

## WisCat Webinar

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<http://webinar.isl.in.gov/p5yt4ltamq6/>

Schmidt: Good afternoon everyone. And thank you for a demonstration of the WisCat installation of AutoGraphics. Thank you all for coming. Hopefully you can all hear me right now. The technology has been an interesting experience for all of us. I'm just waiting for...Okay. You can hear me.

Before we get started, I want to thank Emily Schaber who has agreed to be the producer in the left chair and special thanks to Lisa Meadows whose patience has been remarkable as we bring luddites kicking and screaming into the technological age. And for making all the wondrous, little black boxes work for us today.

For those of you here that are interested in SRCS, I am pleased to announce that to date, we have 108 libraries that have submitted letters of intent. That includes 25 academic libraries, 82 publics and then the State Library, running on 13 different ILS systems. And that represents a combined statewide catalog of over 26 million items. So I think the potential for us is really going to be phenomenal.

Now what I'm going to do is turn the podium over to our colleagues from Wisconsin. With us today is Vickie Long, who is WisCat outreach person at the Wisconsin Department of Public Instruction, and her Interlibrary Loan Team Leader, Christine Barth. So, Vickie if you're ready, I'm going to mute my mic and we'll see if the technology works. Thank you very much.

Long: Thank you, Steve. I hope everyone can hear me. And what I'm going to do is share the screen and do some searching in WisCat to show you what it would look like to a patron user, and then how to manage that request, as a staff person. So it will be a moment while I get this sharing going. And Christine is going to be looking at the chat during this time. So if you have any questions just go ahead and type it in the chat screen.

So you should be seeing the WisCat logo and what I am showing you here is our statewide, what we call our generic free access to search Wisconsin catalogs. Anyone may come, and as you can see, we have quite a few shared and individual library catalogs, including school, medical, state agency, the technical colleges, the University of Wisconsin libraries, and our partner, MINITEX which is the library consortium in Minnesota and also North Dakota and, I believe, South Dakota.

So we search all of these catalogs. When a user comes here, they can leave the default, selected ones, the ones that have checkmarks, and just get results from everybody. Or they can remove some and just select certain ones that they want to search. A library with their own WisCat account would be able to set the defaults that they want. They have a lot more options.

What I wanted to show you here, is that a patron user at any of the libraries can come to the generic WisCat and simply click on the Log In. That individual has their own user account, created by a member library. And we have over 530 member libraries. They can just come to the Log In screen, find their library, either by typing the word, or if they happen to know the library code. And today I'm just using our demonstration library, so it just quad-A. So this individual patron belongs to the demo library and she's going to log in with her username and password.

[Pause]

So, Ms. Long, Yin Yin Long, has her own personal account as a patron of this library. She can start a search by....

Barth: [Faint] Question.

Long: We have a question here

Barth: [Faint] How are these set up?

Long: These user accounts?

Barth: How does a patron receive their user account?

Long: The question was how one would set up an individual user account for a patron. The library staff would be logged into their WisCat account, and then they would go into one of the user administration modules, and create an individual account. And I can show that to you, and I will, once we get a little bit further along and log in as the staff. Why don't we go ahead and create the request? Then we'll go in as staff and look at that.

So here on the screen, the individual patron can use the simple search, which is just the field up here. And it's defaulted to title. That was this library's choice. The patron could change it, if they were doing an ISBN search. And all the resources are here, and if they didn't want to search all these catalogs that are pre-selected, they could change that. And then they just need to click "Enter" or hit the "Submit Search" here.

I wanted to show you that there's also an advanced search which gives them more options. And, again, these search indexes, what they default to can be set at the library level. So at this point, we have set the defaults to Title, Author, and ISBN, but they can be changed on the fly, during any type of search. So I'm just going to do a simple title search. We'll try, "Christmas Quilt" and see what we get. Okay, as you can see here, the results are starting to display. It shows that 18 of the 28 resources, of the catalogs, have returned their results. If a patron sees what they want right away, they can stop that. There was a little button there that you could actually stop it without having to wait for all of the catalogs to return and finish returning results. I've only selected 28.

