Linking Systems: Transforming Resource-Sharing Through ISO ILL and Other Standards
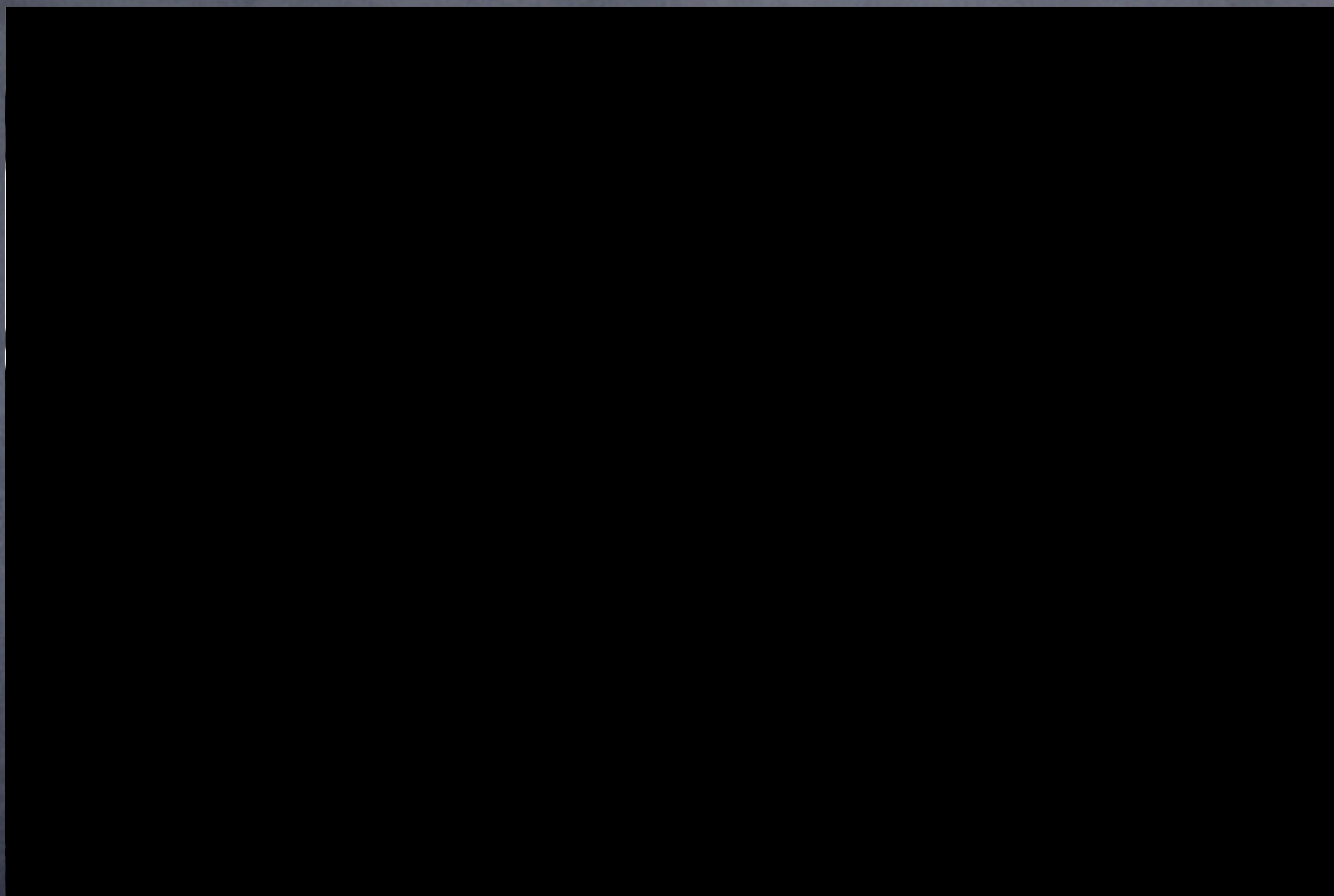
The OpenILL/LDAP Experience

CLA 2004

Mark Leggott - University of Winnipeg / OpenILL Cooperative

OpenILL Genesis

- Dysfunctional ILL marketplace

- Vendors pulling products, AVISO dying

- Frustration with lack of open systems

- Advantages of Open Source model

- GODOT/reSearcher already doing some

- Had to spend $$ – why not benefit all?

