Workflow Optimization with IDS Logic
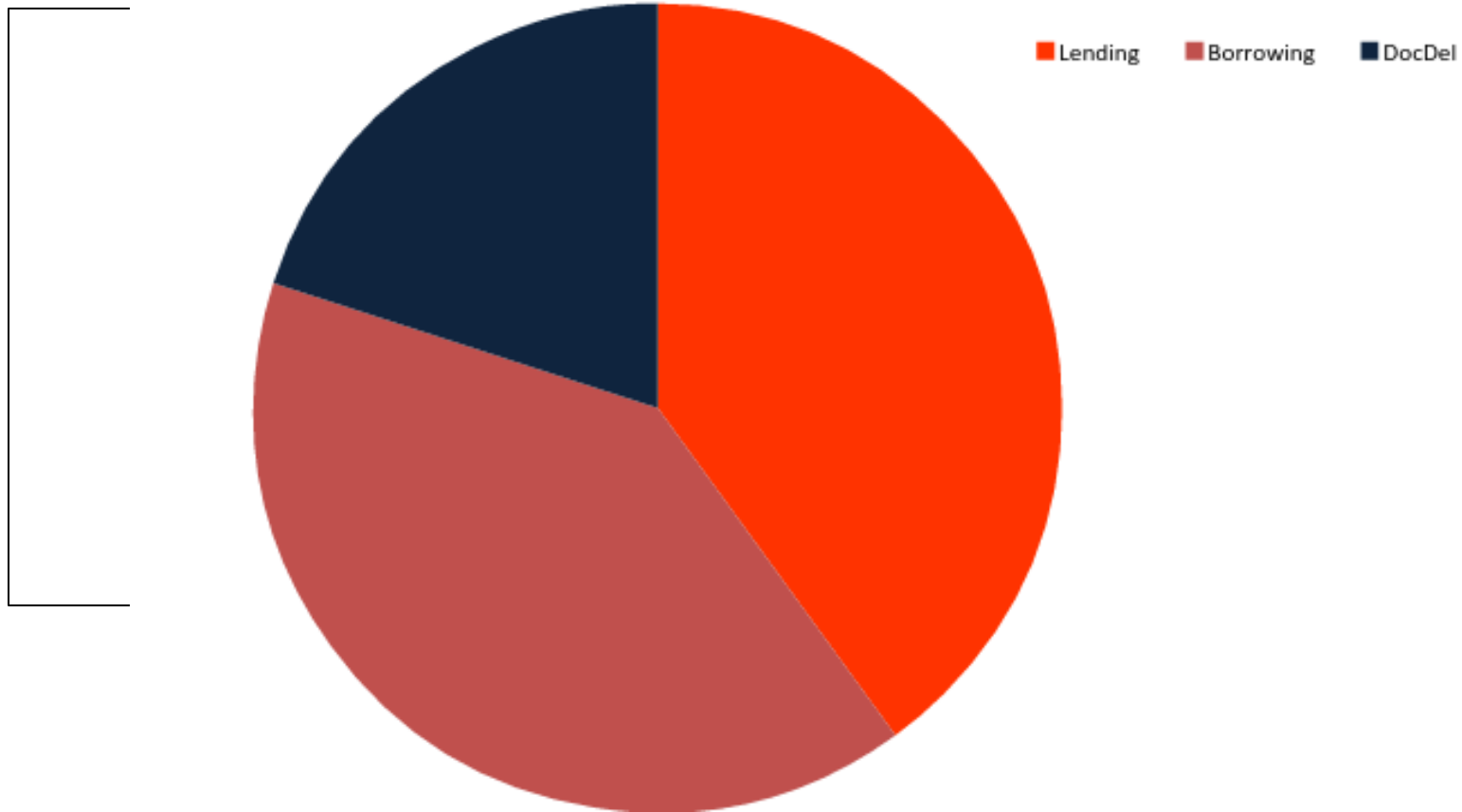
Shannon Pritting, SUNY Polytechnic Institute, Tech Dev. Team, IDS Project