We have over 100 catalogs to speed things up. So as you can see, once a search has pulled items up, this is what the gallery view looks like and what is set for most patrons to see. It's the most colorful, with the book jacket art. And it puts the results into buckets. All the book results, large print, so it makes it easy for the patron just to glance there and say, "oh, this is the book I want," and click on it. Or if they want a large print, and then they can submit their request. Though before we do that, I'll show you that there are facets over in the left hand side.

We've set the format to be the top facet, so it's always open. So if this person really wanted a different format, they can see it right here. They can click on large print. If there was a DVD, it would be there. Click by language, which in this case doesn't matter. And there's just a lot of different options for narrowing the search. So since I want...I'm just going to click on large print. I want as a patron to get this book, I want it in large print. It doesn't matter to me that all the libraries and how many catalogs happen to have copies, it doesn't matter. I have my "Request this item" button. When I click on that, I will get a form. And because I'm logged in as a patron, it knows who I am, and it prefills my, or in this case, this patron's information. So all they have to do at this point, unless they wanted to, this library has several different branches and maybe the patron wants to pick it up at the west branch, they can select that.

There are different options. You could make it available that they would have a notes field to provide additional information if you wanted. And at that point, all they need to do is hit submit. It has their email in there, first name, last name, the necessary password, and that request has now gone off. It's processing. The system, behind the scenes is searching all the catalogs to find as many lenders as possible and put it into the lender string. So as far as the patron cares, their request has been created and it's on its way. They can return to results. They can click advanced and do another search. Or they can go to the home page and do whatever they want.

While I'm here I will show you that because this person has their own account, they have a lot of other options, such as being able to have "my account," and set their own preferences.

Maybe they have some favorite catalogs they want to search; they can do that. They can have different preferences, but also, this library has turned on the permission for ILL request tracking for their patrons. So she can come in here and see which requests she currently has active. And she also, this is another option the library can choose to turn on, is if the request has gone out and hasn't yet been filled, she can just say, "I don't really want this anymore and select cancel." That message will then go to the staff. And then they could cancel that request if it was an appropriate field. If the item was coming due, and they want to keep it longer, they can request renewal. Those are options that can be turned off or on per the library. This patron has created a request.

I'm now going to go in as the library. I've already logged in as staff at the demo library. What you see now are more options. I can use the staff menu to take me to where the requests are managed, along with the other staff functionality that I have access to, including creating user accounts.

This is called the request manager in the ILL admin module, where you manage all the requests. The left side here in action items are the requests created as a borrower.

This is called the request manager in the ILL admin module, where you manage all the requests. The left side here in action items are the requests created as the library being a borrower. And everything on the right side is requests coming in from other libraries asking to borrow items from this library's collection. So lending side on the right, borrowing side on the left. As you can see the new request created by this patron is in awaiting lenders, which means the lender string is being built, and nothing is done to that request until it finishes. Sometimes that takes a while, number 1, because we have so many catalogs that are being searched, including the union catalog, which has, I don't recall exactly, but has a couple hundred libraries' holdings in it as well. So it's building a lender string. When it finishes building that string, it will automatically go into awaiting approval status, which is where we will go to mediate this patron request. In Wisconsin, we have all patron requests being mediated by staff. We don't have open, unmediated requesting by patrons for a variety of reasons; mostly because our libraries like it that way.

While we're waiting for that, I was going to show you where you would create an individual user account. That would be in the user admin module. It opens to the add a user function right here. And this where you'd say, "I'm going to create a patron account." They don't get any of the staff permissions, of course. All you need to put in, is "what's their username or barcode," and typically we tell our libraries the best thing to do is to make it the library card number for that patron. Then you need to create a password, which the patron can change after they log in to their account. So it could just be their birthdate, or a generic date, whatever you want to do, and then confirm it. And you can type a reminder question. Anything in red is not a required field. It usually pays to put in the person's name, and much of the rest of the information you need, or wish, for your purposes. This is your patron. Nobody else is going to see this information. And then you would submit. When you get...when you hit OK, and I'll be right (there's a question, but I'm just going to finish), when you would do OK, and that created the request. If you have borrowing patron ILL functions already set up, it would automatically give them the ILL permissions. But I'll show you that in a moment. And the question is?

