

Sharing Breakthroughs

2017 OCLC RESOURCE SHARING
CONFERENCE

Successes & Failures of Implementing Resource Sharing Workflows & Protocols in a Consortial Environment

Stephen Patton

Chair of Systems

Indiana State University

Holli Moseman

Resource Sharing Coordinator

Indiana State University





Stephen Patton

Chair of Systems



Holli Moseman

Resource Sharing Coordinator

Agenda

- Indiana's Statewide Remote Circulation Service (SRCS)
- Library Consortium of Vigo County (LCVC)
- Consortium holdings & Z39.50
- Exploring NCIP for the consortium
- ISO ILLiad protocol at Indiana State University (ISU)
- Workflow for SRCS at Indiana State University (ISU)
- Future

SRCS

- Indiana's Statewide Remote Circulation Service
- Decentralized collaboration
 - Academic Libraries of Indiana (ALI) & State Library
- Phase 2
- SRCS uses AutoGraphics
- Indiana State University live in Lending, Nov 2016

Library Consortium of Vigo County (LCVC)

- Share Sierra and Encore : Innovative Interfaces Inc.
 - Indiana State University Library
 - Rose-Hulman Logan Library
 - Saint Mary-of-the-Woods Rooney Library
 - Vigo County Public Library

LCVC shares bibliographic records but not item records or patron accounts. Sierra onsite hosting.

Consortium Holdings

The screenshot shows the FileZilla interface with the following details:

- Status Log:** Shows a sequence of events from connection to disconnection. A red box highlights the upload of four files: `sgb.out` (1,157,444 bytes), `v856z.out` (2,356,310 bytes), `vm0bl.out` (2,102,254 bytes), and `icbt.out` (4,172,254 bytes).
- Local Site:** Shows the local directory structure with a red box around the `4 ShareIT Loads` folder.
- Remote Site:** Shows the remote directory listing with a red box around the four files being uploaded: `vm0bl.out`, `v856z.out`, `sgb.out`, and `icbt.out`.
- Transfer Queue:** A table at the bottom shows the progress of the transfers. A red box highlights the **Successful transfers (4)** section.

Server/Local file	Remote file	Size	Priority	Time
srcs@ftp3.auto-graphics.com				
C:\Users\user name\Desktop\4	--> /sgb.out	1,157,444	Normal	7/16/2016 6:13:41 PM
C:\Users\user name\Desktop\4	--> /v856z.out	2,356,310	Normal	7/16/2016 6:13:46 PM
C:\Users\user name\Desktop\4	--> /icbt.out	4,172,254	Normal	7/16/2016 6:13:46 PM
C:\Users\user name\Desktop\4	--> /vm0bl.out	2,102,256	Normal	7/16/2016 6:13:48 PM

FTP MARC records into the SRCS / AutoGraphics database

“Remember, anything you load into this database will be considered loanable in SRCS, so don’t load anything that you don’t want to lend.” ~ SRCS administrators.



Z39.50

(This access point configuration information is provided for informational purposes only.)

How do I know which ports to open for traffic from searchers using our Z39.50 Client?

The administrators of the remote Z39.50 Server you want to search should be able to tell you. Port 210 is the standard, but some developers and vendors of Z39.50 Server software do use different ports.

Do I need to open ports for the Z39.50 Server for inbound traffic? Outbound? Or both?

Both.

Which ports should my library open for innovative staff, the public, library staff, and other related groups such as partner libraries?

Refer to the following chart for all ports that you must open in your firewall for the appropriate parties.

- Unless otherwise noted, both in-bound and out-bound access are required on the indicated port number.
- If your organization allows Secure Shell (SSH) access, Innovative requires TCP/22 - Secure Shell (SSH) access through your organization's firewall to the Millennium system(s) and SFTP access between your server and upgrade.il.com. Innovative can support the Millennium system and applications through SSH. For more information on Innovative's support access via SSH Tunneling, see the SSH (Secure Shell) FAQ.

