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IDS Project: Community and Innovation

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IDS Project: Community and Innovation

Abstract
This chapter discusses the distributed, volunteer nature of an information delivery cooperative which became formally designated as the IDS Project and how a “coalition of the willing” has been able to move the resource sharing community forward on a national scale through innovations in training, support, and technology. The authors use a case study approach to highlight some of the major accomplishments of the IDS Project, such as the Article Licensing Information Availability Service (ALIAS), IDS Search, the Mentor Program, and the Regional Users Groups. The team-based structure of the IDS Project allows for groups to work independently and from multiple locations while still creating a synergistic result through the combination of community and innovation. Distributed teams often provide enriched user skills for the group but often cause difficulties due to the distance, communication, and differing requirements of the different local institutions. The IDS Project’s use of technology and periodic face-to-face meetings has reduced the issues with distributed teams and created highly effective working groups. These groups, such as the mentors and the Technology Development Team, have provided excellent service and training to the member libraries. Through the use of the Best Practices Toolkit, the Getting It System Toolkit, ILLiad Addons produced by IDS, and other national services, the IDS Project has made it possible for libraries that use ILLiad to benefit from its developments.

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Comments
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Abstract

This chapter will discuss the distributed, volunteer nature of an information delivery cooperative which became formally designated as the IDS Project and how the ‘coalition of the willing’ has been able to move the resource sharing community forward on a national scale through innovations in training, support, and technology. The authors use a case study approach to highlight some of the major accomplishments of the IDS Project, such as the Article Licensing Information Availability Service (ALIAS), IDS Search, the Mentor Program and the Regional Users Groups. The team based structure of the IDS Project allows for groups to work independently and from multiple locations while still creating a synergistic result through the combination of community and innovation. Distributed teams often provide enriched user skills for the group but often cause difficulties due to the distance, communication, and differing requirements at the local institutions. The IDS Project’s use of technology and periodic face-to-face meetings has reduced the issues with distributed teams and created highly effective working groups. These groups, such as the mentors and the Technology Development Team, have provided excellent service and training to the member libraries. Through the use of the Best Practices Toolkit, the Getting It System Toolkit, ILLiad Addons produced by IDS, and other national services, the IDS Project has made it possible for libraries that use ILLiad to benefit from its developments.

Keywords: information delivery services, resource sharing, innovation, community, distributed teams, patron driven acquisitions
I. Introduction

In the fall of 2003, Ed Rivenburgh, then director of Milne Library at the State University of New York (SUNY) at Geneseo, organized a meeting among eleven other library directors and began discussing the problems that the twelve SUNY Comprehensive libraries were facing. The primary issue was the reduction in funding that the libraries had been dealing with for years and how the libraries could work together to share their collections. From this first meeting sprang the IDS Project which initially consisted of those twelve SUNY libraries. “Your library is my library and my library is your library” was one of a few scary ideas that the IDS Project put forward in an effort to highlight both the difficulty in overcoming the “silo effect” that was hampering the libraries and the benefits of universal borrowing among member libraries. One of the first technologies that the IDS Project developed was a statistics module that linked all twelve of the ILLiad™ databases together. This Transaction Performance Analysis Module (TPAM) provided the libraries with a great deal of information on where their ILL processes needed to be improved. During the next few years, the IDS Project increased in members and developed several innovative technologies, strategies, policies, and procedures that optimized resource sharing, collection development, and patron driven acquisitions. These innovations included (a) the Workflow Toolkit, a best practices guidebook to resource sharing using ILLiad; (b) the Article Licensing Information Availability Service (ALIAS), an unmediated article and license discovery system that is integrated into ILLiad™; (c) IDS Search, an open source consortial catalog based on the WorldCat™ API; and (d) the Getting It System Toolkit (GIST), a collection of applications that support purchase on demand, gift processing, and collection management. (See Appendix A for additional products).

Even with a focus on innovation, the Project has never been just about technology. Today, the IDS Project community is comprised of 73 libraries and supports approximately 37,000 faculty and 425,000 students. The IDS Project is a people project that uses technology and innovations to improve the support to its members and their constituents. The IDS Project has continued to strengthen the spirit of trust and support through the development of innovative programs such as the Mentors Program and the Regional User Groups. These two groups, when combined with the Technology Development Team, constitute the heart of the IDS Project.

This chapter will discuss the organization of the IDS Project, its primary goals, the teams that compose its innovative training and support cores, and then present a case study performed at Syracuse University to demonstrate the benefits of these programs.
II. The IDS Project Organization

The core organizational principle of the IDS Project has been to remain nimble in order 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” (IDS, 2012a). This has been possible due to a remarkable confluence of talented staff from IDS member institutions working closely with consortia and vendor partners, including Atlas Systems, Copyright Clearance Center®, OCLC®, and Serials Solutions® (IDS, 2012b) while receiving strong support from the SUNY College at Geneseo, the State University of New York, the City University of New York, and the NY3Rs Association.

The IDS Project initially developed out of an alliance of twelve academic libraries in New York State in 2004 that recognized the need for more effective resource sharing to get beyond the costs, delays and restrictions that hindered sharing collections across institutions. Early meetings brought together the libraries’ interlibrary loan (ILL) staff members and their directors to review workflow practices that impacted the length of delivery time and policies that impacted the types of materials which could be borrowed. These discussions fostered an approach to addressing issues that has become the hallmark of the IDS Project and brought about the development of several benchmarks and the IDS Membership Agreement (see Appendix B). Rather than develop standing committees to determine priorities or evaluate options, small teams of participants organically emerged to focus on particular challenges, worked to develop solutions that were implemented at their institutions and then brought back their experiences to the larger IDS membership.

As more of the members adopted the developed solutions, the feedback was used to improve those innovations. This approach to development avoided the delays of second guessing or the potential paralysis when attempting to venture into the unknown. As a result, the IDS Project has produced a number of products that automate processes, provide training and best-practices to staff, and most importantly, produce solutions (IDS, 2012c) that directly address issues impacting ongoing resource sharing operations. These products include ALIAS (Article Licensing Information Availability Service) (IDS, 2012d), IDS Search, GIST (Getting It System Toolkit) and over twenty ILLiad™ Addons. Most of these are describe more fully in the following sections. Since the 2004 inception of the IDS Project, the team approach to supporting IDS operations, while being coordinated by the IDS Project Executive Director with support from an Administrative Assistant, has been the model for organizational management.

