

rails

Overlay Project Environmental Scan

RAILS Consortia Committee Meeting

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Scope of Work

- Identify overlay products currently in production
- Interview consortia using them to determine level of satisfaction with product
- Follow-up as needed with vendor representatives



Consortia Considered

Consortium	Products	Decision
EZ Borrow	Relais ILL	Yes
MARINA	Relais D2D	Yes
MassVC	Auto-Graphics	Yes
JerseyCAT	Auto-Graphics	No, legacy
MelCat	INN-Reach	Yes
Colorado Alliance	INN-Reach	Yes, using Encore too
Maine InfoNet	INN-Reach	No, ILSs limited
OhioLINK	INN-Reach	No, all Millennium
Minitex	VDX and Z-Portal	Legacy
Texshare	OCLC Worldcat Resource Sharing	Yes
LOUIS	Shared ILS	Not using overlay
Orbis Cascade	Shared ILS	Not using overlay

INN-Reach

Innovative Interfaces

Innovative



Innovative Interfaces, Inc.

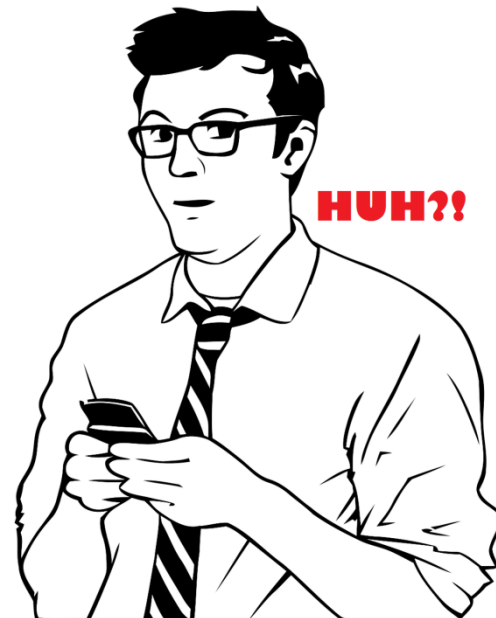
- In library software market for 35 years
- Focusing development efforts on ILS (Millennium → Sierra) and discovery products
- Discovery layer product: Encore
- Lots of other products

INN-Reach

- In production since 1997
- Physical union catalog
- Designed for libraries running Innovative's ILS
 - proprietary interface to Millennium and Sierra
 - very streamlined workflows
- Use DCB server for non-Innovative libraries
 - transactions managed on DCB
 - holdings batch uploaded (not real-time)
 - NCIP support reduces workload

NCIP reduces workload? So....

WHAT IS NCIP?



NISO Circulation Interchange Protocol (NCIP)

- It's a "protocol" also known as Z39.83
- Addresses the need for interoperability among disparate circulation, interlibrary loan, self-service, and related applications
- Used mostly in resource sharing applications, and some self-service
- Overlaps with SIP2

