Product Description: SAVEIT; The System for Automating Vital Elements of Interlibrary Loan Transactions

by Barbara Hale (Interlibrary Loan Librarian, U. of Kentucky)

SAVEIT, an Interlibrary Loan management software program was developed by Pat Brumbaugh and Rick Gillaspie at Interlibrary Software and Services, Inc. The purpose of the software is to create local databases for storing and manipulating data gathered in Interlibrary Loan offices. SAVEIT allows Interlibrary Loan offices to easily gather both borrowing (requests sent by a library to obtain material for their patrons) and lending (requests received by a library in which they will seek to fill requests from their collection) data. The data is entered into SAVEIT in two fashions, by using the savescreen function of the OCLC ILL subsystem or through direct input from the keyboard for non-OCLC requests. Once requests are entered, updating is required to reflect the current status of the requests. Updating can occur by using SAVEIT or OCLC's Micro Enhancer Plus and exchanging the updates, depending on the method chosen.

Many statistical reports may be obtained using SAVEIT. Statistical reports can be created for any time period depending on the beginning date of stored records. In borrowing and lending, statistical reports can reflect total activity broken down by filled and unfilled requests, loans or photocopies and by transaction type (OCLC, fax, ALA, etc.). Statistics may be produced to reflect activity with a single institution, a defined group of libraries or all libraries. In borrowing, statistics may be produced for individual patrons, by status of the patron, and by the patron's department. For some statistical reports bibliographic data may also be included. These reports may be printed or saved to a diskette.

A variety of other reports may also be produced using the SAVEIT system. For borrowing, the copyright compliance report is essential. Collection management reports may be generated to send to library managers for purchase consideration. Overdue reports for both borrowing and lending may be produced. In addition to the above reports, SAVEIT allows Interlibrary Loan staff to handle the financial aspects associated with resource-sharing activity. Databases exist for both borrowing and lending. The Invoice database is a record of invoices received for material obtained and the Checks database is a record of payments for invoices generated. Invoices may be generated and printed in SAVEIT for lending transactions where billing is required.

Many of the above operations are linked to the Library database included in SAVEIT. As individual requests are generated and new libraries are used, SAVEIT will include those libraries within the database. Features within this "LIBS" database allow for the defining of groups (for statistical reports), billing information and policies and procedures. The current version of SAVEIT (version 2) may be used in a LAN environment or in a single workstation arrangement.

The following hardware and software requirements are necessary for the effective use of SAVEIT: IBM-PC or 100% IBM-compatible PC; 530K of available memory to install SAVEIT; 570K of available memory to run SAVEIT; Hard disk with 20-40 megabytes available (for smaller libraries); Hard disk with 40-80 megabytes available (for larger libraries); [Calculate the hard disk space needed by planning for approximately 10 megabytes of space to manage every 5,000 records.]; Internal clock on the PC (or enter the time and date at DOS prompt or at the Micro Enhancer prompt); SAVEIT supports most dot matrix printers and some laser printers; DOS 3.3 or higher (although the producers cannot guarantee SAVEIT's ability to run under DOS versions higher than 5.0).

Technical support is available through a printed manual, User support at 1-800-572-4252 or e-mail to <SAVEIT@ill.com> or via the listserv <SAVEIT-L@Lehigh.edu> dedicated to SAVEIT operations and concerns. The producers are currently working on a newer version of SAVEIT to include many new enhancements. Suggested enhancements are welcomed. Send email to <SAVEIT@ill.com> or write: Interlibrary Software and Services, Inc., P.O. Box 12237, Research Triangle Park, North Carolina 27709. Please contact the offices for a current price quote on the software.