A. Current Organization

Within recent years, as the IDS Project membership has increased significantly, questions of strategic directions have become more apparent (Fig. 1)

An IDS Project Council composed of fourteen administrators that represent sectors of IDS membership (public and private institutions along with consortia partners) was formed to provide the IDS Project Executive Director with advice on sustainability and questions regarding ongoing missions that are a natural result of the growth of the Project. Council meetings are held bi-annually and chaired by the IDS Project Executive Director. The challenge for the Project has been, and will continue to be, to balance input
from the Council and the operations teams with the need to remain nimble as new opportunities present themselves. It is this balance that will allow the IDS Project to scale and sustain itself while providing innovative activities across the membership.

To sustain innovative growth, some formally designated teams were introduced as seen in Fig. 2. All nodes presented in the chart are teams that have specific roles and responsibilities vital to the success of IDS Project. See Appendix C for information about each team.

![IDS Project Membership by Year (2004 - 2012)](image)

**Fig. 1** IDS Project membership growth.
Fig. 2 IDS Project teams chart.

B. IDS Technology Development Team

All IDS member libraries use ILLiad™ Resource Sharing Management Software developed by Atlas Systems, distributed exclusively through OCLC®, as the primary request management software for interlibrary loan. Use of this software by member libraries provides a certain level of common technological ground when focusing on development efforts. Although members share a common platform, the Technology Development Team (TDT) is faced with the fact that each library is a different environment, with different people, and often different needs. This challenge benefits both the team and the member libraries because the needs of the Project make the final production versions of the software fully functional and very customizable.

1. People

The philosophy of the TDT mirrors that of the open source community. The IDS Project has provided the technology it developed freely to members, and on many occasions, to the larger library community. Examples of technology available to the larger community
include the Getting It System Toolkit (Bowersox, Oberlander, Pitcher, & Sullivan, 2012), the Copyright Clearance Center® Get It Now™ Service Addon for ILLiad™ (2012), the Serials Solutions® Addon, along with many of the Addons freely distributed by Atlas Systems. Similarly, the IDS Project developers volunteer their time freely, working on technological problems highlighted by IDS members.

Several of the ILLiad™ Addons developed by the TDT have been created at the request of member libraries and have evolved since their inception with input from libraries across the nation. For example, the Serials Solutions® Addon was originally created to provide a quick way for ILL staff processing an article to find out if it was held by their library and provide them a link to the appropriate resource. However, it has since been modified to be much more and includes licensing information from the IDS Article Licensing Information Availability Service (ALIAS) and the ability to purchase directly from the Copyright Clearance Center®’s Get It Now™ Service (2012), should the library choose to use those options.

Responding to change is a challenge facing all libraries, and the TDT manages that challenge through regular conference calls/webinars, quarterly in-person meetings, archived and managed communication through Basecamp™ a web-based project management and collaboration tool, and coding input through GitHub. Here the chance to respond to change goes hand-in-hand with maintaining a short development cycle. Many developments are small, focused features of a particular project, whether they are an addition to IDS Search, an ILLiad™ Addon, or some other bit of code.

2. Technology

IDS Search serves as a hosted consortial catalog that promotes resource sharing through local, consortia, and worldwide discovery. Once IDS Search was released, the TDT immediately received questions regarding usability and customizations that individual libraries wanted for their local patrons. While the TDT worked with various teams to conduct usability research for qualitative data, including the collection of real-time eye tracking video data from students and faculty, it also felt that a tool was needed which would provide quantitative data. In order to fill this need, the team created a Dashboard that would serve as both a data collection tool tailored to search behavior and a portal where libraries could customize their own instance of IDS Search (Fig. 3).

From the beginning, the TDT used data collection to inform development choices. The team built charts and graphs that detailed usage both project-wide and locally, all of which is available to the libraries using IDS Search. Currently, the Dashboard allows libraries to customize their instance of IDS Search through a simple tool that offers access to the most commonly sought after customizations (logo, colors, OpenURL address, etc.) as well as through an advanced Cascading Style Sheets (CSS) form that allows for any CSS-based customizations. However, as customization features were included, it became apparent that there was no centralized place to go for information about a library. The team realized that this tool had the potential to house more than just IDS Search information.
Fig. 3 IDS Search: Discovery interface for IDS Project libraries.

While the future Dashboard is still in the conceptual stage, it will grow to be the platform for a library’s interaction with the IDS Project. This platform will incorporate the Transaction Performance Analysis Module (TPAM), an invaluable resource that allows individual libraries to check the health of their ILL performance in comparison with other member libraries. Using the lessons learned in the statistical module of IDS Search, we will develop data warehousing and visualization strategies to give them a consistent look and feel. The dashboard will allow member libraries to be able to turn on and off various hosted features and be able to perform something as simple as updating contact information when someone is promoted or changes their name. After all, this is a “people project;” knowing who you’re talking to when a book goes missing is just as important as knowing when it went missing.

As of October, 2012, the Technology Development Team has been in the process of implementing and testing a Circulation Availability Service (CAS) for member libraries. This service creates a custom lending string to provide the fastest turnaround time for borrowing libraries. CAS builds upon IDS technologies and data sources:

1. IDS Search to create a list of holdings;
2. ALIAS to provide true load balancing; and
3. Empire Library Delivery time matrix to sort by shortest estimated delivery time.
This service will save staff time from both borrowing and lending libraries by querying the local catalog to determine if the item is on the shelf or in a restricted collection. Lending requests for items that are not loanable are automatically canceled, and OCLC® is automatically updated so that the request moves to the next library in the lender string.

As a responsive team, the TDT encourages technology requests of IDS Project member libraries in order to strengthen the resource sharing initiatives of New York State libraries. The TDT analyzes evolving technologies and statistical data from the Project members to determine what areas could use further development or require an innovative tool in order to prosper. As new technologies are developed, documentation is provided to the mentors so that training and support can commence.

III. Project Support and Training

A. Mentor Program

In 2005, the Mentor Program was formed in order to quickly bring new IDS Member library operations up to speed on all things ILL and ILLiad™ in order to meet turn-around and delivery benchmarks. Volunteer mentors were chosen from both public and private sector academic libraries, where they specialized in Interlibrary Loan/ILLiad™ and/or Information Technology with experience with ILLiad™. In these specializations, mentors were recruited as either Application or Systems Specialists.

When a new library expressed interest in joining the IDS Project, the IDS Administrative Team would assign one Applications Mentor and one Systems Mentor to work with the library. A basic Needs Assessment (see Appendix D) was sent out to provide mentors with a snapshot of the mentee library’s systems and interlibrary loan department. The assessment also allowed the assigned Applications and Systems Mentors to pinpoint areas running well and those needing improvement. Based on the assessment results, an agenda could then be drawn for the face-to-face mentor visit to the mentee library. Mentees were encouraged to visit the mentor library to experience an optimally run work environment, allowing for exposure to and reflection on ideas for change.