Product (Protocol)	Port Number(s)	Public (Internet / External)	Staff/ Partners (Internal)	Innovative (External)	Other (External)
File Transfer Protocol (FTP) Port 21 is closed to inbound ftp access. Note, this does not affect outgoing traffic on port 21 such as FTP ordering.	20 and 21		X		
Secure Shell (SSH) and Secure FTP (SFTP) for full software upgrades, maintenance updates, and other system	22		X	X	

"How do I know which ports to open for traffic from searchers using our Z39.50 Client? The administrators of the remote Z39.50 Server you want to search should be able to tell you. Port 210 is the standard, but some developers and vendors of Z39.50 Server software do use different ports."

Product (Protocol)	Port Number	External	Internal
WebPAC Z39.50 Client (Z3950)	210	X	X
Z39.50 Client	211	X	X

(Network Time Protocol)					
Z39.50 Server (z3950) Primary database	210	X	X		
WebPAC Z39.50 Client (Z3950)	211 (Your library may require additional ports if your system runs multiple character sets on multiple ports.)	X	X		
Z39.50 Client (Z3950)	Any (The remote organization specifies the port; for example ports 210, 2200 and 7090 are commonly used.)		X		

Z39.50

- Email to innovative on 05-25-2016 "Based on the firewall documentation I am assuming that sierra uses TCP as the transport protocol for z3950. I tested ports 210-211 off campus with no vpn. When I attempt to test the Z3950 connection with MarcEdit I receive an error."

Database Properties

Database Properties | Advanced Properties

Name: Indiana State University

Host: .indstate.edu

Database: INNOPAC

Port: 210 Syntax: USMARC

Username:

Password:

Override pause (6 secs.)

Show Database

Save Close

Query Database:
Indiana State University

Search: global Title

Zoom Implementation exception:
A fatal error occurred in Yaz: 10004 - Connection lost

OK

Syntax:

- USMARC
- MARC21
- USMARC
- UNIMARC
- XML

192.168.99.99 Online

- SYN sent to 192.168.99.99:210
- SYN ACK received from 192.168.99.99:210
- 192.168.99.99 **210 Open TCP**
- bytes sent to 192.168.99.99:210 via UDP
- ICMP type 3 received from 192.168.99.99:210
- 192.168.99.99 210 Closed UDP

192.168.99.99 Online

- SYN sent to 192.168.99.99:211
- SYN ACK received from 192.168.99.99:211
- 192.168.99.99 **211 Open TCP**
- bytes sent to 192.168.99.99:211 via UDP
- ICMP type 3 received from 192.168.99.99:211
- 192.168.99.99 211 Closed UDP

Z39.50

- These are the server details Auto-Graphics uses to connect:

```
1 > Internal code for server: INNOPAC
2 > Display name for server: Indiana State University
3 > IP address of server: xxxxxx.indstate.edu
4 > Port: 210
```

The display name has no impact on connecting, but the other 3 elements do. There is no login required.

This is the database details:

```
01 > Code for database: INNOPAC
02 > Display name for database: Library Catalog
03 > Type of query: 1
04 > Data Format: OPAC
05 > Type Of Updating NONE
```

