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

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Background



In September 2017, Texas State University opened the Archives and Research Center (ARC). It is a 14,000 squarefoot, 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
- 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.

TITLE	▼ darwin		Archi	ves & Research Cent	ter (ARC) 🔻 Sys
			🔲 Remove Unavai	lable Items	
Author	Shapley, Harlow, 1	<u>1885-1972, editor.</u>			
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	Treasury of scien		/ Harlow Shapley, Sa	muel Rapport and He	len Wright.
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ARC General

Q111.S48 1965

AVAILABLE

Special Collections Delivery Request	2
Request is sent over to Caiasoft and Special Collections staff are notified of the request.	
TEXAS STATE	
Request delivery to Wittliff Collections Reading Room	
The Texas liberators : veteran narratives from World War II /	
-Volume(s) * ☑ D810.V42 U684 2018 Copy No. 1	
Contact Name *	3
Email Address *	
Primary Phone Number *	
Additional comments or questions:	
ARC Journal Article Scan Request	
"Request article scan" button in catalog record.	
User selects volume and adds article details.	
	т
Alkek Library Interlibrary Loan ILLiad	1
Logoff pr11 Main Menu New Request View Tools About ILLiad	T
Journal/Magazine Article Request	SC
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Describe the item you want	
* Title (Journal, Conference Proceedings, Anthology)	
Please do not abbreviate unless your citation is abbreviated Journal of the American Dietetic Association.	
* Volume	
v.13 1937	P

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

System 434	34917 - Lending Request	
g Printing Odyssey OCLC Request		
Finished Mark Mark Found Scan Now t Step Renewals	Flag Directory	Notification
Z39.50 PubMed/Dodine	Route to site	
434917 Article ILL Service Type 3/28/2018 11:05 AM Not Wanted After Site Site Regular Shipping Options Voc Type	Awaiting Stacks Searching In Stacks Searching	18675 98265 ORZ,0 WAU OCLC CONS
Collections Local Holdings Imported Request Copyr	Dyrig In Shipping Label Print Queue Informa	ation
Deep learning with Python /	Item Shipped	
François Chollet 2018	Request Conditionalized Date Date Date Date Date Date Date Date	Cancellation of Num
	Awaiting ARC Request Processing ial Instr	uctions
	Odyssey (PDF Enabled) Max Cost/Pie	eces
lote	Type Added By Citation Info	rmation
Illing Notes: USA - PLEASE BILL IFM (we can also pay with Cre Please "Conditional" with questions.NON-USA - We can pay by		

. ILL Article Request – ILLiad Lending Requests are simply routed to the ARC for processing

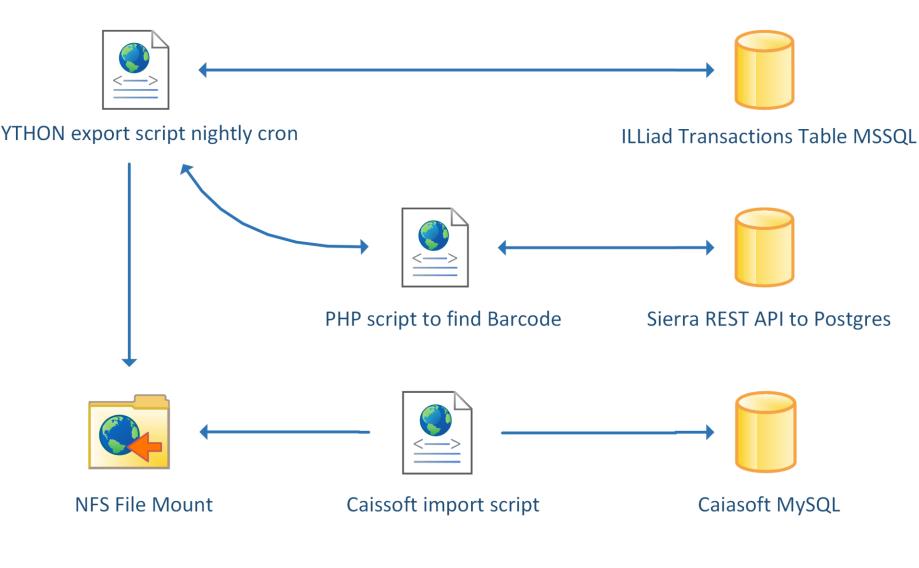
System	4347	77 - Lending Request						
ng Printing Odyssey OCLC Req	uest							
😥 😥 👻	12 🛃							
Finished Mark Mark Found Yes Searching Found Scan Now	Yes With No Due Date	Route Add Flag Remove Policies Billing View Send Notification * Flag * Directory *						
xt Step	Renewals	Route to Site ARC -						
Z39.50 PubMed/Docline		Awaiting Lending Request Processing						
m		Awaiting Rush Request Processing ation						
434777	Article	Awaiting Conditional Request Processing						
ILL	Service Type	Awaiting Renewal Request Processing r 9643						
3/28/2018 11:40 AM -	Not Wanted After	Awaiting Stacks Searching g ISM,						

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.

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Borrowing P	rocessing Printing Copyright								Ģ (
Ø 🎓		Clone to Curren	it User	iiii	8		2	-	
Cancel Request Request + Sent	Route Route To Document Add Flag R Delivery * * H	Remove Clone to Anothe	er User + Policies Directory	Billing	View	Send Notification	Pending Updates *	Import into Resubmission	
Next Step	Routing	Cloning	OCLC	OCLC Billing		User		ystem	
Detail History C	CLC Z39.50 PubMed/Dodine								
General Request Infor	mation					Local Information			
Transaction Number	434432	 Article 	C Loan]	Original TN			
Jsername	tp09	Wanted By				Bib Number			
Transaction Date	3/28/2018 11:57 AM	- Not Wanted After	04/21/2018	04/21/2018		Lending String		ARC	
Delivery Method	Hold for Pickup	Site				Lender			
Service Level	Regular	 Shipping Options 				System ID		LOCL -	
Billing Account		 Doc Type 	Article			OCLC Status			¢

he Scripts

he item barcode is the primary identifier in the repository oftware. The most significant element of integration is etting the barcode from Sierra via the API using the Call# bassed 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



Job	o# J	ob Status	ł	File Name	Items	Denied	Schedu	uled Jo	ob Date	→ Apply to Jo	b	
288	32 Ir	n Queue	illiad2	018041006.tx	t 7	2	3	04	4/10/18	Delete Item	1	
					Re	equest Stre	am Ite	ms				
Barcode)	Request Type	Stop	Requestor	Details	Title		Denied	Denial Details		Schedul on Job	
0112219	915819	ERT	ERT		<u>View</u> Details	Polyhedron.		N			2885	
0112219	915819	ERT	ERT		<u>View</u> Details	Polyhedron.		Y	Item is alread Retrieval Que Job# 2882	dy present on External eue		
0112220	608031	ERT	ERT		<u>View</u> Details	American fa physician.	mily	Ν			2885	
0112219	916031	ERT	ERT		<u>View</u> Details	Polyhedron.		Ν			2885	
0112219	916031	ERT	ERT		<u>View</u> Details	Polyhedron.		Y	Item is alread Retrieval Que Job# 2882	dy present on External eue		
0112214	038617	PYR	a	Patron 1415074	<u>View</u> Details	A handful of	dirt /	Ν				
0112214	976105	PYR	a	Patron 1415074	<u>View</u> Details	The world be our feet :	eneath	N				

- 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.



The rising STAR of Texas MEMBER THE TEXAS STATE UNIVERSITY SYSTEM