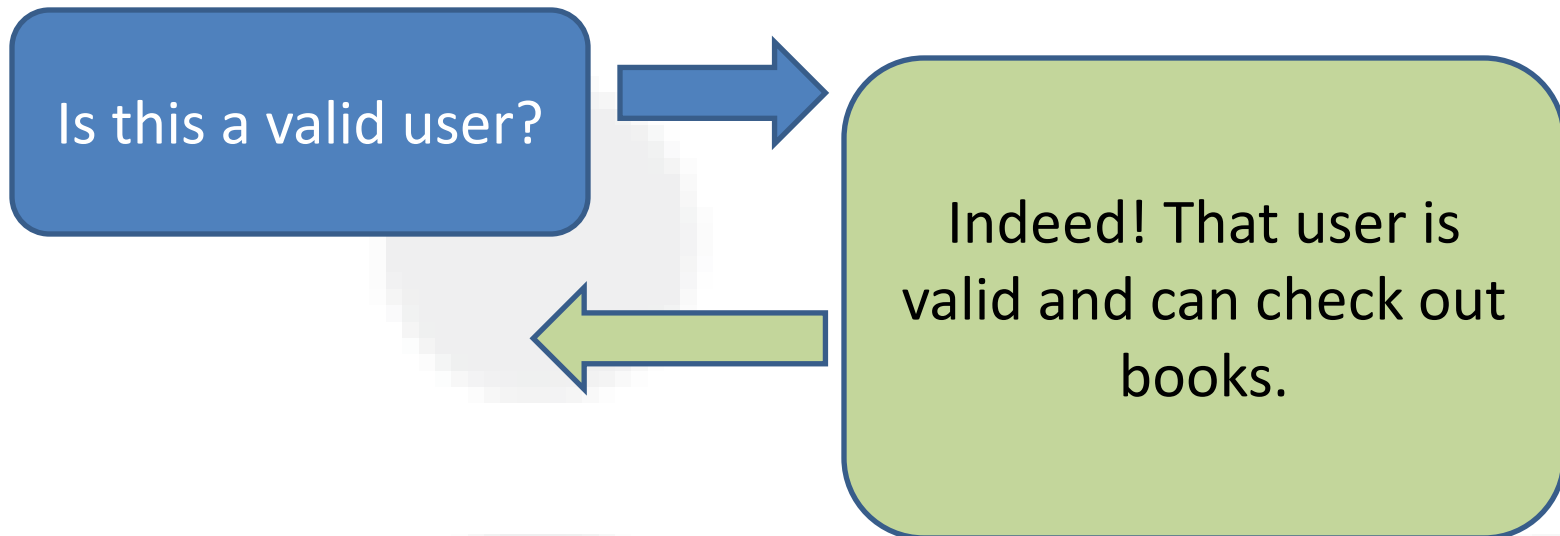
Components of NCIP

Initiator (RSS)

Resource sharing product is responsible for initiating all communications with ILS

Responder (ILS)

ILS just responds to the requests from initiator





NCIP Core Resource Sharing Services (messages)

- CheckInItem*
- CheckOutItem*
- LookupItem*
- LookupUser*
- RenewItem*
- AcceptItem
- CancelRequestItem
- RecallItem
- RequestItem

* Also Self Service Core Service



How Does NCIP Reduce Workload?

- Eliminates the need for staff to create a temporary patron record in ILS in order to circulate an item to an unknown user
- Eliminates the need for staff to create a temporary bib record for a borrowed item
- Provides more info about each (since manually created records can be very skimpy)
- Cleans up after itself (sometimes)



Experience of Consortia Using INN-Reach

Colorado Alliance

MelCat



“What INN-Reach does, it does well,
but don’t expect it to do anything
else.”



INN
REAL LIFE

The text "INN REAL LIFE" is displayed in a stylized, hand-painted font. The word "INN" is in black, while "REAL LIFE" is in various colors: blue, green, red, yellow, green, orange, and pink. The letters have a distressed, splattered appearance with white paint splatters and brush strokes around them.

Innovative Libraries and INN-Reach

- Excellent integration and workflow via proprietary integration
- Staff interface is closely integrated for both resource sharing and ILS management (e.g. one Pull List)
- Holdings available in union catalog automatically and in real time
- Circulation policies set at system level

INN-Reach and non-Innovative Libraries

- Requires a DCB server between INN-Reach and ILS
- Holdings uploaded to DCB server in batches (e.g. daily) so data in union catalog not real-time
- Some transactions must be managed on DCB (e.g. paging slips, receive items)
- DCB via NCIP can reduce workload (e.g. check out, return item)
- Circulation policies set at system level

INN-Reach / ILS Integration

NCIP:

- Agent Verso
- Evergreen
- Polaris
- SD Symphony
- TLC CARL
- TLC Library.Solution
- VTLS Virtua (testing)

No NCIP:

- Ex Libris Aleph
- Ex Libris Alma
- Ex Libris Voyager
- OCLC WMS
- SD Horizon
- SD Voyager

RelaisD2D

Relais International



Relais International

- Resource sharing primary focus of company
- Committed to standards
- Small company
- Use open source products (e.g. MasterKey)
- Canadian

RelaisD2D

- ILS agnostic
- Uses Z39.50 to get holdings from other libraries
 - OCLC WMS has no Z39.50 interface so incompatible (for now)
 - Can create inconsistencies depending on Z39.50 server configuration and bandwidth issues
- IndexData's MasterKey can be used to augment a decent discovery interface for patrons
- Library flexibility in circulation policies



Experience of Consortia using RelaisD2D

EZ Borrow

MARINA



IN
REAL LIFE

“WE DIDN'T HAVE TO DO A THING”

Equally Positive Experience for All

- NCIP interfaces developed for virtually all ILS products so experience is the same for everyone
- Though a small company, development seems to happen as fast as bigger companies
- Good customer service and support

Relais / ILS Integration

NCIP:

- Ex Libris Aleph
- Ex Libris Alma
- Ex Libris Voyager
- III Millennium*
- Polaris
- SD Horizon*
- SD Symphony*
- TLC CARL
- TLC Library.Solution

No NCIP:

- Evergreen
- Koha
- OCLC WMS
- VTLS Virtua

* Doesn't support "RequestItem"

SHAREit

Auto-Graphics



Auto-Graphics

- Long history in resource sharing
- Also have an ILS (Agent Verso)
- Seem to be in a building year....

