



A unified community  
of trust and support  
built around a critical and  
clearly understood purpose:  
effective resource sharing.

# Welcome to the 2016 All-Region User Group!

# Wi-fi Info



# Partnerships



# Agenda

10:00am Coffee & Registration

10:30am Welcome, Updates, and Announcements

10:50am a)ILLiad 8.7 Update/ILL Code Update

11:30am IDS Project contract review

12:00pm Lunch

1:00pm Constant Data/Custom Holdings Groups and Path

1:30pm Learning and Training Opportunities

2:00pm Coffee Break

2:15pm Group Discussion about Training

3:30pm Wrap Up



# **IDS PROJECT**

Update

# New Regional User Group Chairs

Coordinator: Jennifer Acker

Western:

- Chair: Heidi Webb
- Co-Chair: Ben Hogben

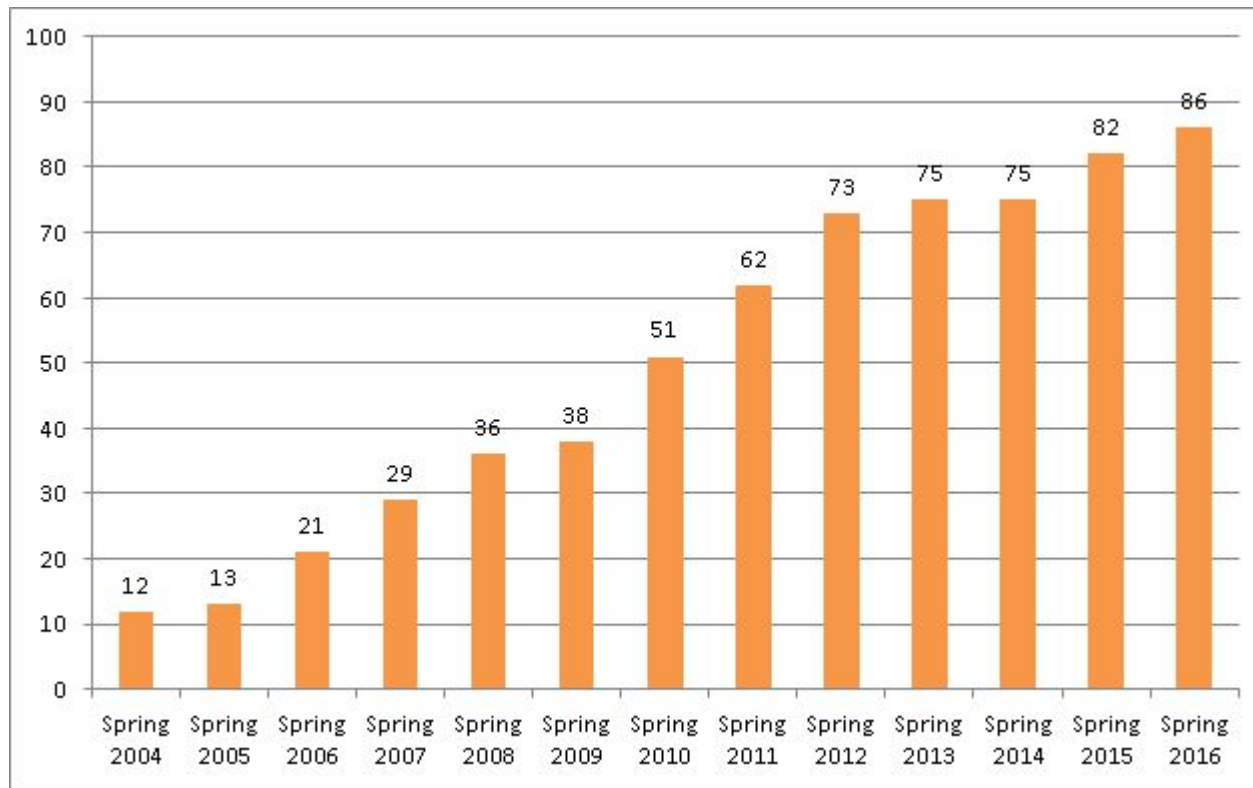
Eastern:

- Chair: Jay Kibby
- Co-Chair: Melissa Perez

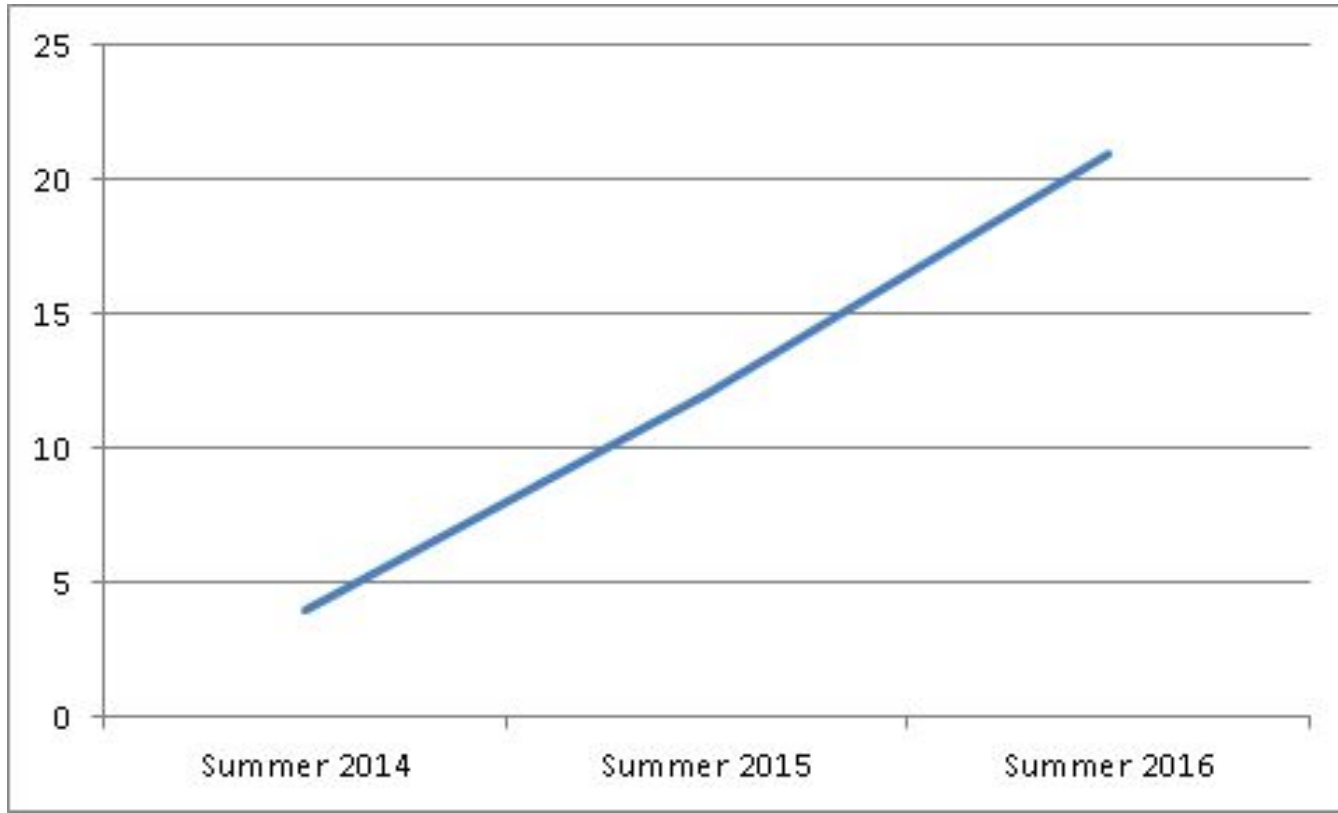
METRO:

- Chair: Simone Yearwood
- Co-Chair: Rebecca Hyams

# Current Membership



# IDS Logic Subscribers





# ILLiad 8.7

## Release Notes

<https://prometheus.atlas-sys.com/display/illiad/ILLiad+8.7+Release+Notes>



# 8.7 Installing

- Server upgrade - 3 minutes (self-hosted)
- Client download - 5 minutes
  
- When updating the client, if you don't have the latest version of .Net, it gets installed for you - 10 minutes, requires a reboot

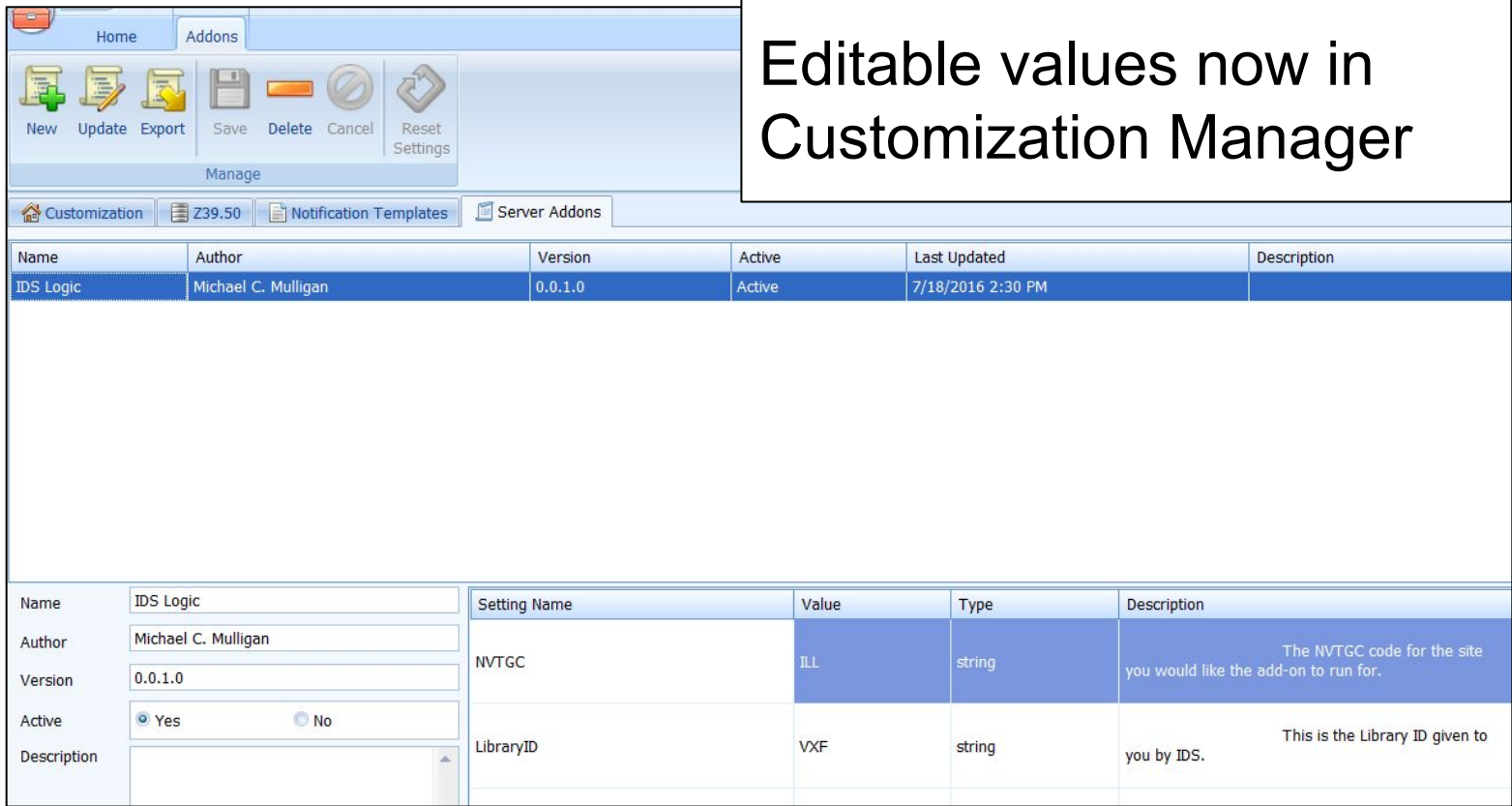
## 8.7 “New” Queue

### Web Request Created

- ~ dozen old requests with no title or history information
- Moved these to Request Finished
- Has not re-appeared

# 8.7 Server Addons

Editable values now in Customization Manager



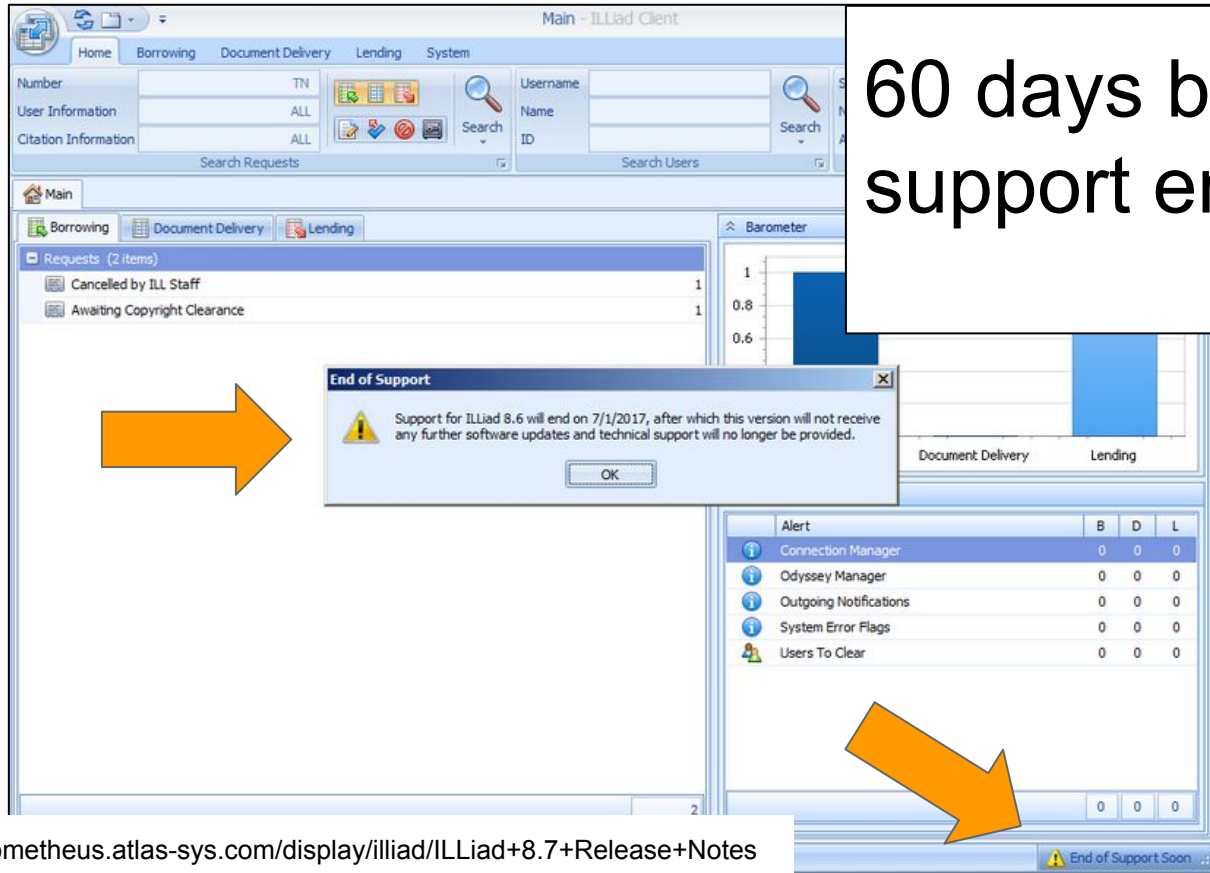
Name	Author	Version	Active	Last Updated	Description
IDS Logic	Michael C. Mulligan	0.0.1.0	Active	7/18/2016 2:30 PM	