Barth: [Inaudible]

Long: LDAP. That sounds familiar. It's not something we use. I know that we have a couple consortia using the system...two library systems are using NCIP, which is a national protocol for circulation interchange protocol (thank you, Chris). Which is a

special set up where patron information can be pulled and checked in the local circulation system. That requires additional set up by the company, and if they've not already done testing and set up with a certain vendor, such as our Lakeshores Library System, uses SirsiDynix, and SirsiDynix and AutoGraphics had done all that testing, and great deal of set up. And so they have NCIP and essentially they do the majority of their interlibrary loan management from within their local system. It's connected to WisCat ILL, but it's magic! They can do most of what they need to do, such as, check out an item. Or for the patron, it would automatically say, "ah, this is a patron in good standing, in the circulation system. So I will create them." And now they have an account automatically created in WisCat and each time they log in, they will be revalidated against the live circulation system. And this is a fancy set up that I do not do. I'm just giving you a lay explanation of how it works.

Barth: [Inaudible]

Long: I think there may be a way, but it would be something through the company. There was SIP2 and there was NCIP. As soon as you would upload those accounts, if it works, and that's something you need to ask the company if they can do it and whether there's an extra charge, we haven't done any of that. Then that information would only be as current as those accounts were loaded, so then it would be a matter of trying to keep everything, and blocking patrons, and doing that from within your system. So that would be a good question to ask the vendor.

Barth: [Inaudible]

Long: Yes. There are two ways to do patron initiated. This is with individual user accounts and it requires a log in. But there's an option to have open, or guest interface. There's a guest interface, a patron interface, and a staff interface. The guest interface is what we saw...there's an automatic log out after a few moments if you haven't done anything and warns you that your search session is ending as a patron. For a staff person, your sessions do not time out.

When you're in the generic one, you're using the guest user account. Each library has a guest interface. So, let me log out here as a staff. Ignore this. We have IP authentication, which brings us to the agency I'm sitting in at the moment. So here is the guest interface for that individual, demo library. The URL has the specific library code, and they post that on their website for their patrons to use, or anybody that comes to their website. You can ignore the log in and just do a search. I'm partial to the advanced search, so I'll do that. I'm doing a title search here. I'm just going to stop the search. This is a book I want, so I would have had to turn on guest requesting. They will not have the request this item button. Let me log back in, and I'll show you how you would do that. I'm logging in as staff of this library. Back in user admin, I'm going to edit user accounts. You can select which accounts you want to look at, or you can hit submit and see all of your accounts, staff and patron. There are some default accounts. The guest interface, the patron interface, which when you

create a user account, it's going to pull the permissions you've given in that patron account. So here, in ILL permission, I have pre-set that the patron account, any account I create will have these permissions automatically. (To be able to create a returnable request; they'll be able to check the status of their own request; and view own requests.) If I wanted, I could also give them the option to request an article request. So when I created the new account, the person automatically got those ILL permissions. However in the guest account, I could also give ILL permissions. So I will create permission here and say you can create requests for returnable items and you always have to do the view own requests, and submit. Close. Now when someone comes to my site (I'm going to log out of here), to my demo library. I'm not logging in, I'm just going to my guest site. And you would have a URL that would take you right here. They wouldn't see that log in screen at all. Here it is. I'm going to do the search again, without logging in. I'm just going to do knitting. Search. I'm going to stop it. I don't want to wait for all 29. This is the book I want. It didn't process yet. It took a little longer to process. What you would see is a request this item button for your guest account. It doesn't require a log in. But it does take time for the system to process that change, so my demonstration isn't exact. I wonder who does have it. I could go to Janesville.

