

ILLIAD FOR MEDICAL LIBRARIES

[Angela S. Galvan / @galvan_as](#)

The Ohio State University Health Sciences Library

IN THIS PRESENTATION...

- Case study: “Sink or swim” ILLiad administration.
- Configuring ILLiad & DOCLINE.
- Embedding library advocacy into ILL.
- Cultural concerns.

TECHNICAL SUPPLEMENTS

ILLiad 2015



DUDE, SUCKIN'
at something
IS THE FIRST STEP
to being sorta good
at something

OSU'S HEALTH SCIENCES LIBRARY

REQUESTS RECEIVED

Lending	10,000
Borrowing	2,500
Document Delivery	2,000

ILL Staff: 1 FTE | Students: 0.5 FTE

Separate network from main campus.

2012: Significant retirement for ILL.

This kind of overhaul doesn't happen without support, trust, and willingness to try.

Assume everything is possible.

LEARNING TO SWIM

QUESTIONS

- What is time consuming about our work?
- Can we automate the boring?
- Are we duplicating a process/information?
- What do users experience and how do they speak to us?
- How do reciprocal partners serve the library?
- Who **doesn't** borrow from us?
- How do we teach ILL?
- What data would be useful?

ENVIRONMENTAL SCANS

- Physical workspace
- User experience
- Kindness audits
- Workflows
- Policy
- Consortia

PHYSICAL WORKSPACE



UX IS ADVOCACY (BEFORE)

Document Delivery

Services offered through the Document Delivery department include article copies and material loans. You can make and track document delivery and book loan requests 24 hours a day through the Health Sciences Library's ILLiad system.

Pricing:

There is a fee for all document delivery services for non-OSU users. By submitting a request you are agreeing to pay any and all fees listed on our fee schedule below.

Fee Schedule for Non-OSU Users and Courtesy Card Holders

Regular Non-OSU Service	Usually provided within 4 days	\$25 per request
Rush Non-OSU Service	Usually provided within 48 hours	\$40 per request

Eligibility:

All OSU faculty, staff, and students are welcome to use our services. Our primary customers represent the various health sciences colleges and the OSU Medical Center. Additionally, we offer a document delivery service to non-OSU customers. All non-OSU customers are charged a fee for service.

How to Use/Order:

Logon to ILLiad to Request Materials

If you have already registered with ILLiad to request Document Delivery materials enter your user information below and select the Logon to ILLiad button below. **Forgot your password? Call 292-4894 to have it reset. PLEASE DO NOT RE-REGISTER!**

ILLiad Username:

ILLiad Password:

[Logon to ILLiad](#)

If this is your first time to make article or book requests online via ILLiad, you will need to register before proceeding. Please familiarize yourself with the Health Sciences Library Document Delivery service [FAQ](#) and service terms and conditions before registering.

[First Time Users Register Here](#)

Loansome Doc Customers

Loansome Doc enables PubMed and NLM Gateway users to order documents found in MEDLINE®. A user can order articles from a list of citations retrieved from [PubMed](#) and the [NLM Gateway](#) by sending requests to the library for the full-text documents.

A [Loansome Doc Fact Sheet](#) is available at the NLM web site. Users must register for this service before using it. For more information please contact Document Delivery staff.

UX IS ADVOCACY (AFTER)

Document Delivery

Service Announcement

If you previously used the Document Delivery system (ILLiad), your records will be transferred to the [Thompson Library's system](#). If you already have a username, you will get to keep your existing username and passwords, request history, and access to recently delivered PDFs.

What's New?

- You can pick up and drop off loans at [any OSU library location](#). Choose the library location most convenient for you.
- You can make requests directly from research databases and [WorldCat@OSU](#) with the ILLiad form auto-populated for you. You will no longer have to manually enter request information.
- Requests will be processed on nights and weekends.

Have questions?

Call Document Delivery at 614-292-4894 or [email us](#). We are excited about these changes and glad to help you!

Forgot your password? [Click here](#) to reset.

Want assistance with research or to refresh your search strategy? Ask one of our [award-winning librarians](#) for help.

Have an article recently accepted for publication? See if your article is [eligible](#) to apply for [Open Access funds](#).

How to Use/Order:

Username

Password

[Forgot password?](#)

New to ILLiad?

KINDNESS AUDITS

ILL as virtual branch.

How many times are patrons told **NO** versus a 'soft' no?

Ask a non-librarian to read an overdue notice.

How does it make them feel?

Read the policies page. Is it written for non-librarians?

Would you want to work here?

WORKFLOWS

- Get rid of Ariel.
- Use Article Exchange.
- Trusted Sender for all libraries.
- Update constant data.
- Adjust DOCLINE settings.
- Configure ILLiad...at all.
- Stop using Notes field to figure out Borrowing.

