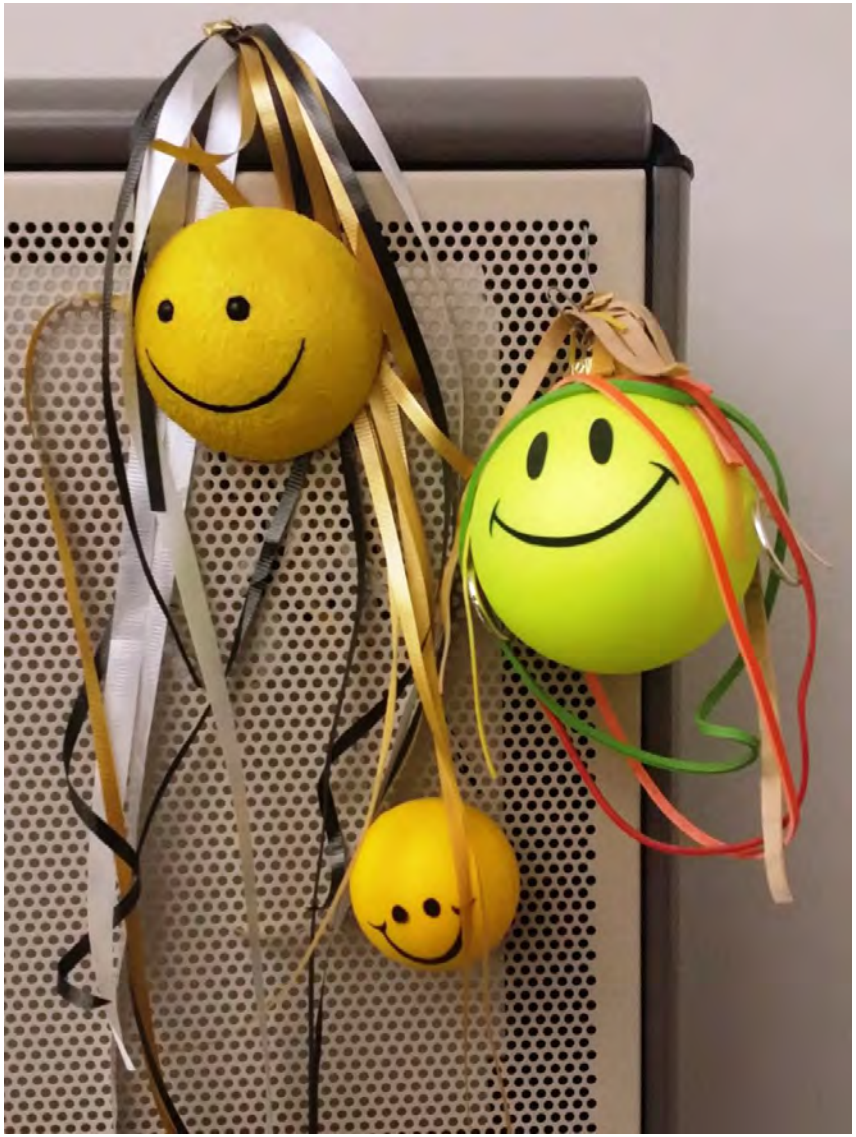
Welcome to Practical Lending Workflow Enhancements from Request Received to Item Shipped



UCCS Kraemer Family Library
UNIVERSITY OF COLORADO COLORADO SPRINGS

Eduard Hoeckel

Interlibrary Loan & Library Technician

Contact Information

Interlibrary Loan Office, EPC 200
719-255-3285
ehoeckel@uccs.edu

I’m here to share the lending workflow enhancements that we have used at UCCS since 2011

- **I hope that your lending operation will find this presentation a benefit**
- **This is my fourth presentation of this work flow**

