Collective Catalogue for Hellenic Academic Libraries

VDX – Resource Sharing & Document Delivery

Nander Lankhorst – 7 May 2007
Agenda

• Introduction to VDX
• Example Implementations
• Functionality Hellenic Academic Libraries
• Demo book request (PowerPoint)
• Demo Article request (Live)
VDX is a document delivery and interlending management system that fully automates the requesting and supply of books and journal articles.

- Single institutions
- Consoria Libraries or whole countries
- More than 20,000 libraries use VDX worldwide
Discovery 2 Delivery

Search —> Locate —> Request —> Deliver

- Get Anything — Anywhere
- The requester supplies the bibliographic data
- VDX manages the request
Discovery 2 Delivery

**Search** —> Locate —> Request —> Deliver

- Union Catalog - Virtual and/or Physical
- Individual catalogues
- Request Bib Data
  - ZPORTAL (patron portal - requesting)
  - VDX Staff Search
  - OpenURL
  - Structured Email
  - Manual
Discovery 2 Delivery

Search → Locate → Request → Deliver

- VDX locates potential suppliers automatically
  - search remote databases to find potential suppliers
  - Incorporate preference rules (filtering and sorting)
  - Load level for internal suppliers
  - Different rules for different locations
Discovery 2 Delivery

Search —> Locate —> **Request** —> Deliver

- Transparent requesting to ANY supplier Library
- ISO/IPIG ILL
- Generic Script, Formatted Email, and more proprietary request protocols
Discovery 2 Delivery

Search —› Locate —› Request —› Deliver

- Physical delivery management
  - Pick lists, ship lists
  - Automated user notification
  - Circulation integration

- E-Doc delivery management
  - Seamless integration with ARIEL
  - Scan on demand, E-Doc attachments
  - Commercial suppliers, BLDSC, CISTI
  - To library or desktop
Standards Used

• Implemented & operational within VDX today
  – Search
    • Z39.50, SRU, http
  – Circulation integration
    • SIP2, NCIP
  – Requesting
    • ISO ILL, OpenURL
  – Electronic Document Delivery
    • GEDI
  – Authentication
    • SIP2, NCIP, LDAP, Shibboleth, Kerberos, Athens
Implementation Scenarios

• Single institution - massive consortia - 1 to 6000 libraries
• Patron / Staff initiated requesting
• Locally managed / Web hosted
• Physical union catalogue / Virtual union catalogue - 1 to 200 catalogues
• Integrated search / independent search interface
Example VDX implementations

Ontario Council of University Libraries
- 20 libraries
- Patron initiated
- Virtual union catalogue
- Now linking their consortia to others
- Routing preference:
  - Internal to consortia
  - CISTI
  - BL
  - Australia
Example VDX implementations

National Library of New Zealand
- 230 libraries
- Physical Union Catalogue
- Staff Initiated
- Automatic routing and load levelling
Example VDX implementations

Australia

- National Library
  - 550 libraries
  - Staff initiated
  - Physical union catalogue - CBS
  - Integrated billing

- Universities
  - Individual systems
  - Patron Initiated, unmediated

- Peer-to-peer integration
- Distributed payments gateway
Example VDX implementations

Vereniging van Openbare Bibliotheeken
- 1200 library locations
- National bibliographic databases & local library catalogues
- Patron initiated
- National A-Select authentication service
- Automatic routing based on van routes and load balancing
- Integration of local circulation systems using SIP2
Scenario for the Collective Catalogue of Hellenic Academic Libraries
Functionality Hellenic Academic Libraries

- Staff initiated - this means that staff can use Muse, the Collective Catalogue or the individual catalogues to locate requested items in Greece.
- The library staff can manually enter requests in VDX and supplying locations will automatically be added to the request.
- When the request is entered in the system VDX randomly sorts the locations – which can be edited and authorised by the library staff.
Functionality Hellenic Academic Libraries

- The first supplying location that receives a request will also receive an e-mail alert that they have to manage a request.
- The supplying library can either supply or not supply using the ISO messages in VDX.
- If a library cannot supply then the request will automatically go to the next library on the list.
- If the request has reached the end of the list then the requesting library can either complete the request or try to find it elsewhere....
Functionality Hellenic Academic Libraries

- The Product will support Greek Character Set for entering requests in the system (manual) ISO -8859-7 and for sending the request between libraries.
- The interface will initially be available in English.
- The Manual produced for the consortium will initially be available in English and will be translated by ELiDOC when finalized.
Implementation steps

- Installation on OCLC PICA hardware ✓
- Configuration 5 libraries for acceptance test ✓
- Manual for Hellenic Academic Libraries ✓
- Initial training 5 libraries (8th May)
- Configuration changes following training (May)
- Finalizing Manual for acceptance (May)
- Acceptation test (June)
- Installation on hardware in Greece (TBD)
- Final acceptance and Go Live (TBD)
- Training other libraries (TBD)
- Support
Implementation steps

http://test.vdx.greek.hostedbyfdi.net/

5 libraries are configured/setup:

- National Technical University of Athens
- University of Crete
- Pantios University
- Technical University of Crete
- University of Patras
Your request has been successfully submitted.