POLICY

- Remove references to patron fees.
- Service over systems.
- Bridges over demarcation and unhelpful rules.
- "Teach to fish" vs "So, this *is* a fish..."

CONSORTIA

- Evaluate which resource sharing agreements serve the library.
- Seek existing consortia: local, regional, national.
- Creating new agreements where gaps exist.

CONFIGURING DOCLINE

REQUEST-LEVEL SETTINGS

[Copyright Compliance](#)

Comments to Lenders

Chars: 45 of 150

Service Type

[Service Level](#)

NLM Delivery Method

Network Delivery Method

Network Alternate Delivery Method(s)

Guidelines ▾

GMR-RL, OhioLINK, CIC, SHARES. EFTS/IFM only.

Copy ▾

Normal ▾

E-mail (PDF) ▾

Odyssey ▾

Ariel Email PDF Email TIFF Fax

Mail Odyssey Pickup Web PDF

Web TIFF

Yes No

Only Route to EFTS Participants

REQUEST-LEVEL SETTINGS

Serial Routing

[Edit](#)

Routing Cells

1 2 3 4 5 6 7 8 9

Resource Libraries

Yes No

NLM

Yes No

All Other Libraries

Yes No

Do Not Route To

REQUEST-LEVEL SETTINGS

Lending Preferences

My library will send copy requests by:

- | | | | | | | | | |
|---------|--------------------------------------|-------------------------------------|-----------|--------------------------------------|--------------------------|------------|--------------------------------------|--------------------------|
| Ariel | <input type="radio"/> Yes | <input checked="" type="radio"/> No | Email PDF | <input checked="" type="radio"/> Yes | <input type="radio"/> No | Email TIFF | <input checked="" type="radio"/> Yes | <input type="radio"/> No |
| FAX | <input type="radio"/> Yes | <input checked="" type="radio"/> No | Mail | <input checked="" type="radio"/> Yes | <input type="radio"/> No | Odyssey | <input checked="" type="radio"/> Yes | <input type="radio"/> No |
| Web PDF | <input checked="" type="radio"/> Yes | <input type="radio"/> No | Web TIFF | <input checked="" type="radio"/> Yes | <input type="radio"/> No | | | |

Send an email notification each time a request routes to my library for:

- | | | |
|---------------------|--------------------------------------|-------------------------------------|
| Normal | <input type="radio"/> Yes | <input checked="" type="radio"/> No |
| Rush | <input checked="" type="radio"/> Yes | <input type="radio"/> No |
| Urgent Patient Care | <input checked="" type="radio"/> Yes | <input type="radio"/> No |
| Loansome Doc | <input checked="" type="radio"/> Yes | <input type="radio"/> No |

[Email Address](#)

document.delivery@osumc.edu

Lend default screen: Batch Single

Additional Software Options

Third Party Products OCLC ILLiad

**Add/Delete
Products**

REBUILD ROUTING TABLES

OHUOSU - The Ohio State University

Address
People
Membership
Services & Fees
DOCLINE Options
Loansome Doc
Out of Office
Activity Summary

Print All Cells

Select LIBID(s) to move between cells or between the workspace and a cell. Institutions within cells are ordered alphabetically by institution name. For detailed instructions, see Help.

Routing Table

Proposed Current Compare

The proposed view is where you edit your routing cells.

Cell

1 2 3 4 5 6 7 8 9

Delete Move to Cell 1 Go Select All

<input type="checkbox"/>	OHUCLE	Case Western Reserve University
<input type="checkbox"/>	OHUCVS	Cleveland Clinic Foundation
<input type="checkbox"/>	INUIND	Indiana University School of Medicine
<input type="checkbox"/>	WIUWIM	Medical College Of Wisconsin
<input type="checkbox"/>	MIUMSU	Michigan State University
<input type="checkbox"/>	ILUCCO	Midwestern University
<input type="checkbox"/>	ILUNWU	Northwestern University
<input type="checkbox"/>	PAUHER	Penn State Hershey George T. Harrell Health Sciences Library
<input type="checkbox"/>	NJUNJN	Rutgers
<input type="checkbox"/>	NJUMSG	Rutgers University
<input type="checkbox"/>	ILUUIV	University Of Illinois At Urbana-Champaign

Workspace

Move to Cell 1 Go Delete

Select All

Your Groups

- CIC
- Committee on Institutional Cooperation
- OutLibGMR
- Outreach Libraries in the Greater Midwest Region
- GMRRG
- GMR Reciprocal Group