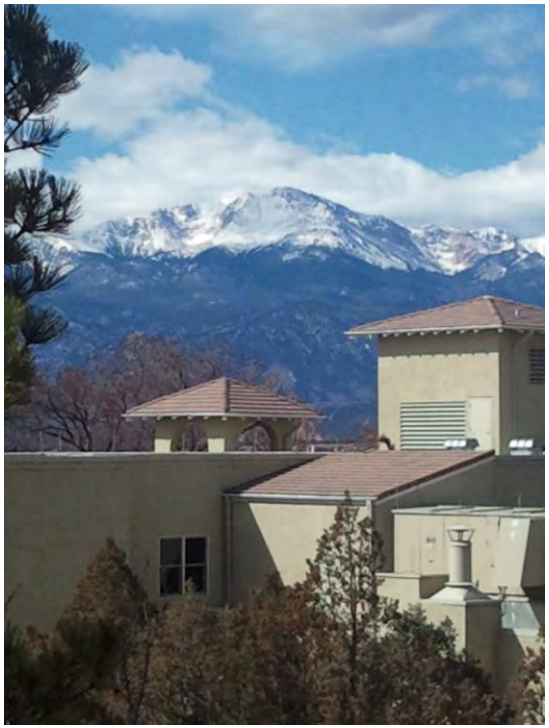
Announcements

A Couple of 2015 Milestones

Processed 100,000th Request Through ILLiad this year!

We are a two person ILL department
One full time
One part time

I've been here through all 100,000 requests since we subscribed to ILLiad in 2007



Where we are we headed?

- **My History in Interlibrary loan –**

Set the stage for the challenges

- **Demonstrate the workflow**
- **Show how to set it up**
- **And then questions/answers**

My History in ILL
Started in 2006
on board with

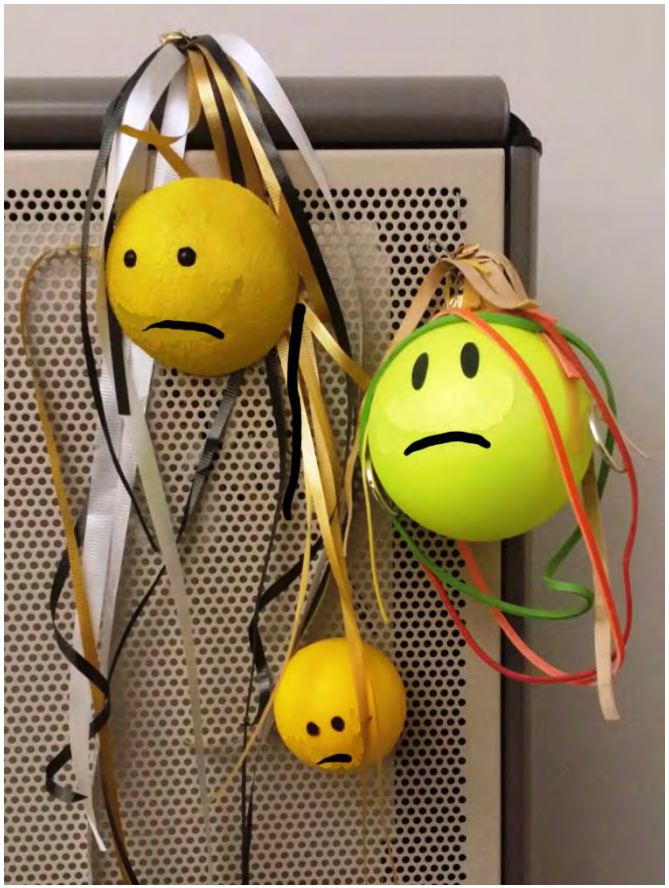
- **4 years of library exp**
- **3 Associate degrees (I love learning)**
- **I m also a shade tree car mechanic**

(I like to tell people I was born with a wrench in my hand)

