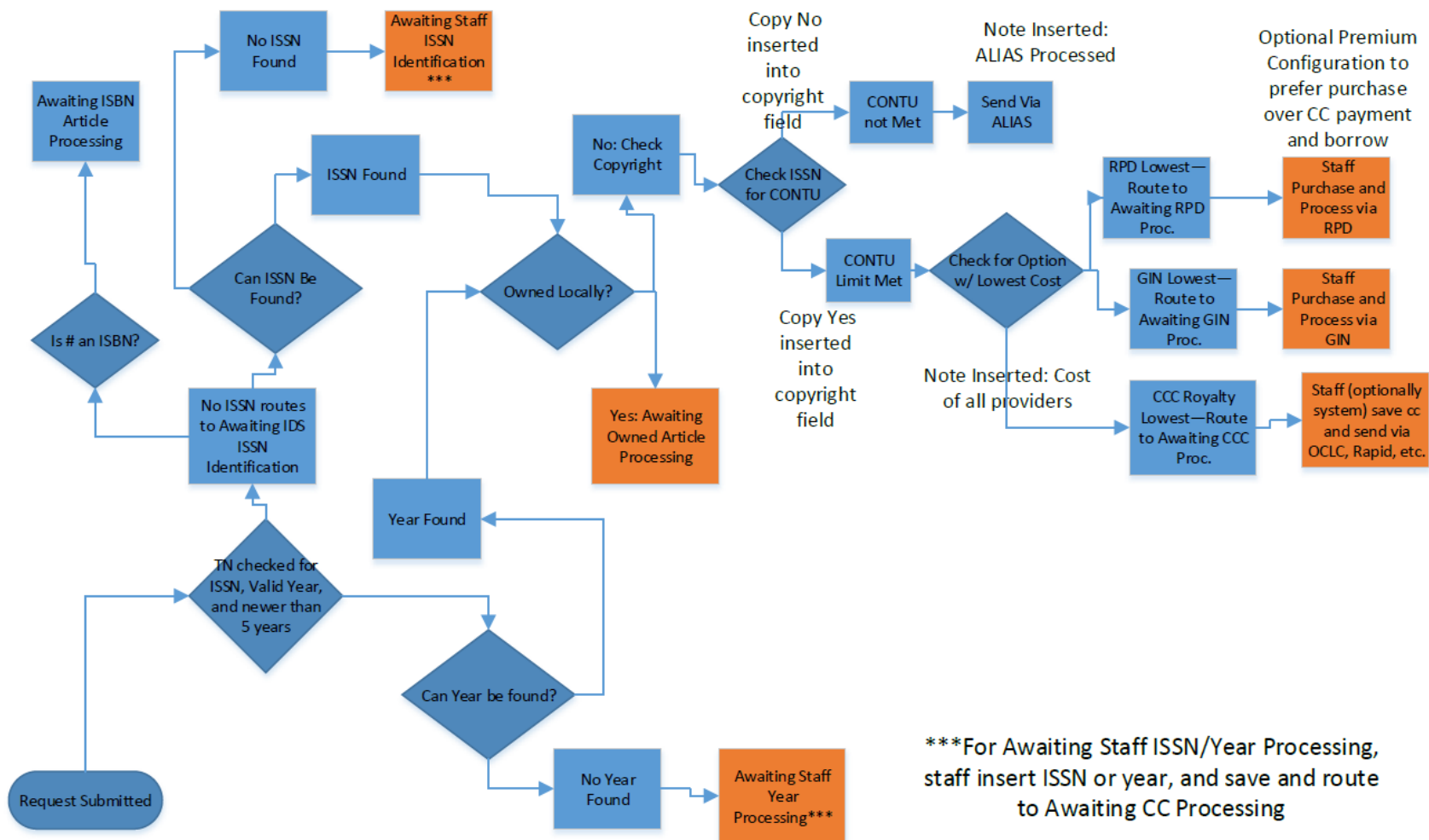**Item Shipment Tracking**

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

IDS PROJECT

Request Submitted

TN checked for ISSN, Valid Year, and newer than 5 years

Can Year be found?

No Year Found → Awaiting Staff Year Processing***

Year Found

No ISSN routes to Awaiting IDS ISSN Identification

Is # an ISBN?

Awaiting ISBN Article Processing

No ISSN Found → Awaiting Staff ISSN Identification ***

Can ISSN Be Found?

ISSN Found

Owned Locally?