3 of 180 Rows Full

Add to Workspace

Option 1

LIBID

Add

Last update: Never ago

LOCATING DOCLINE SYMBOLS

<p>Home Requests Serial Holdings Institutions Loans</p> <p>Search Update OHUOSU</p>	
<p>Top Filters</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> DOCLINE Participant<input checked="" type="checkbox"/> Open Library<input type="checkbox"/> My Routing Table<input type="checkbox"/> My Region<input type="checkbox"/> My State<input type="checkbox"/> Not My Routing Table<input type="checkbox"/> Not My Region<input type="checkbox"/> Not My State	<p>Delivery Options</p> <ul style="list-style-type: none"><input type="checkbox"/> Delivers via Ariel<input checked="" type="checkbox"/> Delivers via Email PDF<input type="checkbox"/> Delivers via Email TIFF<input type="checkbox"/> Delivers via Mail<input checked="" type="checkbox"/> Delivers via Odyssey<input checked="" type="checkbox"/> Delivers via Web PDF<input type="checkbox"/> Delivers via Web TIFF<input type="checkbox"/> Delivers via Fax
<p>Membership Information</p> <ul style="list-style-type: none"><input type="checkbox"/> Federal Library<input type="checkbox"/> Reports Serial Holdings <p>Library Level _____</p> <ul style="list-style-type: none"><input type="checkbox"/> Primary Access Library<input type="checkbox"/> Resource Library<input type="checkbox"/> Regional Medical Library (RML)	<p>Services</p> <p>Interlibrary Loan _____</p> <ul style="list-style-type: none"><input type="checkbox"/> EFTS Participant<input type="checkbox"/> Fills International Requests<input type="checkbox"/> Fills Rush Requests<input type="checkbox"/> Fills Urgent Patient Care Requests<input type="checkbox"/> Provides Color Copies

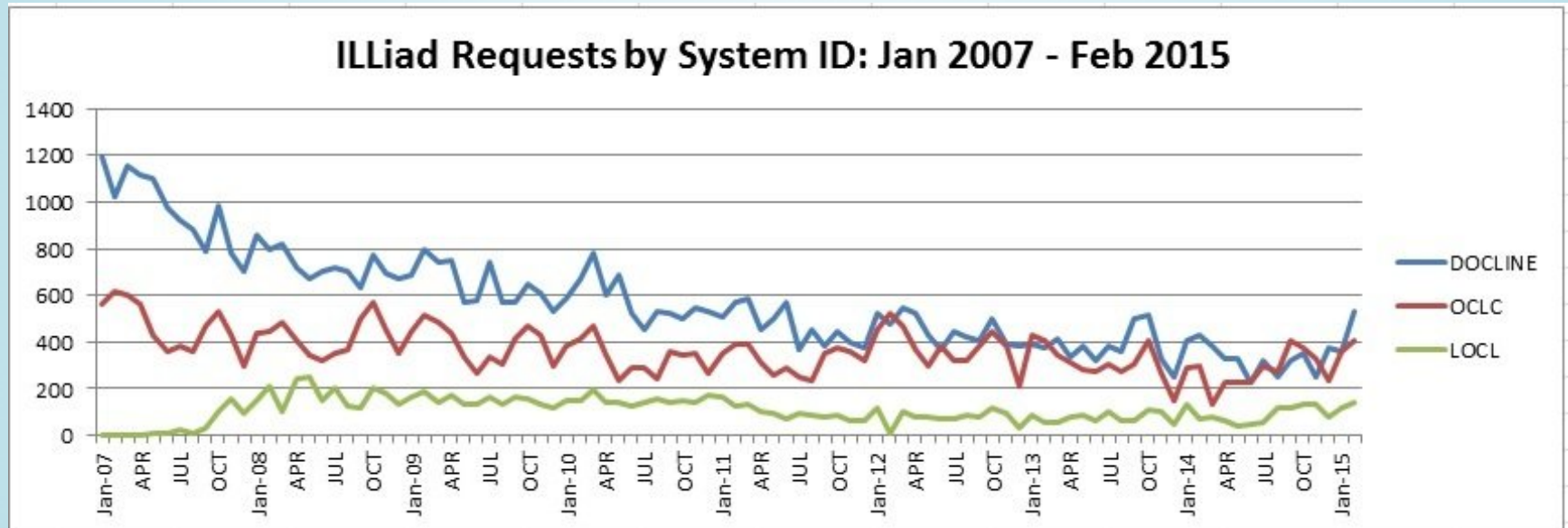
LOANSOME DOC

- Lending webpages can (and should) manage this.
- Easier (or harder) depending on authentication.
- Generic accounts can help--to a point.
- Loansome Doc statistics aren't granular.
- Outreach at best, legacy system at worst.

SERHOLD MAINTENANCE



REALITIES AND CHALLENGES



POSSIBLE STRATEGIES

- Custom flags.
- Most Unfilled/Most Loaned Journals reports.
- Compare SERHOLD to OCLC Holdings...this might be an unpleasant, but useful project.