Name	IDS Logic	Setting Name	Value	Type	Description
Author	Michael C. Mulligan	NVTGC	ILL	string	The NVTGC code for the site you would like the add-on to run for.
Version	0.0.1.0	LibraryID	VXF	string	This is the Library ID given to you by IDS.
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Description					

# 8.7 End of Support Message

60 days before version support ends

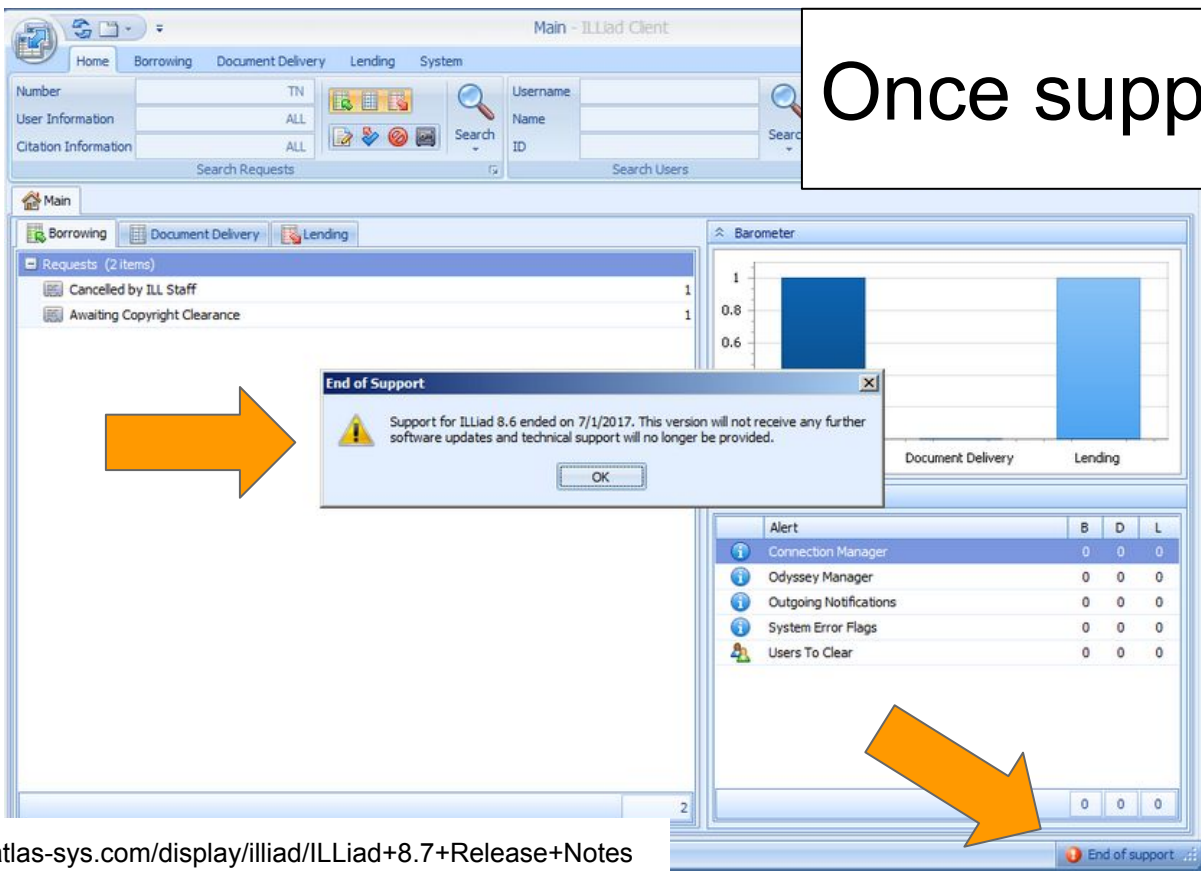


The screenshot shows the ILLiad Client interface with a dialog box titled "End of Support". The dialog box contains a warning icon and the following text:

Support for ILLiad 8.6 will end on 7/1/2017, after which this version will not receive any further software updates and technical support will no longer be provided.

An orange arrow points from the left towards the dialog box. Another orange arrow points from the bottom right towards the system tray area where a small "End of Support Soon" icon is visible.

# 8.7 End of Support Message



Once support ends

## 8.7 Sampling of Minor Changes

- FAQ.HTML and ElectronicDeliveryInformation.html now served by DLL
- “Open e-mail attachments and other uneditable files in reading view” in Microsoft Word is no big deal
- All forms and buttons display correctly at any display resolution
  - Great for those with larger display text
- Custom search exports as an XLSX file type limited in size only by MS Excel
- Files greater than 2GB can now be downloaded from the Electronically Received Articles web page

# ILL Code Update



# ILL Code of the U.S. - Update

- ILL materials permitted for special uses such as classroom presentations or course reserves. Any special use must be negotiated with the lender before shipping/canceling. (2.1, 4.4)
- Libraries encouraged to lend internationally. (3.2)
- Borrower must comply with copyright restrictions. (4.8)
- All fees and reimbursement costs must be paid promptly. (Now addressed in its own section.) (4.10)
- **Due date is now defined as the date the item is returned to the borrowing library, not the lending library.** (4.12, 5.7)
- Lender encouraged to provide as generous a loan period as possible. (5.1)

# ILL Code (Continued)

- Lending library should make available any fee schedule and bill for replacement or damage promptly. (Now addressed in its own section.) (5.3)
- ILL staff should collaborate with serials management personnel whenever possible to make sure license negotiations are favorable to ILL. (5.4)
- Any special terms, restrictions on use or shipping requirements should be negotiated before the request is updated in OCLC as filled or unfilled. (5.5)
- New section: Lending library should provide electronic copies (of high quality) whenever possible, comply with copyright and resend copies promptly when original is not sufficient. (5.11)

# ILL Code Links

Summary of changes to the Interlibrary Loan Code of the United States:

<http://connect.ala.org/node/250213>

Interlibrary Loan Code of the United States with Explanatory Supplement:

[http://www.ala.org/rusa/sites/ala.org.rusa/files/content/sections/stars/resources/ILL\\_Code\\_with\\_Supplement.pdf](http://www.ala.org/rusa/sites/ala.org.rusa/files/content/sections/stars/resources/ILL_Code_with_Supplement.pdf)

ALA - RUSA Interlibrary Loan Code Website:

<http://www.ala.org/rusa/resources/guidelines/interlibrary>

# IDS Project contract review



## 2016/17 Membership Agreement

This document is a voluntary agreement to govern membership in the Information Delivery Services (IDS) Project cooperative. It is based on the premise that each member institution fully supports the IDS Project's purpose statement:

“The Information Delivery Services (IDS) Project strives to be an innovative model of library cooperation for effective resource sharing through the promotion of community engagement, staff development, best practices, and research & development.”

