Fourth Annual IDS Project Conference
SUNY Geneseo, August 8-9, 2006

Ed Rivenburgh opened the conference with a thank you to NYLINK, ATLAS, OLIS and OCLC. This year's conference has the largest attendance ever with 71 attendees. Ed offered a special welcome to non IDS audience members ("interested observers"): Genessee Community College, St. John Fisher and Rochester Regional Library Council Director, Kathy Miller.

Bill Carney from OCLC was the first presenter. Via Webinar, Bill discussed OCLC's eSerials Holdings Service as an important new Resource sharing tool. Members of the IDS group participated in a beta test of the eSerials system through the Spring 06 semester.

Bill presented an overview of the eSerials Holdings Project and talked about the future of the project. Electronic serials currently are among the most expensive content that library's offer. Serial publications are rapidly moving to a purely electronic format. Most e-journals are located in aggregated databases where content is often hidden from the view of the user. While in the world of paper, libraries were able to quickly identify the journal holdings of other libraries, in today's electronic world we are most frequently unable to identify the electronic journal holdings of even those libraries in closest proximity to us. The eSerials project was undertaken to deal with this problem. Members of the project are sharing information about their electronic holdings using open url solutions, such as Serial Solution's Article Linker and Ex Libris' SFX.

OCLC is working with libraries to increase the visibility and use of e-journals by adding holdings info. for e-journals to the content of the WorldCat database. This is just step #1 in attempting to make all kinds of material more accessible than in the past. In addition to eSerials, OCLC has plans to expand WorldCat to include improved access to digitized content in Special Collections, to Open Web Content and institution specific content. ESerials will ultimately be just one small, but important piece of the content being added to WorldCat. Cataloging the "rest" of the resources - - items that are not ISSN based - - is being done on a "one-by-one" basis at OCLC.

Through the eSerials project, OCLC sets and maintains eSerials holdings information in the WorldCat database. This information is loaded for FREE and updated monthly. Holdings data is not currently indexed to the local library level, but adding this more specific data is the goal.

Along with the IDS libraries, the eSerials project is nearing 100 participating libraries.

Libraries in the project are able to see both their print and electronic journals in WorldCat. This facilitates, for the first time, the sharing of articles located in eSerials.

Libraries are also able to use this data to avoid placing ILL requests for journal articles that they already own.

Bill mentioned briefly that using OCLC's new deflection feature, libraries can now achieve automatic control of what types of material they will lend or not lend.

OCLC is also working on providing licensing info, on some level, using ERM (Electronic Resource Management) software. OCLC is not really prepared, however, to deal with licensing issues on a regular basis. For now, they are working on the holdings data problem as the priority. He noted that IDS libraries are already ahead of others in this area. Using information, collected and assembled by Mark Sullivan of SUNY Geneseo, and accessible through the IDS availability server, IDS participants can quickly identify the lending status of thousands of electronic journals available from member libraries.

The next version of the project software will not be available until 2007. Bill has turned responsibility for the project over to Linda Gabel (gabell@OCLC.org). He hopes that holdings data in version #2 will include data to at least the level of year and volume.

Bill indicated that OCLC is urging those who use Serials Solutions or some other product to manage e-journal content to have that vendor take care of your MARC record delivery & updating with WorldCat. Those who do not have a vendor can approach OCLC directly to have this done for free.

Bill noted that as of the 6th of this month, the full content of the WorldCat database is available to Internet searchers by going to WorldCat.com. Further, from the WorldCat database, searchers can quickly identify libraries owning an item of interest.

"IDS Availability Server & eSerials"
Mark Sullivan (SUNY Geneseo)

Mark presented an update on use of license information being provided through the IDS Availability Server. He noted that an early review of materials being shared among IDS members had shown that we were able to fill about 1/3 of all article requests with holdings data currently available in our catalogs. We knew that we could provide some of the remaining 2/3 of the requests if we could accurately determine our joint e-journal holdings. Using a combination of SFX, Serials Solutions databases and even Ebsco data, Mark has been able to compile this data, which he is updating monthly.

