

# RAILS Report

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## RAILS Overlay Project

At its meeting on October 27, 2017, the RAILS Board approved the recommendation of the RAILS Overlay Software Search Working Group that RAILS staff be directed to enter into contract negotiations with Auto-Graphics for use of SHAREit to expand resource sharing among Illinois libraries. Contract negotiations with Auto-Graphics, assisted by consultant Rob McGee, have gone well. The cost of the pilot program has been reduced, and the pricing structure revised to maximize economies of scale as more libraries participate. Budget details will be included in a document for the RAILS Board meeting on January 26, 2018; when available, this document will be posted on the RAILS website at <https://www.railslibraries.info/node/138908>.

Recruitment for the pilot project also ramped up, beginning in November. As of January 12, 2018, 17 libraries (including academic, public and school libraries) from I-Share, PrairieCat, and Rock River Library Consortium are confirmed as pilot participants. The deadline for notifying Jane Plass of participation in the pilot project is January 25, 2018.

At its meeting on January 26, 2018, the RAILS Board will be asked to approve moving forward with the pilot project. The Auto-Graphics contract will be signed after board approval, and implementation is expected to begin in early February.

The project also has a new name—Find More Illinois, which emphasizes the increased discovery aspect of the project and fits with Explore More Illinois, the museum/cultural attraction pass program that RAILS is also developing.

## Delivery Labels Project

Beginning in 2014, RAILS worked on a project to produce delivery labels from various integrated systems (ILSs). An early beta project with SWAN staff and a staff member at Oak Lawn Public Library was successful at a few SWAN libraries, but the complexities of different integrated library systems, different ILS configurations, and different receipt printers thwarted multiple efforts to generalize the label printing software so that it could be used by many RAILS libraries. (See the attached report for a full summary of this project.) Consequently, RAILS has discontinued work on software development for this project. However, if libraries or consortia are interested in doing software development for printing delivery labels from their own ILS, Mark Hatch (RAILS Delivery and Facilities Director) can provide delivery label specifications and verify that the labels generated meet delivery requirements.

## FY2019 LLSAP Support

RAILS is currently finalizing the FY2019 LLSAP-RAILS contracts with PrairieCat, RSA, and SWAN. MAGIC intends to cease operations before the start of FY2019, and their members (along with LINC's) will be live in SWAN in May 2018. These 19 new members have been included in the FY2018 SWAN membership counts for the support allocation formula. RAILS intends to keep the target net support to LLSAPs flat at \$2,250,000 in the RAILS FY2019 budget and has allocated support to each of the three remaining LLSAPs accordingly, using the formula developed for the FY2016–2018 contracts. The RAILS Board and LLSAP governing bodies will vote on contract approval in time for contracts to be included in the RAILS FY2019 area and per capita grant application to the Illinois State Library.

## **LLSAP Financial Sustainability Plan**

In the event that RAILS funding is cut significantly or becomes unavailable, support to LLSAPs may need to be reduced or discontinued. RAILS has asked each LLSAP to develop a contingency plan for sustaining its operations and preserving services to its members should this worst case scenario occur. The purpose of this financial sustainability plan is for each LLSAP to demonstrate its actual and/or contingency plans for independence from RAILS in-kind and financial support. The financial sustainability plans are due on June 30, 2018.

## **Consortia Staff In-Service Day**

The 2017 in-service day for consortia staff was held November 10, 2017 at Waubensee Community College in Sugar Grove. Feedback was positive, with most attendees reporting that the event met or exceeded their expectations and that they would attend other events in the future. RAILS will continue providing events like this at least annually and always welcomes input and ideas.

## **Explore More Illinois**

RAILS is developing a partnership program between libraries and museums and other cultural attractions, using the software program hosted by Quipu and administered centrally by RAILS. The contract with Quipu was signed on September 14, 2017, with an effective date of October 16. Because Quipu is planning a software upgrade in a few months, rollout to libraries has been delayed to spring 2018. However, implementation work will begin in a few weeks. Patrons will log into the web-based system directly to access passes and discounts, with the library's integrated library system providing authentication. RAILS will work with MAGIC initially to test authentication in a consortial environment and then work with other interested consortia on getting authentication in the works before the program is released to members.

## **FY2017 ILLINET Interlibrary Loan Traffic Survey Reminder**

The FY2017 ILLINET ILL Traffic Survey, required for all system members, is now available for libraries to complete at <https://il.countingopinions.com>. Data submitted should cover July 1, 2016 through June 30, 2017. The deadline for completion is March 31, 2018. Completion guidelines are available at [https://il.countingopinions.com/docs/il/FY17\\_ILLINET\\_Instructions.pdf](https://il.countingopinions.com/docs/il/FY17_ILLINET_Instructions.pdf) to help you understand what data libraries will need to complete the survey. For more information, contact the Illinois State Library at 800.665.5576, ext. 2.