One Library's Response —

SAVEIT in operation at the Interlibrary Loan Unit of the University of Kentucky's M.I. King Library

by Barbara S. Hale (Interlibrary Loan Librarian)

The Interlibrary Loan Unit at the University of Kentucky's M.I. King Library processes approximately 58,500 requests annually, 15,500 borrowing requests received by our researchers and 43,000 requests received from other libraries. We are a staff of one librarian (reporting to the Head of Circulation), 3.5 technicians, and approximately 4 FTE of student help. There are 3 other Interlibrary Loan operations on the Lexington campus. The majority of requests acted upon in the King Library Unit are generated or received via the OCLC Interlibrary Loan subsystem. When assuming the position of Head of the Unit in 1988, I was very interested in automating many of the manual operations of the Unit. The Unit, at the time, was gathering statistics from an in-house system that was developed by the previous Interlibrary Loan Supervisors and our Computing Center staff. This method of gathering statistics required assigning a coding sheet to all new incoming requests. The coding sheet required as many as 10 elements to be filled in by writing data in boxes. At the end of each month the coding sheets were gathered and sent to our Computing Center for tabulation. Tapes (and prior to tapes, keypunch cards) would be returned from the Computing Center for the Interlibrary Loan staff to run reports. The level of activity, loss of coding sheets, and incorrect data tabulated from deciphering handwritten code sheets catapulted me into looking for a replacement method for gathering data. Very few software products were available at the time, the most complete being SAVEIT, a product developed by a practicing Interlibrary Loan Librarian, Pat Brumbaugh at Case Western Reserve University. From the very beginning I was and remain very impressed with this software and its developers.

When first installing the software my Unit had only one OCLC workstation with a 40 megabyte hard drive. Very soon after, we acquired our second OCLC workstation and separated SAVEIT borrowing and lending activity on those two workstations. Today the Unit has 4 OCLC workstations, 2 of these are 486 PC's with over 400 megabyte hard drives on which we keep our SAVEIT records, still divided by borrowing and lending activity. The Unit does not currently use SAVEIT in a LAN environment, although we may reconsider this option as our Unit recently moved to OCLC TLP Internet access. Concerns related to moving to Internet access and using SAVEIT have continued on page 84
proven negligible. Before giving up OCLC dedicated lines, our system staff helped to make this transition as smooth as possible. The Unit now uses almost all the functions available in the SAVEIT software.

In our borrowing operation, we save screens all new OCLC requests at the point of producing the records and convert them to SAVEIT records on a daily basis. Updates are also done on a daily basis, and generally by our student workers who find SAVEIT very easy to use. For borrowing, we choose to update records in SAVEIT and then exchange the data entered in SAVEIT to the Micro Enhancer. Our reasons for updating in SAVEIT are to get current and accurate information in the fewest steps. When updating in SAVEIT, we enter not only the current status, but the correct supplying library, the correct due date for loans, information related to fees for filling the request, and change copyright compliance if loans were supplied instead of copies. If this updating were done in the Micro Enhancer and exchanged with SAVEIT, we would still need to return to SAVEIT to input such things as supplying library symbol and due date. Although the majority of our borrowing work is done using OCLC, we still find the use of entering non-OCLC data very helpful. For example, one non-OCLC institution we use regularly is the UnCover service. We place orders directly with UnCover, and after placing orders enter the records into SAVEIT and update them on the receipt of the faxed articles along with all other updating. We also use SAVEIT to enter and print ALA forms when we need to mail or fax requests to libraries not using the OCLC subsystem.

In borrowing we use all of the report functions. We run copyright compliance reports on a weekly basis. We provide collection management reports to our Collection Development Unit on an “as needed” basis and one annual report. These collection reports are run by the department of the requesting patron, i.e., our selectors for history find it helpful to scan these reports looking at monograph or serial titles being requested by our researchers in the history department.

Version 2 of SAVEIT allows for the input of call numbers in the SAVEIT record so that these collection manager reports may be truly subject oriented. When reports are run by department some selectors may miss cross disciplinary research. We use the overdue report function weekly, printing overdue reports that we mail to our researchers who have kept material overdue. We also include with the mailing of this overdue our printed policy statement, highlighting the problems that could result in keeping other libraries’ material overdue. We use the Invoice database to record the receipt of all invoices we have received and sent on to our administrative offices for payment processing.

When first beginning to use SAVEIT, especially for borrowing, we learned one essential fact. Always be consistent when entering data if you want good reports. For example, we had to develop a departmental code list so that we consistently entered the same department information for our researchers for every request generated. This was especially important when generating the collection managers report compiled by the patron’s department. History, Hist. and His. could fall in three different groups when generating these reports if we chose different codes at different times.

