MiLE--Michigan Library Exchange—Project Status Report

Overview of the Project

The goals of the MiLE Project are (1) to share resources of DALNET, OWLS and Suburban Library Cooperative (SLC) libraries, and (2) to enable online patron requests for materials in the participating libraries. There are 24 online catalogs for the 158 library buildings in these consortia.

Year One is funded by a $125,000 LSTA sub-grant from the Library of Michigan. These funds cover start-up costs, which include hardware, software and some additional stops for the TLN van. TLN is the fiscal agent for the grant and the host site for the server.

The MiLE project will be testing: (1) Z39.50 links between 24 online catalogs of participating libraries with broadcast searching across and de-duplication of the result set; (2) interlibrary loan policies agreed to by the participants; (3) use of the van delivery services; and (4) a model for regional multi-type resource sharing.

The software selected is URSA from *epixtech* and TLN has signed a 3-year contract.

MiLE's Resource Sharing Model

The online catalogs of participating libraries are linked for broadcast searching using Z39.50 to create a virtual catalog for MiLE. Using Web browsers, users search MiLE and identify materials that are available in libraries other than their home libraries.

When they begin to request the materials, they will be asked to authenticate themselves by keying in their library card barcode numbers. They will be validated as authorized in their home libraries' patron databases.

Their online requests will then be sent to libraries where the materials are available using a profile of lending libraries and using a load leveling algorithm. Library staff may mediate their requests before sending them along. Patrons may view the status of their requests.

Either the requests are filled and the materials sent—in the TLN van—to the home library for pickup, or the requests are returned to the home library as unfilled. The URSA software checks the library's policy profile to determine if the items can be loaned and integrates with local ILS circulation systems to place holds on items requested and to create temporary item records.

With a Web browser, Library staff use URSA to track borrowing and lending. Items lent are checked out in the local circulation system to the borrowing libraries. Items borrowed are checked out in the local circ system to the patrons who requested them.

Participating Consortium Commitment

All three consortia—DALNET, OWLS, and SLC—have agreed to support the ongoing costs for years 2 and 3. This includes maintenance costs for the server and software and for a part-time system administrator at TLN.

Participating Library Commitment

Participating libraries have been asked to commit to:
  (1) software profiling, testing, training;
  (2) promote the service;
  (3) use MiLE's ILL policies;
  (4) no charge for interlibrary loans;
  (5) ILS compliance with SIP or NCIP;
  (6) data gathering and evaluation.

The draft MiLE ILL policies are to loan circulating books and government documents, but not to loan reference, AV formats, fiche, maps or software. Only returnables are to be requested and loaned for the first year. The loan will be 3 weeks with 1 week for transit. Libraries will be given 2 days to fill. Patrons will be allowed one renewal.

Participating libraries are still working out the details of the best stops for the van without adding more stops than funded by the grant.

MiLE Implementation Phases

Phase 1 libraries are now targeted to be operational in February 2002. They include: Wayne State University, University of Detroit Mercy, Macomb Community College, Eastern Michigan University, Plymouth District, and TLN's shared catalog for 55 public libraries.

Phase 2 libraries for March 2002 are: SLC (27 public libraries), UM Dearborn, Henry Ford Museum, OCC, VA, and Walsh.

Phase 3 libraries for May 2002 are: Lawrence Tech, Oakland University, Botsford, Marygrove, Rochester College and WCCCD.

Others that have not yet chosen which phase are: Orion Township, Cromaine District, and Baldwin Public. At this point, Detroit Public is opting out of the first year of MiLE.

URSA Integration with Horizon

URSA software integrates with ILS systems in these three ways:
  (1)   Z39.50 links to do broadcast searching and de-duplication of results;
  (2)   Patron authentication using the circulation patron database; and
  (3)   Circulation to place holds and create item records.

URSA integrates with Horizon 6.0 with Remote Patron Authentication (RPA) to do the Z39.50 broadcast searching and the patron authentication. URSA will NOT integrate for circulation to place holds and create item records until Horizon 7.2.

This means that our patrons will be able to search the MiLE virtual catalog, identify materials they want, be authorized and place requests. Our staff will need to use both URSA and Horizon to check materials in and out and they will have to mediate all lending requests using URSA's New Request queue until we have Horizon 7.2. Unmediated requests will not be able to come automatically into the hold queue of our Horizon circulation system.

The WSU MiLE Implementation Team thinks that ILL staff should be the ones handling the MiLE URSA borrowing and lending until URSA integrates with circulation.

Horizon 7.2 is expected to be available for beta testing in early 2002 with a targeted general release date of March. DALNET expects to be implementing 7.2 in the Summer.

Next Steps for WSU

Here is our broad timeline for MiLE/URSA implementation for WSU:

November	Profile training
	Activate RPA
	Investigate browser requirements
December	Test URSA Z39.50 interface and our profiles
	Workflow planning; statistics gathering; staff workstations
	"Sneak preview" for ILL and Circ staff on Dec. 11th
	Distribute URSA manuals to staff
January	Train MiLE trainers and key WSU staff Jan. 30th
	Adapt MiLE PR and user survey materials
February	Train rest of staff—ILL, circ, reference, systems
	Determine problem reporting procedures
	Advertise service
February 15?	Go Live!
February – May	Promote service to users
	Data and User survey gathering
	Problem resolution and system refining
	Monitor as MiLE libraries are added
June – August	Evaluate system
	Participate in DALNET's Horizon 7.2 upgrade

Year Two MiLE Plans

MiLE's LSTA proposal for FY2002 funds to expand the project in Year Two will be funded for $100,000 of the $158,000 requested. Plans for Year Two called for expansion of the server, set up of a test and training environment, software license fees to add more libraries including at least one school, and additional van delivery stops.

Services to be added in Year Two include non-returnables (or copies) and links to OCLC's Direct Request system.

The MiLE Steering Committee now needs to review these Year Two objectives and budget to bring them in line with the funding expected.

Decisions for WSU at this point

1.   Web Browser for Public Workstations

Some URSA libraries have discussed the need to turn off the back button for the Web browsers on their public workstations. This is to prevent a patron from using the back button to request items with the previous patron's authorization. There are instructions to disable the back button in either Netscape or Internet Explorer, if that is what we decide to do. *epixtech* recommends Netscape 4.7 or higher or Explorer 5.5.

2.   Van service

The TLN van already stops at DPL Main. Could WSU use this delivery stop initially? MiLE books could be picked up from all WSU ILL units with the regular mail pickups. They will have special wrappers around them so they'll be easy to identify. Those with MiLE wrappers could be placed in a bin to be delivered to DPL. While at DPL, any items from MiLE libraries could be picked up. The items from MiLE libraries could be sorted and delivered with the regular mail.

3.   Statistics

We may need help from Library Directors and ILL units to gather ILL statistics for the past year or more. We need pre-MiLE statistics as a baseline for comparison with MiLE .

WSU MiLE Implementation Team

The Team includes: Adriene Lim, Mary Beth Lock, Dee Callaway, Bradd Burningham, Barton Lessin and Louise Bugg.

L. Bugg, 12-5-01