By entering into this membership agreement, your institution agrees to the following:

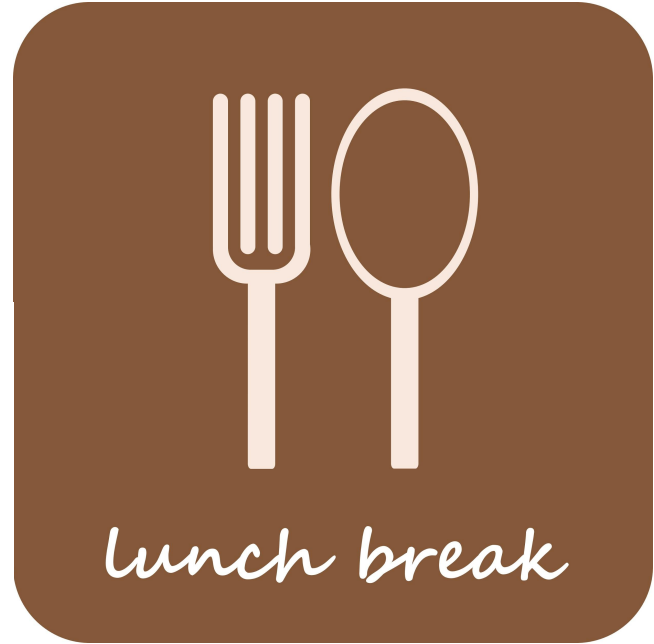
### 1. Resource Sharing

#### 1.1 Reciprocal Lending

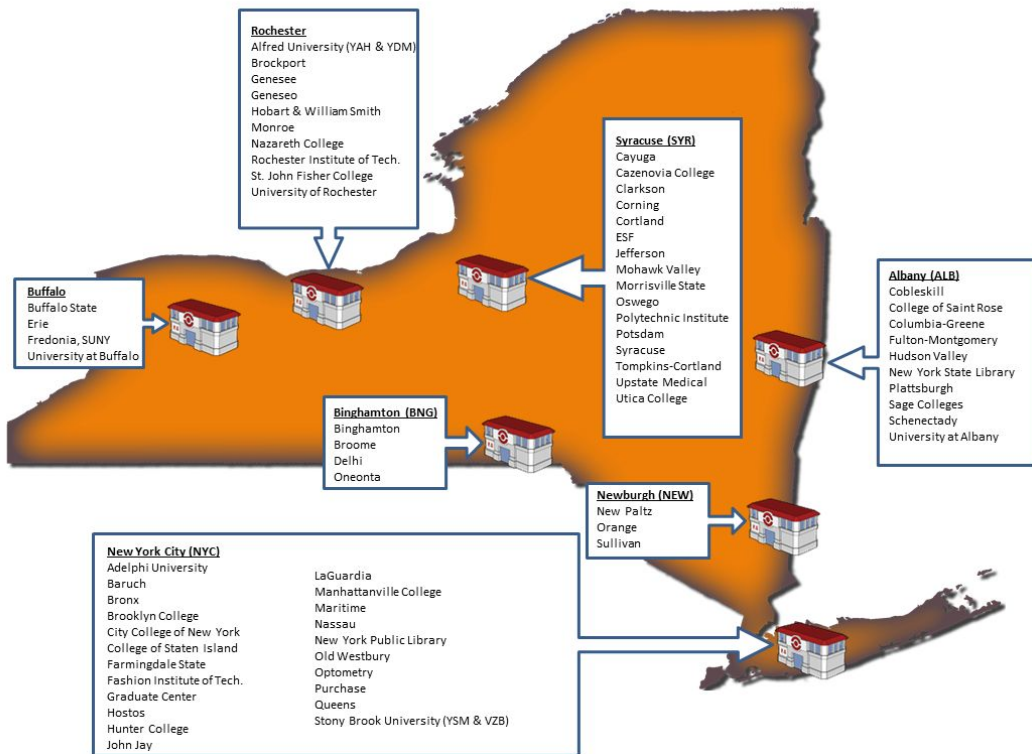
- 1.1.1 Member institutions will not charge each other fees related to the handling of interlibrary loan requests, including per-request lending charges and shipping or postage fees.
- 1.1.2 All member institutions agree to abide by the responsibilities outlined in the [American Library Association \(ALA\) Interlibrary Loan Code for the United States](#).
- 1.1.3 Each member institution agrees to respond to the requests of other members as expeditiously as possible.
- 1.1.4 Article Preferred members will receive and provide reciprocal benefits for Loans in addition to Articles, though they are not required to send loans via Empire Library Delivery, or other local or regional delivery systems.

#### 1.2 Interlibrary Loan Platform

- 1.2.1 All member institutions will use the [OCLC ILLiad® Resource Sharing Management Software](#) as their interlibrary loan platform.
- 1.2.2 Each member institution will make their best effort to optimize their ILLiad® implementation through the adoption of the [IDS Project's Recommended Best Practices](#).
- 1.2.3 All software on your local computers for the purposes of interlibrary loan should



# ELD has how many hubs?



# Empire Library Delivery

Label Maker

FAQs

Roster

Policies & Procedures

Missing Resources

Request Bags

Report an Issue

Contact ELD


<https://www.esln.org/services/empire-library-delivery/>

- Label Maker
- Current Roster
- Request Bags
- Report Lost Books
- Report a Missed Stop



# Label Maker

Find the proper label information for ELD participants by choosing the institution from the dropdown menu:



Empire State Library Network  
Discover. Connect. Engage.

Home Aca  
Resources ▾

- Morrisville State College, SUNY, Morrisville: XMM
- Nassau Community College, SUNY, Garden City: VVX
- Nazareth College, Rochester: XNC
- New Community College, CUNY, New York: NYNCC
- New Paltz, SUNY, New Paltz: ZLM
- New York City College of Technology, CUNY, Brooklyn: ZNC
- New York Public Library, New York: NYP
- New York State College of Ceramics at Alfred University, Alfred: YDM
- New York State Library, Albany: NYG
- Niagara County Community College, SUNY, Sanborn: YKU
- NO LONGER PARTICIPATING: Center for Worker Education - CCNY/CUNY, New York: ZXC2
- NO LONGER PARTICIPATING: Molloy College, Rockville Centre: VYA
- North Country Community College, SUNY, Saranac Lake: ZNO
- North Country Library System, Watertown: RTN
- Old Westbury, SUNY, Old Westbury: ZOW
- Oneonta, SUNY, Oneonta: ZBM**
- Onondaga Community College, SUNY, Syracuse: VOC
- Optometry, SUNY, New York: VXP
- Orange County Community College, SUNY, Middletown: VGA
- Oswego, SUNY, Oswego: YOM
- Adelphi University, Garden City: VJA

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**Oneonta, SUNY James M. Milne Library**

**Oneonta, NY 13820-4014**  
**ZBM**  
**Hub: BNG**

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# PUBLIC ELD ROSTER 2015

PUBLIC ELD ROSTER 2015 (USE THIS ONLY) ☆ 🗑️

File Edit View Insert Format Data Tools Add-ons Help

View only

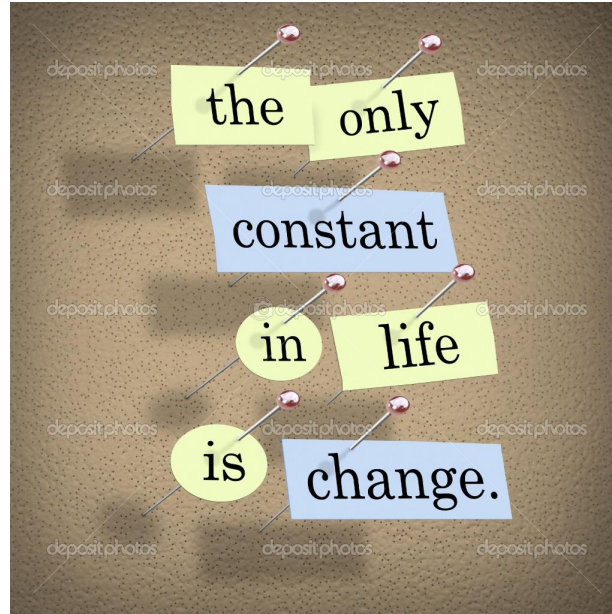
HUB

Temporary filter 1 Range: A1:J125

	A	B	C	
1	HUB	SYMBOL	INSTITUTION	Lib
2	ALB	VJK	Adirondack, SUNY	Lib
3	ALB	YZA	Albany Law School	Sch
4	ALB	NAM	Albany U, SUNY	Uni
5	ALB	VVP	Bard College	Ste
6	ALB	VYD	Capital District Library Council	
7	ALB	YLC	Clinton Community College, SUNY	Ler
8	ALB	VZC	Clinton Essex Franklin Library System	
9	ALB	WKM	Cobleskill, SUNY	Jar
10	ALB	VJN	College of Saint Rose	Nei
11	ALB	VDH	Columbia-Greene Community College, SUNY	Lib
12	ALB	YJM	Fulton-Montgomery Community College, SUNY	The
13	ALB	VXV	Hudson Valley Community College, SUNY	Dw
14	ALB	NYG	New York State Library	Cul
15	ALB	ZNO	North Country Community College, SUNY	Lib
16	ALB	YPM	Plattsburgh, SUNY	Be
17	ALB	YRM	Rensselaer Polytechnic Institute	Re