During the mentor visit, key issues were to be addressed, workflows analyzed, and best practices in interlibrary loan adopted. A sample of these best practices included OCLC®’s Direct Request (2012), custom holdings, copyright, IFM, and, in 2008, the installation of ALIAS. The framework for mentoring libraries seemed solid on paper, but in reality implementation visits seldom went as planned. Each library had its own unique set ups, installations, software and technical quandaries creating delays in ‘bringing the library up.’ No firm deadlines were agreed upon by mentee libraries and mentors, and processes could delay for months.

Once a library was “brought live” in the IDS Project, the mentoring process never seemed complete. Libraries and staff continued to seek mentors for answers. During 2010, the Mentoring Program was assessed by the IDS Project Administrative Team. It was concluded that while mentors excelled in making superficial changes, and optimizing workflows and systems, they were failing to optimize staff or implement lasting and on-going change.
In 2011, “Mentoring for Change: Setting a new course for the Mentor Program” was introduced by Tim Bowersox (2011), Coordinator of Mentors and Training. This program was based on the principle that mentors would be trusted advisors, helping mentees develop skills and knowledge, and building trusting relationships with a clear and mutual purpose. The mentoring process needed to involve not only the ILL staff, but would also require buy-in from the Directors. Mentors would help mentees succeed on their own terms by providing support and training. On-going contact with mentees would be scheduled on a regular basis with movement toward the successful implementation of set goals taken from the Needs Assessment.

Fundamentally, the IDS Mentor Program transitioned to a teaching relationship with each library as a student, and the goal to teach libraries to plan, implement and maintain positive change long after the mentor/mentee relationship ended. New tools such as GoToAssist™, GoToMeeting™, Skype®, Jing® and other remote communications technologies were introduced to mentors as a way to communicate with and train Mentee libraries and staff. Basecamp™ was introduced as the project management system where mentors and the mentee library staff create, add, and track the process of implementing best practices, training, and change. Goals, milestones, and to-do lists can be added to a project plan and assigned to appropriate persons. Users can utilize the messaging system and file sharing features, though mentors and mentees often utilize traditional email as a way to continue communication. These tools allowed for instruction and implementation to take place on a weekly basis, with training provided in a self-paced environment versus a one-day-implementation-fix-it-all mentor visit.

B. Regional User Groups

Use of Regional User Groups is the newest program to come out of the IDS Project. Developed as an outreach vehicle toward renewed community support and personalized training, the Regional User Groups provide professional development opportunities for Interlibrary Loan and Resource Sharing practitioners in an intimate and cultivating environment.

The Regional User Groups were born of multiple changes that IDS, as a whole, was going through. Growing membership, changing programs, and developing wants and needs of the resource sharing community were all contributing factors to the creation of the user groups. Over the past few years, the IDS Project’s membership had surpassed the original expectations of the Project’s founders and, as of January, 2013, sat at 73 members. Each new membership to the IDS Project comes with the responsibilities to implement best practices for that library’s practitioners. Depending on the library, these practitioners could be in need of support and training, or could be able to assist the Project by providing support and training to others. Regardless, the stages before induction into the IDS Project include extensive time spent on behalf of the Mentor Program. No matter the state of the library and the practitioner’s level of comfort with IDS Best Practices, the relationship developed between a new library’s staff and the IDS mentors who bring them into the Project is a long lasting one.

The growing need for mentors as the Project developed has presented an issue with which there seemed to be no simple answer. The Mentor Program was changing its organization and training approach and the ratio of mentors to member libraries was
declining. Not only were the mentors being stretched thin, but they were struggling to maintain the member support being asked of them after the initial training period.

The primary event that the IDS Project and the mentors envisioned to use for large-scale training for all members and practitioners was the IDS Project’s Annual Conference. The mentors held their Best Practices training programs in an effort to provide mass training on the crucial issues those in the field were currently facing. As membership of the project grew, so did IDS Project’s reputation across the nation. Non-members attended the IDS Project Annual conference and soon the Best Practices sessions were overflowing and being held in auditoriums or lecture halls.

It was time for the IDS Project to return its focus to the small community on which it had built its foundation. However, it needed to maintain its place on the national level in order to take advantage of new opportunities. Regional User Groups were the answer. The ability of the Project to provide small, intimate training sessions for its members, by region, would provide the vehicle for improving local networking and support. Bringing people together to discuss policies, procedures, ideas, trials, successes and failures, combined with hands-on training sessions, would present the opportunity for members to get to know each other and become comfortable sharing ideas with each other. Teaching and learning from one another would enhance the IDS Project community of trust and support and add value in a unique and specialized way.

With the need for Regional User Groups identified, the next step involved actually making it happen. How would these meetings be organized? When and where would they be held? Who would coordinate all of this? Would this fall under the Mentor Program’s responsibilities?

The first decision made was to convene the Regional User Groups quarterly with a meeting during the fall, winter, and spring sessions, and a united Regional User Group meeting at the IDS Annual Conference during the summer as a pre-conference session. In order to hold Regional User Group meetings, those regions needed to be defined. New York State has a large expanse of libraries, some of which are more than few hours away from one another. The ability for members to attend the meetings was essential in determining which libraries would be part of which regions. The User Group regions were demarcated by travel distance and roadway options thereby dividing the state into three sections: the Western, Eastern, and Metro as shown in Fig. 4. The Rochester Regional Library Council and the Metropolitan New York Library Council (METRO) provided training facilities for the Western and Metro User Groups, while the State University of New York College at Oneonta provided a centralized location to hold the Eastern User Group meetings. The staff at all three locations have been invaluable in assisting the IDS Project in getting our User Group program off the ground.
When it came time to determine who would organize the User Groups in each region, a loose hierarchy developed. Having mentors spread across the state was already a goal of the Mentor Program, so utilizing these mentors within the newly developed regions made sense. Two mentors from each region would act as Chair and Secretary for two year spans. Their role would be to assist with the details of each User Group meeting as well as be the point of contact for the members in their region between meetings.

Someone was also needed to pull the Chairs together for the organization of the User Group meetings across all three regions. Rolling this responsibility under the Mentor Program was considered, but dismissed primarily due to the time requirements of both programs. The Regional User Groups would require travel multiple times throughout the year as well as a large time commitment to keeping the User Groups agendas moving forward and continually drawing in members to contribute to the program. The User Groups required their own Coordinator in order to allow the Coordinator of Mentors and Training to continue focusing on the growth and development of that program.