Yes: Awaiting Owned Article Processing

No: Check Copyright

Check ISSN for CONTU

Copy No inserted into copyright field

Copy Yes inserted into copyright field

CONTU not Met → Send Via ALIAS

Note Inserted: ALIAS Processed

CONTU Limit Met

Check for Option w/ Lowest Cost

Note Inserted: Cost of all providers

RPD Lowest—Route to Awaiting RPD Proc. → Staff Purchase and Process via RPD

GIN Lowest—Route to Awaiting GIN Proc. → Staff Purchase and Process via GIN

CCC Royalty Lowest—Route to Awaiting CCC Proc. → Staff (optionally system) save cc and send via OCLC, Rapid, etc.

Optional Premium Configuration to prefer purchase over CC payment and borrow

***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
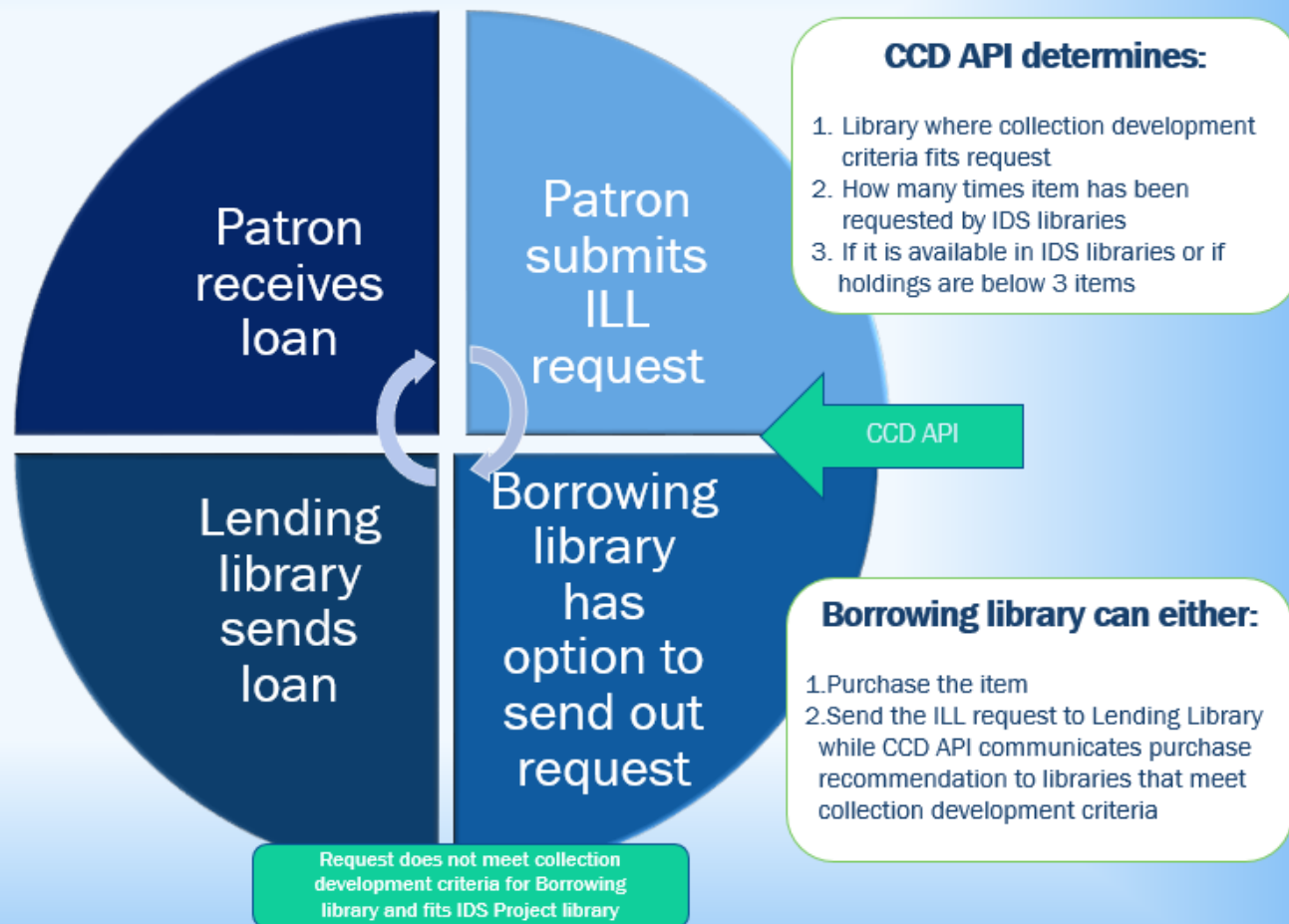
The need:

- 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!

http://rulekit.idsproject.org

https://github.com/idsproject

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