Barth: [Inaudible]

Long: If you mean, can it be set up as a search resource? Let me explain what we do. If a library has a license, and is a full subscriber to WisCat, then they also have a right to add the union catalog as a Z target for searching within their own catalog. Within their WisCat account, you can set up other catalogs to be searched, such as WorldCat, or in this case all these other library catalogs. That's through the Z39.50, another international standard protocol for a remote connection. Behind the scenes we have our WorldCat set up because the system can search that and when we identify which lenders within Wisconsin that we want to automatically go to, it will search that WorldCat behind the scenes, and add those Wisconsin lenders that are actually using OCLC, so that we can send requests to them through another connection called, "ISO," that is connected to OCLC. I hope I haven't confused you, but there's so many different terms and ways of connecting. I'm not familiar with WorldCat local and the other things like that. We did have a library, maybe it was Beloit College subscribed to WorldCat local and at the time they needed an API. We mentioned to AutoGraphics and they were working on it. That would be another good thing to ask AutoGraphics. I think they do have a way now to work with WorldCat local systems, but I can't speak to that because the library decided not to go that route anyway.

Barth: [Inaudible]

Long: How do staff use WisCat instead of OCLC? Many libraries are not subscribers to OCLC. We have libraries of all sizes and they don't have an OCLC code, and they've never subscribed, or they're not presently subscribing, so they use WisCat. And that allows them, searching across all these different catalogs, it identifies what

item is owned. And because of the Z39.50, typically, you can also see the current shelf status (that item is available or it's currently checked out). The Z39.50 service usually part of any host catalog. Sometimes there might be a fee; check with your local catalog provider to find out if that's an extra charge or if that's included. And then we set that up in WisCat. If a library does not have a local catalog with a Z39.50 service for a local connection, they may export a complete file of their MARC records from their local catalog and provide it to AutoGraphics. And then they are batch loaded into the union catalog. So there's no shelf status, but it shows what's owned in those libraries. And those libraries are searched along with the other libraries and the lenders are added to the lender list. Libraries in WisCat use the system to do resource sharing between each other. Libraries that are OCLC subscribers may also subscribe to WisCat for different reasons. Number one, they can borrow from all the libraries that don't have their holdings in OCLC, or findable in OCLC. As an OCLC subscriber they can borrow from any other libraries they want who use OCLC around the country. What we do here as the statewide clearinghouse as part of the subscription to WisCat, is when the library's request cannot be filled within the state, it will then come to our clearinghouse and our staff will identify {Elvis} libraries, libraries very interested in sharing on OCLC and we input their OCLC codes and then that request is thrown over the wall by the ISO connection we have with OCLC and those requests go to those lenders. When they respond to a request, such as shipped, that message comes back via ISO into WisCat ILL and the WisCat library, when they get the item physically from whatever library filled it, they would update it to received and then that status flies over the wall back into OCLC. So there's these remote connections. I've made this rather complex. It is complex, it truly is. We have quite a few levels of searching. Some libraries don't want their requests to go out of state. In that case we set it so that their requests we won't refer out of state. A lot of this is within the configuration. There are so many options that it makes it difficult to try and cover all of them in one answer.

Barth: [Inaudible]

Long: So Chris is trying to explain to me what folks are not getting. Let's go back into the ILL request manager. It's still taking a while. I'm going to go into a request that is already awaiting approval. What happened as soon as the patron submitted the request, the software is searching all the catalogs to look for lenders. Lenders that we've identified that can be put into the lender list. So when they find those lenders, searching the catalog, and it's available, it puts that library lender code into the lender list. And, let me find one that's...Let's try this one...I haven't already. Okay. So here is all of the lenders the system found after the patron submitted the request. So it's ready to go. And these are live libraries, so if I hit "Approve/Send," this request to go out the first library in the list and if that library couldn't fill the request, the individual person at that library would update it to "Will not supply the request." It will automatically go to the next lender, WL77. That lender could fill a request. They would update it to "Shipped." Ok. So, what is nice about this, is that it will put every