When I arrived in 2006 we **did not** have ILLiad

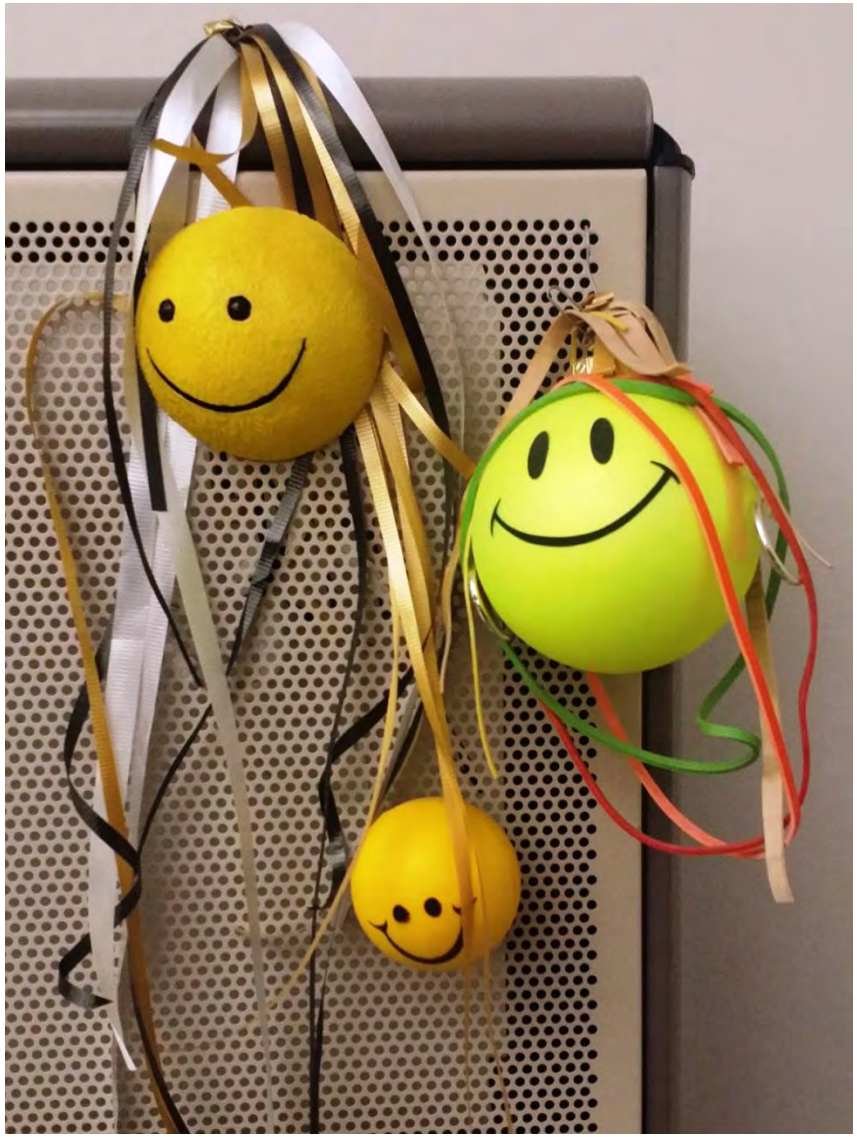
- **Frown face ☹**
- **Paper file system**
- **We took a lot of**

  Notes



In 2007 we subscribed to ILLiad

- **Smiley face ☺**
- **Good to see the Contrast/Benefits**
- **Management of Requests through the workflow**
- **History tracking**



Pending Retirement ILL Coordinator Library Technician III

- **Lari'sPush to get ILLiad - Leave ILL in Best condition possible**
- **Challenge**

could not fill position for 2 months

- **Learned Everything I could about lending and borrowing**

Recognized and kudos

- **Fall semester 2008 all borrowing and lending**
- **Relief arrived - Don Pawl MLS**
- **Change of leadership and responsibilities**
- **Refocus on lending priorities**

In 2011 Performance Plan

- **Input on goals?**
- **5 years total ILL experience**
- **4 years of it with ILLiad**

- **I think I cut paper use by %50 and increase Lending workflow efficiency**
- **I would like to see if I could get ILLiad to <u>print the courier slips</u>**

Gained from meeting

- **More Control of my workflow**
- **Access to the customization manager**
- **Freedom to create**

The Courier system in Colorado
CLiC

- **Fantastic Resource Sharing Network**
- **Schools, Hospitals, Rural**
- **Estimated costs .50$ to 1$**
- **Significant savings in delivery costs**

Bottle Neck in Courier Delivery

- **Filling out slips by hand**

Potential legibility if not written clearly

- **Referring to a list for code**

Potential error in copying codes

- **Time consuming**

Additional Courier Challenges

- **Clic expanded courier service into neighboring states**
- **Blue Sky Express, CoKaMo,**
- **More codes and formatting to cope with**