Now that the organizers of the User Groups were in place, the focus of the meetings was to be determined. Keeping in line with the purpose of the meetings, the agendas included hands-on training sessions as well as roundtable discussions. These two components met the essential needs of the IDS members as well as provided an atmosphere for the sense of community to grow. The training sessions could be conducted by mentors or other members, who were encouraged and sought out. These sessions were meant to address the needs of the region, which could also be applicable across all three regions. The topic could be an ILLiad™ workflow change due to a recent update of the software, or an uncommon aspect of the resource sharing profession that would be beneficial for members to hear about. For example, a recent presentation like this explored statistics within interlibrary loan. The presenters shared the various statistic tools available to users within ILLiad™, OCLC®, and the IDS Project. They then
demonstrated examples of why practitioners might use each tool and provided a chart for assisting in the decision making process of when a practitioner might use one statistic collection tool over another.

The roundtable discussions continued this type of sharing with a discussion base rather than a training base. Members were given the opportunity to discuss policies, upcoming changes, ideas, and more with each other in small groups. The Chairs and Secretaries of each region facilitated discussion during this period, noted observations, and collected possible topics for future user group meetings. This portion of the day has proven to be the most energetic and dynamic. Providing time for practitioners to come together and ask what their counterparts were doing with things like loan periods, renewals, new billing systems, and workflow hiccups gave them an informal chance to share and learn without even realizing it. Our hope is that comfort among members lasts beyond the workshop and that there will be a handful of people to call or email the next time that a question arises.

Continuing the mission of community, a few other opportunities have been encouraged by attendees. Members are partnered with each other for the span of time between user group meetings. These partnerships are geared toward visiting one another to see and experience another library, workflow, workspace, and dynamic. Partners are asked to bring something they shared and something they learned from their partner to the next user group meeting. Partners are then switched around at each meeting so that eventually, each member will have had the chance to visit all of the other members and member libraries within their region.

Sometimes physically taking the time away from the office or traveling to a partner’s library for these visits is not possible. Technologies are provided as well as ideas and examples for virtual visits. Extending and opening up the possibilities has been a long time focus of the IDS Project. Encouraging members to do the same pushes the whole Project forward in innovative sharing.

As of late 2012 two sets of quarterly meetings have been held. Each meeting has provided learning opportunities for the members as well as the mentors organizing them. The list of future topics continues to grow and members have already begun participating in presentations, registrations, leading roundtable discussions, and other logistical pieces of the meetings themselves. Members are getting more involved and meetings have become increasingly engaging. Members also are providing the essential feedback needed to make sure the next meetings continue to meet the training and information needs of the members. A survey is presented at the end of the user group meeting to give members the opportunity to share the most and least beneficial aspects of the workshop. Feedback from attendees has been profusely positive. These surveys are extremely helpful as the planning of the next meeting begins. The agenda items are developed from the members’ input and will keep the user groups on target.

Moving forward, the user groups are focusing on the hands-on aspect of the training sessions. Allowing members to get their hands dirty with pieces of the ILLiad™ workflow that they might be less comfortable with, will be extremely beneficial in the long run. This will also allow members to work together and by teaching and learning through immediate trial and error, develop a deeper understanding. For those members who are unable to make a meeting, virtual attendance is being explored. Session materials and videos of presentations are being archived on the Regional User Groups’
websites and members are encouraged to explore these documents and contact their partners or mentors with questions about what they might have missed. The interest that members have shown in these archives is encouraging to the Project because it shows that attendance is valued by the members and that we are meeting a need.

In summary, the IDS Project Regional User Groups are about the community. Bringing members together in smaller settings provide participants with the opportunity to learn from each other, get to know one another, and gain professional development for their positions as they strive to improve day in and day out. While still in the formative stages, the Regional User Group program is already promising to be one of the most essential aspects of the IDS Project. Members are learning from each other and in turn teaching mentors, bringing the purpose of resource sharing to the forefront, and influencing the IDS Project as a whole. The Project was started as a small subset of libraries working together. As the parent project grows, these sets of regions allow the fostering of that original mission.

C. Workflow Toolkit

The Workflow Toolkit was first released at the 2008 IDS Conference in order to document many of the resource sharing best practices and workflow enhancements for ILLiad™. The primary goal of the Toolkit was to help libraries easily apply or adapt best practices into their workflow thereby reducing costs and processing time. This toolkit includes general tips and workflow suggestions for Borrowing, Document Delivery, and Lending modules. For example, all the email and print files use a special command to include external data that incorporates a library’s “LocalInfo” table values, and if that library keeps the borrowing, document delivery and lending contact information up to date in ILLiad™, they will not have to edit each text file or word document. In order to implement most of the options in this Toolkit, ILL practitioners need the following ILLiad™ access:

- Customization Manager.
- Resource Sharing Settings which is authorized by the user manager.
- Write access to Print and Email folders -- important for adding and customizing new slips, labels, and emails.
- Write access the PDF or ElecDel folder (or secure FTP) which is required to save PDF files into ILLiad™’s server.

Customization access and methods for accessing the Print, Email, & PDF/ElecDel folders and the Customization Manager are determined by local practice, policies, and how ILLiad™ is supported. Consultation with the library’s IT administrator may be necessary in order to continue this customization process. The IDS Project recommends that whoever manages the ILL operations have access to the above, if not more of the ILL staff, in order to rapidly implement, adapt, and streamline workflow. Some of the tips are region specific (custom holdings with Rochester Regional Library Council & New York) or require membership (Libraries Very Interested in Sharing, IDS Project). However, the information is made available in an interest to share strategies that have proven useful, and so that other libraries can evaluate, select, and easily adapt tools into their workflow. The main goal of the Workflow Toolkit is to share information and tools
that have helped various libraries streamline, automate, lower costs, and even expand services by eliminating steps, customizing automation around ILL department needs, and making ILLiad™ more effective.

Truly effective resource sharing depends upon each library running at peak efficiency. The goal of the Workflow Toolkit is to help ILL staff implement best practices that will save valuable turnaround time while cutting the costs of doing business. Maintained by the IDS Project's mentors, in partnership with Atlas Systems, the Toolkit provides best practices that can enhance all aspects of borrowing, lending, and document delivery services through ILLiad™ customizations, resource sharing strategies, and workflow improvements. The Workflow Toolkit consists of individual Google Docs organized into sections, making it easy to use online or in print.

The IDS Project hosts the Workflow Toolkit-L list, the ILLiad™ community’s hub for sharing news, support, ideas, and best practices. Over 500 users (IDS and non-IDS members) currently subscribe to the list and chat about questions concerning ILLiad™ and its many functions. Several vendors, including Atlas Systems, OCLC® and the Copyright Clearance Center®, are members of the list and often provide answers to questions about their services. Many items that are discussed on the list end up having their resolution added to the Workflow Toolkit for future reference.