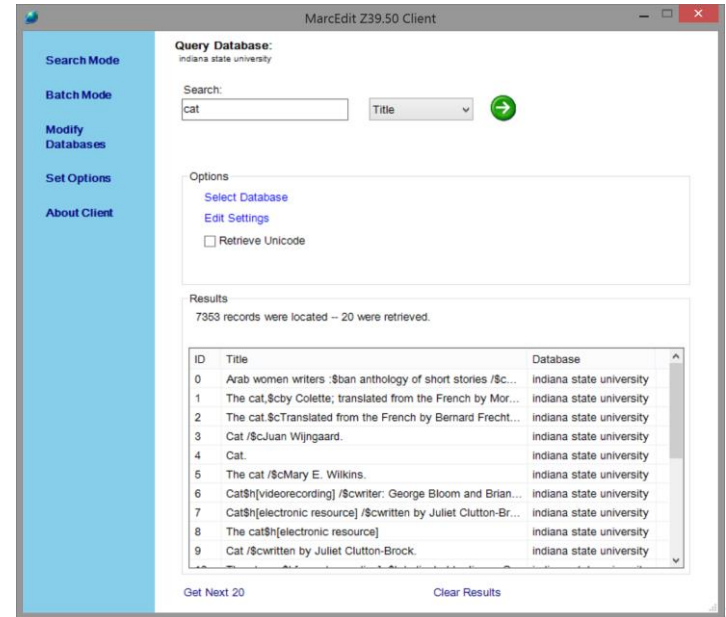
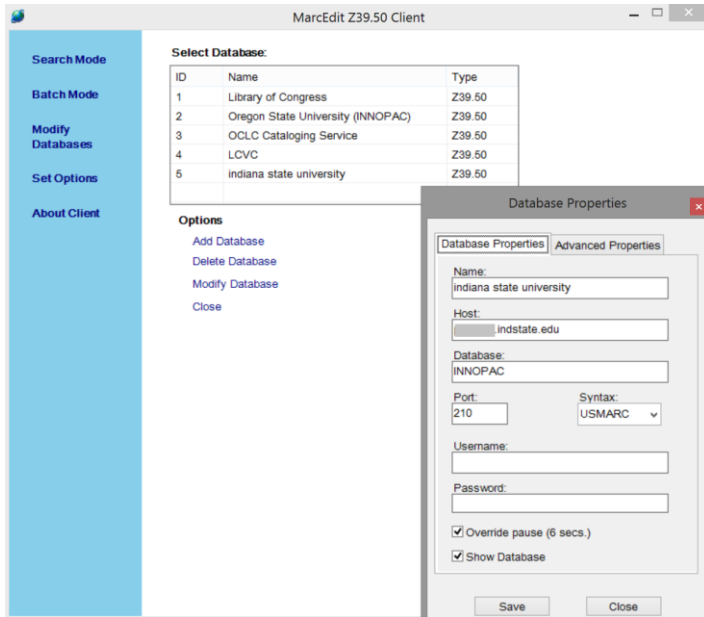
Again, the display name is not important.

There are several search attributes, here are 3:

```
7 > TITLE (t): 1:4, 2:3, 3:1, 4:1, 5:1, 6:1
8 > AUTHOR (a): 1:1003, 2:3, 3:1, 4:1, 5:1, 6:1
9 > ISBN (j): 1:7, 2:3, 3:1, 4:6, 5:1, 6:1
```

Z39.50

Successful Z39.50 connection after III's modification.



SRCS Z39.50 Search

SRCS: Statewide Remote Circulation Service

Enter search for: All

Search Terms Filters Catalogs Languages

Choose Resources - 65 Resource(s) selected

Clear All Check All

- Public Libraries
 - Anderson Public Library
 - Aurora Public Library
 - Avon-Washington Township Public Library
 - Bristol Washington Township
 - Brownsburg Public Library
 - Charlestown-Clark County Public Library
 - Delphi Public Library
 - Evergreen Indiana Libraries
 - Fairmont Public Library
 - Fayette County Public Library
 - Frankfort Clinton County Public Library
 - Fremont Public Library
 - Gosport Public Library
 - Hamilton East Public Library
 - Harrison County Public Library
 - Hartsville City Township Public Library
 - Indiana Youth Institute - Virginia Beall Ball Library
 - Jasper County Public Library
 - Jasper-Dubois County Contractual Public Library
 - Jeffersonville Township Public Library
 - La Porte County Public Library
 - Library Consortium of Vigo County - LVC
 - Marion Public Library
 - Middlebury Community Library
 - Muncie Public Library
 - Napoleon Public Library
 - New Albany Floyd County Public Library
 - New Castle-Henry County Public Library
 - Ohio Township Public Library System
 - Owen County Public Library
 - Pendleton Community Public Library
 - Porter County Public Library
 - Warsaw Community Public Library
 - Wells County Public Library
 - Westchester Public Library
- Academic Libraries
 - Anabaptist Mennonite Biblical Seminary
 - Ball State University
 - Concordia Theological Seminary
 - Earlham College
 - Goshen College
 - Grace College & Seminary
 - Indiana University East
 - Indiana University, Jerome Hall Law Library
 - Indiana University Kokomo
 - Indiana University Lilly Medical Library
 - Indiana University Northwest
 - Indiana University Purdue University Columbus
 - Indiana University Purdue University Fort Wayne
 - Indiana University School of Dentistry
 - Indiana University South Bend
 - Indiana University Southeast Library
 - Indiana Wesleyan University
 - IUPUI University Library
 - Ivy Tech Community College Libraries
 - Marian University
 - Taylor University
 - University of Evansville
 - University of Indianapolis
 - University of Notre Dame
 - University of Southern Indiana
 - Valparaiso University
 - Vincennes University
 - Washburn College
- Union Database
 - SRCS Union Catalog
- In Process
 - Chubbuck Public Library
 - Fairmont Public Library
 - Harrison College
 - Huntington University
 - Oakland City University (Barger Richardson LRC)
 - Purdue University Libraries
 - Putnam County Public Library
 - Rushville Public Library
 - Salem-Washington Township Public Library
 - Sullivan County Public Library
 - Tipkett County Public Library
 - University of Saint Francis
 - Wakarusa Olive, Harrison Township Public Library