CONFIGURING ILLIAD

BATCH PROCESSING

LendingReasonsForCancellation

ReasonNumber	NVTGC	Reason	DefaultNote	OCLCCode	DodineCode	RLINCode
0	OS2	Health Sciences Reserve		1	USE	
1	OS2	Library Policy (non circulating, in MHC, etc)		4	NCR	
2	OS2	Incomplete Citation		17	INC*	
3	OS2	Not Owned Title		5	NOT	
4	OS2	Our holdings END BEFORE this volume		9	LAC	
5	OS2	Our holdings BEGIN AFTER this volume		9	LAC	
6	OS2	At Bindery		8	BDY	
7	OS2	Lack Volume or Issue		9	LAC	
8	OS2	Lost		3	LOS	
9	OS2	Not On Shelf/Missing		10	NOS	
10	OS2	Other		27	OTH	
11	OS2	Cancelled		27	CAN*	
12	OS2	Poor Condition		27	POR	
13	OS2	License Agreement		27	LIC	
14	OS2	In Use/Off Campus/Checked Out		1	USE	

EMAIL ROUTING & CUSTOM QUEUES

WEBCIRC

USERS SPEAK THROUGH ILLIAD

Beyond request data, users speak the most during **Registration**.

What are they saying? What are you asking?

Balance your needs with theirs.

PASSWORD RECOVERY

```
<a href="https://yourILLiadserver/illiad.dll?Action=10&Form=84">Forgot password?</a>
```

Hospitals run 24/7, calls are for reference and troubleshooting.

CULTURAL CONCERNS

"We have always done it this way."

...and generalized resistance are other ways of saying

"I am afraid of failure."

This would be fine, except...

THE REAL COST OF FEAR

Borrowing is difficult without any Custom Holdings.
How much time was lost to this workflow?

Date	Note
12/27/2012 5:06 PM	1999+ online
12/27/2012 5:10 PM	OCLC 23725363 inu, mnu, OCLC 476891400 no USA locs., OCLC 41964024 idl, cgu, uiu, eym, eem, upm, gzm.
12/27/2012 5:11 PM	inu is currently a non-supplier

"BUT IT'S ONLY 5 MINUTES!"

Workflow math:

5 minutes x 20 requests = over 1.5 hours lost.

What else could you have done?

Breaking through resistance requires dismantling fear.

PLANNING
CHANGE
DEFENSIVELY



POTENTIAL STRATEGIES

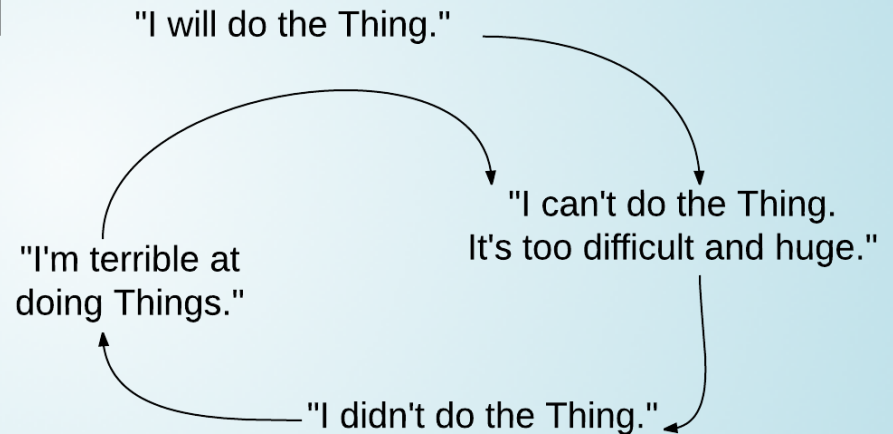
- Document.
- Start small.
- Time/\$ as leverage.
- Incremental change.
- Ask for a trial period.
- Data, data, data.
- Find allies in patrons.
- Exploit fragility.

HOW DO I START?

Start small means different things depending on skills and access to resources.

Achieving small goals creates motivation.

Try to be patient with yourself.



FINDING HELP

Workflowtoolkit-L

ILL-L

IDS Project

Nearby ILLiad institutions

Social media

Right now!



JUST SHY
NOT ANTISOCIAL
(YOU CAN TALK TO ME!)

RESULTS

"THIS IS GREAT ANGELA,
BUT WHAT DOES IT GET ME?"

600 more Borrowing requests. Reduced article turnaround time by **20 hours**. Empowered staff, improved communication, created a more positive work culture by eliminating tedious workflows, and **reclaimed 40% of staff working time.**

QUESTIONS?

Thanks!

@galvan_as

galvan.22@osu.edu