When combined, the mentors, user groups and Toolkit provide strong support to the members of the IDS Project and also provide a strong sense of community.

IV. Syracuse University Library as a Case Study

Syracuse University Library (SUL) joined the IDS Project in June 2009, and soon began to realize the benefit of the support from the IDS community and the use of IDS Project tools. With the support of both the Mentor Program and the core IDS administrative group at SUNY Geneseo, SUL’s resource sharing performance has steadily improved since 2009. SUL’s lending fill rate increased by seven percent its first full year in IDS due largely to increased lending of electronic articles through the use of ALIAS. The use of ALIAS was further integrated into the Ex Libris SFX OpenURL link resolver and Serials Solutions® Addons, which SUL has adopted, resulting in continued fill rate improvements of four and five percent by the end of the 2014 year. The connections between the mentors and the member libraries are essential in continuing to disseminate the use of new tools that further integrate best practices and innovation into ILL workflows.

A. Launching IDS Initiatives

A year after SUL joined the IDS Project, initiatives for Document Delivery (“Articles to Go”) and Purchase on Demand (“Buy Not Borrow”) were launched. The support of the IDS Project community was evident in helping plan for these programs, sending a team of IDS Project specialists to visit and consult with SUL librarians. After departmental reorganizations and staff changeover, the IDS Project again supported the training of staff and use of ILL best practices at SUL. In the past year, SUL Resource Sharing librarians have worked through the Best Practices workbook and visited several IDS libraries to refine its workflows. Visits have included both broad discussions as well as specific
visits to libraries to observe office layouts and staff furniture choices. What is most impressive is the ability of the IDS Project’s mentor program to extend beyond a single visit through web meetings, phone calls, constant email communication, and general collegiality that makes constant improvement to workflows and practices easy as there is always support available. In implementing these resource sharing best practices and changes in workflow and procedures, 1.5 FTE staff members have been reassigned to assist with other processes such as electronic reserves and circulation activities. In the past 2011-2012 academic year, lending turn-around time has decreased by 80% from 42.5 hours to roughly 8.5 hours for articles.

B. Staff Training and Building a Community of Trust

Most important to SUL’s membership in the IDS Project is the focus on continuous training, professional development, and the sharing of knowledge and best practices. SUL’s resource sharing staff, as in most large research libraries, has previously been focused on staff specializing in lending, borrowing, or other specific parts of the ILL workflow. Syracuse, in the past five years, has upgraded its staff lines to create a more dynamic and highly trained staff who are all asked to be trained to do any job if needed. There has, therefore, recently been a great deal of cross-training and more extensive training of resource sharing staff at SUL. As the mentors train using freely available tools, such as the Best Practices Institute Workbook and the Workflow Toolkit (IDS, 2012e), the lessons learned by staff attending IDS events can easily be incorporated into training materials. In creating the ILL training manuals, the Workflow Toolkit is a foundation for a great deal of documentation and assessment. With the use of existing IDS training tools that staff and librarians are already familiar with, only local exceptions and unique procedures need to be documented.

As most libraries use the tools and ILLiad™ Addons developed by the IDS Project, there is a community of innovation and entrepreneurship that helps facilitate local changes. At SUL, ILL did not, until recently, use the Copyright Clearance Center®’s Get It Now™ service, which uses technology developed by the IDS Project (the Get it Now™ ILLiad™ Addon). As there were so many libraries that used this service in the IDS Project, SUL Resource Sharing librarians were able to gather enough supporting data and information about the service to initiate quick change to adopt this service. The result has been that SUL has saved more than $1,500 in its first month using the Get it Now™ service.

As the IDS Project is built on the principles of “a unified community of trust and support,” the expectations for fast turnaround times come with a great deal of support from expert volunteers as well as freely available tools that help with extensive changes. The IDS Project’s Custom Holdings Helper served as a crucial tool in the complete revision of SUL custom holdings in the past six months, resulting in lower OCLC® ILL Fee Management (IFM) and other borrowing costs. In attending IDS Project Regional User Groups and other training events, the tools that IDS libraries use to solve problems are also discussed. After learning about how other libraries are using the GIST Gift and Deselection Manager (GDM), SUL is now using this tool to help make collection movement and storage decisions. The GIST GDM has allowed processes that involved large amounts of librarian time to become data-driven and less labor intensive.
C. The Benefits

Finally, as Syracuse University Library is one of just a few large research libraries in the IDS Project, the assumption was that SUL would be a net lender in the Project. However, with its focus on building and maintaining research collections, SUL has found great value in the more curriculum focused collections across the IDS Project. With the load leveling built into ALIAS, SUL has not seen significant increases in lending volume, and has not been a net lender. Instead, SUL has seen great value in its membership. Over an eighteen month period beginning in May 2011, SUL filled 63% (over 17,000 requests) of its ILL requests for free from other IDS member libraries, with no shipping costs other than a flat courier fee of $5,250 per year through Empire Library Delivery (2011). Compared to over $60,000 in direct charges plus several thousand dollars in shipping costs for the other 37% of Syracuse’s requests, the requests filled in IDS are a bargain.

The IDS Project community offers important opportunities for any type of library and any staff. The IDS Project’s focus on participation among its members creates opportunities for organizational growth. At SUL, there has been a great deal of focus on improved performance and decreased request times, and there have been many opportunities for support and growth in these areas. As SUL is now able to maintain excellent request times through best practices, there are now development opportunities through involvement with the Technology Development Team and Regional User Groups to extend best practices beyond conventional improvements through workflow adjustments to system level development. As the IDS Project has, in the past three years, worked to integrate resource sharing as a critical part of all areas of the library, there are also opportunities for support to help expand the role of resource sharing locally. Internally, the IDS Project’s contacts and knowledge have allowed for extensive connections between collections, acquisitions, reference, and cataloging, which did not previously exist.