SRCS: Statewide Remote Circulation Service

dog

Page 1 of 58,888 Total Results for: dog

20 per page | Sort by Relevance | Modify Search

33% Returned 23 of 65 Resources

Format

- Audio CD (179)
- Book (3483)
- DVD (76)
- eBook (76)
- Government Publication (20)
- LARGE Print (99)
- Mixed CD (13)
- Sound Recording (199)
- Videocassette (52)
- Visual Materials (200)

Show More

Subject

Author

Title

Language

Date

Expand Your Search

Subject

- Dogs
- Fiction
- Juvenile fiction
- Juvenile literature
- Monkey fiction
- Cats
- Human-animal relation
- United States
- Pets
- Friendship

Author

Title

20 per page | Sort by Relevance | Modify Search

DOG

Dog man

Dog-eared. Harvey, Amanda

Dog tags. Rosenthal, David

Dog tales. Flory, Betsy

Dog

Dog-eared. Harvey, Amanda

Dog tags. Rosenthal, David

Dog tales. Flory, Betsy

Lucky dog lessons : train your dog in 7 days

Daniel's dog

Dog biscuit

Dog Blue

Lucky dog lessons : train your dog in 7 days. McMillan, Brandon

Daniel's dog. Bogert, Jo Ellen

Dog biscuit. Cooper, Helen

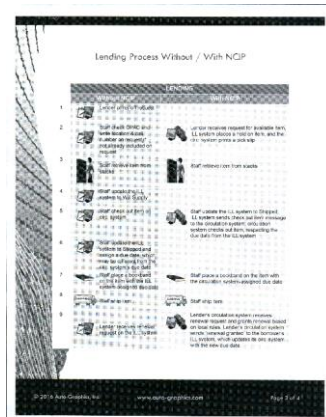
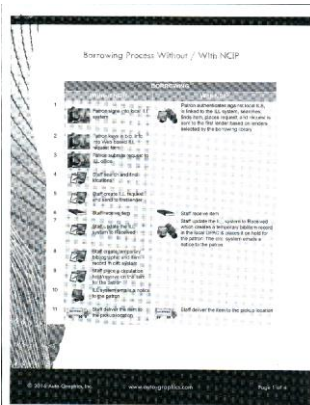
Dog Blue. Dunbar, Patsy

Dog Comp O'Donnell, F

Z39.50 Search Resources

Exploring NCIP for the Consortium

- NCIP: NISO Circulation Interchange Protocol
 - (National Information Standards Organization)
- SRCS training advocated for NCIP

