

Slide 1

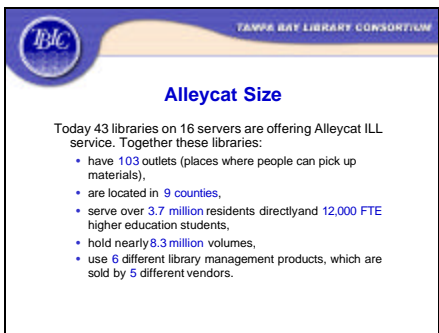


Slide 2



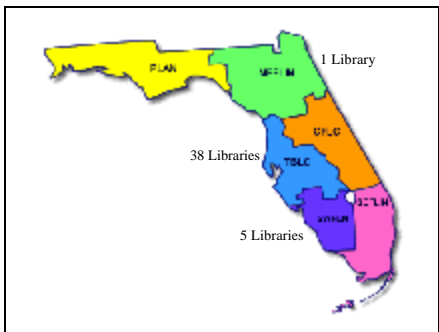
This is TBLC's Virtual Library site, which provides a gateway to 4 premium services. This project was funded with LSTA funds and is a pilot for a statewide virtual library. We started with the resource-sharing component - Alleycat in 1999. The final component – Smart Search was just recently completed in September 2003. Smart Search uses WebFeat to search both free and commercial databases. Authentication of commercial databases is done with RPA. Ask a Librarian is a joint project with the community colleges and public libraries through out the state.

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Alleycat has grown to 43 libraries with 103 outlets located in 9 counties serving over 3.7 million residents and offering nearly 8.3 million volumes.

Slide 4



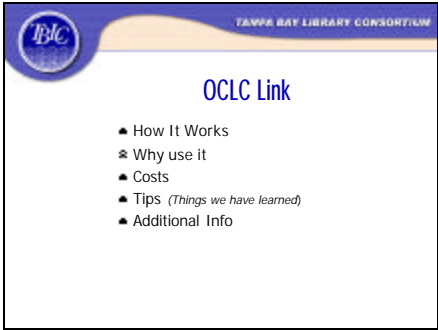
This map shows the 6 library consortiums in Florida and TBLC's service location in relation to them. Alleycat has participating libraries in both TBLC and SWFLN consortiums. By the end of the 2003 one library from the NEFLIN consortium will be joining Alleycat.

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Alleycat was possible because of the statewide delivery service structure built a couple years before hand.

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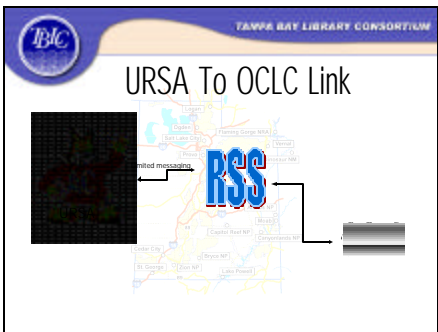
This presentation is a discussion about the OCLC link in URSA. I will talk about how it works, why some libraries use it, the cost of a request through URSA verses a traditional OCLC request, and things we have learned working with this feature.

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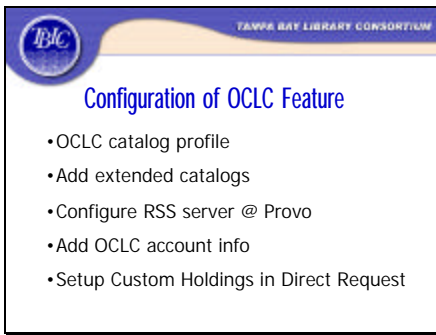
Way Cool!

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The URSA to OCLC link is made via a RSS server in Provo, Utah. The RSS server is needed as that software contains the ISO protocols required to send messages between ILL systems.

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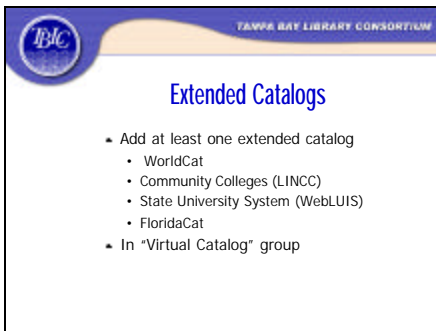


The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The title 'Configuration of OCLC Feature' is centered. Below the title is a bulleted list of five items.