File Edit View Insert Format Data Tools Add-ons Help

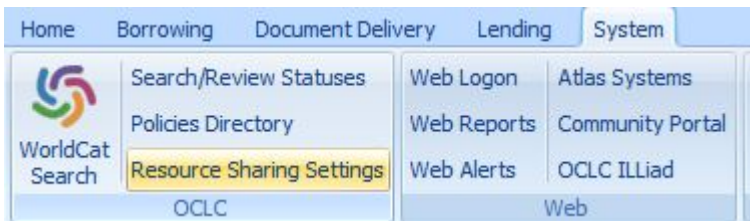
- Share...
- New
- Open... Ctrl+O
- Rename...
- Make a copy...
- 🗑️ Add to My Drive
- 🗑️ Move to trash
- Import...
- See revision history Ctrl+Alt+Shift+H
- Spreadsheet settings...
- Download as
  - Microsoft Excel (.xlsx)



# Constant Data

# How to get to your Constant Data Records

System Tab->Resource Sharing Settings



Constant Data Tab -> Click on the down arrow on the right side



# What is it?

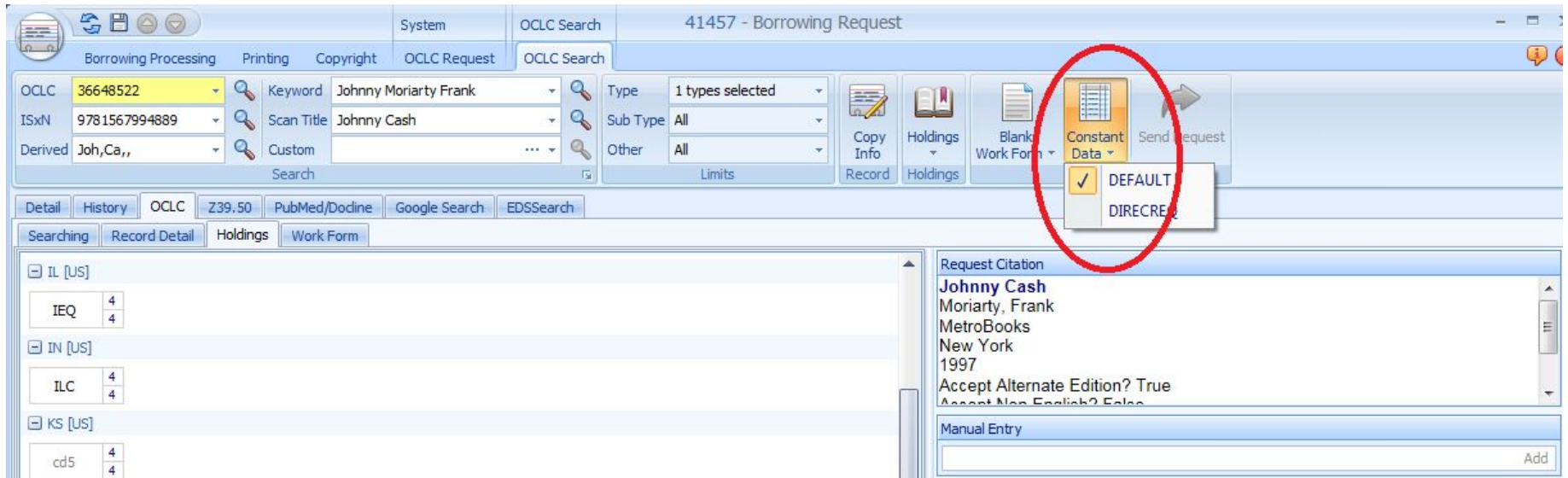
Name				DEFAULT			
Affiliation		IDS Project, SUNY/OCLC Reciprocal ILL Code, LVIS, and CDLC		Copyright Compliance		Edition	
Bill To Attention		Interlibrary Loan (MRV-117)		E-Mail		ill@hvcc.edu	
Bill To Address		Hudson Valley Community College		Billing Notes		Fax	
Bill To Address 2		80 Vandenburg Avenue		Borrowing Notes		Please condition if there are charges. Thank you!	
Bill To City		Troy		Bill To State/Province		New York	
Bill To Postal Code		12180		Bill To Country		United States	
Patron		Patron ID		Lending Notes		Lending Charges	
Patron Status		Patron Department		Lending Restrictions		Max Cost	
Patron E-Mail		Patron Notes		Need Before Date		0.00	
Patron Phone		Patron Fax		Shipped Date		+30	
Patron Address		Patron Address 2		Return Via		Due Date	
Patron City		Patron State/Province		Ship Via		+35	
Patron Postal Code		Patron Country		Ship Insurance		Replaced Date	
Return To Attention		Interlibrary Loan (MRV-117)		Method Sent		20160223	
Return To Address		Hudson Valley Community College		ELD Courier/Odyssey/Fax/Artide Exchange/Library Mail		Type	
Return To Address 2		80 Vandenburg Avenue		Type		Ifm	
Return To City		Troy		Due Date		Type	
Return To Postal Code		12180		Replaced Date		Ifm	
		Return To State/Province		Ship To State/Province		New York	
		Return To Country		Ship To Country		United States	

How many Constant Data records do you have?

1. Default
2. Direct request
3. Overseas (Anyone?)



# Selecting a Constant Data profile



The screenshot shows the OCLC interface for a borrowing request. The top navigation bar includes 'System', 'OCLC Search', and '41457 - Borrowing Request'. Below this, there are tabs for 'Borrowing Processing', 'Printing', 'Copyright', 'OCLC Request', and 'OCLC Search'. The main area contains search criteria: OCLC 36648522, Keyword Johnny Moriarty Frank, ISxN 9781567994889, Scan Title Johnny Cash, and Derived Joh,Ca,,. A red circle highlights the 'Constant Data' dropdown menu, which is open to show two options: 'DEFAULT' (selected with a checkmark) and 'DIRECRE...'. Below the search criteria, there are tabs for 'Detail', 'History', 'OCLC', 'Z39.50', 'PubMed/Docline', 'Google Search', and 'EDSSearch'. The 'Work Form' tab is active, showing a list of holdings for IL [US], IN [US], and KS [US]. The right pane displays 'Request Citation' for Johnny Cash, Moriarty, Frank, MetroBooks, New York, 1997, and a 'Manual Entry' field.

Category	Item	Count
IL [US]	IEQ	4
		4
IN [US]	ILC	4
		4
KS [US]	cd5	4
		4

Request Citation  
**Johnny Cash**  
Moriarty, Frank  
MetroBooks  
New York  
1997  
Accept Alternate Edition? True  
Accept Non-English? False

Manual Entry  
Add

# Custom Holdings Groups & Paths



# What is a Custom Holdings Group

## Custom Holdings Groups

A custom holdings **group** is a record that contains the OCLC symbols of preferred lenders for a particular category of borrowing activities.

