License to ILL

How Evergreen begat FulfILLment

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Background

OHIONET (and others) decided to fund the creation of an open source ILL solution. They chose Equinox to build an ILL application from the robust, scalable Evergreen infrastructure.

The project was “sporked” from the Evergreen code in August of 2010.
Keys of FulfILLment

- Union database of bibliographic records
  - No item loading
- “Metarecords” built by fingerprinting
  - Collapsing, not de-duplication
- FulfILLment cares about known items
- Evergreen’s granular permissions
- Best hold selection & proximity adjustments
- LAI connectors to disparate ILSs
- Tools: SIP2, NCIP, APIs, Z39.50
The guts of FulffILLment

- Transactions managed within FF using existing, lightly modified, Evergreen components.
- ILS-specific connectors relay info to/from each ILS.
- Koha connector uses SIP2 and the Koha “svc” API.
- Evergreen connector uses custom FF pass-thru service.
- Horizon connector uses a combination of SIP2, Z39.50, and NCIP.
Privacy

Patrons may opt out of FulfILLment retaining their personal information and borrowing or request history. This may also be controlled at the organizational level.

Since FulfILLment authenticates the patron’s login/password against their home ILS in real time, it holds little personal information.
Workflow

- Patron searches the union db OPAC and places a title level hold
- FulfILLment uses hold matrices and policies to choose best item and requests that item from the library
- The library staff member scans the item in FulfILLment
- FulfILLment prints an ILL transit slip and checks the item out to a proxy user in the local ILS
- The circulating library receives the item in FulfILLment and FulfILLment creates a brief record in the local ILS, attaching the patron’s hold to the brief record
- The patron is notified by the local ILS of hold availability and then staff check the item out and back in via FulfILLment, which will update the local ILS at each step
- Upon checkin, a new transit slip is printed in FulfILLment and the item returns to the owning library
- Receipt of the item in FulfILLment will close the transaction in the ILS and FulfILLment
Talk is cheap

Live demo time!
Status of LAI connectors

Evergreen - 100% functional
Koha - 100% functional
Horizon - 100% functional
Polaris - tested in development, no live testing
Millennium - tested in development, requires NCIP for further testing
Symphony - waiting for a CGI script
TLC - ?
What about that spork?

There is no spork.

It is not the spork that bends, it is only yourself.

- FulfLILment 1.0 was rebased to Evergreen master circa 2.5
- It now operates as a branch of EG with its own SQL upgrade script.
- We get new features and security fixes from EG with each merge.
- Tracking Evergreen requires effort and caution, but should ultimately require less effort than cross-porting features.
Resources

http://www.fulfillment-ill.org/

http://www.youtube.com/watch?v=0lI3Pxm4Elw
FulfILLment demo on YouTube.

https://67.220.127.132/eg/staff/fulfillment/borrower/pending
Equinox’s public demo server
admin / demo123
Evergreen patron OPAC login 341173 / demo123
Emergency Screen caps

In case of internet failure, use screen caps.
1. **Critical perspectives on Harry Potter**
   - **Language material** (2008)
   - Call number: 823.914
   - 1 of 1 copy available at Fullfillment Consortium.

2. **Harry, the dirty dog.**
   - **Zoo. Game.**
   - **Language material** (1956)
   - Call number: UNKNOWN
   - 2 of 2 copies available at Fullfillment Consortium.

3. **Harry Potter and the prisoner of Azkaban**
   - **Rowling, J. K.**
   - Language material (1999)
   - Call number: [Fic]
   - 3 of 3 copies available at Fullfillment Consortium.

4. **Harry Potter and the sorcerer's stone**
   - **Rowling, J. K.**
   - Language material (1998)
   - Call number: [Fic]
   - 2 of 2 copies available at Fullfillment Consortium.

5. **Harry Potter and the Half-Blood Prince**
   - **Rowling, J. K.**
   - Language material (2005)
   - Call number: [Fic]
   - 4 of 4 copies available at Fullfillment Consortium.

6. **Harry Potter and the Deathly Hallows**
   - **Rowling, J. K.**
   - Language material (2007)
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Item Details

Barcode: 30374000002513
Status: In transit
Owning Lib: AKILSDONK
Title: 21st century psychology
Author:
Call Number: BF131 .A15 2008
FulILLment Bib ID: 1300
Remote ILS Bib ID: 313

View in Catalog

Transaction Details

Requesting Patron: Lana Perez
Requesting Library: APEX
Pickup Library: APEX
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Capture Date: 3/17/14
Transit Source: AKILSDONK
Transit Destination: APEX
Transit Send Date: 3/17/14
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