possible lender in here that has the item according to their catalog as being owned. And those lenders are all in here. You're not limited to 10, or even 50. There could be 150, if that's how many libraries own the item. And then it would go to each lender in turn, until someone updated it and said they could ship the item. So, here. What I'm going to do, because I don't want this request to actually go to real libraries, I'm going to remove and just keep another test library in here. And I'll show you what happens. So, as staff, I've mediated this. I've said yes, it's okay. Let me check and make sure the dates okay. I'm going to approve it. I hit submit. And when it processes that request is now looking at my own borrowing side. It has gone into pending, meaning if I log in over here as that lender. Which is where I've logged in over here earlier. And I come to my request manager. And go to my lending side. Here is the request that I just sent to them. This library, if the item is on the shelf, would go ahead and update the request to shipped once they pull then item, and they can print off a shipping label. And they would mail the item, if the library is not on statewide delivery, or put it into statewide delivery. In which case it would be picked up when the truck came the next time and drive it off to the borrowing library. And then this would go back and forth. The borrowing library, when that item actually arrived, (I need to refresh my screen), physically arrived in their library would (I thought I updated it to shipped, let me try that again). They should see it in shipped. Okay, here we are. When that item physically arrived they would simply find the request that matches the item, and update to received status and then check it out to their patron. So this is just how they are managing those requests. When a request is filled by an OCLC lender, those, whatever status they update it to in OCLC, the associated status would show here in the WisCat library for the local, borrowing library to be able to manage. And it goes back and forth. So this request manager looks different than in OCLC. But basically the process is the same. Now there's configuration behind, which is making this happen.

Barth: [Inaudible]

Long: Right. Mm-hmm. I'm not sure if you can hear Christine, but what she's saying is, looking at the questions, it truly depends on how your consortia and the individual library that belongs to the consortia, that's going to be using the system, wants to set it up. There are so many different ways of setting it up. What we have here, is the way we use it in Wisconsin. But it doesn't necessarily have to be this way. If you're going to be, all have your holdings in a union catalog, such as the WisCat union catalog, then it's just one big library catalog. Then that's how you can use it. And the ILL would be, you'd be borrowing amongst yourselves. And if you wanted a connection to OCLC you could have that as well, set up. So if you want to do the NCIP, that's something, another option. It's possible to do so much activity that it can really be confusing listening to me.

Barth: [Inaudible]

Long: Right. Right. Right. And as Christine as just reminded me, in addition to our ISO remote connection to OCLC, to be able to send requests there, we also have it set up with individual ILLiad systems. The University of Wisconsin-Madison uses their own ILLiad, and we have an ISO connection direct to their ILLiad system. So they manage the request in ILLiad, and the libraries in WisCat manage their end of it within WisCat. We have another library system, South Central Library System, based in Madison, which uses a direct ILLiad connection. Viterbo University. Those are the three I can think of that we have direct links to. In the different states that have contracts with AutoGraphics, have such a variety of connections of how they're using the system. It depends on Indiana, what you choose, how you choose to use it.

Barth: [Inaudible]

Long: Right. Yes. Via ISO connection. You can have your own OCLC. You can also set it up in your own library/WisCat account as a searchable resource. So there can be global searchable resources. Or they can just be a local one. You can choose to manage. You can become a, I forget what they call it, OCLC something-or-other, where you can manage all your OCLC requests and your ShareIT requests within your ShareIT account. Or you can manage your lists. I could go on and on and on and it would just cause more confusion. I'd be glad to answer questions that I can do so now. Or I really highly recommend talking to the product manager from AutoGraphics. They are very helpful. And certainly, if anything here, that I've talked about, that you want to find out more about how we use it in Wisconsin, I'd be glad to talk to you again, or individually.

Barth: [Inaudible]

Long: I think that is has to be initiated from within their WisCat account, because it's the searching, it's the discovery process that enables a request to be created. So here we have as I say, approximately 100, 106 catalogs. We have to be able to search it across the board. This federated searching to be able to find the record to begin with. Once the staff or the patron sees the book or DVD they want, and the click and submit their request, then the system, because this is set up a Z targets, can search them all and pull in all the lenders. The reason an OCLC library can't submit a request to a nonsubscribing OCLC library, in Wisconsin, let's say Osseo, is because in OCLC they can't find or search their holdings there. They have to go in to discover or go to that local library to discover whether they own the item. So the advantage of having a federated search, being able to search across all these catalogs, enables the ability to submit a request. Otherwise a patron going into their local catalog, and the can do is say, "I want this item," and the interlibrary loan staff would have to go either to OCLC or to WisCat or to whatever interlibrary loan system they want to use to be able to discover a record and submit a request. Did that help, I hope?

