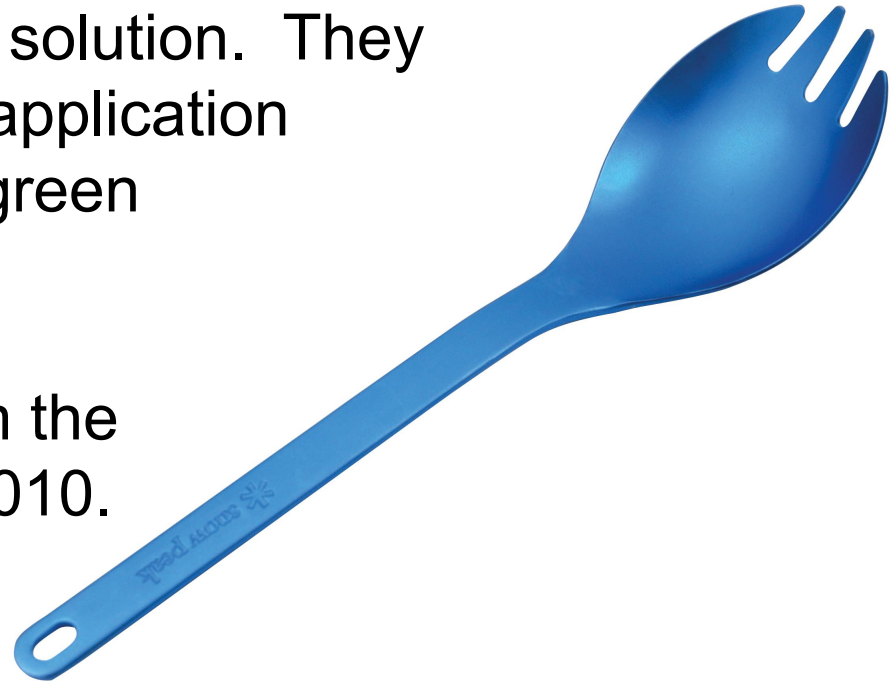# License to ILL

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 FulfILLment

- 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 availablity and then staff check the item out and back in via FulfILLment, which will update the local ILS at each step
- Upon checkin, the 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.

- FulfILLment 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=0II3Pxm4EIw

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.

OPAC

FulfILLment

Link 1   Link 2   Link 3   Link 4   Link 5

Search the Catalog   Advanced Search   Browse the Catalog

Search: `harry`   Type: `Keyword`   Format: `All Formats`   Library: `FulfILLment Consc`   **Search**

Another Search   **Advanced Search**   Sort by `Sort by Relevance`   **Show More Details**   ☐ Limit to available items

Search Results   Results 1 - 10 of about 23   (page 1 of 3)   Preferred library: **FF Evergreen**?   1 2 3   Next ▶

Personal Author — More	
Rowling, J. K.	(10)
Collingwood, Harry, 1851-1922	(2)
Bailey, Arthur Scott, 1877-1949	(1)
Harris, Nicholas 1956-	(1)
Harte, Bret, 1836-1902	(1)

Topic Subject — More

Potter, Harry (Fictitious character)	(12)
Granger, Hermione (Fictitious character)	(10)
Hogwarts School of Witchcraft and Wizardry (Imaginary organization)	(10)
Weasley, Ron (Fictitious character)	(10)
Wizards	(10)

Series Title — More

Around and about	(1)
ColecciÃ³n Septem universitas	(1)
Project Gutenberg 21062	(1)
Project Gutenberg 25090	(1)
Project Gutenberg 2544	(1)

1. **Critical perspectives on Harry Potter**   ✓ Place Hold   🗒 Add to my list
   Language material (2008.)
   Call number: 823/.914
   1 of 1 copy available at FulfILLment Consortium.

2. **Harry, the dirty dog,**   ✓ Place Hold   🗒 Add to my list
   Zion, Gene.
   Language material ([1956])
   Call number: UNKNOWN
   2 of 2 copies available at FulfILLment Consortium.

3. **Harry Potter and the prisoner of Azkaban**   ✓ Place Hold   🗒 Add to my list
   Rowling, J. K.
   Language material (1999.)
   Call number: [Fic]
   3 of 3 copies available at FulfILLment Consortium.

4. **Harry Potter and the sorcerer's stone**   ✓ Place Hold   🗒 Add to my list
   Rowling, J. K.
   Language material (1998.)
   Call number: [Fic]
   2 of 2 copies available at FulfILLment Consortium.

5. **Harry Potter and the Half-Blood Prince**   ✓ Place Hold   🗒 Add to my list
   Rowling, J. K.
   Language material (2005.)
   Call number: [Fic]
   4 of 4 copies available at FulfILLment Consortium.