## ILS-Generated Delivery Labels Project Summary

November 2017

The project to generate delivery labels from integrated library systems (ILSs) was conceived in 2014 with the following goals:

- Increase accuracy and efficiency across the delivery system by automating transit label production at the library level
  - Current RAILS delivery labels require that library staff handwrite delivery codes. Handwritten labels are error-prone and often illegible, which can lead to inaccurate sorting by delivery providers. Testing libraries found that using automated labels saved significant staff time.
  - RAILS delivery providers could potentially further automate and expedite sorting with a barcoded label.
- Produce labels that meet the statewide delivery standards released by the Illinois State Library Delivery Advisory Committee in April 2014

This began as a partnership with SWAN staff to develop an ILS-generated delivery label solution and generate proof of concept. To inform this work, RAILS technology and delivery staff developed draft specifications for label design and printing based on statewide delivery labeling recommendations, delivery system needs, and library staff and patron needs. Since then, RAILS has pursued several avenues of consortial collaboration and software development, investing considerable staff and financial resources. The experiment has been met with technical and scale issues at each phase that challenged the feasibility of continuing.

### Collaboration with SWAN

#### Millennium Pilot

- SWAN staff developed a solution that used print templates in Innovative's Millennium ILS, and printed as a transit slip on sticky receipt paper. This solution was deployed successfully to two SWAN libraries (Oak Lawn and Melrose Park).
- This early pilot concluded when SWAN migrated to SirsiDynix's Symphony platform, as Symphony does not have the same native capability to produce these labels.

#### John Huber & Associates / Rasmussen development (\$7,300)

- Leading up to SWAN's migration, RAILS worked with Rasmussen Software and consultant John Huber to develop a custom pilot installation for SWAN's Symphony platform based on their existing Holds Label Solution software. SWAN tested the software and did not include it in their Symphony go-live because of several deal breakers we discovered. These included an administratively heavy licensing model and installation/configuration requirements that required the loss of other print formatting, as well as too much required staff intervention.

## Oak Lawn solution

- A staff member at Oak Lawn Public Library (OLPL) developed a homegrown solution in the final days of SWAN ILS migration and decided to make it open source. This software worked for OLPL's local needs but required additional development for broader distribution to other SWAN libraries and other Symphony consortia.
- RAILS began working with this staff member from OLPL to further develop and test the software, which had no documentation and needed usability improvements. However, the collaboration was discontinued when communication and responsiveness issues became insurmountable.
- In the meantime, the software was deployed independently by the OLPL staff member to several other SWAN libraries who contracted with him for support. Though it was not feasible for broader RAILS deployment, we encouraged SWAN libraries to continue using it if it worked for them. SWAN staff recently attempted to work with the source code themselves to explore SWAN-wide deployment and concluded it was not feasible. SWAN is currently pursuing other avenues.

## RAILS open source development (25 hours of C# development time—\$4,125)

- RAILS IT staff contracted with a software developer to evaluate, modify, and document the OLPL software with the goal of preparing it for broader deployment within and outside of SWAN. The software included a number of functions that were unrelated to label production and which needed to be removed, and no documentation existed previous to this work. Though progress was made on those two points, RAILS and the developer were never able to find and modify the area of the software which contained and would need to allow for modification of the library codes. This would be a necessity for testing deployment to any library outside of SWAN. The OLPL staff member was unresponsive to inquiries about this after several attempts.

## Testing with other consortia

RAILS worked with staff at several other consortia to explore whether their ILS software could produce a label that met the RAILS specs, with results as follows:

- Pinnacle (Polaris)—not able to meet specs natively; feasibility of custom development of a third party tool for Polaris was not explored
- PrairieCat (Sierra)—similar native functionality to Millennium
- RSA (Symphony)—not able to meet specs natively or through custom development of the Symphony platform

## Conclusions

- Developing a product or suite of products at a RAILS-wide scale involves working with and addressing three significant variables: ILS software platforms, unique ILS configurations, and printer models and drivers. Each of these variables presents many permutations.
- When considering a potential RAILS-wide deployment of any products, or even deployment to multiple consortia, the challenges of scale are considerable at all levels: installation, ongoing

software support, and initial and ongoing ILS configuration changes and updates. We don't have staff resources consistently across RAILS, consortia, and member libraries to reliably commit to maintenance.

- Encouraging broad deployment across RAILS would raise questions from members about printer and paper purchasing costs. Though group discounts are available, a subsidy is likely impossible, and adoption rates would depend entirely on local library budgets and motivation.
- The consortial landscape has changed considerably through the course of this project, and continues to shift. The delivery landscape may soon shift as well, depending on the results of the study currently underway with the Laboratory of Applied Spatial Analysis (LASA) at Southern Illinois University Edwardsville. Software development and related ILS integration and configurations would need to be responsive to these shifts and resulting changes in library and hub codes, making for a challenging environment in which to successfully develop and test new software with already complex deployment requirements.
- Given these issues, RAILS has decided to cease further development and all other work on this project.
- Potential remains at the individual library or consortium level. If libraries or consortia are interested in doing software development for printing delivery labels from their own ILS, Mark Hatch (RAILS Delivery and Facilities Director) can provide delivery label specifications and verify that the labels generated meet delivery requirements.