V. Conclusion

The IDS Project’s focus on community and innovation has been the reason for its continued success. New ideas come from all sections of the interlibrary loan community and often provide the catalyst for innovations. Other times, one innovation may lead to several others or to the combination of innovations which create even better performance in the resource sharing community. The development of the IDS Mentor Program eventually led to the creation of the Regional User Groups through the need for increased training of a much larger IDS Project membership. The implementation of Addon technology in ILLiad™ by Atlas Systems led to an explosion of new tools for the interlibrary loan community. While some tools are only available to IDS members, many are available to all users of ILLiad™. ALIAS, which had provided journal licensing information only to IDS Project members, is now available to all ILLiad™ users through the Serials Solutions® and SFX Addons. GIST for ILLiad, the Workflow Toolkit, and two dozen Addons are freely available to non-members and are supported by the IDS Project.
The tools, training, and support provided by the IDS Project have helped member libraries increase the volume of requests that can be handled while decreasing the time required for each request. As noted in the Syracuse Case Study, lending turn-around time had decreased by 80% from 42.5 hours to roughly 8.5 hours for article requests while allowing for 1.5 FTE to be reassigned to different projects. By optimizing workflow and freeing up staff time, libraries will have knowledgeable staff available to seize new opportunities in a community of trust and support built around effective resource sharing.
Appendix A: Innovative Components of the IDS Project

The Workflow Toolkit is designed and updated regularly to help libraries adopt best practices to get the most out of ILLiad. It helps member libraries and potentially over 1,100 other ILLiad libraries by decreasing staff time spent processing requests and by increasing the efficiency of workflows in general. It can also save libraries money by reducing borrowing and lending costs as well as through better use of staff time, equipment, and supplies. It also serves users by improving turnaround times.

2. Mentor Program - [http://idsp Projekt.org/About/Mentors.aspx](http://idsp Projekt.org/About/Mentors.aspx)
The mission of the Mentor Program is to help each IDS Project member perform within the cooperative's standards through the adoption of tools and best practices, led by a trained group of volunteer experts in resource sharing. These experts are certified to help each member simplify their ILL workflows and systems, working closely with staff to implement positive changes and build a strong sense of community within the IDS Project.

The IDS Project is very committed to the ongoing professional development of our members and the promotion of best practices in our member libraries. In partnership with the New York 3Rs, we are organizing three regional IDS Project Users Groups that will leverage the strengths of the mentor program with the extensive collective knowledge base of our members. Each user group will meet quarterly to provide training, facilitate discussion and problem solving, and most importantly build stronger interdependent relationships among members.

The IDS Project promotes cooperation through mutual accountability. “Trust but verify” is the guideline. TPAM is used for extensive interlibrary loan data analysis that serves as a basis for informed decision-making. It queries transaction data from each IDS Project library’s ILLiad server and creates graphical displays useful for analyzing transactions across the consortia and between individual libraries.

IDS Search is a powerful discovery tool that enables users to search for materials at their local, IDS Project member, and WorldCat libraries. Features include: facets, relevancy ranking, availability and citation views, spell check, RSS for searches, Google Books preview, Get It button to place ILL requests, statistics, and many customization options in an easy to use control module. IDS Search uses APIs from WorldCat, Google Books, and Yahoo spell check, it also offers context sensitive linking to external resources: reserve collection, EBSCO, YouTube, Google, and more. IDS Search is hosted on a robust commercial server that provides fast speeds for displaying results.

6. Article License Information Availability Service (ALIAS) - [http://idsp Projekt.org/Tools/ALIAS.aspx](http://idsp Projekt.org/Tools/ALIAS.aspx)
Working with Atlas Systems, the IDS Project has developed a service that allows ILLiad to perform unmediated article request processing. ALIAS is able to construct a lender string and send article requests straight to OCLC. This can save an average of 10 to 20 hours of processing time and decrease the turnaround time for article requests. ALIAS uses a unique licensing management system that eliminates the need for each library to monitor licenses. ALIAS promotes electronic over print holdings and performs load leveling.
Addons are .lua scripts that allow the user to incorporate others systems into the ILLiad program. The IDS Project has created over 19 Addons, including two that combine the licensing data of ALIAS and the purchasing ability of CCC's Get It Now Service with either Serials Solutions or SFX.

This service creates a custom lending string to provide the fastest turnaround time for borrowing libraries. CAS builds upon IDS Search to create a list of holdings, ALIAS to provide true load balancing, and the Empire Library Delivery time matrix to sort by shortest estimated delivery time. Staff time from both borrowing and lending libraries is saved by querying the local catalog to determine if the item is on the shelf or in a restricted collection. Lending requests for items that are not loanable are automatically canceled, and OCLC is automatically updated so that the request moves to the next library in the lender string.

GIST is designed to leverage data from various systems to help libraries streamline and transform their acquisitions, collection development, and interlibrary loan workflows.
- GIST for ILLiad enhances the ILLiad web request form to show users links to millions of full text titles from Hathi Trust and Google Books, Amazon.com reviews, and price options for books. This information helps users and staff make informed decisions, saving money and diversifying your regional holdings. It also enhances the ILLiad client with a full featured Acquisitions Manager which allows for streamlined budget management, fund tracking, and materials purchasing.
- The GIST Gift and Deselection Manager (GDM) is a standalone open-source system that streamlines deselection and gift processing. GDM streamlines processing and provides local & regional holdings, edition, and full text information, and recommendations based on customizable profiles for rapid decision making and handling, including OCLC cataloging and donor letters. GDM also provides batch analysis of collections to evaluate for weeding, digitizing, or selecting for special collections, and automatically generates a spreadsheet of holdings, full-text, pricing, and more.
Appendix B

IDS Project Membership Agreement

This document is a voluntary agreement to govern membership in the Information Delivery Services (IDS) Project cooperative. It is based on the premise that each member institution fully supports the IDS Project's mission statement:

“The mission of the IDS 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, through the development of a rapid and effective resource-sharing system among libraries in New York State.”

By entering into this membership agreement, your institution agrees to the following:

1. Resource Sharing

1.1 Reciprocal Lending
Member institutions will not charge each other fees related to the handling of interlibrary loan requests, including per-request lending charges and shipping or postage fees. All member institutions agree to abide by the responsibilities outlined in the American Library Association (ALA) Interlibrary Loan Code for the United States. Each member institution agrees to respond to the requests of other members as expeditiously as possible.

1.2 Interlibrary Loan Platform
All member institutions will use the OCLC ILLiad Resource Sharing Management Software as their interlibrary loan platform. Each member institution will make their best effort to optimize their ILLiad implementation through the adoption of the IDS Project's Recommended Best Practices. All software on your local computers for the purposes of interlibrary loan should be updated to current versions.

1.3a Local Holdings Maintenance
Each member institution agrees to maintain the currency and accuracy of their OCLC local holdings. We strongly recommend a reclamation process making sure your catalog matches your OCLC holdings.