6. **Harry Potter and the Deathly Hallows**   ✓ Place Hold   🗒 Add to my list
   Rowling, J. K.
   Language material (2007.)

FulfILLment
Inter-Library Lending Software

| Pending Requests | Inbound Transits | Outbound Transits | On Shelf | Currently Circulating | Item Status |

Requests By My Patrons   Requests From Other Libraries   Actions ▾

✔	#	Request ID	Item Barcode	Copy Library	Request Date	Expire Date	Active	Requesting Library	Pickup Library	Title
☐	1	9	30374000002707	AKILSDONK	3/17/14		true	APEX	APEX	unknown to history a story of the captivity of mary of scotland
☐	2	11	30374000002628	AKILSDONK	3/17/14		true	APEX	APEX	pioneers of the old south a chronicle of english colonial beginnings
☐	3	14	30374000000011	AKILSDONK	3/17/14		true	APEX	APEX	the bravest dog ever
☐	4	19	30374000000435	AKILSDONK	3/17/14		true	APEX	APEX	andrew lloyd webber
☐	5	21	30374000002793	AKILSDONK	3/17/14		true	APEX	APEX	the wind in the willows
☐	6	23	30374000002523	AKILSDONK	3/17/14		true	APEX	APEX	the cambridge handbook of computational psychology

Manage ILL   Manage Bibliographic Records   Location: APEX ▾   Log Out

Pending Requests   Inbound Transits   Outbound Transits   On Shelf   Currently Circulating   Item Status

Requests By My Patrons   Requests From Other Libraries   Actions ▾

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☐	2	11	30374000002628	AKILSDONK	3/17/14		true	APEX	APEX	pioneers of the old south a chronicle of english colonial beginnings
☐	3	14	30374000000011	AKILSDONK	3/17/14		true	APEX	APEX	the bravest dog ever
☐	4	19	30374000000435	AKILSDONK	3/17/14		true	APEX	APEX	andrew lloyd webber
☐	5	21	30374000002793	AKILSDONK	3/17/14		true	APEX	APEX	the wind in the willows
☐	6	23	30374000002523	AKILSDONK	3/17/14		true	APEX	APEX	the cambridge handbook of computational psychology

Fulf ILL ment
Inter-Library Lending Software

Pending Requests   Inbound Transits   **Outbound Transits**   On Shelf   Currently Circulating   Item Status

ILLs to Other Libraries   **Returns to Other Libraries**   Actions ⌄

✓	#	Transit ID	Item Barcode	Copy Library	Transit Date	Transit Source	Transit Destination	Title
☐	1	19	30374000000276	AKILSDONK	3/17/14	APEX	AKILSDONK	physics of baseball & softball
☐	2	18	30374000002645	AKILSDONK	3/17/14	APEX	AKILSDONK	the moonshiners at hoho hebee falls1895
☐	3	20	30374000000122	AKILSDONK	3/17/14	APEX	AKILSDONK	beethovens wig
☐	4	21	30374000000264	AKILSDONK	3/17/14	APEX	AKILSDONK	albert einstein, young thinker

Pending Requests   Inbound Transits   Outbound Transits   **On Shelf**   Currently Circulating   Item Status

For My Patrons   At Other Libraries   Actions ▾

✓	#	Request ID	Item Barcode	Copy Library	Shelf Date	Shelf Expire Date	Patron First	Patron Last	Patron Barcode	Title
☐	1	22	30374000000270	AKILSDONK	3/17/14		Lana	Perez	341173	the chronicles of avantia

Manage ILL   Manage Bibliographic Records   Location: APEX ▾   Log Out

Pending Requests   Inbound Transits   Outbound Transits   On Shelf   **Currently Circulating**   Item Status

To My Patrons   To Other Libraries   Actions ▾

✓	#	Circ ID	Item Barcode	Copy Library	Patron First	Patron Last	Patron Barcode	Checkout Date	Due Date	Circulating Library	Title
☐	1	8	30374000000012	AKILSDONK	Lana	Perez	341173	3/17/14	3/31/14	APEX	fantastic beasts and where to find them

FulfILLment
Inter-Library Lending Software

Pending Requests   Inbound Transits   Outbound Transits   On Shelf   Currently Circulating   **Item Status**

| 30374000002513 | Go! | | Abort Transit | Cancel Request | Receive Item | Retarget Request | Print Details |

Item Details	**View in Catalog**
Barcode:	30374000002513
Status:	In transit
Owning Lib:	AKILSDONK
Title:	21st century psychology
Author:	
Call Number:	BF131 .A15 2008
FulfILLment Bib ID:	1300
Remote ILS Bib ID:	313

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