Planting Seeds
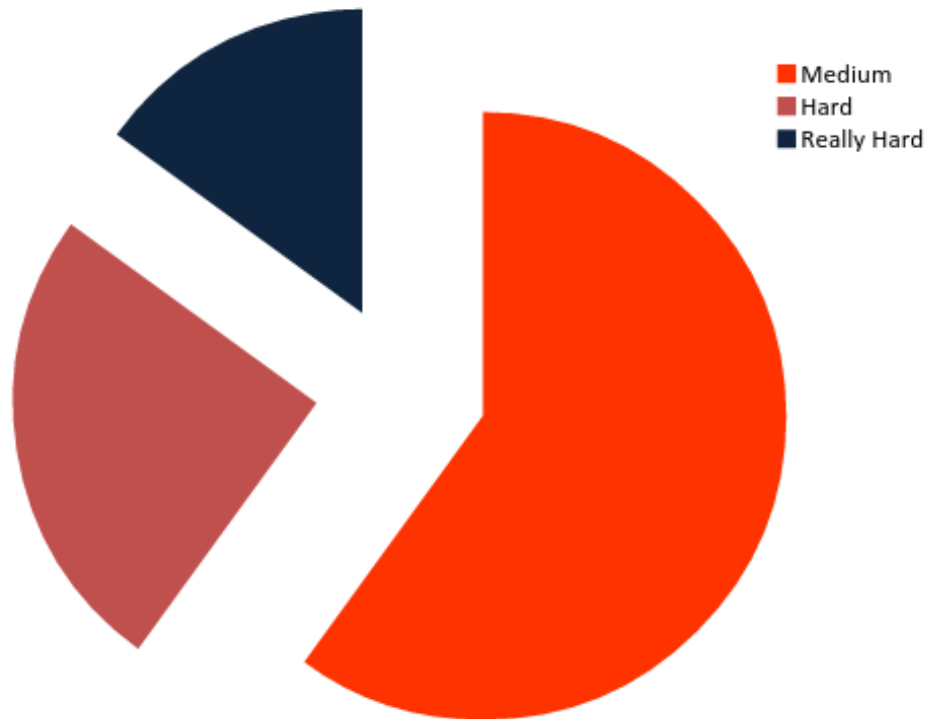

Dr. David Ferrucci

Image from ibm.com—
IBM Watson site

ILL is a big pie, and we have functions for many pieces, but have room for growth in borrowing and doc del.
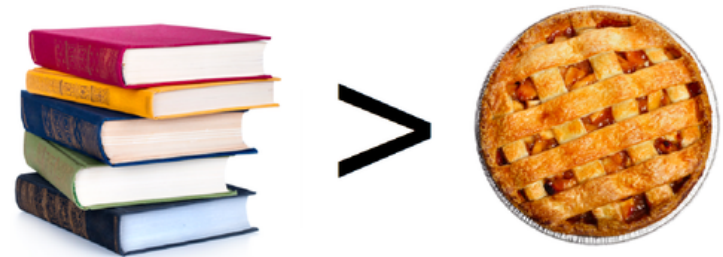
Lending   Borrowing   DocDel
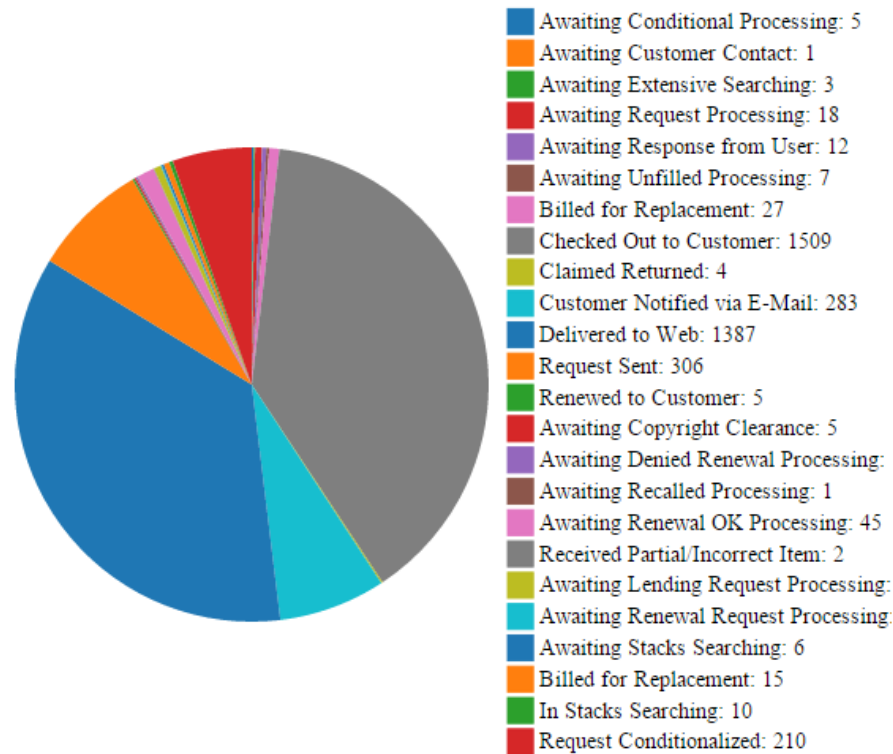
Right now, we're getting to the medium stuff

