Minitex Policy Advisory Council Meeting

March 5, 2010

AGENDA ITEM # 5

MnLINK Gateway --- Report & Update

A report will be sent to you prior to the meeting. Attached are statistics for first two quarters, FY10.

**Requestor / Borrower** means these were requests for loans and copies generated by end users and/or library staff.

**Responder / Lender** means these were requests filled by lending libraries and sent to requesting libraries.

This provides a comparison of the first two quarters, FY09 & FY08. We can discuss at the meeting. Please note the fill rates, which is the ultimate satisfaction element for borrowers.

My suggested highlights would be:

- The reason Requests are low from CLIC libraries is because CLIC patrons use Innovative Interface for requests to each other and send requests to Minitex via OCLC resource sharing. On the lending side, since CLIC is a MnLINK Gateway site, they receive requests from other Gateway sites and filled 73% of them during the first six months of FY10.
- Similarly, if you look at the Minitex – U of MN, under the Responder/Lender columns for FY10, you will notice the fill rate of 78%. The majority of these loans are to MN public libraries and these patrons are searching for academic type monographs held at the University.
- If you look at the public libraries under Responder/Lender columns for FY10, you will notice that the public library fill rate for these loans is 74%, which is pretty good. This includes loans referred to public libraries by the Minitex staff after ascertaining the item is reported ‘available on the shelf’.
MnLINK Gateway Statistics 1st Half Fiscal Year 2010
Total borrowing traffic within the system for the period July 2009 – December 2009 declined slightly by 0.6% from 285,389 requests in FY’09 to 283,644 requests in FY’10. The drop for MELSA libraries was 5.5%. MELSA libraries accounted for 51% of all public library borrowing traffic within the system. Minitex borrowing traffic declined by 17.5% and private colleges by 22.8%. Lending traffic for private colleges, MELSA, and public libraries as a group declined. Minitex lender activity was flat. Total system lending traffic decreased from 296,469 requests in FY’09 to 282,229 requests in FY’10. This is a 4.8% decline continuing a trend noticed in the 1st Quarter FY’10.

ZPORTAL/VDX Version 4.1 Upgrade
Now that library staff and end-users have had time to adjust to the changes brought by the move to Version 4.1 of the Gateway’s supporting software we’ve been introducing some of the new features. Libraries have begun using the user alert functionality that allows automated messages to be sent to users when their requests reach certain statuses. The messages are pre-defined by the library and are sent to the users e-mail address. We are recommending that these alerts be sent for not supplied requests and those that are new and held for staff review for reasons such as for items that are locally owned and/or for notifying users of a possible purchase of an item because of the Amazon date/price lookup service. This benefits both libraries and users as the alerts give the users timely information about the status of their request and the staff can provide a higher level of customer service with little effort.

Another feature of the upgrade results in a time savings for libraries that have implemented NCIP for integration between the local circulation and the VDX interlibrary loan system. This is the ability to do a batch update on requests that are being changed to certain statuses. This is most useful for the shipped and received actions. A webinar explaining how this works was provided to library staff this week.

We are pleased to report that the slowness issues that we experienced for months after the upgrade have been resolved. We appreciate the patience of the staff in the Gateway libraries as they were dealing with these issues.

MnLINK Gateway Contract Process
We are currently using the Zportal/VDX software on the MnLINK Gateway. The system OCLC has lined up to replace it is the WorldCat Navigator. An important consideration in moving to the WorldCat Navigator is the requirement that all of our libraries would need to have their records loaded on WorldCat. We currently have eight public libraries that are not full members of OCLC but may load holdings using CatExpress.

Bill DeJohn and Becky Ringwelski met with Mike Morey, OCLC Library Services Consultant, on January 4th to discuss how we’ll be proceeding with the renewal of the contract for the MnLINK Gateway. At this meeting it
was stressed that we only want to contract for the continued use of the Zportal/VDX software and not include a commitment to move to the WorldCat Navigator product. We took the opportunity to emphasize the financial challenge libraries would face in taking on the expense of joining OCLC. Mike suggested that it might be helpful to arrange a meeting at the mid-winter American Library Association Conference in Boston. That meeting was planned and Becky Ringwelski had an opportunity to discuss the contract issues with Mike Morey, Katie Birch who is responsible for OCLC resource sharing products and Mindy Pozenel who is responsible for the WorldCat search interface.

At this meeting, it appeared that OCLC understood our position. OCLC staff will be pulling together a package to present to us in late March. This will include information pertaining to the inclusion of all eight libraries that are not current members of OCLC. It was suggested that there would be a no or low cost approach for the eight libraries if we decide to move to the Navigator product at some point in the future. We need to see the package to be clear on what they are suggesting. We also expect that the package will include information on the length of time that OCLC will continue to support the Zportal search interface.

We want to emphasize that our contract that will be put in place on July 1, 2010 will be for the continued use of the current Zportal/VDX software for the next two years with extensions possible after that period. There should be no changes in how libraries are currently using the Gateway during this time period. We’re learning more about what options we’d have if we decided to continue using an OCLC solution for the MnLINK Gateway when Zportal is no longer supported. Let us know if you have any questions.

**SirsiDynix and NCIP**

We now eight SirsiDynix locations using NCIP (NISO Circulation Interchange Protocol) to streamline the interlibrary loan request process. Traverse des Sioux Library System, Ramsey County, Martin Luther College, Rochester Public, Scott County, Dakota County, Great River Regional and Washington County are all in production with NCIP. SELCO and Anoka County are in the queue to go live with NCIP in the coming months.

Nick Banitt and Agnes Lee from the Minitex staff have been making visits to the libraries that have implemented NCIP. This allows them an opportunity to learn how the library has implemented the functionality and share information they have culled from their visits.

**News on Innovative Interfaces and NCIP**

We have recently learned that III is developing an NCIP application based on the NCIP Direct Consortial Borrowing (DCB) profile. This news is both good and bad for Innovative sites on the MnLINK Gateway. The good news is that Innovative is developing NCIP, the bad news is that they are implementing version 2 which is not currently compatible with the OCLC VDX ILL system. Most vendors have not yet implemented version 2 and it is not compatible with version 1 that is most widely used.

OCLC has developed an NCIP gateway that mimics NCIP functionality for interaction between the MnLINK Gateway Zportal/VDX ILL system and the ILS circulation system this is another option for our libraries. The NCIP gateway is meant to be used by libraries that have an Innovative Interfaces ILS system. We have placed the MnLINK Gateway Innovative Interfaces Inc sites on the list of those who would be configured to use this functionality when it becomes available to us. The preliminary pricing information we’ve heard on this would make it costly for our libraries to use this approach. We’re awaiting a firm pricing document.

**MnLINK Users Group Meeting – Fall 2010**

Plans are underway for a MnLINK User Group to take place in the fall. This meeting has been held in the years that an Ex Libris Regional meeting is not held. This meeting is intended for staff using the Ex Libris Aleph ILS and/or the MnLINK Gateway.