<https://prometheus.atlas-sys.com/display/illiad/OCLC+Custom+Holdings>



# How are your groups set up?

## Material you need:

Books, articles, music scores, or DVDs

## Location:

Hubs, state, local libraries, or time zones

## Group Affiliation:

IDS Project, LVIS, Capital Dist Libr Coun, or Reciprocal Agreements

## Cost/Billing Method:

Free, IFM or IFLA Voucher

## Delivery Method:

Odyssey, Article Exchange, or Air Mail



You can have as many groups as you want but..

Who created your groups? How often do you review or change your custom holdings groups?

# Where to get groups?

## IDS Project Page

<http://idsproject.org/Index.aspx>

### Loans IDS Project Custom Holdings Group (75 as of April 2016)

BNG BUF CTX NAM NYG NYP RRR RVE SYB UVV VDB VDH VGA VGK VJA VJN  
VND VQT VSI VVB VVJ VVV VVX VWB VXF VXP VXT VXV VYE VYQ VYT VZB VZJ  
WKM XBM XDM XFM XJM XMM XNC XQM YAH YBM YCM YDM YEM YFM YGM  
YJA YJL YJM YOM YPM YSM YSY YTM ZBM ZCM ZCZ ZDG ZEM ZGM ZHC ZHM  
ZIH ZLM ZMM ZOW ZPM ZQM ZRS ZVM ZXC ZZY

### Articles IDS Project Custom Holdings Group (87 as of April 2016)

BBH BNG BUF CTX EAU HDC IXA MBB MDY NAM NYG NYP RRR RVE SYB TXJ  
UVV VDB VDH VGA VGK VJA VJN VND VQT VRU VSI VVB VVJ VVO VVV VVX VWB  
VXF VXP VXT VXV VYA VYE VYQ VYT VZB VZJ WEL WKM XBM XDM XFM XIM  
XJM XMM XNC XQM YAH YBM YCM YDM YEM YFM YGM YJA YJL YJM YOM  
YPM YSM YSY YTM ZBM ZCM ZCZ ZDG ZEM ZGM ZHC ZHM ZIH ZLM ZMM  
ZOW ZPM ZQM ZRS ZSL ZVM ZXC ZZY

# OCLC Policy Directory

1 LVIS Group

Group Affiliation: LVIS

Delivery Method: Odyssey

Article Exchange

1 - 20 of 1326 Results

Display Symbols

« First

1

2

3

4

5

Next »

Last »

## Symbols

AAU ABF ABJ AD# AFU AKC AKD AKK AKP AKR AKU AMH AML ANC ANTCH AP8  
ARTIB ASC AST ASU ASZ AUG AUV AVE AVL AWC AXJ AZH AZM AZN BAB BAL BBH  
BCF BCM BDR BET BIC BLC BMC BPJ BRB BRC BRL BSC BUC C7M C7T CASCU CAU  
CCM CCT CCW CCX CDF GEN CFHUM CFI CFS CHC CHE CHU CIS CKK CKM CLG  
CLO CLV CLZ CMJ CNO COA COC COM CON COS COW COX CPS CS1 CSA CSJ CSU  
CTB CTD CTL CTN CTU CTW CTX CU3 CUL CWC CWU CWY DBI DED DEF DKC DLR

## Search

### Institution Information

Search By

Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Days To Respond - Copies (0)

Days To Respond - Loans (0)

Rush Supported

International Lender (0)

Group Affiliation (0)

### Policy Information

Fee

Currency (0)

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

Reset

Search

# By ELD Hub?

**Albany:** NAM NYG VDH VJK VJN VKM VVP VXV VYD VZC VZS WKM XJM YJM YLC YPM YRM  
YZA ZNO ZRS ZWU

**Binghamton:** BNG XDM YSY ZBM

**Buffalo:** BUF BUFSP VKC XFM YBM YJL YJT YKJ YKU

**Newburgh:** VDN VGA VGK VGN VVR VXW VZU YWM ZLM

**New York City:** BKL CTX JOURN NYNCC NYP SDE UVV VDB VJA VMY VSI VVB VVD VVJ VVS  
VVX VWB VXP VYE VYL VZB VZL VZP VZQ WCC XMC XME XQL XQM YFM YKC YSM ZGM ZHC  
ZHM ZMM ZNC ZOW ZPM ZQC ZXC

**Rochester:** RRR RVE VQT VZJ XBM XNC YAH YDM YGM YJA ZAM ZEM ZFM

**Syracuse:** RTN SYB VFL VND VOC VVC VVV VXF VXH VXT VYQ VYT XLM XMM YCM YHM YOM  
YTM ZCM ZCZ ZDG ZQM ZVM ZZY

**Article Only:** BBH DRB EAU IXA MBB MDY TXJ UCW VRU VVO VYA WEL XIM

# Add initials and/or date to description

Main OCLC Resource Sharing Settings X

Custom Holdings Paths Custom Holdings Group Constant Data Direct Request Profiles Saved Field Request Order

Custom Holdings Groups

Name ARTONLY

Description IDS Project Article Only Libraries JJA 7/2016

- BBH
- BNG
- BUF
- BUFSP
- CTX
- EAU
- HDC
- IXA
- MBB
- MDY
- NAM
- NYG
- NYP
- RRR
- RVE
- SYB
- TXJ
- UCW
- UVV
- VDB
- VDH

Symbol

+ Add Symbol to Group

Remove Selected Symbols

Remove All Symbols

# Paths

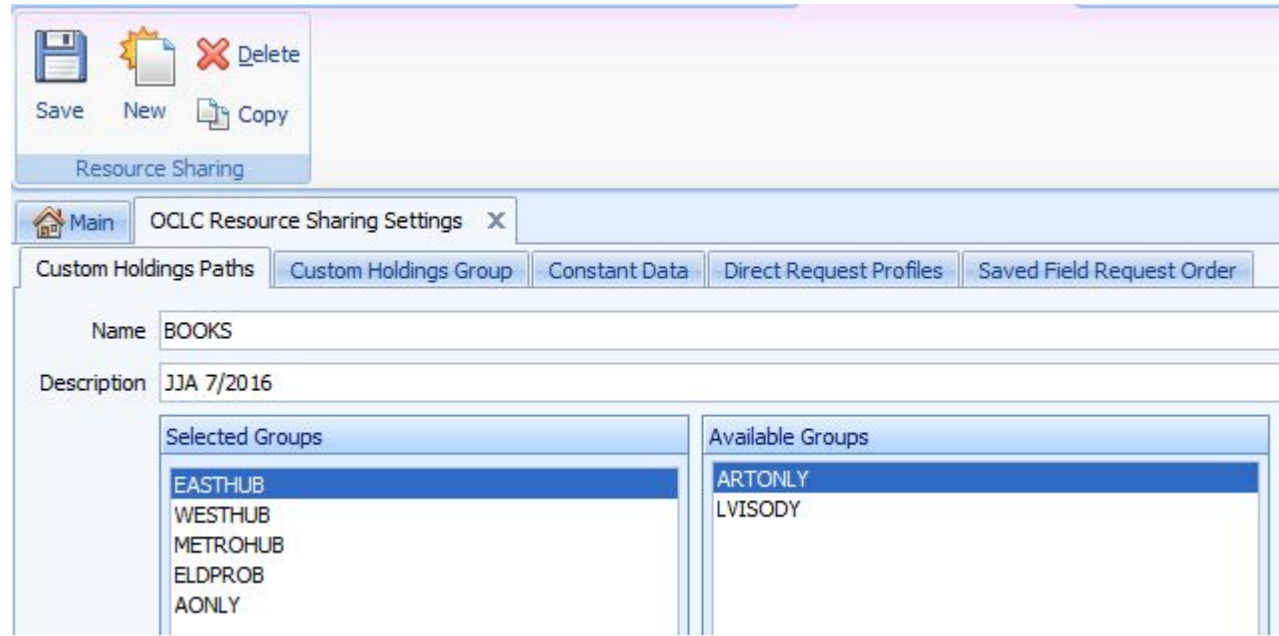
## Custom Holdings Paths

A custom holdings **path** is a record that contains the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference.