Finding unexpectedly large pieces of your ILL pie.

- Different types of libraries will have different issues.

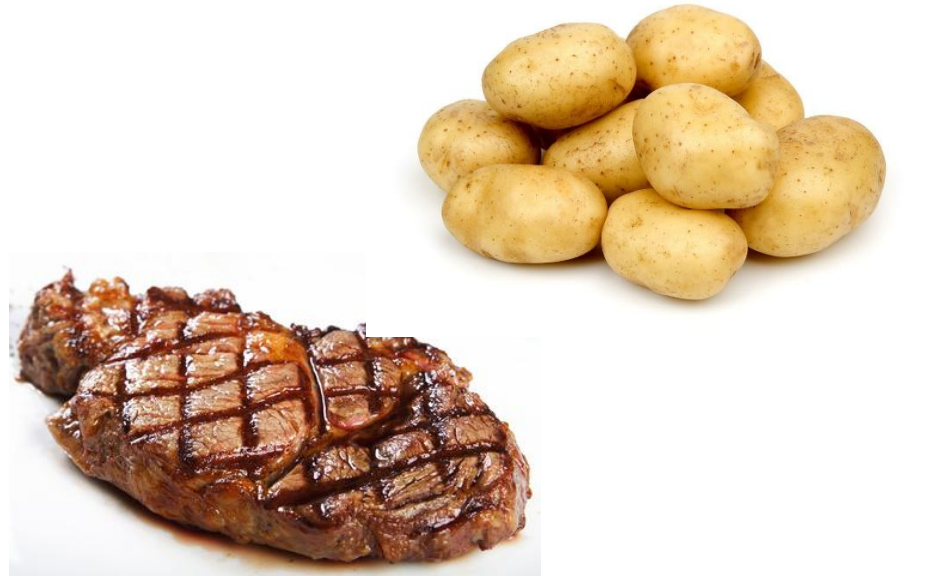- SYB—27% of all ILL activity required availability look-up.

The slices we'll go after will be smaller and smaller.