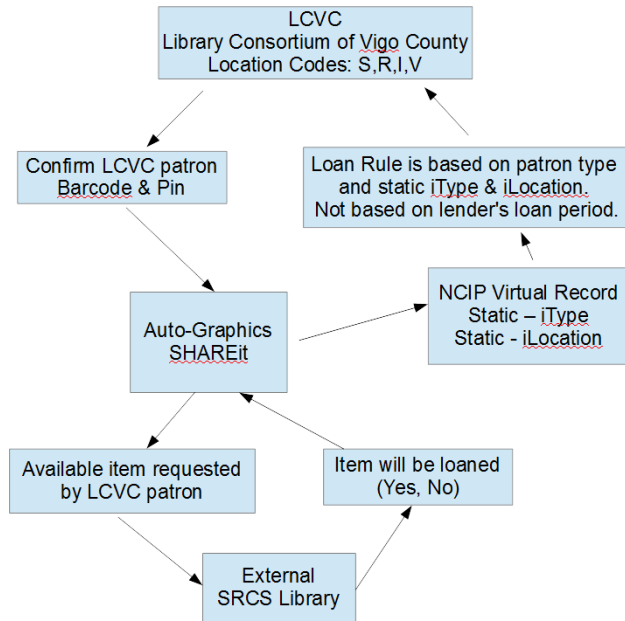


Exploring NCIP for the LCVC Consortium

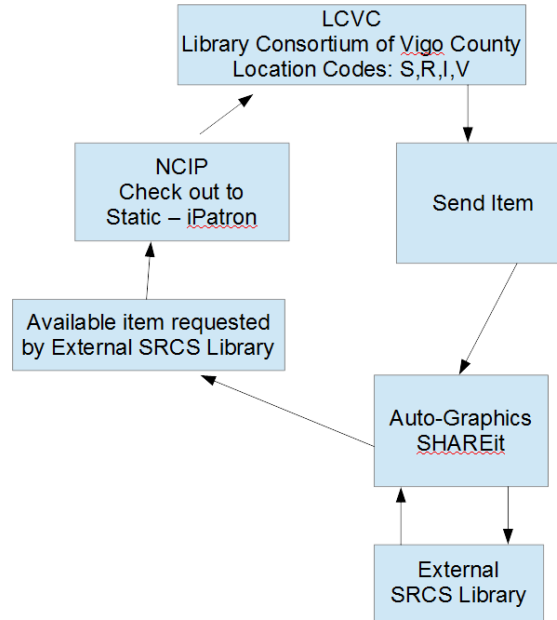
- LCVC decides to go with NCIP
- Signed contract
- Innovative has issues with AutoGraphics
- Each library would have to buy NCIP individually
- Annual cost is significant
- The Minuteman Library Network (MLN) is a consortium

NCIP “unmediated” workflow

Borrowing



Lending



Exploring NCIP for the Consortium

- LCVC meets again
- Decides NCIP isn't worth the cost or the workflow issues
- Vigo County Public Library said
 - Borrowing won't be that high
 - Workflow isn't that much different from what they do currently
 - VCPL at present is not live

Exploring NCIP for the Consortium

- Indiana State University decided not to use NCIP
 - SRCS uses proprietary logon
 - ISU is a single logon environment
 - Patrons to place request in ILLiad
 - Involve Circulation
 - Lending is done with ISO protocol in ILLiad

ISO ILLiad protocol at ISU

- ISO protocol allows ILLiad to communicate with another program
- Integrates SRCS lending requests into ILLiad
- ISO was included in our ILLiad subscription

ISO ILLiad protocol at ISU

- Set-up with AutoGraphics
- Set-up with OCLC (ILLiad onsite hosting)
- Set-up in ILLiad Customization Manager
- Resource sharing friends
- Error messages and technical support

ILLiad Customization Manager

ISOReturnIPAddress [ILL]

Settings

Key Value: 1611

Description: Address of Database

Value Changed From	Value Changed To	NVTGC	Changed Time	Changed By
123, 123, 123, 1611	1611	ILL	8/16/2016 10:34 AM	holi

ISOSystemID [ILL]

Settings

Key Value: OCLC:ISU

Description: System ID of your system

Value Changed From	Value Changed To	NVTGC	Changed Time	Changed By
ISU	OCLC:ISU	ILL	11/7/2016 4:14 PM	holi

SystemIDISOSymbol [ILL]

Settings

Key Value: OCLC:ISU

Description: Your ISO ILL symbol or what you call yourself when sending ISO requests. Normally this would match the value of ISOSystemID.

Value Changed From	Value Changed To	NVTGC	Changed Time	Changed By
OCLC:ISU	OCLC:ISU	ILL	12/14/2016 10:11 PM	holi
	OCLC:ISU	ILL	12/14/2016 12:09 PM	holi

Double-click a tracking row to revert to the previous value.