What I wanted

- **To automate courier slip printing**
- **A print as needed system**
- **Did not know if it was possible but I was determined to find out**

Summer of 2011 a window of opportunity
Summer the time for projects

- **Students are gone**
- **Borrowing and Lending Requests down**
- **Now time to work on projects**

Investigation reveals/wrapping my mind around the functionality of ILLiad

- **Templates**
- **Merge fields**
- **Filtering and sorting of requests**
- **Queue up templates**

snag

- **Need control of 1 cell of data to filter by**
- **1st step in request received is inputting the addresses**
- **Default Shipping Options can I customize it?**

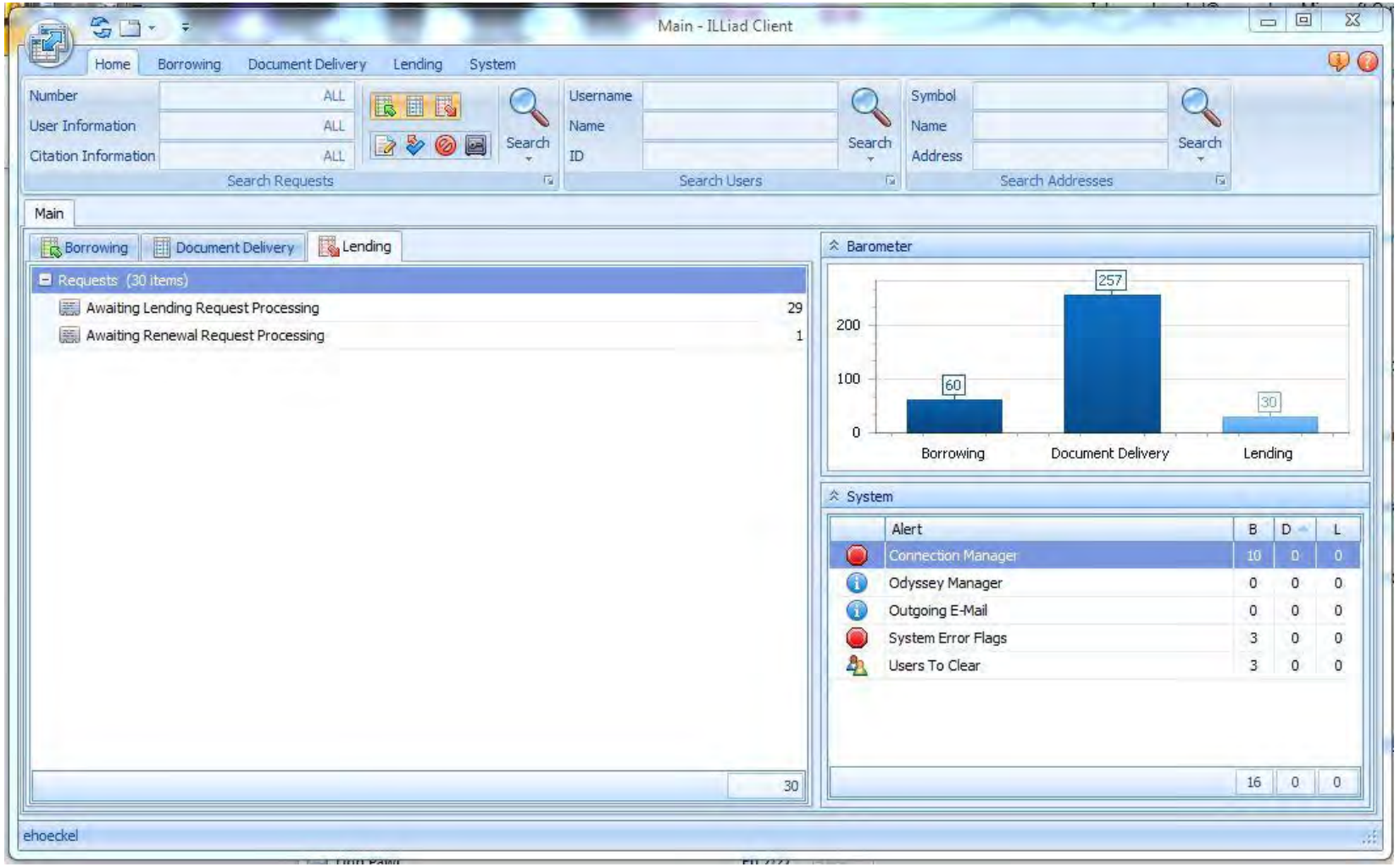
Miss Violita Senior Support Analyst

- **Customer support**
- **Turns out problems with my approach**
- **Default Shipping Options in billing manager**
- **Final Piece Thank you Miss Violita**