1.3b Link resolver maintenance
Give permission for the IDS Project to contact Serials Solutions to add your data to the extracts that are run every two weeks. Alternatively, add IDS Project Executive Director (Mark Sullivan: sullivm@geneseo.edu, 585-245-5172) to your SFX Administration permissions so that he can generate the download file from the data directly. This will allow him to keep ALIAS up to date with your holdings. We strongly recommend that print holdings for journals also be loaded into the link resolver knowledge base. The guide to implementing ALIAS, and adding print holdings to Serial Solutions, can be found at: www.idsproject.org/alias_setup.zip. If you have a different open URL resolver we can work with you to implement ALIAS. Contact Mark Sullivan at sullivm@geneseo.edu
1.4a Delivery Methods for Physical Items
Each member institution agrees to ship requested loan materials using the Empire Libraries Delivery Service (http://www.empirelibrarydelivery.org/), except when an item’s condition requires an alternative courier.

1.4b Delivery Method for Electronic Articles
Each member agrees to supply requested article copies using ILLiad’s Odyssey electronic delivery software.

1.5 Optimized Data Sharing
Member institutions will provide the IDS Project Systems Administrator with direct access to the ILLiad database stored in the locally or OCLC hosted SQL server. This data will be shared with other participating libraries and analyzed using a common set of transaction performance measurements. The tables required are LenderAddresses, Transactions, Tracking, and Notes. If direct access is not possible, please contact the IDS Project Systems Administrator (sullivmi@geneseo.edu) to discuss the possibility of other options.

2. Member Contributions

2.1a Membership Contribution
Each member institution will support the operation of the IDS Project with a $700 contribution, per year. This support will allow the IDS Project to send mentors out to member libraries, coordinate IDS Project events and meetings.

2.1b In-kind Contributions
Member institutions will make their best effort to support the mission of the IDS Project through in-kind contributions of personnel or other resources. This includes contributing the library’s staff time and talent to IDS cooperative projects.

2.2 Member Liaisons
Each member institution will identify a liaison to the IDS Project Executive Director for coordinating that institution’s participation in the IDS Project. Liaisons are responsible for coordinating IDS Project initiatives at their institution and representing the interests of their institution to the IDS Project Executive Director. Liaisons are requested to provide contact information to the IDS Project, and to use the IDS Project Listserv, which has been established for rapid communication among all participants of the Project.

2.3 Participation in Mentor Program/Conference
All library staff members are strongly encouraged to participate in our free Mentor Program. Each library is assigned a mentor team comprised of an applications specialist and/or a technical systems specialist who travels to your library to assist in optimizing the use of OCLC, ILLiad, and the special IDS Project software. The local IDS Liaison, the Library Director, and the appropriate resource sharing staff members are also invited to attend the annual summer conference, Regional User Groups and participate in periodic conference calls and webinars.
2.4 Cooperative Accountability
Each member institution agrees to hold itself accountable for implementing and maintaining the **IDS Project’s Recommended Best Practices**. Each member institution will strive for specific turnaround time benchmarks of 48 hours for articles and 72 hours for loans. Weekends and holidays are excluded.

2.5 Quality and Accuracy
All items transmitted via the IDS Project will be prepared with due attention to high-quality reproduction and bibliographic accuracy.

2.6 Cooperative Governance
The director of each library agrees to support the cooperative governance of the IDS Project through participation in occasional advisory meetings, which are designed to guide the IDS Project’s operations and strategic initiatives. This also includes, where reasonable, your staff participating in various working groups, webinars, and the IDS Project annual conference.

**IDS Project Membership Agreement**
On behalf of my library, I am authorized to join the IDS Project and agree to abide by the terms above.

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Please return a signed copy via email, fax, or mail to:

Mark Sullivan, IDS Project Executive Director  
Milne Library  
1 College Circle  
Geneseo, NY 14454  
Phone: 585-245-5172  
Fax: 585-245-5769  
sullivm@geneseo.edu
Appendix C: Teams

The IDS Project Administrative Team is composed of seven members, including the IDS Project Executive Director, the IDS Project Executive Director’s Assistant, the Coordinator of Mentors and Training, the Coordinator of Regional User Groups, the Chair of the Technology Development Team, the Case Studies & User Experiences Coordinator and one SUNY OLIS representative. This team meets virtually on a weekly basis to share updates on current initiatives and plan for future initiatives.

The Mentors Team is led by the Coordinator of Mentors and Training. Currently the IDS Project has nine mentors that specialize in either Interlibrary Loan or Information Technology. Mentors are responsible for providing best practices training to new and current member libraries. This team meets on an as needed basis, as well as during the Regional User Group meetings and the annual IDS Project Conference.

The Regional User Groups Team is led by the Coordinator of Regional User Groups. There are three Regional User Groups in New York State, each with its own chair and secretary. Agendas for each quarterly meeting are assembled by the Coordinator of Regional User Groups and chairs and secretaries from all regions.

The Technology Development Team (TDT) is composed of six members including a chairperson, and meets in-person on a quarterly basis and virtually on a monthly basis. The TDT is responsible for maintaining IDS Search, creating new ILLiad™ Addons, and finding new ways to connect users to information and resources.

The Proof of Concept Team is composed of eight members and meets on a quarterly basis. This team is currently exploring a centralized ILL service to reduce costs and labor associated with ILL at smaller libraries by utilizing the distributed capabilities of ILLiad™.

The Best Practices Toolkit Team is composed of two members that meet to assemble and update the Best Practices Workflow Toolkit. This team meets on an as needed basis as updates are made to ILLiad™ software and new Best Practices are discovered.

The ALIAS Licensing Team is composed of two administrative members and approximately thirty volunteer librarians that come together once a year to update the ALIAS Licensing Database. This database is queried to perform unmediated article request processing by checking licensing policies, creating a lender string, and sending article requests straight to OCLC®.

The Resource Sharing Advisory Committee is a new committee that will focus on the needs of the day-to-day user of ILLiad™ and Interlibrary Loan.

The Conference Planning Team includes members of the IDS Project Administrative Team and volunteer staff members from IDS Project libraries. The Conference Planning Team is responsible for maintaining conference registration, website management, programming, marketing, on-site visits, contacting vendors, securing keynote speakers, administering the conference, and collecting assessment data of conference outcomes.

The IDS Project Council is composed of fourteen administrators that represent sectors of IDS membership (public and private institutions along with consortia partners) that provide the IDS Project Executive Director with advice on sustainability and questions regarding ongoing
missions that are a natural result of the growth of the Project. Council meetings are held bi-
annually and chaired by the IDS Project Executive Director.

Appendix D: Mentor Program

Site visit checklist for ________________________________ Date: ________________

Opening Briefing

☐ Introduce yourself & explain the mentoring process
☐ Briefly explain the IDS Project, if needed
☐ Gauge expectations for the day
☐ Prompt for questions/comments

Workflow Tour & Needs Assessment

Systems Assessment

☐ What version of ILLiad are they currently using?
☐ Does OCLC or Atlas host their ILLiad?
☐ Which ILS is the library using (i.e. Aleph)?
☐ Which link resolver is the library using (i.e. Serials Solutions)?
☐ Has the library uploaded their print holdings to their link resolver?

