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Open-Source Resource Sharing Platform

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Open-Source Resource Sharing Platform

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What is OpenRS?

OpenRS is a coalition.

OpenRS is a coalition of libraries, consortia, open-source developers, and vendors who have organized to create a resource-sharing platform to accommodate the full spectrum of mediated and unmediated resource-sharing.

OpenRS is a platform.

Designed to be ILS and discovery agnostic, OpenRS is developing as an umbrella project to support:

- Returnables
- Document delivery
- Mediated interlibrary loan

Projects

The Foundation serves as a home, and provides infrastructure and services to open source communities in the library space.



OpenRS

OpenRS is reinventing resource sharing to meet the needs of different types of consortia.

OpenRS is a heterogeneous resource sharing system that is ILS and Discovery agnostic while accommodating the full spectrum of mediated and unmediated resource sharing. OpenRS uses open standards and native integration to provide consortia with robust and extended functionality for consortial resource sharing, including



Founding Council

Adam Murray

Marmot Library Network

Donna Bacon

MOBIUS

George Machovec

Colorado Alliance

Ian Ibbotson

Knowledge Integration

Lucy Harrison

GALILEO

Mark Allcock

EBSCO Information Services

Scott Garrison

Midwest Collaborative for Library Services (MCLS)

OpenRS Implementations

MOBIUS Consortium – first consortium – Live in June 2024.

- FOLIO
- Polaris
- Sierra

GALILEO Consortium – second consortium – Now In implementation.

- FOLIO
- Alma
- Evergreen

Direct Consortial Borrowing vs. Traditional Resource Sharing

Direct Consortial Borrowing	Traditional Resource Sharing
Mediated and Unmediated resource sharing	Requires mediation by library staff
Uses typical ILS workflows	Uses specialized workflows/specialized requirements
Detailed configuration leads to quick delivery and first-to-fill times	Quick configuration, slow fill times
Integrates with multiple ILSs and discovery platforms	Standalone interface
Users search and request using a central index that provides access to the shared holdings of all participating institutions of a consortium	Users make local requests that go through the interlibrary-loan office at their institution

OpenRS DCB Core Capabilities

- Union Catalog
 - Automated bib/instance harvesting from source catalogs
 - Data transforms and normalization
 - Deduplication, instance selection and consolidated holdings
 - Patron search application API + OPAC
- Resource requesting
 - Patron authentication & eligibility, pickup at any member library
 - Item selection, DCB circulation messaging
- Standard circulation capabilities (hold, loan, cancel, renew, patron empowerment)
- Supports FOLIO, Sierra, Polaris (more ILS/LSP's planned)
- Administration, reconciliation capabilities and circulation exception reports

Core Capabilities

Union Catalog

- Automated bib/instance harvesting from source catalogs
- Data transforms and normalization
- Deduplication, instance selection and consolidated holdings
- Patron search application API + OPAC

The screenshot shows a library catalog interface. At the top, there are logos for MOBIUS and OpenRS, followed by the word 'CATALOG' and a 'Catalog home' link. A search bar contains the keyword 'buddha'. Below the search bar, the results for a book are displayed: 'What the Buddha thought / Richard Gombrich.' by Richard F. Gombrich, published in 2009. It indicates that 5 of 5 copies are available and provides a 'Place a hold' button. To the right is a small image of a Buddha statue. Below this, a table titled 'Availability & locations' lists five library holdings with their status, library name, location, and call number.

Status:	Library:	Location:	Call number:
✓ Available	University of Missouri Library System	MU Ellis Library General Collection	BQ915 .G66 2009
✓ Available	University of Missouri Library System	UMKC Miller Nichols Library General Collection	BQ915 .G66 2009
✓ Available	Rockhurst University	ROCK Circulating 2nd Floor	BQ915 .G66 2009
✓ Available	Truman State University	TRUMAN General Collection	BQ915 .G66 2009
✓ Available	State Fair Community College	SFCC Electronic Resource	Ebsco Electronic Book

ILS Integration

- Patron authentication & eligibility, pickup at any member library
- Item selection, DCB circulation messaging
- Standard circulation capabilities (hold, loan, cancel, renew, patron empowerment)

Sign in

Let's find your institution

Altoona Public Library



Find your institution



✓ Altoona Public Library

A.T. Still University

Avila University

Benedictine College

Bettendorf Public Library

Calvary University

Authentication & Patron Data

- OpenRS serves as middleware connecting the ILS systems
- OpenRS relies upon local authentication, e.g., Barcode/PIN, SSO, etc.
 - Any changes to login/password would be handled locally
- Patron Data remains local, no Personally Identifiable Information in request
 - Only information regarding where to send the requested material (pickup location) is listed

