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Alison E. Lampley
East Tennessee State University, lampleyae@etsu.edu

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Alison E. Lampley, "To Buy or Not to Buy: Rolling Into the Future With ILLiad" (2016). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284316440>

To Buy or Not to Buy: Rolling Into the Future With ILLiad

Alison E. Lampley, Resource Sharing and Acquisitions Librarian, East Tennessee State University—Charles C. Sherrod Library

Abstract

Librarians at East Tennessee State University (ETSU) have spent a lot of time over the past few years eliminating paper waste and encouraging the use of digital forms for many library services. One such service is the library's suggest-a-purchase program. When the database that held our previous online form was dismantled, paper forms and e-mails started coming in. Most of those e-mails were printed out by library staff. The previous acquisitions librarian retired soon after, leaving behind mountains of papers and no real idea for how to proceed. This paper presents how we solved this problem with ILLiad addons and Web pages from the IDS Project and how we hope to assess our print collection going forward.

Background

Previous to 2013, university faculty were discouraged from submitting purchase requests to Sherrod Library. The library had not received a budget increase in over 20 years; in fact, the money we receive for collections has been steadily decreasing over the years. Currently, we spend 90% of our materials budget on electronic resources, including e-books. We knew that our faculty and students wanted print books, so we decided to make some changes and implement a new service to help facilitate those requests.

Preliminary Steps

Since we already use ILLiad software for interlibrary loan processing, it made sense to look for something that could integrate into that program. Luckily, the IDS Project from the State University of New York (SUNY) Geneseo developed just the addons and Web pages we needed. Back in 2009, they began the project that would eventually be implemented by hundreds of libraries around the nation: The Getting It System Toolkit (GIST). This toolkit is free and open source, meaning it is completely customizable to a library's specific needs. It allows for easy integration of interlibrary loan and acquisitions workflows, if that is desired. The main three parts of GIST are:

- ILLiad GIST Web: Allows viewing of data pulled from GIST Web ILLiad tables (required).
- ILLiad add-ons: Cataloging, Copyright Clearance Center's Get It Now, Amazon, Better World Books, Barnes & Noble, GOBI,

Powell's, Resources for College Libraries, Title Source 3 (not required, but many recommended).

- Acquisitions manager: Allows processing of acquisitions without using an ILS (not required).

(The IDS Project, n.d.-a)

The toolkit can be used with all add-ons together working as one, or it can be used one piece at a time. For ETSU's purposes, we decided to use a few of the add-ons but not all of them. We also decided against using their acquisition manager since we were already using our ILS for that purpose.

Planning

The GIST website provides project planning worksheets to help inform decisions related to workflows and other procedures. In their words, "because changes to the ILLiad user interface can have such a profound effect on your patrons, it is very important to plan effectively for a smooth transition." This could not be more true, especially since there are so many different ways to configure GIST to meet specific needs (The IDS Project, n.d.-d).

For the first steps, IDS recommends setting implementation goals, identifying beneficiaries and stakeholders, and then workflow mapping and design. Each of these steps will help libraries consider what type of service works best for their needs. For example, think about patron-driven acquisition versus purchase on demand, and which of those services will achieve the goals the library

has set for this project. Next, think about who will benefit from the service, and who will be responsible for different aspects of the service? Lastly, consider how those people identified previously will be involved in the project. Who will be responsible for each step? Of the departments that will be involved, when do they need to be brought into the process (The IDS Project, n.d.-d)?

An additional part of the planning process involves looking at the available ILLiad add-ons and deciding which ones are appropriate for use in the library. ETSU decided to use the Amazon, Get It Now, and GOBI add-ons. These may or may not be helpful to another library, but since GIST is completely customizable, that decision can be made differently at other locations. It may be necessary to consider workflows when deciding on which add-ons to use. Add-ons can be installed at each instance of an ILLiad client on a computer, so multiple staff can use the same add-on at any given time.