- OCLC catalog profile
- Add extended catalogs
- Configure RSS server @ Provo
- Add OCLC account info
- Setup Custom Holdings in Direct Request

Dynix creates a “library profile” called OCLC in your URSA software, they also create connections for at least one extended catalog and they configure the RSS server in Provo with your library’s information. In URSA OCLC account information is added to each library profile that will be using OCLC. The Library is responsible for profiling Direct Request and setting up their Custom Holdings.

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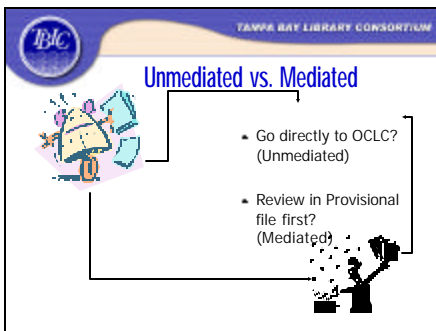


The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The title 'Extended Catalogs' is centered. Below the title is a bulleted list of items.

- Add at least one extended catalog
 - WorldCat
 - Community Colleges (LINCC)
 - State University System (WebLUIIS)
 - FloridaCat
- In “Virtual Catalog” group

In order for OCLC to become the “library of last resort” you have to search at least one extended catalog along with your local catalogs. We offer our libraries 4 catalogs in which they can select any combination. The catalogs are: WorldCat, the community colleges, the state university system and a subset of Florida Libraries from WorldCat. When a library implements the OCLC feature they choose at least one of these catalogs to be included in the main catalogs searching group. To reduce the number of hits, many of the libraries have chosen to use FloridaCat in the “Virtual Catalog” group then list WorldCat separately. This requires some instruction for the patron, so they know to search WorldCat if they don’t find what they are looking for in the ‘Virtual catalog’

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The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The title 'Unmediated vs. Mediated' is centered. Below the title is a diagram with two boxes. The left box contains an illustration of a computer monitor and keyboard. The right box contains a list of two items. A line connects the two boxes.

- Go directly to OCLC? (Unmediated)
- Review in Provisional file first? (Mediated)

Each URSA library determines if their requests will move directly to the OCLC Review file or will staff review the request in the URSA ‘Provisional’ file. After experimenting with these options, most of our libraries have chosen to review the requests before sending them onto OCLC Direct Request.

Reasons for this:

Cost - what libraries need to weigh is:

Extra staff time for Mediated mode staff are reviewing the request twice – once in URSA then again in OCLC
Is it more economically to take extra staff to look at the request before it goes to OCLC and incurs a charge?
Reduce ILL backlogs by having requests from users automatically sent

They do not want their patrons requesting certain formats of materials such as videos or they want to review what their patrons are requesting before paying the OCLC costs.

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The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The main title is 'Path of a Request to OCLC'. The content is a bulleted list:

- Create the request
 - Search strategy must contain one extended catalog
- Goes to local lenders first
- Not filled
 - Waits for sweep to occur (60 seconds)
 - **OCLC Review** file in Direct Request
 - Message returned to URSA (60 minutes)

Patron creates a request using a catalog strategy that includes at least one extended catalog such as WorldCat. If no local libraries can fill the request then it waits for the sweep utility to pickup and deliver it to Direct Request review file where it is either accepted or rejected. In either case a message is returned to URSA via the RSS server within 60 minutes.

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The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The main title is 'Messages'. The content is a numbered list:

1. "ERROR: Please return to your form (by pressing the Back button on your browser) and correct the ISBN field, which is not valid"
2. OCLC/REVIEW:8056537
Produce option in profile set to no
3. OCLC/REVIEW:8018080
No bib record numbers in request
4. OCLC/REVIEW:8056719
Held by your library

There are 7 messages that we have seen so far:

1. When a request generated by staff is sent with an invalid ISBN (by this I mean the number is wrong, the check digit does not work) and a correct OCLC number, URSA attempts to validate the ISBN before sending to OCLC. This is because OCLC matches only on ISBN. In this case it rejects the request. It has a message on the request that says "ERROR: Please return to your form (by pressing the Back button on your browser) and correct the ISBN field, which is not valid". This request never got to OCLC.

2. When OCLC finds a matching ISBN then attaches the request to a BIB in WorldCat it sends the Produce option message.

3. When a bib is sent with a blank ISBN field and has a correct OCLC number, OCLC accepts the request but with no bib matched to it and the message "No bibliographic record numbers in request." OCLC only matches on ISBN

4. OCLC has identified the item and your library owns it. Most likely it got to OCLC because your copy is in a 'not available' status.