In addition to the basic "who owns which titles" info, Mark has also worked to compile copyright licensing data for titles owned by IDS members. In the past, it has been necessary to go to the full journal list to determine if a journal could safely be ILL'ed. Mark demoed a new, much easier way to determine both who owns a title and if it is borrowable. It is now possible within ILLIAD to click on the OPAC button, to search for a title by ISSN or title and determine who owns it and if it is ok to borrow. Better yet, Mark is now also providing quick access to detailed holdings information (click on record detail), making it easy to avoid placing a request with a library that does not have the particular volume, issue you need.

In response to a question, Mark indicated that he had built the licensing information from a review of the individual contracts of numerous vendors. Kudos to Mark for some amazing technical work.

Jon Penn, NYLINK
"Auto-Deflection of OCLC ILL Requests"

Jon Penn demoed the new auto-deflection feature within ILLIAD, explaining both how it works and what its potential benefits might be. He noted that there are basically two different ways to set up auto-deflection:

    1.) through the Policies directory, or
    2.) through the Connexion browser

It is important to understand that deflection is based on elements in the cataloging record, not on library policies. Deflection can be enabled or disabled easily. Jon provided a handout listing the 22 different formats, listed in a drop down menu, that you can choose to deflect. For example, you might choose to deflect requests for electronic journals from all but other IDS libraries at this point in time.

You can also deflect requests by group. Jon has set up the following four groups for us:

IDSZ . . . . . the IDS Libraries
RSUN . . . . SUNY Libraries
LAND . . . LAND Libraries
CTYU . . . . CUNY Libraries

A reminder - - Please DO NOT deflect IDSZ for e-journals. Sixteen libraries are currently defined as IDSZ libraries. New libraries will be added as the IDS group grows.

OCLC will eventually offer deflection by customized groups. Other possible ways to deflect requests may include the following:

- cost
- geography
- age of materials
- custom holdings groups
- library type

ILLIAD will automatically move a request along to the next lender in a string if it encounters a library that has set deflection in place for that type of item.

Setting up deflection within the Connexion browser would normally be done item by item, during the cataloging process. You use the 008 field for set up.

Participants had time to do a hands-on exercise following the demo.

Day 2
Wednesday, August 9ᵗʰ

Ed Rivenburgh (SUNY Geneseo)
"IDS Project Report"

Ed welcomed those in the audience representing new IDS libraries, including reps from Broome Community College, Fulton-Montgomery CC., Cobleskill and the Stoney Brook Health Sciences Library. He noted that the Colleges participating in IDS now represent about 85,000 students and 7.3 million volumes.

The number of transactions processed through IDS continues to climb each semester. In spring 2004, it took an average of 85 hours to process 3071 loans. In spring 2006, our average processing time for loans was 82.9 hours and we processed 11,184 loans.

Similarly, for articles, in 2004 our average turnaround time was 60.4 hours and we processed 3318 transactions. While in spring 2006, our average turnaround had fallen to just 42.3 hours and this was the average across over 9300 transactions.

Similarly in 2004, only four of our libraries were up and running on ILLIAD, and only two of these four had Odyssey running. Now, 15 libraries are ILLIAD users, and 13 of these are using Odyssey regularly. Only 1 of our Libraries had direct request functioning in 04, now 11 of us are employing it to speed average turnaround times.

We are now filling about 40% of the total loan transactions that take place across our libraries from within IDS, and 37% of all article transactions.

Goals for IDS in 06-07 include the following:

- Implement ILLIAD 7.2
- Focus on improving number of unmediated direct requests for monographs
- Implement OCLC eSerials project across all IDS member libraries
- Be sure that deflection policies are set to not exclude IDS libraries from inter-lending of eSerials
- Encourage participation of other academic libraries, SUNY or non-SUNY, in IDS
- Work with NYLINK on new LAND contract RFP
- Work with 3R's Councils to explore interconnections with private academic libraries
- Re-design IDS web-site
- Explore future governance structure for IDS

Matt Goldner (OCLC)
"Putting Library Services Where Our Users Work & Live"

Matt, has been with OCLC since October 2004. He is the Executive Director of Cooperative Collections Services there.