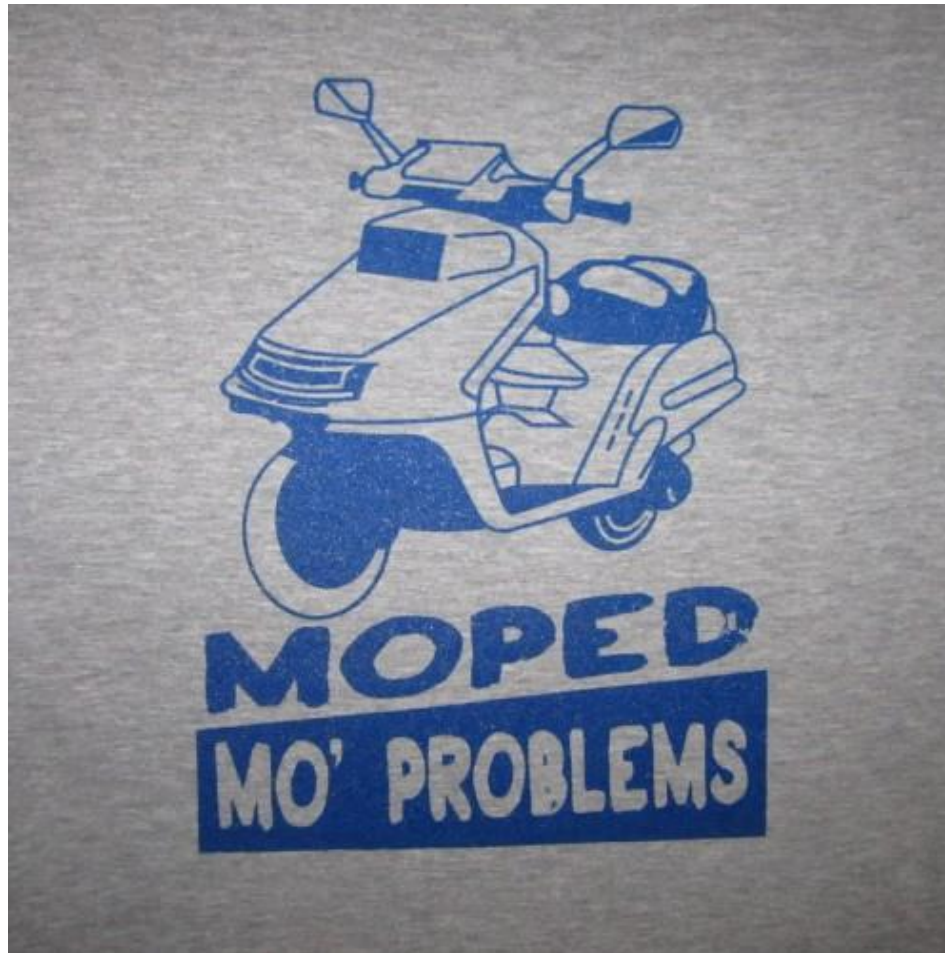
Pie Chart: Pie Slice Hover Tooltip

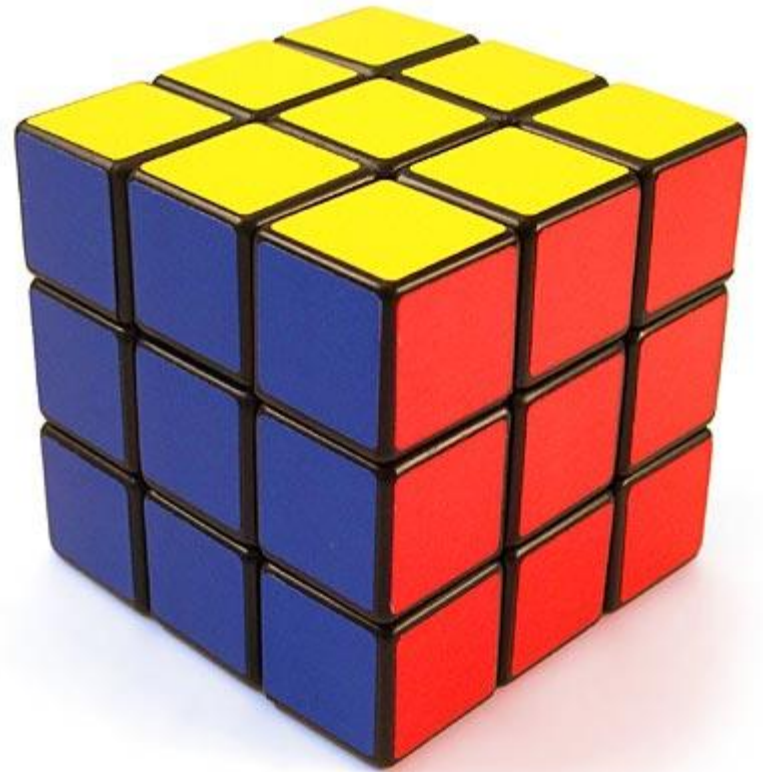# And then, the slices will get more and more refined.