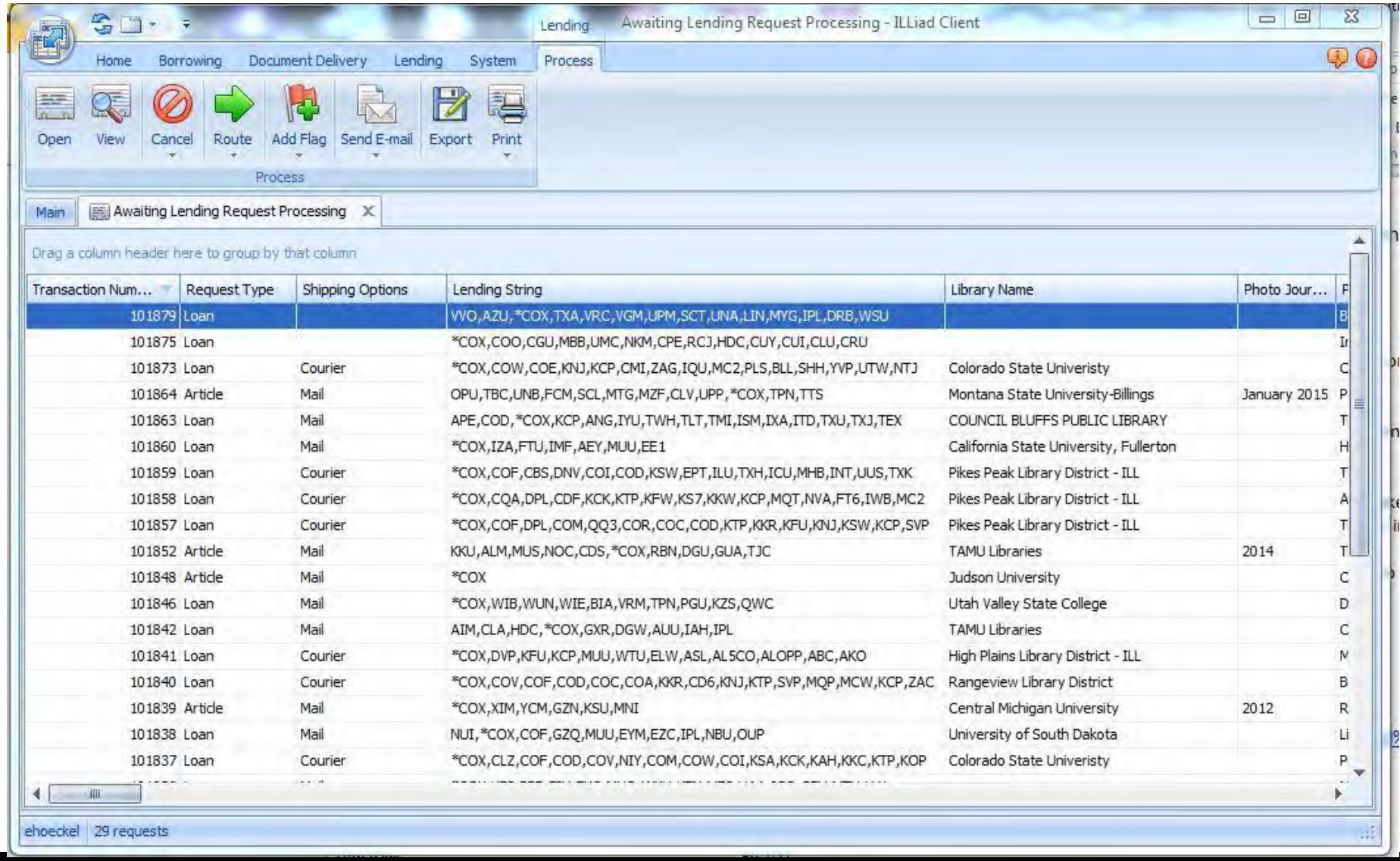
Next The Workflow

- **From request received to