Barth: [Inaudible]

Long: It's called an external communication. I can show you what the configuration looks like. But...let's see...Let me log in as a superuser here, which I am. So, let's see, I want to go to...my brain isn't quite working, I'm going to go here as a customer superuser, so I can actually access another library's system. So Madison Public Library-Central is actually an ILLiad library using a consortium. So we have an external communication set up with them here, within the participant record for that library within WisCat. And this is what tells the ShareIT software, that when you need to communicate with this lender, you need to send that message over this ISO link, and so all this information is here. Which is what's needed for the system to be able to communicate. And the message to come back from South Central's ILLiad system. And for each of the Wisconsin OCLC lenders, we have participant records set up so that when a request is going to them, it looks at their external communication; it knows to send it via our connection to OCLC.

Anything else?

I'm wondering if I should stop sharing right now, so that...

So I see from your question, Holli, was how you get a request from ShareIT into ILLiad. So it is that ISO ILL connection.

Barth: [Inaudible]

Long: Right. So I am going to mute so that hopefully if Steve or someone else has questions, they can...

Schmidt: Vickie and Christine, I want to thank you very much. I realize how difficult it is to do a live demo and I appreciate everybody's patience and all of the questions. We are recording this session and we will post it on our SRCS page as soon as we get the audio portion of it transcribed. So it will be a couple of days. I will stay online for a little while, if you have any other questions you would like answered, go ahead and type them into the chat and we will add those to the questions and answers we post. Vickie and Christine, thank you very much for, I know it has been a stressful day for you. But this was the first glimpse any of us had seen of this system in operation. It's been very informative, for I think everybody. With the caveat that the system in Indiana will probably work slightly differently. The main one being that I believe it is the recommendation of the Resource Sharing Committee that all of our requests would be unmediated. As I put in the chat there will be a meeting of the Resource Sharing Committee later this month and I'm expecting to get a final list of recommendations from them at that time. And as soon as we have it we will post it on the webpage. And I just saw Collette's comment, "Yes, please, unmediated!" but I won't let that sway me. Thank you all very much. We appreciate your attention.

Ingrid, your question on "what if you want to mediate your requests?" I believe that is a local option, but I'm going to have to wait and see what the Resource Sharing Committee says.

“Who gets credit for the circ?” This is one of the things I’m still waiting for, but it is my understanding that...and I’m not going to get this right off the top of my head...one library gets credit for the loan and one library gets credit for the circulation, but let me double check that and it will be in the transcript of the questions.

Yeah, I see that. John’s question about whether patrons in Indiana will have to initiate the request in what is called SRCS rather than WisCat, from the local catalog. No, I think it will have to be in the SRCS union catalog. It is my understanding that NCIP is a one way method of communication. You can check things out in SRCS and it will notify your catalog to update the record using NCIP. It does not work both ways. Again, I’m going to get a final answer on that in the transcript.

This is all part of what the initial set up will be. I am assuming, and that’s all it is at this point, that there will be a way to do a batch creation. What that means and how it works, we will have to wait a little while. We’re still not in open communication with AutoGraphics as we’re still trying to finalize the final periods in the contract. Which has drug along a little longer than I had expected over the holidays, but we are getting there.

We had a question on how large are the libraries who have already signed up. We had A, B, and C class public libraries. We have academic ranging from some of the smaller Ivy Tech campuses up to Purdue, West Lafayette. So I think you can say that we have a fairly wide-ranging group of libraries. As I said earlier, right now the catalog they represent is 26 million items. And we still have about 3 more weeks for people to sign up for this first consideration. So I think there is going to be a huge pool of materials for people to check. And the nice thing about it, is the requests are going to libraries that they own records, the book is on the shelf. So the success rate should be much higher than sending it to somebody who cataloged it in OCLC 30 years ago and hasn’t updated since. So I think this going to be a very positive system for the state.

[END]