Version 1.1

- June 2004 - 1st Partner/SourceForge

- Local/hosted (CF, MySQL, Java, Linux/Win)

- Borrowing & Lending, GS and ISO

- Unmediated & mediated, ILS integration

- E-Mailing patron, history, patron interface

- LAC ILL Policy Directory complete

Version 1.2 & 2.0

- 1.2 – September 2004

  - More complete ISO support, help screens reports: (picklists+, financial, statistics)

  - Z39.50 broadcast integration

- 2.0 – January 2005

  - Prospero/Ariel integration, IM Client, NCIP

  - Features determined by Partners

OpenILL Cooperative

- Coop registration process is underway

- Partners become full members, have a vote, determine where funds go

  - Partners – $2.5-7.5K join/$250-750 annual
  - Members – $250-1K join/$50-200 annual
  - Hosted – $500-2K join/$250-1K annual
  - Download – free

http://www.openill.ca/openill_20040608/index.cfm?CFID=4107&CFTOKEN=54757620&fuse

OpenILL

openILL

UWINNIPEG
LIBRARY & INFORMATION SERVICE

STAFF FUNCTIONS

welcome to OpenILL.

OpenILL is being developed as an open source system for managing inter-library loans (ILL).

If you are interested in learning about the project, please visit www.openill.org.

If you want a peak at the interface, send us a line.

Development updates:

brief notes to update partners on new features, fields and other enhancements to the application.

Note / comment	date
Slight re-arrangement of the main processing pages: • *for borrowing requests, the responder details are now displayed above staff actions (right panel)* • *on supply side, requester details now appears over the staff actions panel.*	2004-06-08 14:10:19.0
Major change to way in which requests in process are tracked: previous usage involved application variables	2004-06-08 12:00:01.0

Login:

username:

password:

[login]

http://www.openill.ca/openill_20040608/index.cfm?CFID=4107&CFTOKEN=54757620&fu

Google

Apple .Mac Scotiabank CIBC Cybrary Google Stimpson Pitcairn UW CBMH OpenILL OILL Patron CUFTS Loomware MT Login »

OpenILL

STAFF FUNCTIONS

Borrowing: select requests

— — — BORROWING

- MANAGE REQUESTS

1. **BORROWING**
2. **SUPPLYING**
3. **PLACE NEW REQUEST**
4. **MESSAGE HANDLER**
5. **FAXES IN QUEUE**
6. **MESSAGE QUEUE**

+ DIRECTORY

+ EMAIL FUNCTIONS

+ ADMIN FUNCTIONS

+ LIBRARY ADMIN

Description [select requests]
Select requests from state categories, or by doing a search against the database.

search
[   ]

field
godot id

truncation
◯ none ◯ right only ⦿ right and left

iso state
Any / All

order by
request id

max
10

[retrieve]

New requests	All Loans	All Copies	Total	Queued requests	Requests in process
🚩 godot requests (no lenders)		7 Req.	7 Req.	0	0
🚩 New Request Entered	5 Req.	4 Req.	9 Req.	0	0
🚩 Staff change	2 Req.		2 Req.	0	0
🚩 technical error: please review notes	13 Req.	4 Req.	17 Req.	0	0

Pending requests	All Loans	All Copies	Total	Queued requests	Requests in process
🚩 Awaiting reply	101 Req.	222 Req.	323 Req.	0	0
🚩 manual request (e.g., fax)	2 Req.	1 Req.	3 Req.	0	0

Can't be supplied	All Loans	All Copies	Total	Queued requests	Requests in process
orphan requests		13 Req.	13 Req.	0	0
Staff change	2 Req.	1 Req.	3 Req.	0	0
Unfilled Answer sent	4 Req.	9 Req.	13 Req.	0	0

Shipped requests	All Loans	All Copies	Total	Queued requests	Requests in process
Item shipped	6 Req.	12 Req.	18 Req.	0	0
orphan requests	7 Req.	11 Req.	18 Req.	0	0
Staff change	6 Req.	22 Req.	28 Req.	0	0
technical error: please review notes		2 Req.	2 Req.	0	0