Implementation

Once the workflow planning is completed and implementation goals are decided, implementation can begin. There are six main steps for the implementation process:

1. Obtain required API keys
 - a. Amazon Web Services API
 - b. WorldCat Search API
2. Install the GIST SQL tables
 - a. If the library's instance of ILLiad is hosted by OCLC, the library will need to contact them to install the required SQL tables for GIST use. If the library is self-hosted, the GIST project website has instructions needed to install SQL tables.
3. Install GIST files to ILLiad directory
4. Configure GIST settings
5. Customize Web pages
 - a. HTML knowledge required
6. Install GIST Web add-on

(The IDS Project, n.d.-c)

There are detailed instructions on the GIST website for completing each of the above steps. Since the steps can be complicated, it is best to either ask someone with computer science knowledge to help, or contact the IDS Project themselves and ask for assistance. Mark Sullivan (Library Systems Administrator for SUNY Geneseo and Executive Director of the IDS Project) assisted ETSU with its implementation and was extremely helpful when needed, as our systems staff was too busy to assist at that time.

After GIST is installed and configured to the library's desired settings, configuring ILLiad itself is the next step in the process. This process should be done in conjunction with whoever is in charge of ILLiad and its customization manager. There are six steps:

1. Modify the WebFormValues table
2. Create custom queues for purchase requests
3. Create routing rules to filter requests
4. Create e-mail routing to notify patrons
5. Add acquisitions contacts to LocalInfo table
6. Create staff manager accounts (if needed)

(The IDS Project, n.d.-b)

Customizing ILLiad is where libraries can really make this project their own. Custom queues can be added as needed and can be labeled however the library decides. There is no required format for those. E-mail templates can be created that mimic language and style of other library-related e-mails, if desired. There is no required format for those either.

Testing

After GIST and ILLiad are installed and customized, testing should begin prior to the official release of the service. One of the easiest ways to test the service without releasing to the entire community is to create "GIST Tester" user accounts in ILLiad. Once the library has a few volunteers, user statuses can be changed in ILLiad, and once complete, only those volunteers will see the new Web pages in their ILLiad account. If the library opted to use the Amazon and

WorldCat APIs, make sure those searches are working correctly in the webpage. ETSU had an issue with our Amazon API search and ultimately decided to remove those searches from our Web pages. After requests have been received into ILLiad on the staff side, check to make sure all routing rules and custom queues are running correctly and that the e-mail templates look as desired. If the library runs into any trouble during testing, the IDS Project/GIST website has some troubleshooting solutions that might help. As always, feel free to contact the IDS Project themselves for assistance (The IDS Project, n.d.-e).

When everything works as desired, the new Web pages can be released to end users. We released a campus-wide e-mail informing the university of the new service. We also made sure to make clear that while we were accepting requests again, we could not purchase everything, and it had to match our collection development policy.

Results

It took a few months for the word to get out, but eventually faculty began submitting requests (and students, too). We realized quickly that they wanted the form to submit not just book requests but also

journals, video, and databases. We quickly added those formats to the appropriate GIST Web pages and continue to tweak them on occasion (based on user feedback). Faculty submit requests have far exceeded student and staff requests almost 25 to 1. We have encouraged submission through our website and, most importantly, through our curriculum process system instructions. We ask that when faculty create syllabi for new courses that they evaluate what the library has to support their new course. If they think we do not own enough books or other materials to support the course, we ask that they submit requests through the new GIST form in their ILLiad account. To track these types of requests, we added a drop-down box in the form for faculty to choose why this book is needed. We hope more faculty will take advantage of this option in the future as we continue to build our print book collection more effectively.

Please note that as of the time this presentation was proposed to the Charleston Conference in early 2016, the author did not know OCLC had purchased rights to ILLiad and was planning its own cloud-based interlibrary loan product. It is possible that the wonderful combination of ILLiad and GIST will not be available to us in the future. Stay tuned!

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