- Find the medium stuff in a more complex process or queue.
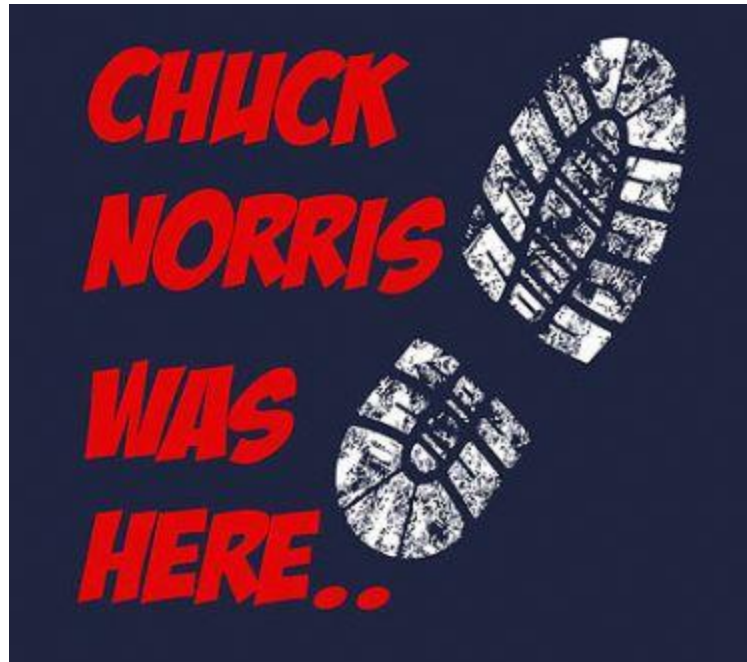- Define your perfect automation and review everything else.

Logic and Change

It's no fun Being Left with Problems

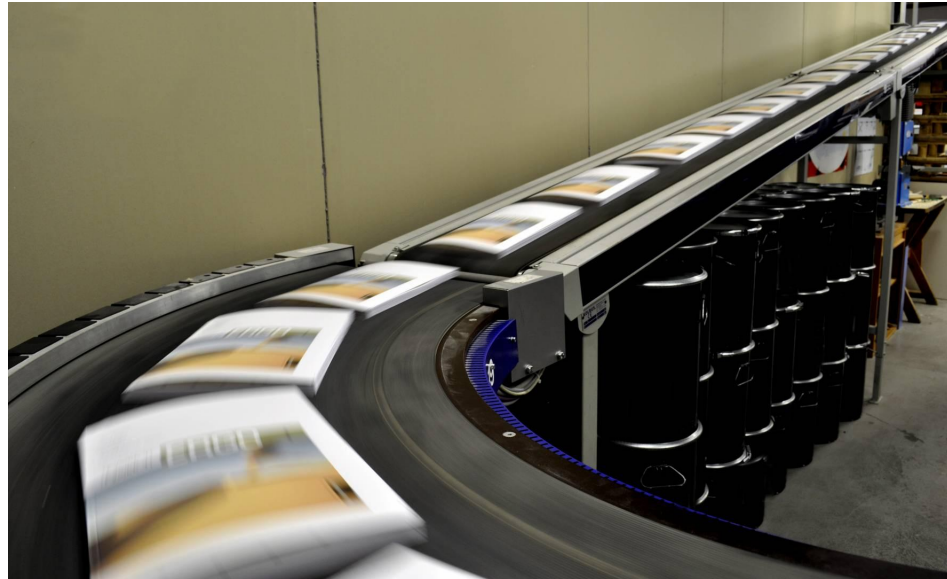# Logic leaves you notes to tell you what it did to transactions.