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The slide features a blue header with the BJC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The main title is 'Messages'. The content is a numbered list:

5. Request rejected by OCLC
**ERROR: Could not connect to database:
SQL Error # 4002
(RSS server needs to be rebooted)
6. OCLC/REVIEW:8043513
No custom holdings
7. Request rejected by OCLC
This record was not returned from OCLC
within the set time limit of 60 minutes

5. There is a problem with the RSS server it needs to be rebooted

6. Could not find any lenders as profiled by your custom holdings in OCLC. Need to add lenders.

7. OCLC did not response to the RSS server within 60 minutes. You will need to check the Review File in OCLC. Chances are it is there.

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Direct Request

- Decide to submit request
- If "yes"
- Find any missing information
 - Attach to BIB
 - Add Lenders
- Add optional information
- "Produce" it

The screenshot shows a table with columns for request details and a 'Produce' button at the bottom.

When staff login to OCLC Direct Request they check the Review File. For each request they need to decide to continue with the request, if so then they Add missing information such as attaching it to a BIB record or adding lenders, add any optional information and produce it.

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Find Missing Information

The screenshot shows a search results page with a 'Search for BIB' button circled in black.

Check for missing information. This request has the message "No bibliographic record numbers in request". You must find a record that you can use. Click the "Search for BIB" button.

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Add Lenders

Add lenders by selecting the **Path** name that contains **Holding Groups**

The screenshot shows a list of holding groups with one entry circled in red.

Find a good match and add lenders using your paths, which have been pre-defined in custom holdings.

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URSA Connection - Request Number

The screenshot shows a form with a 'Request Number' field circled in red.

The URSA request number is automatically placed in the Patron ID field so it can be tracked back to the URSA request if needed. The Request is now ready to be "Produced" in OCLC.

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Complete the Cycle

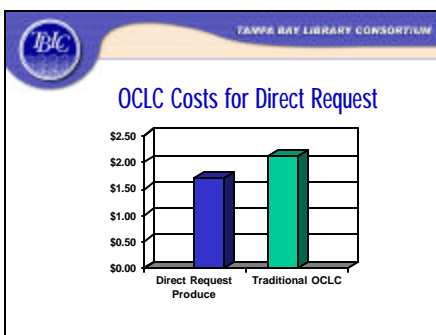
★ Receive	OCLC/URSA
★ Return	OCLC
★ Return/Complete	URSA

When the item arrives and you receive it in OCLC you can identify it as an URSA generate request by the code IPIGILL (fondly called piggy) and the Patron Id field contains the request number on the request form in OCLC. If it has this code then you also need to receive it in URSA if you want to track it or use the extended circulation feature of URSA.

To receive in URSA use the Receive External Loans option.

When the item is Returned in URSA it is automatically set to Complete status

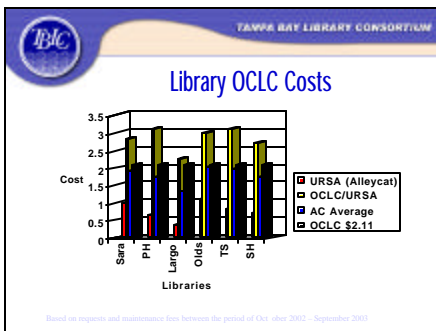
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The average OCLC cost to “produce” a request using Direct Request is \$1.69 vs. traditional OCLC at \$2.11 is shown here.

Note: This cost does not include connect time. The \$2.11 is for a library classified as a full user. This is not a loaded cost.

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This chart compares the traditional OCLC cost (\$2.11) (black bar) with the cost of a request going through URSA (Alleycat – red bar). The Alleycat cost is determined by taking the URSA maintenance fee divided by the number of requests made. This cost varies from one library to another due to different maintenance costs and number of requests made. Number of requests is taken from period October 2002 – September 2003. The cost of a request going to OCLC through Alleycat is determined by dividing the annual maintenance cost for the OCLC feature by the number of request submitted to OCLC; adding the Direct Request fess (1.69 added to the Alleycat cost) and adding the average cost of an Alleycat request (red bar). The Alleycat average for a request regardless of how it is obtained (URSA or OCLC through URSA) (blue bar) is less than obtaining all requests through traditional OCLC ILL.

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The slide features a blue header with the TFLC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The main title is 'Why Use It?'. Below the title is a bulleted list of reasons for using the system.