SAVEIT also serves as a status tool for our researchers. Often they visit the Unit to inquire about requests submitted, and if they do not remember titles requested we will search under their name to retrieve their requests. If requests are in a pending status, we will login to OCLC to see if the item has been supplied or shipped.

Our biggest databases for SAVEIT reside on our Lending workstation, as we see three times as much incoming lending activity as borrowing. New OCLC requests are printed and captured into SAVEIT in the morning. During the workday the final disposition of the requests is determined and updating is done at the end of the day. When updating in lending, we do the exact opposite from borrowing. Here we choose to update in the Micro Enhancer and exchange the updates with SAVEIT. We do this for a couple of reasons. The major reason is that we do not use SAVEIT for Lending overdue, but instead rely heavily on the OCLC overdue function to notify libraries that they have kept our materials overdue. We give institutions a two-week loan period from the date of receipt. Since we do not have an exact date and too much additional worktime would be involved in correcting the record in SAVEIT, we have chosen this alternate method of updating. We appreciate the flexibility SAVEIT gives us in this instance. We use the invoice function of SAVEIT to generate and print invoices. SAVEIT gives multiple options for generating invoices and we choose to print individual invoices by ILL number because we mail the invoice with the item. Invoices are clear and precise, pulling information from the Lending database including the patron’s name and brief title of the requested item.

We do more manual input in lending than we do in borrowing, but not as much as we did when we first installed SAVEIT. When originally acquiring SAVEIT, almost all of Kentucky’s public libraries sent print forms when requesting material from our library (the only ARL research library in the state). There was a large number of requests, but because we wanted SAVEIT to reflect all of our Lending activity, we took the time to input these non-OCLC requests. Our state, soon after my move to head the Unit, moved our public libraries into a more technologically based resource sharing environment by funding OCLC Group Access to many for our state’s small libraries who were not full OCLC member libraries. This move created a drastic decrease in the amount of time used for the input of non-OCLC requests, as these libraries began to submit their requests using the OCLC ILL subsystem. When keying in non-OCLC requests, we again learned the importance of consistency. We learned that library symbols were case sensitive and statistics would not be accurate if not always entered the same in every instance of manually inputting records. Dates had to be entered in OCLC format “Year, month, day” or statistics for a given time period would be inaccurate. Consistency became our byword.

We generate statistical reports two months following the most recent month. This is primarily because borrowing requests generated in a given month may take these two following months to determine their receipt or cancellation status, especially those requests generated late in the month. SAVEIT allows you to generate reports for a given time period, and the reports are based on the date the requests were produced. Before generating statistical reports we search the borrowing and lending databases for the date range to be covered in the report. Using the browse function in SAVEIT, we look for any requests that should have a final disposition but have a status of “pending” or “in process” or “shipped”. We correct these to reflect the actual status of the request (supplied copies, loans, sold, no for lending received or canceled request in borrowing).

One major problem we encountered in the years of using SAVEIT occurred in the early years. We neglected to do regular back ups of our hard drives. So the worst happened, and we lost three months of lending data. Needless to say, we have worked in a regular backup system today. If your library plans to use SAVEIT, take this backup advice seriously. Keep your SAVEIT databases in good working order by running system maintenance regularly and backup the data you have worked so hard to collect! Overall, we have been very pleased with SAVEIT and the help we get when problems arise or when installation of new versions are required. Work is currently underway for version 3 of SAVEIT and we look forward to the new enhancements that Pat Brumbaugh and Rich Gillaspie will be providing Interlibrary Loan services. If the opportunity arises, plan to attend workshops conducted by Pat Brumbaugh. A recent SAVEIT workshop hosted by the University of Cincinnati proved invaluable.

Have You Heard?

From our Materials Vendors:

- Academic Book Center: announced that three OCLC TECHPRO employees have been installed at Academic’s Portland, Oregon facility to upgrade CIP cataloging records for OCLC’s PromptCat service. All OCLC users will benefit from the timely upgrades, but Academic's PromptCat customers will be assured that 100% of their PromptCat records will have received the upgrading.
- B. H. Blackwell (BHB) and Blackwell North America (BNAm) have agreed to work cooperatively with WLN, the Pacific Northwest...
based bibliographic utility. According to the agreement, BNAm and BHB data will be available to WLN customers for the following areas: BNAm upgraded CIPs, BHB US MARC cataloging data for UK editions, Blackwell’s New Titles Online database, and Blackwell’s Table of Contents database. These services are expected to be available to WLN customers later this spring.