Discovery Integration

- OpenRS is Discovery agnostic
 - Our demo today will use the Locate OPAC created by EBSCO
- OpenRS creates a Physical Union Catalog
- OAI-PMH or native ILS API can be used to load catalog records
 - Harvesting can be set to once every 4 to 24 hours depending on needed frequency
- Real-Time Availability Checking (RTAC) via API keeps current holdings updated

Goals of OpenRS DCB



High first-to-fill rate
(90 – 95%)



Fast turnaround (2 –
3 days)



Low total cost (\$1 – 2
per transaction)



Platform agnostic



Directly integrates
into existing ILS
capabilities



Most importantly, very
high levels of
customer satisfaction

Hosting - Increased security via AWS

OpenRS Future Goals

- Network to Network resource sharing
- Document Delivery
- Controlled Digital Lending

Resource Sharing Integration

- OpenRS is designed so that you can do your work in your existing ILS
- Your requesting and circulation workflows are directly in your ILS
- Unfilled requests would move to the next available in network supplier
 - Once all suppliers exhausted, would need to manually place request in external ILL system

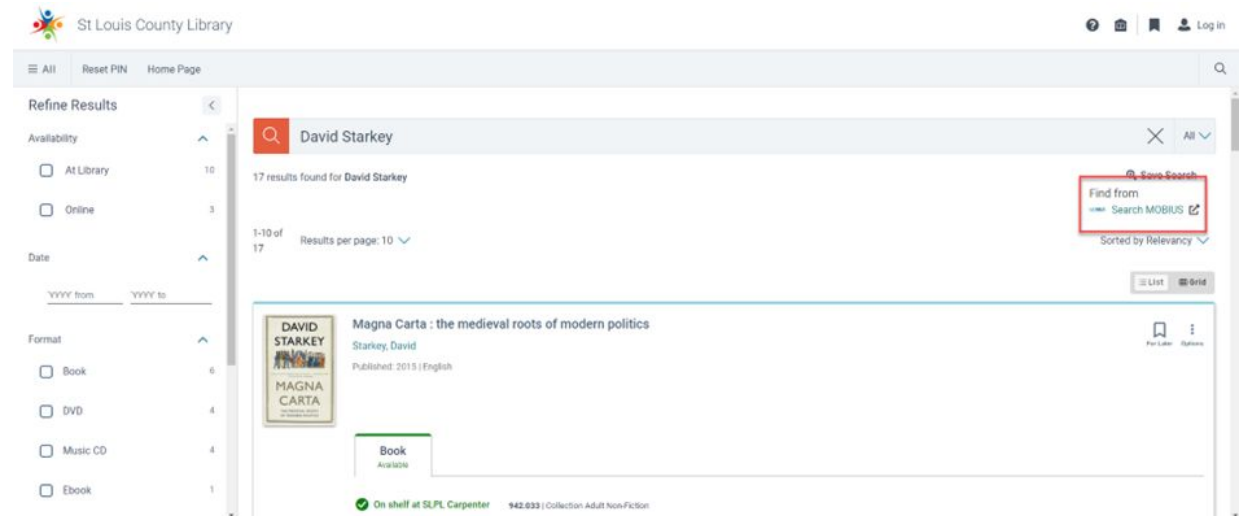
ILS Compatibility

- **Completed:** FOLIO, Polaris, Sierra
- **Pending:** Alma
- **Requested:** Evergreen, Follett, Apollo, Symphony, Horizon
- **Additional for Indiana:** Autographics, Biblionix, Aleph, Voyager, Millennium, Insignia, WMS, TLC

- Connections use either APIs or NCIP, depending on the system

OpenRS Process Overview

Step 1: Patron searches their local catalog



If the local catalog does not contain the desired result, the patron can click a button to expand their search to all of MOBIUS.

Step 2: Patron searches OpenRS union catalog

Within search results, patrons can review which libraries own the material, and information about the status, location, and call number of the item. This is all contained in the RTAC table – short for Real Time Availability Checking.