- Patrons have one software interface for requesting and managing ILL requests
- Can use Extended Circulation feature of URSA
- Time saver for staff
- Faster Service
- Cost Savings

Since a request through URSA - OCLC cost more than a traditional OCLC request – Why use it?
Patron Empowerment – the big one
Manage all requests in same manner especially if using extended circulation
Time saver for library staff they don't have to re-key and in most cases search WorldCat for the item
Faster service provides for a smoother work flow making staff more productive thus speeding up the process
Cost savings most libraries found that with custom holdings they were saving on OCLC charges. Such as: One library using traditional OCLC discovered they were on average displaying holdings three times before attaching lenders to a request. Direct Request cut out the extra charges of displaying holdings.

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The slide features a blue header with the TFLC logo and the text 'TAMPA BAY LIBRARY CONSORTIUM'. The main title is 'Tips'. Below the title is a bulleted list of tips for using the system.

- Don't set OCLC to automatically Produce
- Change Default "Need by Date" on the RSS server to 30 days (Default is 4 days)
- May want to add OCLC number to item label
- Turned on Advance Searching – get better results for WorldCat subject searching
- Libraries with branches need to be careful when they set an item to "Not Available"
- Increase URSA default need-by date to least 45 days

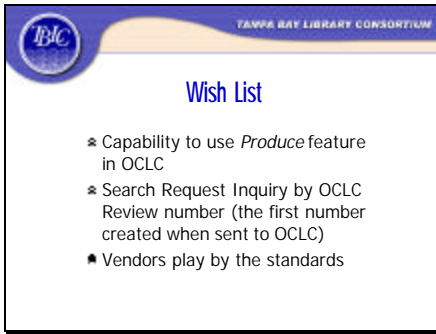
Some things that we have learned:
All requests going to OCLC Direct Request must arrive in mediated mode. At this time you cannot use the automatically "Produce" feature in OCLC.
The default "Need by date" on the RSS server is 4 days. Our libraries are changing it to 30 days. 4 days is way to short!
If you use an item label when you circulate your URSA requests you may want to add the OCLC number to it.
Advance searching for patrons was turned on so they might get better results when searching for a subject in WorldCat.
We have found a request would make its way through the local lenders without being filled then drop to OCLC only to be filled by one of the local lenders. We discovered this was happening because (in a multiple branch system) – the first branch would set it to not available. Eventually the item would end up at OCLC where the other branches in the system would get a chance to fill the request. Branches within a system need to make sure they are the last branch who will not supply the item before setting it to Not Available in URSA.
Increase URSA default need-by date to at least 45 days.

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Set up Direct Request profile making sure the "Produced" option is set to NO
Add custom holdings. In custom holdings you create Holding groups such as:
FREELOC Libraries in your local area
FREEREG Libraries in your region
FREEOTH All other libraries
Then create different path names for different situations such as:
Books, av, genealogy, etc. which include selected holding groups
Most libraries will use the default record for the Constant Data. Our libraries only changed the Need by Date in the default constant record.

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We have identified several issues that we think would improve the product.

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I have created a project website where you are welcome to visit.
Our project website has the Workflow Instructions that we give our libraries when we train them along with other information about the project.

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Slide 27 features a header with the Tampa Bay Library Consortium logo and name. The main content is titled "Additional Info" and lists four items:

- ✦ Project website <http://tvlc.org/aal>
- ✦ Allevcat at <http://allevcat.tvlc.org>
- ✦ OCLC Direct Request <http://illweb.oclc.org>
- ✦ OCLC <http://www.oclc.org>

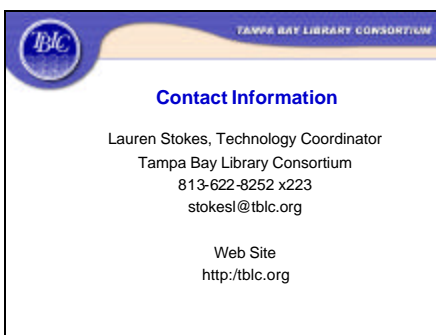
Our project website has the Workflow Instructions that we give our libraries when we train them along with other information about the project.

If you want to try our extended catalog searching go to Allevcat and login using "Guest" for both the library and barcode. Perform a search using "Virtual Catalog"

The illweb URL is the one you use to access Direct Request for management of requests sent by URSA

The last URL gives general information about OCLC.

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Slide 28 features a header with the Tampa Bay Library Consortium logo and name. The main content is titled "Contact Information" and lists the following details:

Lauren Stokes, Technology Coordinator
Tampa Bay Library Consortium
813-622-8252 x223
stokesl@tvlc.org

Web Site
<http://tvlc.org>

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Slide 29 features a header with the Tampa Bay Library Consortium logo and name. The main content is a large black square with the text "Questions?" centered below it.