

## Atrium and Texas Armadillo Network Integration

As a participant in the statewide interlibrary loan (ILL) program through the Texas State Library and Archives Commission, keeping your library's records up to date in the **Texas Armadillo Network** (SHAREit, powered by Auto-Graphics, Inc.) is important so that the ILL program works effectively and efficiently for all. As you add and delete items from your local catalog those changes also need to be updated with the union catalog, so that the Texas Armadillo Network contains accurate information on what items libraries have available for interlibrary loans.

Book Systems is pleased to announce the ability to automate the process of updating your records in the Texas Armadillo Network for our Atrium customers. In addition to automatically syncing your catalog records, we also utilize NCIP and z39.50 access for your Atrium system to perform patron authentication and automated circulation actions in Atrium as requests are made in the ILL system. Participating libraries with the Texas State Library and Archives Commission that used Atrium as of June 2024 are already setup with this integration and new qualifying libraries can be added at any time. Below is a general overview of how the integration works inside your Atrium system.

**Sharing Records:** We've configured a generic export for common ILL items that will upload automatically to the Texas Armadillo Network. Matching items that you add, modify or delete in Atrium will be uploaded automatically every week to the ILL system. If you need to change which items are being sent from Atrium to the ILL system, Book System's Technical Support department can assist you with customizing the export filter as needed. You can view the items being sent to the Texas Armadillo Network by checking the "Texas ILL SHAREit Automatic Export" saved report inside your Atrium.

**z39.50 Access for Item Status:** When items are searched in the Texas Armadillo Network, that system can use the data from the provided automatic uploads to check the real-time circulation status shown by the z39.50 server connected to your Atrium database. This helps ensure the item being requested is available for loan before continuing to process requests.

**NCIP Authentication and Automatic Actions:** With NCIP, the Texas Armadillo Network can verify your patron's account status and send messages to your Atrium that copy certain ILL actions in order to stay in sync. The Atrium workflows for this are further outlined below.

**Patron Authentication** – Patron Barcode is needed to authenticate over NCIP. Atrium sends back an "OK" provided the patron is not blocked due to:

- Patron is over the Fine Limit threshold.
- Patron has the "block for circulation" flag on their record in Atrium.
- Patron has reached the maximum Overdue Limit.
- Patron's card is expired.

## Atrium and Texas Armadillo Network Integration (continued)

### Borrowing ILL items requested by your patrons:

- When a request is marked “Received” in your Texas Armadillo Network Request Manager borrower queue, the ILL item gets automatically added to your Atrium database as a temporary item (will be deleted at check-in) and put on the Reserve Shelf by the NCIP process for the patron that requested it.
- The patron picks up their item when it’s ready, and you check it out through Atrium like normal.
- When the patron returns the item, checking it in through the Texas Armadillo Network will check it in through Atrium by the NCIP process and the temporary ILL record will be deleted.
- ILL Items that get checked in to Atrium first will need to be manually checked in to the Texas Armadillo Network.

### Loaning out your items requested by other Libraries:

- When a request is marked “Shipped” in your Texas Armadillo Network Request Manager lender queue, the item you are sending out is automatically checked out to a designated ILL Patron Barcode in Atrium by the NCIP process.
- When the item is checked back into the Texas Armadillo Network, it will also check it in to your Atrium.
- ILL Items that get checked in to Atrium first will need to be manually checked in to the Texas Armadillo Network.

You will primarily use the Texas Armadillo Network interface to perform most ILL tasks. The automatic NCIP actions described above will help keep your Atrium in-sync with loan and borrow actions performed in the ILL system.

**To Avoid Issues with the Integration:** Certain settings, reports and worker records inside your Atrium make this integration possible. Changing any of the below may affect the integration.

**Check** with Book System’s Technical Support before renaming Item Classes, such as Report Class and Material Types. Your export filter may need to be modified to accommodate changes.

**Check** with Book System’s Technical Support before deleting or changing the barcode of your primary ILL patron record. Backend settings for NCIP may need adjusted.

**Do not** edit or delete the Saved Report named Texas ILL SHAREit Automatic Export.

**Do not** edit or disable worker records that contain bsi, z3950, or ncip as part of their username.