Transactions are followed through workflows to reduce touches through Logic.

- TNs move through processes with different rules applied based on your business logic.

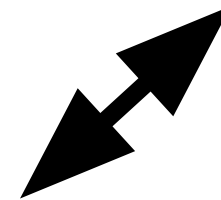# How Does IDS Logic Work?

Libraries Configure Logic Rules and Services to best automate workflows, getting data from APIs, web services, and other sources

Z39.50

ALIAS

OCLC™

API
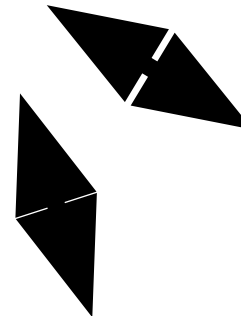
Server Addons

- Run in System Manager
- Like a system/form addon, store lua and config.

Supported Commands:
- Route
- Add Flags
- Send Emails
- Set Flags
- Add ESP Update
- Write Sys. Log

How we're using Server Addons

- A main server addon
- Lua is written on the fly for the addon to execute based on your needs.
- No need for dozens or hundreds of addons.
- Simple for you.

Simplicity takes **WORK.**

Code that writes code…

CHUCK NORRIS DOESN'T WRITE CODE

He stares at a computer screen until he gets the program he wants.

Sometimes in life, it's about the queue, not the transaction.

Buttons are much more powerful when you can act on many transactions at the same time.

Logic Addon(s): Coming Soon

- Logic Dev has led us to dynamic addons for the Illiad client managed by Logic.

- Go to Logic Dev session for more information and discussion.

What exactly does this mean to me?

- IDS Logic can insert information into transactions.

- IDS Logic can route transactions.

- IDS Logic can cancel and update transactions in ILLiad and WCRS/Worldshare.

- IDS Logic can send emails to patrons or other libraries based on criteria you give it.

- IDS Logic can read information in transactions and take actions based on criteria.

KEEP CALM AND HAVE SOME PIXIE DUST

Who's Using Logic Now?

73 Libraries

Most are IDS Project Members, and all types of libraries are represented in this group.

Logic Development Libraries

IDS Logic Rules

ILLiad

IDS LOGIC

Can key off date information

IDS Logic looks for information that is reliably acted upon and takes actions, including notifying patrons

Emails Patron

Updates/Routes Transaction
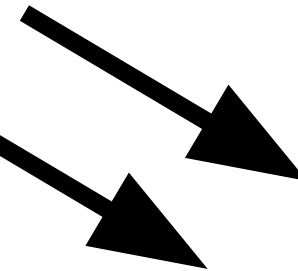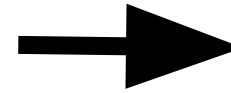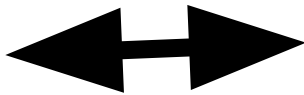
Add Flag   Remove Flag
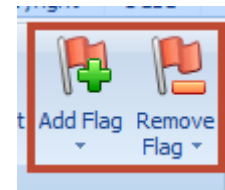
Add/Remove Flags

How are Logic Rules different than Client Routing Rules?

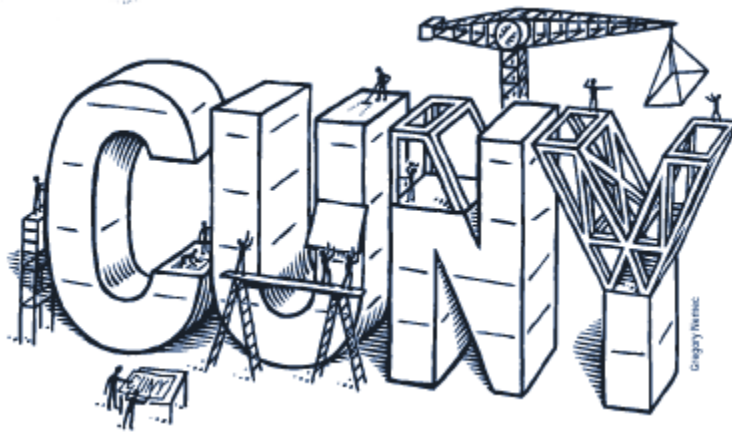Rules can make finding, fixing, and working on your workflow problems much easier.

