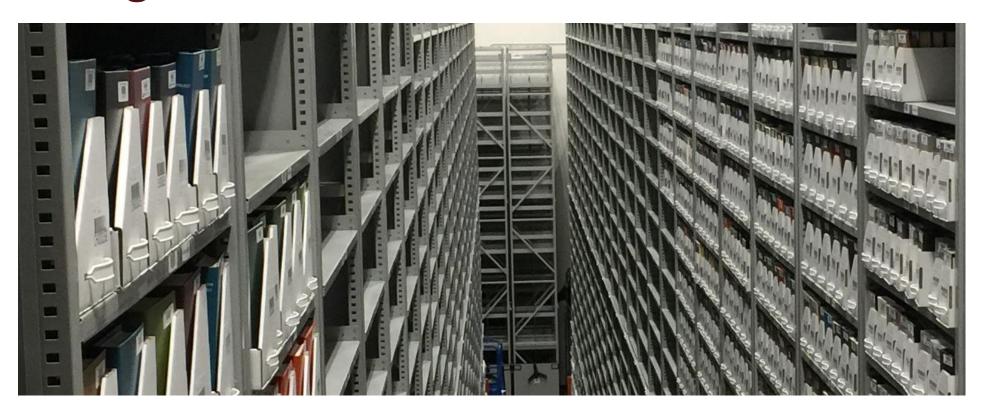# Integration of Off-Site Repository Software with the Library Catalog and Interlibrary Loan

Todd Peters, Paivi Rentz, Jason Long

Alkek Library, Texas State University

Presented at the 2018 Texas Conference on Digital Libraries, Austin, TX.

Background

In September 2017, Texas State University opened the **Archives and Research Center (ARC)**. It is a 14,000 square-foot, off-site, state-of-the art facility that will preserve decades of university treasures and library resources, collections, and research materials.

The University Libraries selected **Caiasoft** from CAIA Software & Solutions as the repository management software for the facility. University Libraries staff constructed scripts to integrate **Caiasoft** with our Integrated Library System, **Sierra**, and our Inter-Library Loan system, **ILLiad**. This allows patrons to request materials from the ARC through the catalog, and allows document delivery and inter-library loan article requests to be fulfilled electronically from the facility using Odyssey.

This poster explains how the integration was set up and diagrams the workflows involved.

Types of Requests coming to Caiasoft

1. Requests from the catalog (Sierra) for general collection items at the ARC
2. Separate request for special collections items (not requestable through circulation request system)
3. Article scan requests from within the university initiated from the catalog
4. Interlibrary loan requests from other libraries for books and articles

Requesting General Collection Items via Sierra

- Uses standard request functionality of the catalog
- File of available ARC items with holds is sent to Caiasoft along with item barcode Transfer can be automated with Sierra Scheduler.

Special Collections Delivery Request

Request is sent over to Caiasoft and Special Collections staff are notified of the request.

ARC Journal Article Scan Request

"Request article scan" button in catalog record. User selects volume and adds article details.

Integration with Illiad

Requirements: Multi-site installation, created new queue called "Awaiting ARC Processing" ILL staff determine when a resource is located in the ARC using the Z39.50 lookup within ILLiad. Three request types are handled differently

1. **ILL Book Request – ILLiad Lending**
   Requests are placed in a holding queue until received from the repository then are processed normally

2. **ILL Article Request – ILLiad Lending**
   Requests are simply routed to the ARC for processing
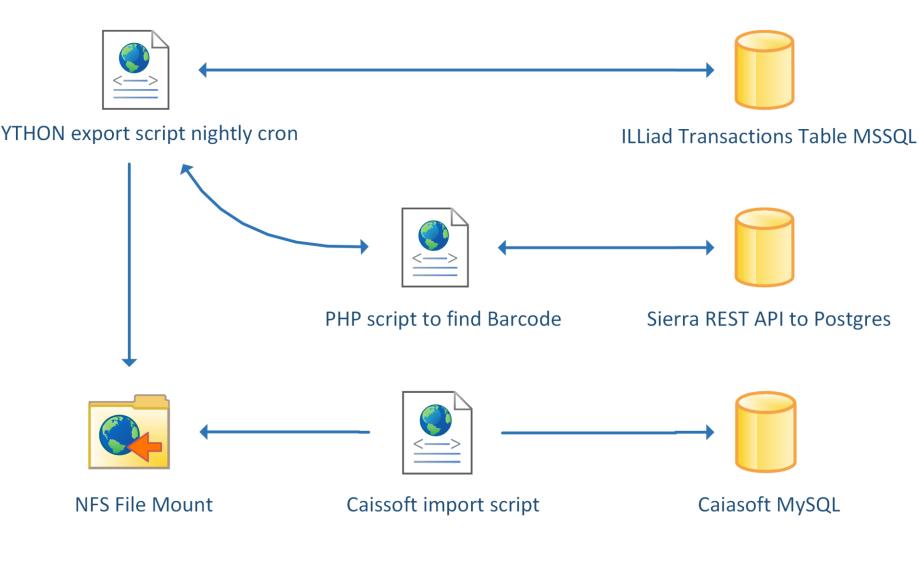
3. **Article Requests from TXSTATE via Sierra – ILLiad Borrowing**
   Requests are routed using local routing. The System ID is set to LOCL, the Lending String is set to ARC, and Request Sent is chosen.

The Scripts

The item barcode is the primary identifier in the repository software. The most significant element of integration is getting the barcode from Sierra via the API using the Call# passed by ILLiad in order to import into CAIA.

ILLiad MSSQL SQL

```
SELECT * FROM Transactions WHERE
TransactionStatus  LIKE '%Awaiting ARC%'
OR (Username = 'ARC'
AND RequestType = 'Article'
AND TransactionStatus IN ('Awaiting Local Request
Processing','Awaiting Lending Request Processing'))
AND (Location NOT LIKE 'ARC Southwestern Writers%')
AND (Location NOT LIKE 'ARC SW%')
AND (Location NOT LIKE 'ARC Special Collections%')
```

Sierra REST API

```
$s = new Sierra(array(
'endpoint' =>
'https://catalog.library.txstate.edu/iii/sierra-api/v3/',
'key' => 'Sierra Client Key',
'secret' => 'Sierra Client Secret' ,
'tokenFile' => '/tmp/SierraToken'  )););
```

Caiasoft Processing

- All incoming files have item barcodes to facilitate locating the item at the ARC.
- Files appear or can be manually uploaded into Caiasoft Circulation.
- Repository staff applies all or selected items to a retrieval job.
- Using the item barcode, a pickup list is generated that will list the item location in the high pile (aisle – shelf – tray – footprint).
- E-retrievals (scan requests) are automatically queued into a refile job.

Fulfilment of Requests

Book requests for TXSTATE users are delivered to the main circulation desk for pickup.

Special Collections requests are delivered to the main library Special Collections.

ILL book requests are delivered to the main campus ILL office for labeling and shipping.

Article requests are scanned at the ARC with a Bookeye4 scanner using BSCAN software and delivered via electronic delivery with OCLC Odyssey software.

TXSTATE users receive an email their article is ready and login to ILLiad to download the PDF.

TEXAS STATE UNIVERSITY ®

The rising STAR of Texas

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM