rails
Overlay Project Environmental Scan

RAILS Consortia Committee Meeting
Lori Bowen Ayre
December 9, 2013
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

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

HUH?!
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

Is this a valid user?

Indeed! That user is valid and can check out books.
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.”
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

<table>
<thead>
<tr>
<th>NCIP:</th>
<th>No NCIP:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Verso</td>
<td>Ex Libris Aleph</td>
</tr>
<tr>
<td>Evergreen</td>
<td>Ex Libris Alma</td>
</tr>
<tr>
<td>Polaris</td>
<td>Ex Libris Voyager</td>
</tr>
<tr>
<td>SD Symphony</td>
<td>OCLC WMS</td>
</tr>
<tr>
<td>TLC CARL</td>
<td>SD Horizon</td>
</tr>
<tr>
<td>TLC Library.Solution</td>
<td>SD Voyager</td>
</tr>
<tr>
<td>VTLS Virtua (testing)</td>
<td></td>
</tr>
</tbody>
</table>
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
“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 on HTML5
• 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:**
- Ex Libris Aleph
- Ex Libris Alma
- Ex Libris Voyager
- III Millennium
- OCLC WMS
- SD Horizon
- SD Voyager
- TLC CARL
- VTLS Virtua
Worldcat Navigator
OCLC
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

<table>
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# Overlay Product Scorecard

<table>
<thead>
<tr>
<th>Company</th>
<th>Standards</th>
<th>Development Activity</th>
<th>Staff Workflow</th>
<th>Configuration Flexibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>INN Reach</td>
<td>Excellent (big)</td>
<td>There are issues</td>
<td>Not so much</td>
<td>Great for Innovative. Less so for other ILSs</td>
</tr>
<tr>
<td>RelaisD2D</td>
<td>Excellent (small)</td>
<td>Excellent</td>
<td>Good</td>
<td>Good</td>
</tr>
<tr>
<td>SHAREit</td>
<td>Not good right now</td>
<td>To be determined</td>
<td>To be determined</td>
<td>To be determined</td>
</tr>
<tr>
<td>Navigator</td>
<td>Excellent (huge)</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Okay</td>
</tr>
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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.
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<th>INITIATORS</th>
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<tr>
<td></td>
<td>Relais</td>
</tr>
<tr>
<td>RESPONDERS</td>
<td></td>
</tr>
<tr>
<td>Evergreen</td>
<td>In development</td>
</tr>
<tr>
<td>Ex Libris Aleph</td>
<td>NCIP 1.0</td>
</tr>
<tr>
<td>Ex Libris Alma</td>
<td>NCIP 2.0</td>
</tr>
<tr>
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<td>NCIP 1.0</td>
</tr>
<tr>
<td>III Millennium</td>
<td>NCIP 2.0 but doesn't support RequestItem</td>
</tr>
<tr>
<td>III Sierra</td>
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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
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