SHAREit

- Legacy resource sharing product is Auto-Graphics Resource Sharing
- All in-production systems are running their legacy resource-sharing product
 - except possibly Mississippi Library Commission
- New user interface built onHTML5
- Very flexible about policies for each library



Experience of Consortia Using SHAREit

MassVC



**“IF THE PRODUCT WORKED LIKE
THEY SAID IT WORKED, IT WOULD
BE GOOD. BUT IT DOES NOT.”**



Things are Rocky

- Project management hasn't gone well
- Development process has been very slow
- MassVC developed their own NCIP interface for Voyager
 - Ex Libris wouldn't do it (end-of-life product)
- HTML5 interface not usable yet
- Hope to bring some libraries on to system this summer

SHAREit / ILS Integration

NCIP:

- Evergreen (in development)
- Koha (in development)
- Polaris
- SD Symphony
- TLC Library.Solution

No NCIP:

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Worldcat Navigator

OCLC



OCLC[®]

*The world's libraries.
Connected.™*

OCLC

- Company has many irons in the fire related to resource sharing:
 - Worldcat Resource Sharing
 - ILLiad
 - Worldcat Local
 - Worldcat.org
- Not even in the fire yet:
 - Worldshare ILL
 - WMS for Groups

Navigator is Consortial Solution

- Only *in-production* resource sharing product designed for consortia is Navigator
- ILL Products:
 - Worldshare ILL is replacement product for Worldcat Resource Sharing
 - FirstSearch → WMS platform
 - ILLiad unchanged
 - High volume ILL

Navigator

- WorldCat Local acts as the discovery interface
- Scoping within product is excellent (the Worldcat advantage)
- ILS agnostic, standards-based
- Good support for NCIP
- Requires library to keep records in Worldcat



Experience of Consortia Using Navigator

Texshare





IT'S FINE. WHATEVER.

Functional

- TexShare mediates most of their requests so patrons don't use Worldcat Local
 - their choice, not a requirement of software
- NCIP reduces some work, but
 - doesn't clean up temporary records so each ILS have a different batch process it runs
 - TLC Library.Solutions doesn't have an NCIP interface so everything handled manually

Navigator / ILS Integration

NCIP:

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- Ex Libris Voyager
- Polaris
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No NCIP:

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In-production

Overlay Product Scorecard

	Company	Standards	Development Activity	Staff Workflow	Configuration Flexibility
INN Reach	Excellent (big)	There are issues	Not so much	Great for Innovative. Less so for other ILSs	Poor
RelaisD2D	Excellent (small)	Excellent	Good	Good	Good
SHAREit	Not good right now	To be determined	To be determined	To be determined	To be determined
Navigator	Excellent (huge)	Excellent	Excellent	Okay	Poor

Alternatives to Overlay Approach

Or “The Thing About NCIP...”

If you'll just learn
to expect a lot less,
you won't be nearly
as disappointed
all the time.



ROTTEN&CARDS USER
CARD

NCIP SUPPORT MATRIX	INITIATORS			
	Relais	A-G ShareIt	III INN-Reach	OCLC Navigator
RESPONDERS				
Evergreen		In development	NCIP 1.0	
Ex Libris Aleph	NCIP 1.0			
Ex Libris Alma	NCIP 2.0			NCIP 1.0
Ex Libris Voyager	NCIP 1.0			NCIP 2.0 as of 8.2
III Millennium	NCIP 2.0 but doesn't support RequestItem			
III Sierra				
Koha		In development		
OCLC WMS				
Polaris	NCIP 1.0	NCIP 1.0	NCIP 1.0	NCIP 1.0
SD Horizon	NCIP 1.0 but doesn't support RequestItem			
SD Symphony	NCIP 1.0 but doesn't support RequestItem	NCIP 1.0	NCIP 1.0	
TLC CARL	NCIP 1.0		NCIP 1.0	Testing
TLC Library.Solution	NCIP 1.0	NCIP 1.0	NCIP 1.0	NCIP 1.0
VTLS Virtua	Testing			

Shared ILS and New Service Platforms

- New service platforms changing the landscape
- May be an opportunity to think differently about what a “shared ILS” really means
- Orbis Cascade chose Alma...why?



Reconsider Role of Consortia/Networks/LLSAPS?

- Could role of consortia within RAILS change?
- If not providing shared ILS services, what else might they offer?
- Is funding model of LLSAPs tying your hands?
Can that change?



ILS Designed for Consortia

- Evergreen designed specifically for consortia
- Offers more flexibility locally
- But/And.....open source
- But....not a “new service platform”



WMS for Groups



- Intriguing new product from OCLC
- Not yet in production....
- Designed on the assumption that “libraries want to run their own ILS but they want to share”
- Separate datasets, funds, policies but “Group Aware”
- Even definition of “groups” is defined by each library

Limitations of NCIP

- NCIP interfaces aren't very standard
- At best, NCIP only eliminates some steps for staff
 - Limited by the Initiator/Responder division of labor adopted by ILS/RS products
 - Still have to “receive” items in RS product

Fulfillment

- Just another overlay product...
- Working now with Koha, Horizon, Evergreen, Aleph, Polaris, Millennium
- Relies on SIP and NCIP support on ILS side
- Fact that it is Open Source and still in development opens an opportunity to determine functionality



Questions

Presentation

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