- YBP demonstrated their new online service called GOBI (Global Online Bibliographic Information) at ALA Midwinter. GOBI, successor to FOLIO, will be accessible from YBP’s Web site on the World Wide Web in March. Providing access to the integrated databases of YBP and W.H. Everett & Sons of London, England, GOBI will provide increased functionality including keyword and Boolean searches, fully indexed test fields, customized reporting capabilities and same session messaging. Registration forms are available through the WEB <http://www.ybp.com> or by sending an email request to <service@ybp.com>.

- From EBSCO, have you heard that EBSCOhost, the Z39.50 compatible client/server periodical access system currently offering access to periodical databases via the Internet has a new release scheduled in the second quarter of 1996. The new release will offer more intuitive searching assistance, database-specific limiters, new printing features, and the addition of Macintosh and Solaris platforms. A World Wide Web interface will be released in late 1996. EBSCOhost has been chosen by the Missouri Research and Educational Network (MOREnet) to provide the online full-text databases for libraries throughout the state of Missouri.

- EBSCOdoc, EBSCO’s document delivery division has developed a site on the WWW that offers many of its services to users in a fast, easy-to-use format. Users can search EBSCOdoc’s database of 28,000 plus titles; place orders for documents; access and subscribe to EBSCOdoc ALERT!, a table of contents service; or browse and order documents from the ADONIS database of over 650 biomedical journals. Most services on the Web site are free; users pay only for documents they order. Any document ordered as a result of a search on EBSCOdoc’s Web site receives a Web discount price. Users have the option of 24-hour delivery, and ADONIS articles are delivered by fax within 30 minutes. For more information, call (415) 259-5000, visit the web site at <http://www.ebscodoc.com>, or email <info@ebscodoc.com>.

From our Systems Vendors:

- According to Endeavor Information Systems, Voyager 3, its state-of-the-art library management system, is the first library automation system to offer a relevance search engine like those used on the World Wide Web. Voyager’s creators believe that they are on the cutting edge of a paradigm shift, from traditional Boolean searching to an easier, more effective way to perform OPAC searches. According to Jane Burke, Endeavor CEO, “We designed Voyager to be able to access information wherever it resides, and relevance searching is the new standard in client/server systems like ours.” Relevance searching requires only words, no operators; it uses all of the information the searcher has at hand, and that information is natural language, not controlled vocabulary; it searches the entire record, not just certain fields. Relevance effectively does a fuzzy “and” search and then a series of fuzzy “or” searches. Through this process, in which the user is first presented with records that include all of the terms entered and then the records with some of the terms entered, relevance actually expands the scope of the search. The search results are presented to the user via a small graph called a histogram — to show how relevant each record is. For more information, contact Don Reilly: (800) 762-6300, email <cdonald.j.reilly@endinfosys.com> or visit the Website at <http://www.endinfosys.com>.

- Ameritech Library Services has announced the formation of the Horizon Service Center. The new center will oversee product implementation and customer support services for its more than 160 Horizon customers worldwide. Ameritech has also announced that Dynix Cataloging for Windows, the first in a series of Windows-based Dynix modules, is now in general release. This combines Dynix functionality with the power of the latest Windows operating system. A graphical user interface, increased processing power, and improved functionality are delivered with this product.

- Ameritech Library Services unveiled its 1996 satellite technology seminars, called Connections, at ALA Midwinter. Library professionals can tune in each month, beginning in March, to the Ameritech Library Network to learn about technology issues in the library industry. Offered to all public, school, and academic libraries, the monthly broadcasts will feature networking basics such as LANs and WANS, Internet access, network management topics, and creative fund-raising ideas. Programs are available via satellite access or on videotape. Call (800) 773-9649 for subscription information.

More from Ameritech: Announcement of the successful completion of a Horizon benchmark project designed to ensure that Horizon meets current and future scalability needs of Indiana University and other large sites. This 5-month project involved a collaborative relationship between Ameritech Library Services, Indiana University, Sybase, Inc. and IBM.