SRCS Auto-Graphics setup

External Communications

System type:

ISO ILL ▼

Transport method:

Direct connection (TCP/IP) ▼

Computer or Email Address:

Your IP address or Host Name

Computer Port No.:

1611

ISO System Code:

ISU

Code Type:

OCLC

ISO ILLiad protocol at ISU

Port 1611 (ISO return address) transmit and receive

Must use IP address not a DNS host name

Automatic check in on Auto-Graphics and ILLiad

system ID ISO symbol - OCLC:XXX

(your symbol all caps) must match

ISO system ID - OCLC:XXX (your symbol all caps)

Workflow for SRCS at ISU

SRCS request downloads into ILLiad "Awaiting ISO ILL Request Processing"

Staff uses Z39.50 to get call number/ location

Is the Borrowing Library information complete?

No

Yes

Staff logs on to SRCS and looks up library

Staff copies over library information from SRCS into ILLiad

Staff fills in shipping, billing, groups, & clicks priority shipping

Staff adds due date of 2 months & clicks "allow renewals"

Staff routes to "Awaiting Stacks Searching"

Staff/ Student prints
pull slips

Student pulls item

Student places item on
SRCS area of cart

Staff/ Student answers item:
Update Stacks Search Results

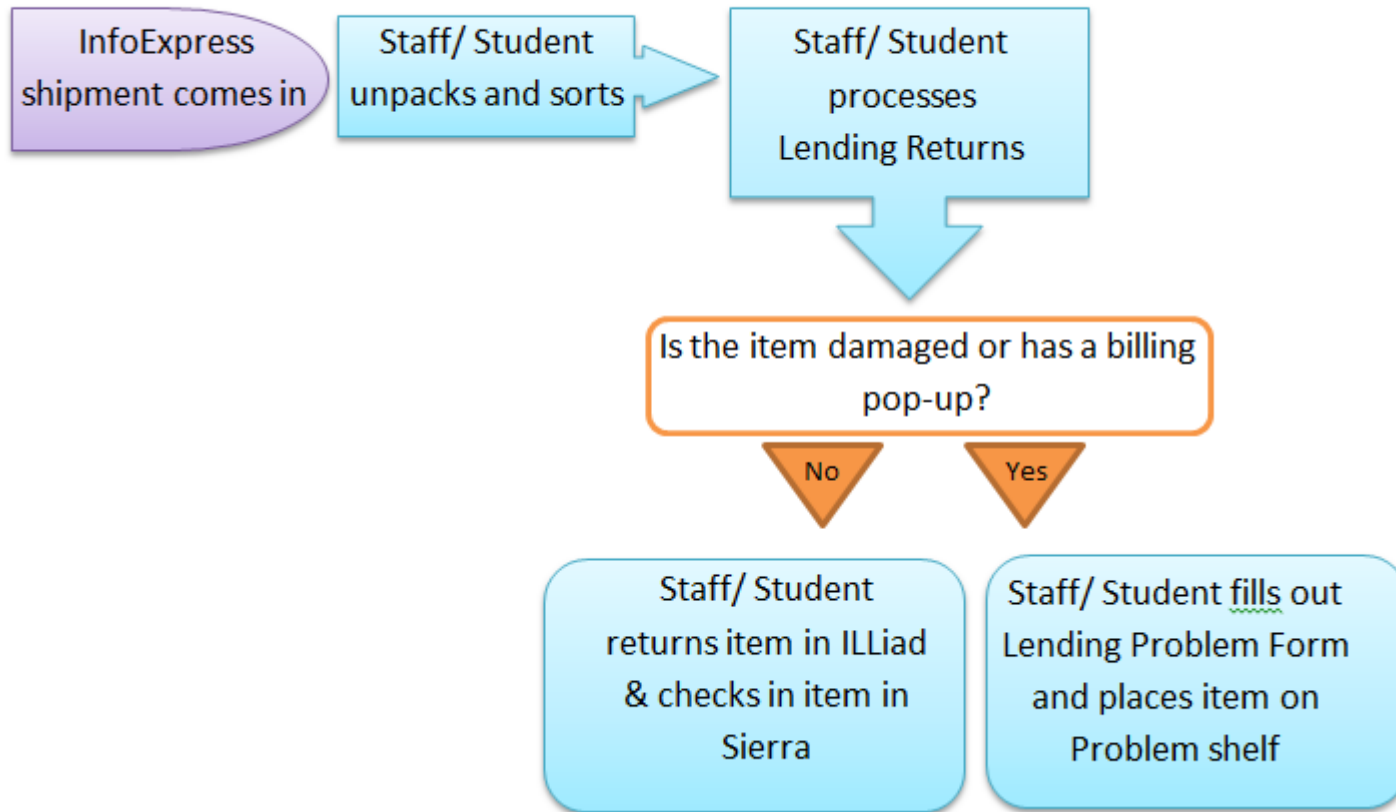
Staff/ Student confirms item is
correct, records conditions &
barcode in ILLiad