Received items	All Loans	All Copies	Total	Queued requests	Requests in process
Item shipped	1 Req.	19 Req.	20 Req.	0	0
Received	175 Req.	1680 Req.	1855 Req.	0	0
Staff change	15 Req.	1390 Req.	1405 Req.	0	0

openILL

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LIBRARY & INFORMATION SERVICE

Logout | Home | Help | Mark Leggott | Your Settings

STAFF FUNCTIONS

Browse requests

select link / function

- **MANAGE REQUESTS**

  1. **BORROWING**

  2. **SUPPLYING**

  3. **PLACE NEW REQUEST**

  4. **MESSAGE HANDLER**

  5. **FAXES IN QUEUE**

  6. **MESSAGE QUEUE**

+ DIRECTORY

+ EMAIL FUNCTIONS

+ ADMIN FUNCTIONS

+ LIBRARY

search

leggott

iso state

Any / All

field

patron last name

order by

request id

truncation

○ none   ○ right only   ● right and left

max

10

retrieve

	numbers	item type and title	patron	current state	dates	supplier	details
1.	openILL 1360 No. Trans. Qualifier 040101383 Godot 40101383	Serial / Journal / Periodical *Journal of Virology Structures of Host Range-Controlling Regions of the Capsids of Canine and Feline*	Leggott, Mark	Received [In Local Circulation]	Date Requested Jan 30, 2004 last service (d/t) Feb 02, 2004	AEU	1. process request 2. Fax form 3. Details
2.	openILL 1513 No. Trans. Qualifier 040200041 Godot 40200041	Serial / Journal / Periodical *Proceedings of the National Academy of Sciences of the United States of America The costs and benefi*	Leggott, Mark	Received [In Local Circulation]	Date Requested Feb 02, 2004 date received Feb 13, 2004 last service (d/t) Feb 13, 2004	SSU	1. process request 2. Fax form 3. Details
3.	openILL 4085 No. Trans. Qualifier 040300408	Serial / Journal / Periodical *IEEE Spectrum The Web Within the Web*	Leggott, Mark	Received [In Local Circulation]	Date Requested Mar 04, 2004 Need Dec Before 31	MWU	1. process request 2. Fax form

2. SUPPLYING

3. PLACE NEW REQUEST

4. MESSAGE HANDLER

5. FAXES IN QUEUE

6. MESSAGE QUEUE

+ DIRECTORY

+ EMAIL FUNCTIONS

+ ADMIN FUNCTIONS

+ LIBRARY ADMIN

1 - 1 / 1 yyy 1   **REPORTS:** generate Fax form

(process)

return to: ⦿ search result list [requests.list] ◯ selection screen

RECORD 1 / 1 [req.id = 7935] DETAILS		last sent / received as Generic Script message

request details [6] [3] DETAILS	EDIT	responder details [4] [3] DETAILS	EDIT

Request ID 7935
transaction 040400522
Qualifier
Service Type *Copy/Non-returnable [2]*

Responder Symbol BVAS
Responder Authority NLC-BNC
email (resp) libloan@sfu.ca

dates [1] [3]   DETAILS | EDIT
Need Before Dec 12, 2004
Date Requested Apr 29, 2004

Expiry Date Dec 12, 2004

patron details [2] [4]   DETAILS | EDIT
full name Leggott, Mark
last name Leggott
first name Mark
Notes TESTING DO NOT FILL

item details [3] [8]   DETAILS | EDIT
item type *Journal / Article*
Vol./Issue 19
publication date 1996--

author(s) - Fitch, Eric L.
article
pagination 30
iSSN 02631776
title Wellsian: The Journal of the H. G. Wells Society
title of article How Green Was My Utopia? A Reflection on William Morris's

ACTIONS

⦿ No response

🚩 ◯ **Received item**   Detail?
              Date Received
   ◯ Loan ? ⦿ Copy   [JUN ▾] [12 ▾] [2004 ▾]

🚩 ◯ **Cancel request**   Detail?

🚩 ◯ **Item Lost**   Detail?

🚩 ◯ **Change ISO state**   Detail?
        [select state   ▾]

🟧 ◯ **Message Request**   Detail?