- Information Management and Engineering, Ltd. (IME) has agreed to be acquired by Data Trek, Inc., part of the Dawson Holdings, PLC group. The new company will combine the market power of the worldwide coverage of IME and the extensive customer base of Data Trek, creating a global library automation and services company with well over 6,500 library clients in over 85 countries on six continents. Existing product lines will continue to be supported and active leadership in international library and technology standards will continue. A partial list of what the resulting company offers libraries includes: integrated library automation systems for MS-DOS, Windows, Netware, and UNIX; full adherence to the MARC bibliographic standard, including format integration, UNIMARC and international variations; EDI and X12 capabilities; true client/server system architecture; multiple language capability and UNICODE character set standards; wide area networking systems; Internet and World Wide Web products; Z39.50 searching tools. The combined company of Data Trek and IME will have its headquarters in Carlsbad, California, with European headquarters in London, England.

- Also on the European scene, we hear that VTLS Inc. has been awarded the contract to provide the automation software for the Senatsbibliothek (SEBI) in Berlin, Germany. For the library automation project, VTLS is working alongside Hewlett-Packard as the hardware provider and EDS as the outsourced project coordinator.

- SIRSI tells us that it has unveiled VIZION 1.2, the upgrade to their off-line Internet search tool. Providing smartly arranged categories of links to the most relevant and content-rich Internet sites, VIZION saves time and money for both novice and expert users by allowing off-line searches with a customizable, sophisticated site management system. Jim Young, CEO of SIRSI, says that “The Internet, and in particular the World Wide Web, is an excellent source of information, but performing searches on it is often time-consuming, frustrating and expensive. VIZION takes the tedium and expense out of online searching by bringing entire categories of fully-detailed site descriptions offline and onto the user’s desktop.”

- As part of its launch strategy, SIRSI is offering a free trial offer of VIZION 1.2 on its Web site <http://www.sirs.com>. Called WebSpecial, this downloadable FTP file offers a sampler portfolio of destinations which can be expanded using a new destination delivery system available in the full-scale version, VIZION PRO. Offered within WebSpecial, VIZION PRO is available directly from SIRSI for $19.95. Designed for frequent Internet users looking for one-step and unlimited site access, VIZION PRO gives users a common front end from which to launch their growing base of Internet tools. While pricing for category downloads will vary based on subject and number of sites, SIRSI estimates that each subject download will cost approximately $5. For more information, call (205) 922-9820 or the WWW at the address above.

- SIRSI has this additional news to share: SIRSI has released a Macintosh Graphical client for its Unicorn library management systems; SIRSI’s new MeSH Searching Aid allows immediate access...
For Readers Only

by Tom Leonhardt (University of Oklahoma)

With this issue we are instituting a new feature called “For Readers Only.” The idea is to devote a page of each issue of Against the Grain to books. The individual theme will vary, infinitely, we hope, but the common line will be books, authors, genres, languages, countries, characters. You get the idea. Suggestions for themes are welcome. We would like to provide some mystery, too, to keep you interested and reading, so a quiz will generally be included as part of this page for readers only.

We want to encourage non-required reading, reading that is nourishment for the soul, refreshing in the summer when it sizzles and warming in the winter when it drizzles.

The theme for this issue is the sea. This will help you solve the quiz that follows. If you are familiar with German, you know that “See” has two watery meanings. Depending on the article used, it can mean sea or lake. Lake Constance, for example, is Der Bodensee in German.

The sea as a theme is more to the point than trout fishing is to Richard Brautigan’s book, Trout Fishing in America, but it is a superficial theme that provides a platform (floating?) for the authors to launch rather long discourses on the meaning of life.

These three books have long been favorites of mine. I had read each of them at least twice before reading them once again over the past holiday season. Each book seems to have improved with age, like fine red wines. I was reminded, too, that each of these books qualify for my “Reading as a Subversive Activity” list.

Can you name these books and their authors from the excerpts below? Two of the books are non-fiction works by famous authors, but only one of the books is famous. One author is of this century, one is from the 19th century. The work of fiction is from the 20th century and was written by a not-so-famous author praised for his works about the sea.