The system has assigned an id of 351 to the request.

Use the Requests option to track the status of this request.
### Work Queue

#### Borrower

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
<th>Waiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel Pending</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Idle</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Pending</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Received</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Returned</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Shipped</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Messages</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Standard Received list</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Standard Returned list</td>
<td>0</td>
<td></td>
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</table>

#### Lender

<table>
<thead>
<tr>
<th>Description</th>
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<th>Waiting</th>
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</thead>
<tbody>
<tr>
<td>Conditional</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>In Process</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Not Supplied</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Shipped</td>
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<td>0</td>
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<tr>
<td>Messages</td>
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<td>0</td>
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<tr>
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<td></td>
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<tr>
<td>Standard Shipping list</td>
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<td></td>
</tr>
<tr>
<td>ILL No</td>
<td>Requester Symbol-TGQ-TQ-STQ: Responder Symbol</td>
<td>Status</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>351 AAAAI</td>
<td>Marketing Management Kotler</td>
<td>Idle</td>
</tr>
<tr>
<td>346 AAAAI</td>
<td>Marketing Management Kotler</td>
<td>Idle</td>
</tr>
<tr>
<td>311 AAAAI</td>
<td>Marketing Management Kotler</td>
<td>Idle</td>
</tr>
</tbody>
</table>
Action Successful

Your action has been successful.

Use the Requests option to search for more requests, or the Results option to return to the results of the last search.
This is a test mail request

Account Id:  
Additional:  
Alternative Barcode:  
Article Author:  
Article Title:  
Auditor: 371  
Author:  
Barcode: PATRAS1  
Body:  
Class Mark:  
Client Department: 54  
Client Name: Nander  
Client Id: 54  
Client Billing Address:  
Client Billing Fax No:  
Client Delivery Address:  
Client Delivery Fax No:  
Copyright Text:  
Cost To User:  
Current Date: Sat May 05 06:44:52 2007  
Date of publication:  
Delivery Method: ILL-DN1 - Electronic Mail Document Delivery  
Detail:  
Due Date:  
Edition:  
Expiry Date:  
Format: 102 - Book  
ILL No: 380  
Instructions: 2 - Copy non returnable
### Work Queue

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<tr>
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<tr>
<td>Received by Email or FTP</td>
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<tr>
<td>Shipped</td>
<td>1</td>
<td>1</td>
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</tr>
</tbody>
</table>

#### Lender

- **In Process:** 2
- **Shipped:** 2
- **Messages:** 0
- **Standard Pick list:** 2
- **Standard Shipping list:** 2

**Barcode:** TUC1
<table>
<thead>
<tr>
<th>ILL No:Requester Symbol-TGQ-TQ-STQ: Responder Symbol</th>
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<tbody>
<tr>
<td>352 AAAAI-351-350 AAAAP</td>
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<tr>
<td><strong>Marketing Management</strong></td>
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<tr>
<td>Add Shipped</td>
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</table>

<table>
<thead>
<tr>
<th>ILL No:British Railways holiday guide 1952.</th>
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<tbody>
<tr>
<td>249 AAAAD-247-248 AAAAD</td>
</tr>
<tr>
<td>Status: In Process 27 Apr 2007 Authorisation: To be Acknowledged Last Action: REQUEST-Indication 27 Apr 2007</td>
</tr>
<tr>
<td>Add Answer Conditional</td>
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</table>

**End of Results**
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</table>

Barcode: PATRAS1

(If you need, I can provide a markdown version of this table.)
Your request is available at the library

Client Name: Mander Lankhorst
Client Id: 54
Client Billing Address:
Client Billing Fax No:
Client Delivery Address:
Client Delivery Fax No:
Current Date: Fri May 04 15:51:52 2007
Date of publication:
Delivery Method: ILL-RM4 - Postal Delivery Document Delivery Detail:
Due Date: 04-MAY-2007
Edition:
Expire Date: 14-MAY-2007
Format: 102 - Book
ILL no: 351
Instructions: 1 - Loan
ISBN: 0967654321123
ISSN:
Issue title:
Item Type: 1 - Printed
Language:
Local Due Date: 04-APR-2007
Max Cost Currency:
Max Cost Required:
Medium: 1 - Printed
Notes:
Number:
Pages:
Part P
Date:
### Requester Results

**Total Hits: 3**

<table>
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<tr>
<td><strong>Marketing Management</strong> Kotler</td>
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**Status:** Received: 04 May 2007  Authorisation: Processed Last Action: Received: 04 May 2007

- Returned
- Cost Adjustment
- Damaged
- Local Change
- Request Details
- Lost
- Message
- Renew
- Resend Last Message

<table>
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<tr>
<th>About Harry Potter (In)</th>
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<tbody>
<tr>
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- Cost Adjustment

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<tr>
<td><strong>Status:</strong> Received: 04 May 2007  Authorisation: Processed Last Action: Received: 04 May 2007</td>
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- Cost Adjustment
Live Demo Article Request?

http://test.vdx.greek.hostedbyfdi.net/
Questions?