NOTES TO INCLUDE WITH OUTGOING MESSAGE

[   ]

STAFF NOTES staffNotes7935

[   ]

(process requests) (process requests)

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http://www.openill.ca/openill_20040608/index.cfm?CFID=4107&CFTOKEN=54757620&fuse;

Apple   .Mac   Scotiabank   CIBC   Cybrary   Google   Stimpson   Pitcairn   UW   CBMH   OpenILL   OILL Patron   CUFTS   Loomware   MT Login   »

OpenILL   OpenILL

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LIBRARY & INFORMATION SERVICES

Close window

SEND EMAIL

patron email:

m.leggott@uwinnipeg.ca

Reply email:

m.leggott@uwinnipeg.ca

Subject:

Your ILL request is available for pick-up – Journal

Message:

PICK-UP – CIRCULATION DESK

```
----------------------------
title: Wellsian: The Journal of the H. G. Wells Society
publication date: 1996--
item type: Journal / Article
title of article: How Green Was My Utopia? A Reflection on
William Morris's News from Nowhere, H G Wells's Men
Like Gods and Ernest Callenbach's Ecotopia
iSSN: 02631776
Vol./Issue: 19
```

send email

EMAIL LOG

no	subject	message	date
1	Your ILL request is available for pick-up - Journal	PICK-UP - CIRCULATION DESK ------------------------------- title: Wellsian: The Journal of the H. G. Wells Society publication date: 1996-- item type: Journal / Article title of article: How Green Was My Utopia? A Reflection on William Morris's News from Nowhere, H G Wells's Men Like Gods and Ernest Callenbach's Ecotopia iSSN: 02631776 Vol./Issue: 19 author(s) - article: Fitch, Eric L. pagination: 30	Jun 12, 04

Close window

UWINNIPEG
LIBRARY & INFORMATION SERVICES

LIVE HELP

Staff Directory | Site Map

QUICK SEARCH:

Library Catalogue ▼

go!

Home | Find | Get | Learn | MyLibrary | About | Help

You are here: **MyLibrary** > My Interlending

Printer-friendly version | **Comment**

My Interlending

Personal details as given in your most recently-submitted request:

patron:	Leggott, Mark
Library Code (barcode):	21888
Department:	Library
Patron Type:	0
Work Phone:	9801

- **Completed Requests**
- **New requests**
- **Pending requests**
- **Received items**

Completed Requests

(Requests that have been completed)

RequestID:	**5031**
Date Requested:	17 Mar 2004 10:39 AM
Need Before:	31 Dec 2004 12:00 AM

library id	symbol	org name	system addresses	
2352	MWUCE	Ukrainian Cultural and Educational Centre, Library edit entry	type	num / address

library id	symbol	org name	system addresses	
2351	MWUC	University of Winnipeg, Library edit entry	type	num / address
			fax	204-786-1824
			gs address	ill_mwuc@openill.ca
			iso address (email)	ill@uwinnipeg.ca
			ariel	ill_mwuc@openill.ca

Select at least one field to begin search. Results limited to 500 records:

NLC-BNC Library Code	[ ]
Library Name	[ ]
Province	Select province ⇕
City	[ ]
Library Type	Any ⇕
Lends Monographs? Field42	☐ YES
Lends Serials? Field47	☐ YES
GS addresses? Field13	☐ YES
ISO (SMTP) addresses? Field14	☐ YES
ISO [TCP] addresses? Field15	☐ YES

Include: ⦿ email / numbers ◯ addresses ◯ both

◯ Brief ◯ Detailed ◯ WDDX ◯ XML ⦿ Structure (Search)

LDAP Directory

- OpenILL working with LAC to develop LDAP version of ILL Policies Directory

- Part of international testing (US, Australia)

- Currently test version at UofW

- Will allow searching of all directories

Vendor System

Local/OS System

Dynamic Search/
Synchronization

Weekly/Monthly
Batch Loading

LDAP Directory Space

US

Australia

Canada

LAC

B

Institution
A

C

B

Consortium
A

C

Directory Opportunities

- Correct once, automatic update for all

- Centralized/distributed maintenance

- Same standard for all directories

- Enhance for other protocols

    - virtual reference services

www.openill.org
directory.openill.org

m.leggott@uwinnipeg.ca