Lending Assessment

☐ Has the library activated the lending module in ILLiad?
  ☐ If yes, is the library using it exclusively for lending requests?
  ☐ If no, propose Atlas Systems lending implementation training
☐ Does the library use Docline?
  ☐ If yes, is the library using it within ILLiad?
☐ Has the library implemented any custom queues for lending?
  ☐ If yes, what are they for? Are they efficient?
  ☐ Would creating any custom queues simplify their workflow?
☐ Has the library created any routing rules for lending?
  ☐ If yes, what are they for? Are they efficient?
  ☐ Are there any routing rules that could simplify their workflow?
☐ Has the library created any email routing for lending?
  ☐ If yes, what are they for? Are they efficient?
  ☐ Are there any email routings that could simplify their workflow?
☐ Has the library customized their printing?
  ☐ If yes, review their templates and see if they need to skip unused templates
  ☐ Are they interested in changing them? If so, review the Workflow Toolkit’s
☐ Does the library lend articles electronically?
  ☐ If yes, do they use Odyssey, Odyssey Helper, and/or Ariel?
  ☐ If no, propose Atlas Systems Odyssey training
  ☐ Do they lend from their electronic journals?
Borrowing Assessment

- Would the library benefit from using any ILLiad 8 Addons?
- Does the library use IFM and/or Billing Manager?

- Has the library activated the borrowing module in ILLiad?
  - If yes, is the library using it exclusively for borrowing requests?
  - If no, propose Atlas Systems borrowing implementation training

- Has the library implemented the ILLiad web pages?
  - If yes, are they using OpenURL with their databases and/or link resolver?
  - If no, propose Atlas Systems web page implementation training

- Does the library use Docline?
  - If yes, is the library using it within ILLiad?

- Does the library use RapidILL?
  - If yes, do they use the ILLiad Rapid Manager?
  - Do they want to send requests to RapidILL or ALIAS first?

- Does the library use the Z39.50 feature to search their catalog in ILLiad?

- Does the library use the Copyright Clearance module?
  - If yes, is their workflow efficient?
  - Does the library use the “Older than Rule of 5” routing rule?

- Has the library implemented any custom queues for borrowing?
  - If yes, what are they for? Are they efficient?
  - Would creating any custom queues simplify their workflow?

- Has the library created any routing rules for borrowing?
  - If yes, what are they for? Are they efficient?
  - Are there any routing rules that could simplify their workflow?

- Has the library created any email routing for borrowing?
  - If yes, what are they for? Are they efficient?
  - Are there any email routings that could simplify their workflow?

- Has the library customized their printing?
  - If yes, review their templates and see if they need to skip unused templates
  - Are they interested in changing them? If so, review the Workflow Toolkit’s

- Does the library use Odyssey for electronic delivery?
  - If yes, have they turned on Trusted Sender for all libraries?
  - Do they use Ariel? If so, are they importing files into Odyssey?
  - Is the library scanning articles received by fax or mail?

- Would the library benefit from using any ILLiad 8 Addons?
- Does the library use IFM?

Debriefing

- Review your assessment with the library
- Propose next steps for implementation
- Develop an implementation schedule and set target completion date
- Prompt for questions
Systems Checklist

Lending

☐ Ensure that OPAC is properly configured in Z39.50 (for SUNY, see Aleph instructions at http://tinyurl.com/Z39-ALEPH)

☐ Turn off OdysseyReminder in the Customization Manager (http://workflowtoolkit.wordpress.com/lending-workflow/odysseyreminder/)

☐ Turn on CopyTitleToClipboard in the Customization Manager (http://workflowtoolkit.wordpress.com/copytitletoclipboard/)

☐ Adjust the PrintDocumentsPath to ensure that templates open automatically, if necessary (http://workflowtoolkit.wordpress.com/printdocumentspath/).

Borrowing

☐ Set OdysseyAutoElecDel (aka Trusted Sender) to Always in the Customization Manager (http://workflowtoolkit.wordpress.com/borrowing-workflow/odysseyautoelecdel/)

☐ Configure AutoBackgroundSearchOrder in the Customization Manager (http://workflowtoolkit.wordpress.com/borrowing-workflow/autobackgroundsearchorder/)

☐ Ensure that the OpenURLMapping & WorkFormMapping tables are properly configured in the Customization Manager to accept OpenURL requests (https://prometheus.atlas-sys.com/display/ILLiad/The+WorkFormMapping+Table and https://prometheus.atlas-sys.com/display/illiad8/Installing+OpenURL)

☐ Implement Direct Request (http://workflowtoolkit.wordpress.com/borrowing-workflow/direct-request/)

Statistics

☐ Link ILLiad to Microsoft Access, if interested (https://prometheus.atlas-sys.com/display/illiad8/Linking+ILLiad+with+Microsoft+Access)

Addons

☐ Download, install, and configure desired Addons (https://prometheus.atlas-sys.com/display/ILLiadAddons/Addons+Directory)
Workflow Checklist

**Lending**

- Create Group in ILLiad called IDS Project. Add ILLiad addresses for all IDS Project members to it and set them to 'Exempt' billing category (list at http://idsproject.org).
- Set up PDF article conversion with either MyMorph or MS Document Image Writer, and Odyssey Helper (see http://workflowtoolkit.wordpress.com/lending-workflow/converting-pdf-articles-to-tiff/ and http://workflowtoolkit.wordpress.com/lending-workflow/odyssey-helper/)
- If deflection is used, ensure that the IDSZ group is exempt (configure in the OCLC Policies Directory).
- Review Workflow Toolkit routing rules and implement any if interested (http://workflowtoolkit.wordpress.com/lending-workflow/routing-rules-lending/)
- Review Workflow Toolkit email routing and implement any if interested (http://workflowtoolkit.wordpress.com/lending-workflow/email-routing-lending/)

**Borrowing**

- Create the IDS Project Custom Holdings Group and place it first in Custom Holdings Paths (for current list, log into http://idsproject.org/).
- Review Workflow Toolkit routing rules and implement any if interested (http://workflowtoolkit.wordpress.com/borrowing-workflow/routing-rules-borrowing/)
- Review Workflow Toolkit email routing and implement any if interested (http://workflowtoolkit.wordpress.com/borrowing-workflow/email-routing-borrowing/)

**TPAM & Statistics**

- Distribute the TPAM guide (see Mentor Program shared files)
- Review the ILLiad Web Reports and WCRS Stats Module (if necessary).

References