<https://prometheus.atlas-sys.com/display/illiad/OCLC+Custom+Holdings>

# At HVCC we have 3

- ARTICLES
- BOOKS
- DIRECREQ



The screenshot shows the OCLC Resource Sharing Settings interface. At the top, there is a toolbar with icons for Save, New, and Delete, and a 'Resource Sharing' label. Below this is a navigation bar with tabs for 'Main', 'Custom Holdings Paths', 'Custom Holdings Group', 'Constant Data', 'Direct Request Profiles', and 'Saved Field Request Order'. The 'Custom Holdings Group' tab is active. The main form contains the following fields:

- Name: BOOKS
- Description: JJA 7/2016

Below the description field are two side-by-side lists of groups:

Selected Groups	Available Groups
EASTHUB	ARTONLY
WESTHUB	LVISODY
METROHUB	
ELDPROB	
AONLY	

# Learning and Training Opportunities



# ILLiad Documentation



Release Notes



Downloads



Video Training  
Library



New Users



Contact Us

 [Borrowing Guide](#)

 [Lending Guide](#)

 [Doc Del Guide](#)






 [Addons](#)

 [Updating ILLiad](#)

 [Release Schedule](#)

[Table of Contents](#)

## Recently Updated

-  [Adding Notes to Request Forms](#)  
updated Jun 30, 2016
-  [Processing Renewal Responses](#)  
updated Jun 30, 2016
-  [Configuring Borrowing Renewals](#)  
updated Jun 30, 2016
-  [Initiating Renewal Requests](#)  
updated Jun 30, 2016
-  [Using Web Platform Integration  
with ILLiad and Aeon](#)  
updated Jun 30, 2016

## Most Popular

1. [ILLiad 8.7 Home](#)
2. [ILLiad 8.7 Release Notes](#)
3. [ILLiad 8.7 Downloads](#)
4. [ILLiad 8.6 Release Notes](#)
5. [New User Guide](#)
6. [Borrowing Guide](#)
7. [ILLiad Quick Tutorials](#)
8. [Updating ILLiad to Version 8.7](#)
9. [Configuring Article Exchange  
Integration](#)
10. [ILLiad Client Installation](#)

# OCLC Support

Contact: Phone, Email, or Online Form

OCLC WorldShare Interlibrary Loan

## Support & Training home

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WorldShare Interlibrary Loan

- [Documentation](#)
- [Known Issues](#)
- [Release Notes](#)
- [Frequently asked questions](#)
- [Training](#)

OCLC Hosted Services

Migration  
Server Configuration  
Issues with your Server

# Atlas Systems - Video Training Library

<https://training.atlas-sys.com/>

## Train on your schedule with the Video Training Library

There certainly are times when you and staff benefit from the interactivity of live online classes. But there are also times when video tutorials will work just fine.

The Video Training Library brings videos, from beginner to advanced topics to your device of choice—desktop computer, laptop, iPhone or iPad.

- 24/7 on-demand access to online class recordings, self-paced training modules, and tutorials
- iPhone and iPad playback
- Enhanced video quality
- Class descriptions and links to handouts included
- New classes added regularly



The **Video Training Library** is affordable for every library's budget. Flexible pricing starts **as low as just \$30 a month or \$299 a year**, with tiered pricing available for groups. Questions about pricing? Please email [Training@atlas-sys.com](mailto:Training@atlas-sys.com).

# Atlas Systems - Access Services Concierge

- Personalized consultation and training on new ILLiad and Ares versions.
- Customized care from an Atlas team who knows your library.
- One on-site Tune-up every two years.
- Technical and editing help with Web pages, Word documents and email messages.
- Customized training plan for your staff.
- Unlimited access to the online Video Training Library and live online classes.
- Targeted project plan designed for your service goals.
- On-going communication and collaboration to make your services the best they can be.
- Coverage for ILLiad and Ares.
- Custom pricing is available for multi-library systems and/or consortia.

 [Access Services Concierge Product Highlights](#)

 [Making the Case for Access Services Concierge](#)

 [What is the Access Services Concierge Service?](#)

For more information, email [concierge@atlas-sys.com](mailto:concierge@atlas-sys.com).

# ILLiad International Conference

- The ILLiad International Conference offers high-level sessions as well as “in the trenches” programs for all levels of staff involved in Access Services and Resource Sharing.
- The conference is typically held in Virginia Beach, VA the 3rd week of March; Hilton Virginia Beach Oceanfront Hotel
- Call for Proposals are generally in late October of the year preceding the conference.
- Registration Fees: Pre-conference Fee: \$350 (Before March 1: \$325)  
Conference Registration fee: \$200 (Before March 1: \$175)  
Total for Preconference and Conference: \$550 (Before March 1: \$500)
- Topics Include: DIY Add-Ons, Get It Now, Integrating ILLs, Text Message Notifications, Office Delivery, Updating Web Pages
- Most sessions are recorded and conference attendees are allowed access to view through the Atlas Video Training Library

 [Making the Case for the ILLiad Conference](#)

# Mentor Program:

## The benefits of having an IDS Mentor

- General on-call assistance
- Go-to-Assist online support
- Polishing-up after installation
- Workflow evaluation & optimization
- Workflow Toolkit updates & additions
- Site visits



# When to contact an IDS Mentor:

- **Navigating Change**

- New staff
- Current staff, new duties
- Visiting, re-visiting and revising workflows

- **ILLiad customization**

- routing rules
- email routing
- print templates
- custom queues
- custom holdings groups
- Addons



Nancy Abashian : Mentor Coordinator

[abashian@binghamton.edu](mailto:abashian@binghamton.edu) 607-777-6356

Mentor contact info: <http://idsproject.org/About/Mentors.aspx>

# Call a mentor:

- When you need a friend
- Need immediate assistance
- Problem solving : IDS or OCLC
- Questions about your IDS membership
- Best Practices & the Workflow Toolkit
- Have a suggestion for IDS to consider for development



# Meet your Mentors:

- **Jennifer Acker**, [j.acker1@hvcc.edu](mailto:j.acker1@hvcc.edu) (Hudson Valley Community College)
- **Silvia Cho**, [jcho@gc.cuny.edu](mailto:jcho@gc.cuny.edu) (CUNY Graduate Center)
- **Rebecca Hyams**, [rhyams@sunymaritime.edu](mailto:rhyams@sunymaritime.edu) (SUNY Maritime)
- **Jay Kibby**, [kibbyj@mail.strose.edu](mailto:kibbyj@mail.strose.edu) (The College of St. Rose)
- **Will Koch**, [WKoch@brooklyn.cuny.edu](mailto:WKoch@brooklyn.cuny.edu) (CUNY Brooklyn College)
- **Micquel Little**, [micquel\\_little@cuc.claremont.edu](mailto:micquel_little@cuc.claremont.edu) (Claremont Colleges Library)
- **Travis Olivera**, [tloliver@utica.edu](mailto:tloliver@utica.edu) (Utica College)
- **Melissa Perez**, [mperez@binghamton.edu](mailto:mperez@binghamton.edu) (Binghamton University)
- **Beth Posner**, [BPosner@gc.cuny.edu](mailto:BPosner@gc.cuny.edu) (CUNY Graduate Center)
- **Chris Sisak**, [csisak5@naz.edu](mailto:csisak5@naz.edu) (Nazareth College)
- **Simone Yearwood**, [Simone.Yearwood@qc.cuny.edu](mailto:Simone.Yearwood@qc.cuny.edu) (Queens College)



**IDS PROJECT**

Online Mentor

**Institute**

Opening again this Fall!