Staff/ Student checks
out item in Sierra to
ISU-L

Staff/ Student places
item on the
InfoExpress cart

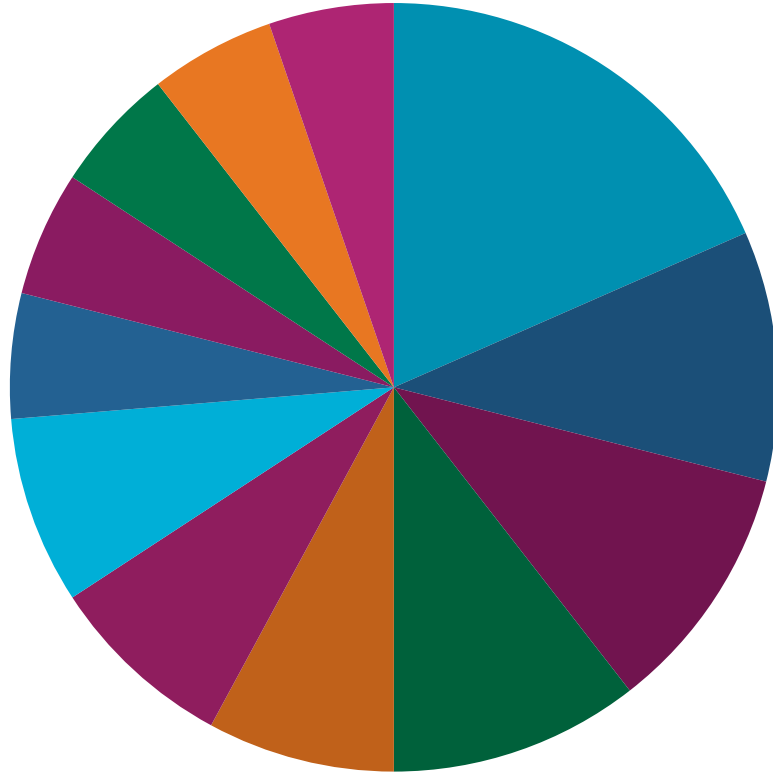
Staff/ Student processes
manifest for InfoExpress and
ships item

ISU SRCS Lending Return Workflow



ISU SRCS

West Lafayette Public Library	7
Delphi Public Library	4
Hamilton East Public Library	4
La Porte County Public Library	4
Charlestown Clark County Public Library	3
Goshen Public Library	3
New Albany-Floyd County Public Library	3
Alexandrian Public Library	2
Ball State University	2
Middlebury Community Public Library	2
Peabody Public Library	2
Porter County Public Library System	2
	38



- West Lafayette Public Library
- Delphi Public Library
- Hamilton East Public Library
- La Porte County Public Library
- Charlestown Clark County Public Library
- Goshen Public Library
- New Albany-Floyd County Public Library
- Alexandrian Public Library
- Ball State University
- Middlebury Community Public Library

Future of SRCS

- ISU and staff borrowing summer 2017
- ISU begin talking about SRCS as a database
 - How will ISU use it ?
 - Will it be added to Database List?
 - Will it be added to Teaching?
- Encourage the rest of LCVC to participate

Special Thanks

- Pam Childers & Alison Johnson
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- Stephanie Frederick
 - Valparaiso University
- The Minuteman Library Network (MLN) consortium

Questions?

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thank you

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INDIANA STATE UNIVERSITY

Stephen.Patton@indstate.edu

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Holli.Moseman@indstate.edu