The screenshot shows the Mobius Catalog search results for 'David Starkey'. The search bar contains 'David Starkey' and the results are sorted by Relevance. There are 86 results. The left sidebar shows filters for Format, Location, Publisher, Language, and Subject. The main content area displays three results:

- Video Recording:** Magna Carta, with David Starkey BBC Worldwide Ltd. Year: 2015
- Book:** The English court : from the Wars of the Roses to the Civil War / David Starkey ... [et al.]. Year: 1987
- Book:** Starkey's book of states / poetry by David Starkey ; drawings by Rafael Perea de la Cabada. By: Starkey, David. Year: 2007

Additional filters in the sidebar include: great britain (24), electronic books (16), history (12), monarchy (9), henryviii king of england 1491-1547 (8), and documentary television programs (7). A '+94 more' link is also present.

The screenshot shows the Mobius Catalog search results for 'Monarchy with David Starkey'. The search bar contains 'David Starkey' and the results are sorted by Relevance. There are 86 results. The left sidebar shows filters for Format, Location, Publisher, Language, and Subject. The main content area displays three results:

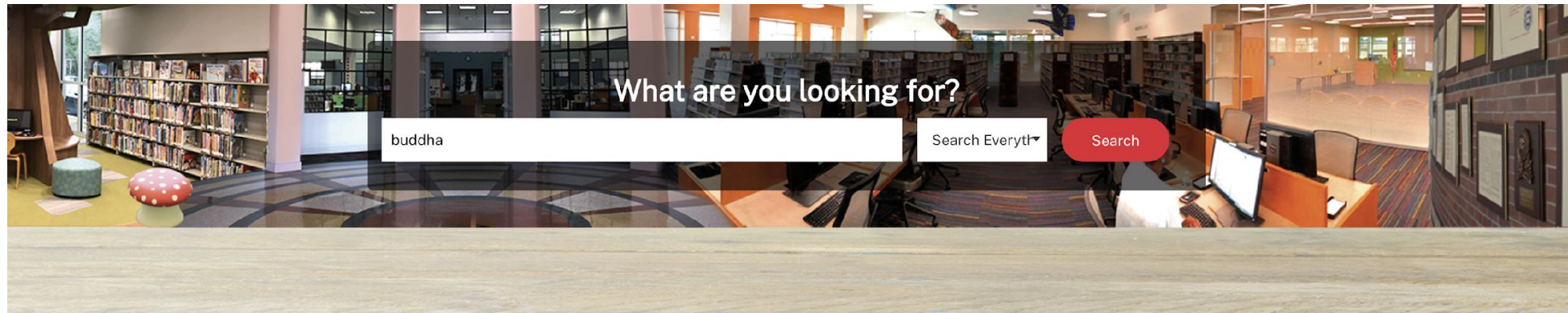
- Video Recording:** Monarchy with David Starkey ; a production of Thirteen/WNET New York in association with Channel Four Television and Granada ; directors and producers David Hutt, David Wilson, Mary Cranitch, Lucy Swingler, Steven Clarke, and James Runcie. Year: ©2006. Available: 6 of 6 copies remaining. [Place a hold](#)

Availability & locations

Status:	Library:	Location:	Call number:
Available	Truman State University	TRUMAN Media DVD	DA28.1 .M65 2006 v.1
Available	Truman State University	TRUMAN Media DVD	DA28.1 .M65 2006 v.2
Available	Webster University - Eden Theological Seminary	Webster DVDs 1st Floor	DA28.1 .M66 2006 v.1
Available	Webster University - Eden Theological Seminary	Webster DVDs 1st Floor	DA28.1 .M66 2006 v.2
Available	Westminster College	Westminster College Reeves DVD	JC375 .M66 2006 v. 1
Available	Westminster College	Westminster College Reeves DVD	JC375 .M66 2006 v. 2

[Show less](#)

Bonus Points! Combine Step 1 and Step 2 with Bento



Results for "buddha" | JPL Catalog 150 | Journals 262,854 | Electronic Resources 44,749

See all results for "buddha".

[Refine Search Results](#)

JPL Catalog

Buddha / text, Patricia Crété, illustrations, Bruno Wennagel, Mathieu Ferret ; translation, Catherine Nolan.

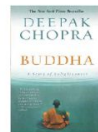


Authors: Crété, Patricia, author; Nolan, Catherine (Translator), translator

[Record details >](#)

[View Catalog](#) | [Read More](#) | [Add to Saved list](#)

Buddha : a story of enlightenment / Deepak Chopra.



Authors: Chopra, Deepak

[Record details >](#)

[View Catalog](#) | [Read More](#) | [Add to Saved list](#)

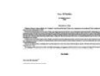
Buddha : a story of enlightenment / Deepak Chopra.