# Mentor Program:

## The benefits of becoming an IDS Mentor



- Access to Atlas Training Suite (\$999.00 annual subscription)
- Conference fee to *International ILLiad Conference* covered (\$200)
- Conference & hotel to *Annual IDS Conference* covered (\$175+ hotel)
- Professional development opportunities available
- Collaborate with other mentors
- Travel & accommodations for site visits covered
- Opportunities to learn from others & bring new ideas back to your library



# Online Learning Institute

Fall Courses:  
Borrowing 101 | Lending 101 | Copyright 101

Additional Courses Coming Spring 2017:  
Purchase on Demand | Statistics and Assessment | Workflow Assessment

*Seats limited to 30 students*

## **Lending 101:**

**Fall Course Dates: September 5 - September 30, 2016**

*Live Sessions happening on Tuesdays @ 2pm EST*

**For more course information visit: <https://www.idsproject.org/OLI/lending101.aspx>**

## **Copyright 101:**

**Fall Course Dates: October 3 - October 28, 2016**

*Live Sessions happening on Mondays @ 11am EST*

**For more course information visit: <https://www.idsproject.org/OLI/copyright101.aspx>**

## **Borrowing 101:**

**Fall Course Dates: October 24 - November 18th, 2016**

*Live Sessions happening on Wednesdays @ 3pm EST*

**For more course information visit: <https://www.idsproject.org/OLI/borrowing101.aspx>**

**Additional courses coming Spring 2017! Check back at: <https://www.idsproject.org/OLI/coursedescriptions.aspx>**



*rethink | reflect | redefine | recreate | revive*



## 2016 RRS Innovation Award Winner!



Online Learning  
Institute

# Community

- IDS
  - Partners
    - Informal and Formal
  - IDS-L
- Other local, regional, national and international ILL groups
  - LACUNY ILL Roundtable
  - METRO ILL SIG
  - ILL-L
  - Workflow Toolkit-L
  - ALA
  - IFLA
  - Rethinking Resource Sharing Initiative





# IDS Project Website and Workflow Toolkit

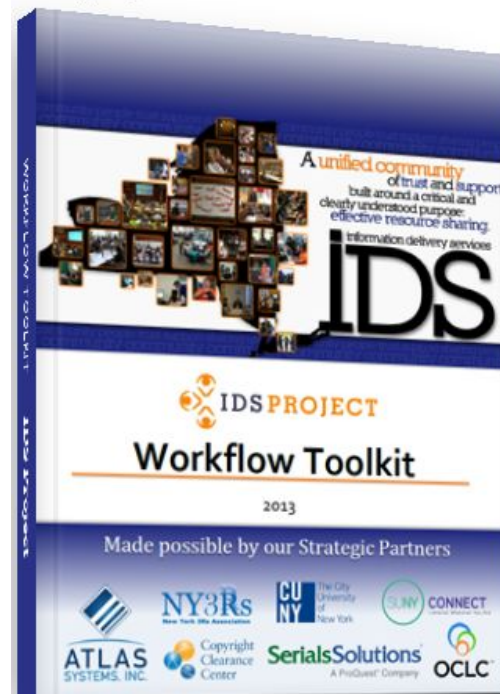
Look at past Conference and User Group presentations



## Archived Resources

- Spring 2016 Agenda
- Spring 2016 Presentation: IDS Project Member Update
- Spring 2016 Presentation: IDS Logic Update
- Spring 2016 Presentation: iPads in ILL
- Spring 2016 Presentation: ILLiad Routing Rules and IDS Logic Rules
- Spring 2016 Handout: ILLiad Client-Side Routing Rule Template
- Spring 2016 Handout: What Does a Logic Rule Look Like?
- Summer 2015 All User Group Meeting Presentation
- Spring 2014 Agenda
- Spring 2014 Presentation: IDS Logic
- Fall 2013 Agenda
- Fall 2013 Handout: ILLiad Webpages Resources
- Fall 2013 IDS Member Library ILLiad Webpage Shareboard
- Fall 2013 Presentation: ILLiad Webpages - How to Talk About Changes
- Fall 2013 Presentation: ILLiad Webpages - Why You Should Customize
- Fall 2013 Presentation: How to Find Your ILLiad Webpages
- Fall 2013 Presentation: Introduction to Coding
- Fall 2013 Presentation: Step by Step Header Changes
- Summer 2013 Agenda
- Summer 2013 Presentation: Customization Manager 101

Workflow Toolkit





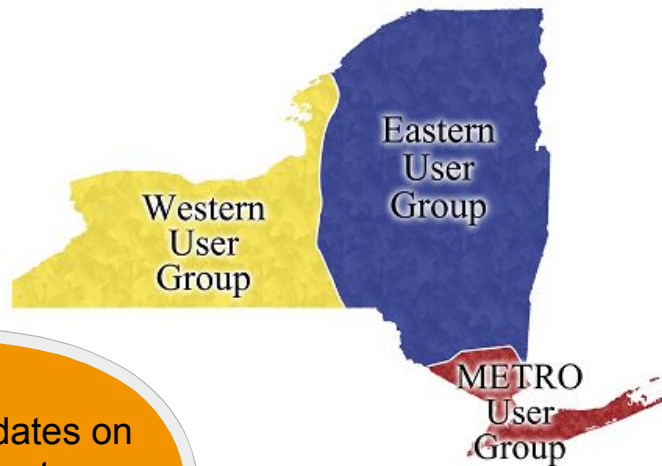
# Regional User Group Meetings

Meet with fellow members in your user group

Spring and Fall Meetings held in rotating locations


Get Updates on the Project

Professional Development

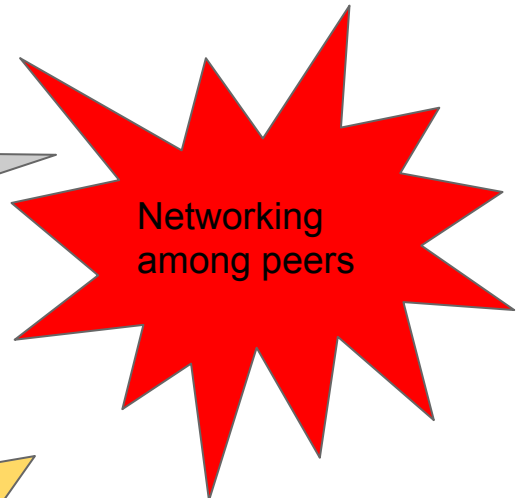


- Routing Rules
- Using Ipads in ILL
- ILLiad Webpages
- Customization
- Email Templates


# IDS Conference




Discussion of  
common  
problems &  
solutions



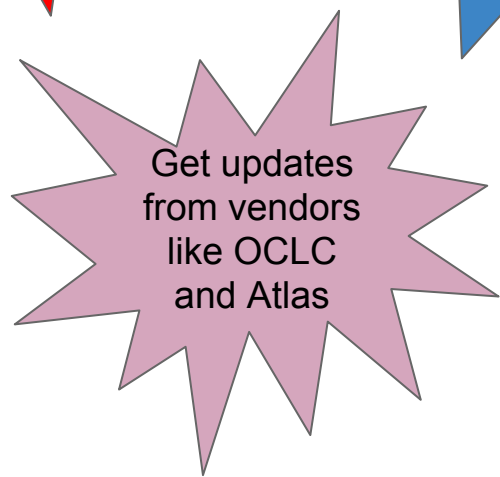
Networking  
among peers



Learn new  
skills



Interesting topics:  
\* Purging Data  
\* Remote  
Authentication  
\* Webpage



Get updates  
from vendors  
like OCLC  
and Atlas

# Discussion

- How were you – or were you not – trained?
- How do you train new ILL colleagues in your library?
- What could IDS do to help you more with training?

Knowledge  
is  
power!



IDS Project wants to visit you!!!

We need locations for our Fall and Spring RUG Meetings?



Dinner  
King Street Ballroom  
6:00pm - 8:00pm



# Thank you to our IDS Conference Sponsors!