Matt reviewed some interesting statistics taken from OCLC's recent publication on "Perceptions of Libraries and Information Resources".

He noted that 93% of those surveyed for this report agreed that Google provides worthwhile information, 85% feel this way about Yahoo and only 78% agreed that Library web sites provide worthwhile information. 69% felt that libraries and search engines provide the same level of trustworthiness.

The report demonstrated that people still think first of books where libraries are concerned, and do not necessarily see libraries as good sources for digital information.

Matt referred to this shift in thinking about where information comes from as a "Tectonic shift" and urged that libraries need to work to move their services more to where the users are, i.e., Google, Yahoo and other major web sites.

He also noted that libraries could do more to avoid duplicative efforts by moving some local processes to a more cooperative level. Cataloging was one such process he mentioned.

Libraries do have valuable data to add to the aggregate that is currently available and we need to think and design with this data, not simply pages.

Matt sees OCLC's role as providing a means to expose the wealth of data that libraries have and offer FREE to users on the Web. He noted that on the 6th of August 06, just a couple of days ago, WorldCat became freely available on the web at Worldcat.org. OCLC's goal with future versions of this database is to include local data as well a local holdings for materials located in other vendor databases within Worldcat, with the intent again of meeting the user where they live and promoting the value of libraries as portals to information in both print and digital formats. Right now, users are clicking through from WorldCat to individual libraries at the rate of about 148,000 clicks a month. OCLC has about 70,000,000 records out there right now to which they are providing access.

Matt did a brief demo of the new WorldCat.org site and indicated that discovery without delivery is as yet a problem to be solved. He talked about the idea of Circ. Systems providing for home delivery of requested items. OCLC is working on a universal resolution service and on indexing holdings information for content to the article level. He also noted that OCLC does not believe that users should have to authenticate to get open access content.

Over 7,000 libraries have already linked their catalogs, with local holdings information, to WorldCat.

The two things the user wants are to First, FIND IT and Second, GET IT.

Matt promoted taking a closer looks at the Perceptions Report at the following web address: http://www.oclc.org/reports/2005perceptions.htm

He also advised reading a second OCLC publication on rebranding libraries, which can be found at: http://www.oclc.org/community/default.htm

Dan Specht (Atlas Systems)
"ILLIAD 7.2"

Dan noted that Atlas is still in the process of moving servers. They anticipate rolling out ILLIAD version 7.2 sometime in mid-October

What's big in 7.2?

1. total web re-design, with all pages designed around style sheets
2. web page editing will be a lot easier in this new version
3. there is a restore or "undelete" function
4. smart request forms
5. ability to search by several fields to see where your request is in the processing chain
6. inclusion of a community portal
7. Odyssey will be able to send PDF files without first having to convert them to TIFF
8. authentication component has been simplified

   AND MORE

Stephanie Spires (Atlas System Webinar)
"Copyright Clearance Demo in ILLIAD"

Stephanie noted that with subscription pricing for training, staff can attend all training sessions as many times as they want

The borrowing guide, which is available from ILLIAD's main website, devotes chapter four to the issue of copyright

You can also find information there about the community portal which allows libraries to share documentation as well as inquiries about ILLIAD.

In response to a question, Stephanie indicated that articles always go 1st to "awaiting copyright clearance"

She mentioned customization keys that allow you to set number of loans that can be received from any given title.

The most common error that people generally make is saving copyright information on everything. New ILL staff, in particular, tend to make this mistake.

Session Reports to Group
[Nancy Alzo from SUNY Potsdam for ILL libraries & staff](#)
[MaryRuth Glogowski from Buff State for Library Directors](#)

In closing Mary Alice Lynch congratulated the group for their innovative work together and Ed blessed the fleet for the 4th year, awarding small symbolic boats to all new members.