Authors: Chopra, Deepak

Electronic Resources

Story of Buddha



[Record details >](#)

[Read Online](#) | [Read More](#) | [Add to Saved list](#)

The Buddha : A Storied Life



Authors: Sasson, Vanessa R., editor; Scheible, Kristin, editor

[Record details >](#)

[Read More](#) | [Add to Saved list](#)

Buddha



Authors: BORUP, JØRN

Source: 85

[Record details >](#)

[Read More](#) | [Add to Saved list](#)

Journals

SEARCHING FOR BUDDHA. (cover story)



Authors: Almond, Philip C.

Source: History Today, Feb2024, Vol. 74 Issue 2, p42-55. 14p.

[Record details >](#)

[Read Online](#) | [Read More](#) | [Add to Saved list](#)

Pollution fingerprintings in soils and plants of Buddha Nalah drain contaminated with industrial effluents



Authors: Dhaliwal, Salwinder Singh; Sharma, Vivek; Kaur, Janpriya...

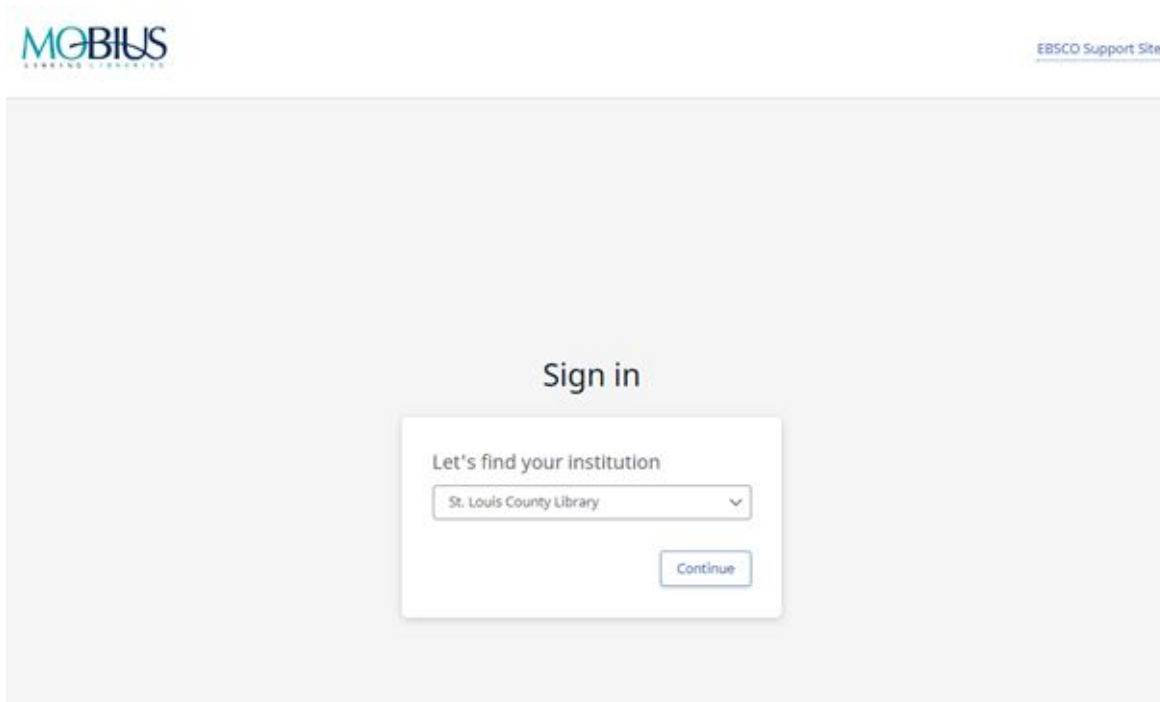
Source: Environment, Development and Sustainability: A Multidisciplinary Approach to the Theory and Practice of Sustainable Development. :1-23

[Record details >](#)