Lending Availability Service

Remember the good old days when we had to look up ILL requests manually?

LAS Now @ CUNY

What's Coming with ALIAS

- Lending Improvements.
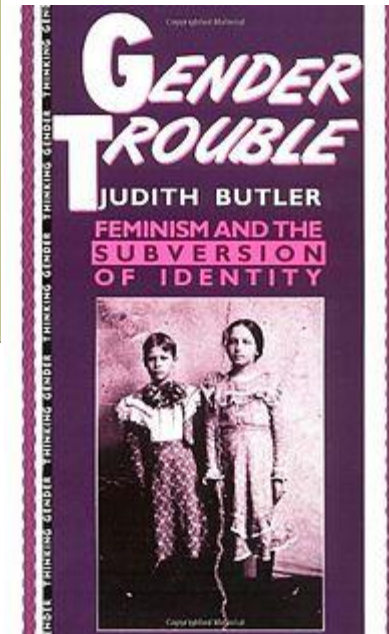- Print finally gets its due.
  - Avail Lookup for print articles.
- Sorting E and P for workflow optimization.

From: http://library.buffalo.edu/annex/

Borrowing Availability Service—Baker's Dozen

- Set your direct request free and still find what you have that's available.

My Library is Your Library

Direct Request Enhancer: Straight from Ken's Brain

From independt.co.uk

Tales of a SuperSearcher

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/20/2015 9:23 AM	1. Request matched profile DIRECTRE./2. No lenders or not enough lenders ☐	System	System

Rule Examples: Stale Requests in Request Sent

- Finds requests in queues that you'd like to monitor closely—but may not have the time to.

Rule Example: Book Chapter Direct Requester—16 Libraries Using

- Article requests shouldn't be ignored just because they're book chapters.
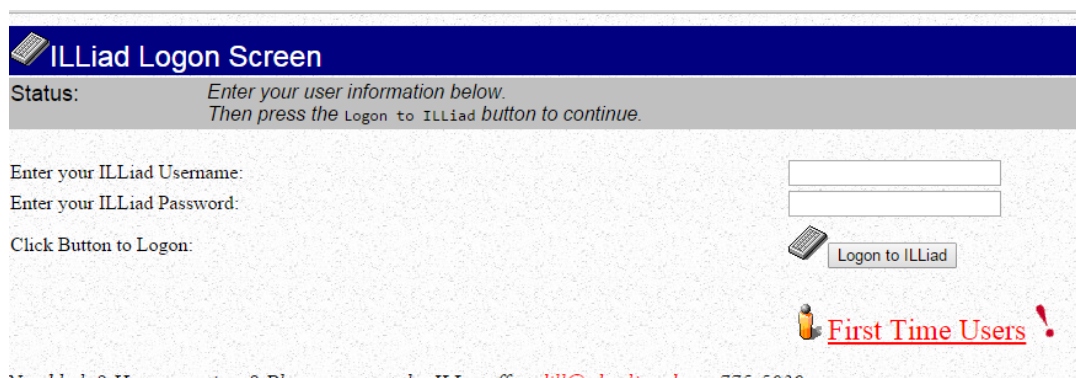- And OCLC shouldn't be ignored either.

Logic is a platform that will continue to be built to facilitate the most effective resource sharing possible through ILLiad automation and enhancements.

Taking Logic to the Web (think GIST 2.0)

- ILL webpages dynamically generated to offer different options for purchase or rental for books and articles.
- Integrate Discovery APIs into webpages to harvest citation information and provide purchase options.

Future Developments: GIST Rules

Turning the Mic over for questions…