THE EXCERPTS:

A. “How does one organize an expedition: what equipment is taken, what sources read; what are the little dangers and the large ones?”

B. “The sun is but a morning star.”

C. “Be master of yourself. The world is not an oyster to be opened, but quicksand to be passed. If you have wings you can fly over it, if not you may — yes, you, I am coming now, my dear! — you may quite possibly be sucked in.”

“The” is the first sentence in the body in the body of the work and follows some preliminary matter. “A” is the last sentence of another work, and “C” is part of a speech delivered by a bookseller to a young man. The speech inspires the young man to give up everything and go off to sea.

Please send your answers to me via e-mail <tom@libadm.lib.uknor.edu>, fax (405/325-7550), or USPS (University of Oklahoma, Bizzell Memorial Library, 401 W. Brooks, Norman, OK 73019-0528). There is a prize for the first correct answer. A drawing will be held should there be a tie. Good luck!

Innovations
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From IDS: journals, the 37 IDS databases are focused files and fit specific market segments.” This arrangement signifies new opportunities both for Information Providers to publish additional data electronically and for subscribers who will now have electronic access, via the SPIRS interface, to information that was previously unavailable or with limited availability.

The Rutter Group and West Launch Desktop Continuing Education for Lawyers

California lawyers will soon be able to earn Minimum Continuing Legal Education (MCLE) credit from the convenience of their offices, homes, or anywhere that they have access to a computer, using multimedia technology. The Rutter Group and West Publishing announced that a new California-specific multimedia MCLE product is being tested in that state. First available for attorney testing in West’s Information Centers in December, this new multimedia product is designed to help busy attorneys manage the time demands associated with fulfilling state mandated MCLE requirements. The initial multimedia product offered for testing is based on The Rutter Group’s Survival Skills in U. S. District Court seminar. Using West’s technical expertise for CD-ROM technology and The Rutter Group’s MCLE content, this product integrates audio and visual clips from live Rutter Group seminars, program hypotheses, featured Rutter Group practice guide sections, and referenced cases and codes that include West’s editorial enhancements. The Rutter Group and West have agreed to waive fees for test participants who will qualify for 3-hours of MCLE credit. Long term plans include offering a full-line of Rutter Group continuing education seminars to the desktop in this multimedia CD-ROM format. For more information about this technology or to participate in the testing of this product at one of the California West Information Center locations, call Jennifer Morello or Linda Helmes at 1-800-778-8090.

DOC AQUIS
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to both the National Library of Medicine’s (NLM) MeSH database and a site’s own catalog via the Unicorn client. George Washington University’s Himmelfarb Health Science Library is one of the first sites to use the product.

From OCLC:

• OCLC has announced that Puvill Libros S.A., based in Barcelona, Spain, has agreed to contribute its unique database of Spanish titles to the OCLC Online Union Catalog in early 1996. Approximately 15,600 bibliographic records will be added initially, and some 400 records will be sent to OCLC each week to update the database. The records are in US MARC format and will be available to PRISM users, in the WorldCat database, and on EPIC. OCLC also tells us that cataloging records for European Union publications will be added to the Online Union Catalog. The agreement between the Office for Official Publications of the European Communities (EUR-OP) and OCLC will launch a one-year pilot project in 1996. This project is in response to a proposal from EUROLIB, the cooperative group of European institutional libraries. Following a technical assessment by OCLC of EUR-OP catalog records, a date will be agreed upon for the creation of a EUROLIB/EUR-OP resource file which will be accessible via the OCLC PRISMS service. EUROLIB catalogers will upgrade the records to full OCLC records. During the first year pilot, 2,500 records are expected to be added. At the end of the pilot, EUR-OP, EUROLIB, and OCLC will assess the impact of the project.

• OCLC also recently announced that their FirstSearch and EPIC services now offer the EBSCO Mag database from EBSCO Publishing. Featuring abstracts and indices from more than 2,300 periodicals and ASCII fulltext online from more than 1,000 of those periodicals, EBSCO Mag is the fourth database on FirstSearch and EPIC to support fulltext online.

<http://www.spidergraphics.com/atg>

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