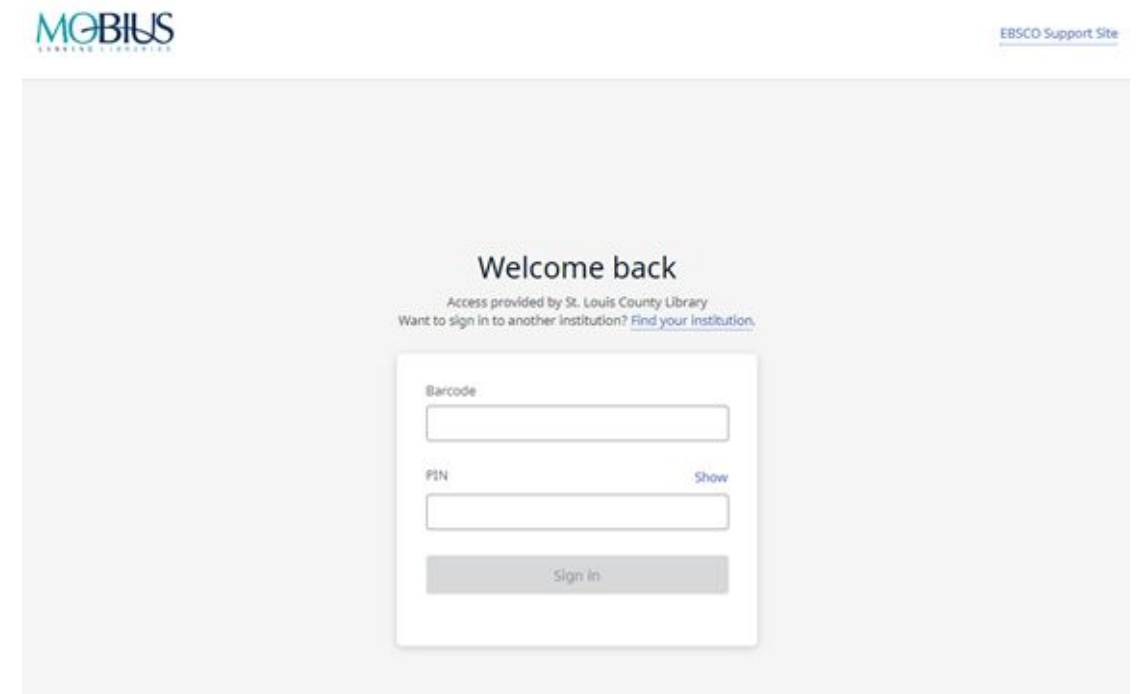
[Read More](#) | [Add to Saved list](#)

Step 3: Patron initiates request

After clicking 'Place a hold', the patron will select their home library from a dropdown list.



The screenshot shows the MOBIUS logo in the top left and "EBSCO Support Site" in the top right. The main content area is titled "Sign in". Below the title is a white box with the text "Let's find your institution". Inside this box is a dropdown menu currently displaying "St. Louis County Library" with a downward arrow. To the right of the dropdown is a "Continue" button.

