Innovative Integration

IUG2017

ILLiad, NCIP, Navigator

GOAL

Items borrowed from other libraries need to be included in our OPAC. This benefits patrons who need to see what they have on-hold and checked out. Our Circulation Staff needs to ensure that borrowed items are returned on time. Including ILL items has proven cumbersome in the past and we needed an error-free way of integrating borrowed ILLiad, and WorldCat Navigator with our Sierra system.

Previous Attempts

- Manual – in 1995 we expanded ILL. Print request forms were used which were manually input into our database and OCLC. When an ILL book was received brief bibliographic and item records were keyed into Millennium. These were booked for the requester and notification was sent separately. This process was time-consuming and error prone. Delivery to the patron was delayed because of so many manual steps.
- ZAP – After the 2004 ARL study for ILL performance we learned that a key factor to fast turnaround was putting the request into OCLC's Direct Request queue. We modified our web forms to work with ZAP. We continued to manually process received items. End delivery was still delayed.
- ILL Module – Innovative's ILL product received patron requests that we uploaded to OCLC. We reduced manual entry and requests were linked to a patron record. Notification was streamlined as it came from our OPAC. The down side was that errors continued to be made and items were not updated promptly.
- INN-Reach – adding LINK+ to our services reduced the number of returnables we needed to process via ILL. Data entry errors and end delivery delays persisted for ILL.
- ILLiad – with ILLiad we realized very quick processing on the OCLC side but continued with manual processing on the local side. An "AHA" came after we implemented Navigator – why not hack the ILLiad Connexion addon? Time was saved time and data errors eliminated but records remained in our OPAC confusing staff until we manually delated them.

SIP2
Standard Interchange Protocol

- We implemented OCLC's WorldCat Navigator software to support borrowing in our consortium where multiple platforms are used.
- Standard Interchange Protocol (SIP) is a proprietary standard from 3M for communication between library systems and self-service circulation terminals. It was used by OCLC for Circulation Integration for Innovative systems. III did not have NCIP at this time.
- Version 2.0, known as "SIP2", is a de facto standard for library self-service applications. The standard was the basis for the NISO Circulation Interchange Protocol (NCIP) standard which is eventually intended to replace it.
- We only needed to purchase another SIP2 license and OCLC did the scripting.
- The protocol specifies messages to check books in and out and other functions. OCLC has added coding to 'export' a bib-item combination which is suppressed as per our local record templates.
- *This method has worked fairly well for us with 2 disadvantages:*
  - Brief bib and item records remain in our system until we delate them. These do not contain useful data for analysis and we can gain more data from OCLC's statistics site.
  - Received items are not held for our patrons since III's implementation of SIP2 does not support holds.
- We were inspired to use a similar system for ILL but we needed the contemporary NCIP package to overcome these disadvantages.

NCIP

NISO Circulation Interchange Protocol is the standard for the exchange of messages between computer-based applications to enable them to perform the functions necessary to lend and borrow items. III has participated for years and with the Sierra platform they offer 4 basic messages to accomplish circulation integration.

- Accept item : requests Sierra to accept an Item to be circulated to a User. Sierra creates a virtual item (as with INN-Reach and the ILL Module) Implicitly this holds the item for the patron and the patron is notified when we produce Pick Up notices as we routinely do for INN-Reach.
- Check Out Item : requests Sierra to check out an Item to a user. We use a single patron record for all ILL Lending.
- Check In Item : requests Sierra to check in an Item. This works on both the borrowing and lending side.
- Lookup Item

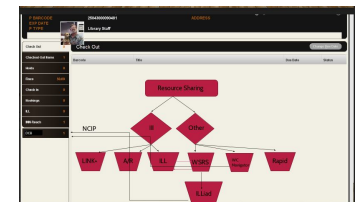We had Atlas Systems do an add-on to ILLiad that sends messages to Sierra as follows:

- Borrowing -- Check in from lending library : sends an Accept Item message and routes request to "Checked out to Patron" in Illiad.
- Borrowing – Circulation – Check In : sends a Check In Item message to Sierra and routes the request to Returned in ILLiad
- Lending – Update Stacks Search – Mark Found : sends a Check Out Item request to Sierra which charges the item to our ILL patron record and routes the request to a Shipped status
- Lending – Returns : sends a Check In Item message to Sierra and routes the request to a Complete status.

Glitches

- Innovative's implementation of NCIP requires a <RequestId> for a Check Out Item message. This is optional on other systems. Atlas added this in and all of our messages worked correctly.
- If a requested item is returned unused by the patron, we must check it out and check it in manually on Sierra in order for it to be removed from the patron record. INN-Reach has a utility to do this. We'll need to try it for ILL returns.

All Together Now

WorldCat Navigator

We have asked OCLC to change our Circulation Integration in Navigator from SIP2 to NCIP. All other ILS's with Navigator Circ Integration are using NCIP. This request is awaiting exchange of messaging information between Innovative and OCLC.

John de La Fontaine

delafo@oxy.edu