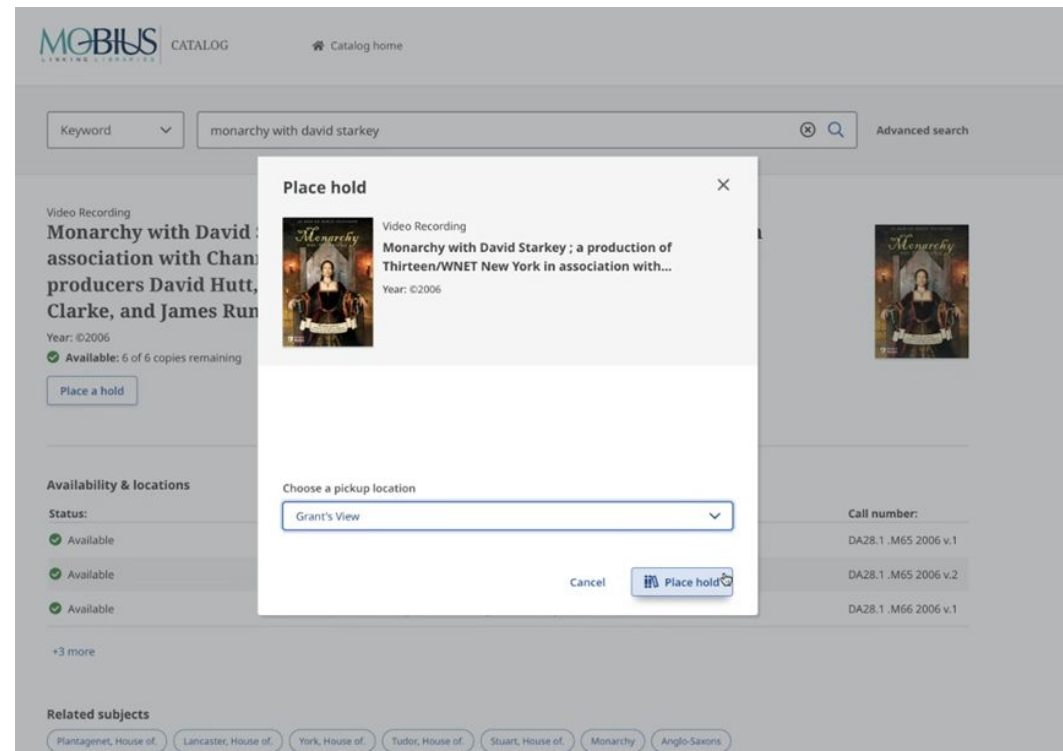


The screenshot shows the MOBIUS logo in the top left and "EBSCO Support Site" in the top right. The main content area is titled "Welcome back". Below the title is the text "Access provided by St. Louis County Library" and "Want to sign in to another institution? [Find your institution.](#)". Below this is a white login form with a "Barcode" field, a "PIN" field with a "Show" link to its right, and a "Sign in" button at the bottom.

The patron will be prompted to log in with their barcode and PIN (or equivalent), or via single sign-on (SSO), depending on your local library's configuration.

Step 4: Request placed

In the 'Place a hold' modal, the patron will be prompted to select the library at which they wish to pick up the material.



A single library may have multiple “pickup locations” specified in this dropdown, which are defined in the administrative setup for OpenRS.

Step 5: Request created & item selected for fulfilment from eligible lender

In a situation where multiple eligible lenders for the material exist and all things – item status, etc. – are equal, the lender is selected based on proximity to the selected pickup location.

OpenRS completes the following in the local ILS of the selected lender:

1. Creates a virtual patron user record
2. Places a request for the item on that user record

OpenRS completes the following in the local ILS of the borrowing institution*:

1. Creates a virtual item record representing the requested material
2. Places a request on behalf of the user for that item

*If the pickup library is different from the home library of the borrowing patron, a virtual patron record will also need to be created in the pickup ILS to support this workflow.

Step 6: Selected lender fills request

If the requested material is available on the shelf, the lending library will take the following steps:

1. Print pick slips in the local ILS
2. Locate requested material on the shelf
3. Check the requested item in at the circulation desk
4. Send the item in transit to the pickup library

Step 7: Borrowing library receives requested material and fills request

When the requested material arrives at the pickup library, the pickup library will take the following steps:

1. Check in the item
 - a. This should initiate a request pickup notice to the patron from the ILS at the borrowing library.
 2. Check out the item
 - a. This action will automatically check the item out to the virtual patron in the lending ILS – no staff action required at the lending library!
 - b. The patron should receive a checkout receipt, if configured in the ILS at the borrowing library.
 - c. Subsequent circulation notices should be sent from the ILS at the borrowing library.
-

Step 8: Requested material is returned

When the patron returns the material to the library from which they circulated the item, the pickup library will take the following steps:

1. Check in the item
 - a. This “closes” the loan to the patron and will remove it from their account.
 - b. The item will convert to an “in-transit” status.
2. Send the item back to the lending library

Step 9: Transaction is completed

The lending library will check the item back in once received back in the delivery. This action will:

1. Close the loan for the virtual patron record in the lender's ILS
2. Indicate that the OpenRS request has achieved a "terminal" status

Can a patron cancel an OpenRS request?

Yes, a patron can cancel an OpenRS request all the way up until they check the item out.

If a patron cancels the request before the material is in transit to the borrowing library:

- The request is cancelled in both the borrowing and lending ILS.

If a patron cancels the request while the material is in transit to the borrowing library:

- The request is canceled in both the borrowing and lending ILS.
- When the item is received at the borrowing library and they check the item in, they will be directed to return the item to the lending library.

If a patron cancels the request while the material is awaiting pickup on the hold shelf:

- The request will appear on the hold shelf clearance report at the borrowing library.
- The borrowing library staff will check in the item to route it in-transit back to the lending library.

What happens if my library receives an OpenRS request that we cannot lend?

If a library cannot fulfil a lending request (e.g. because the item is missing or damaged), staff at the lending library can cancel the request in their local ILS.

OpenRS will try to identify another eligible lender, excluding any libraries that have declined the request in the past.

Once eligible lenders are exhausted, the borrowing ILS request achieves a terminal state and sends a cancellation notice according to the notice policies configured in the borrowing ILS.