item shipped**

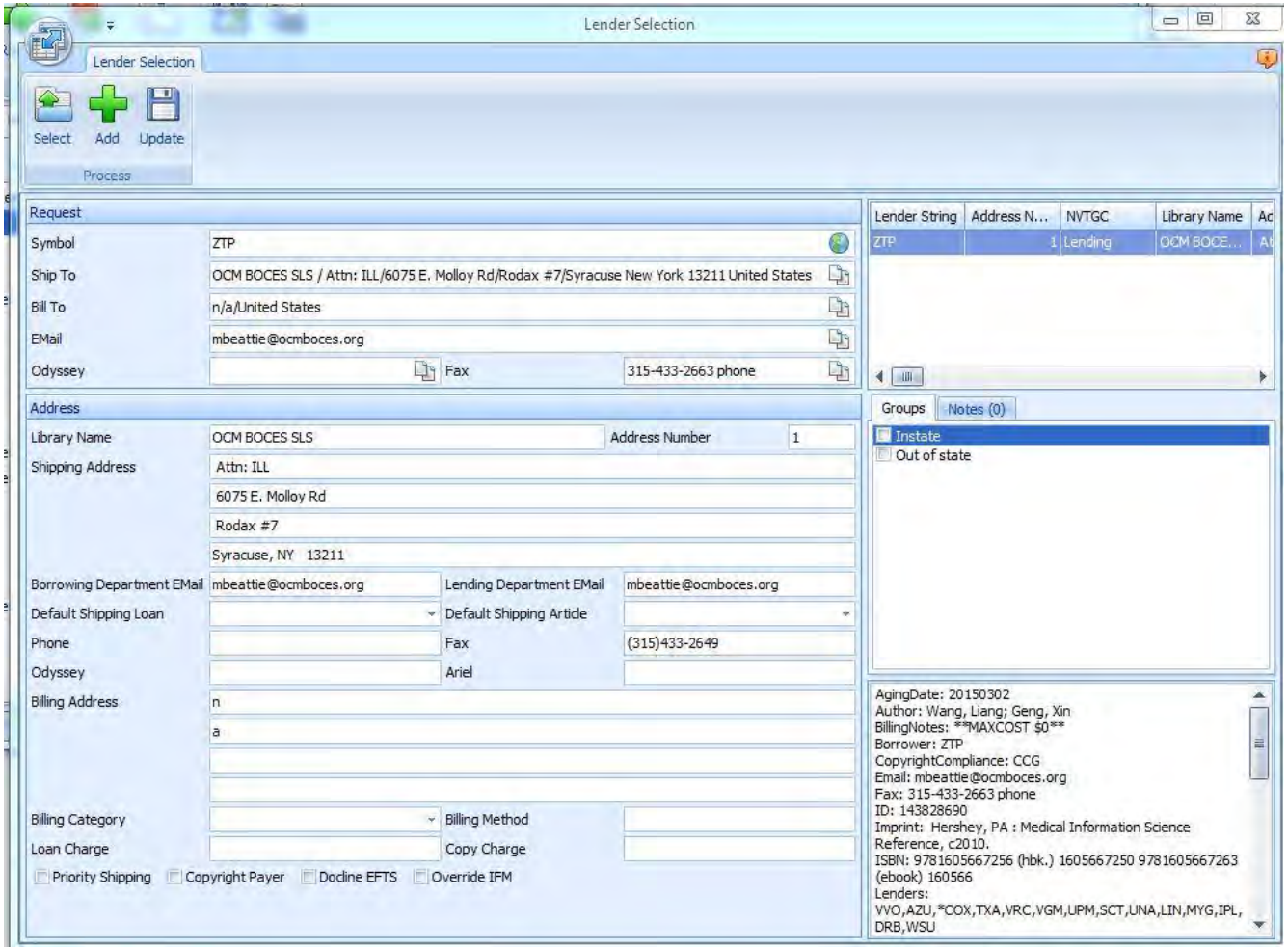
Awaiting Lending Processing



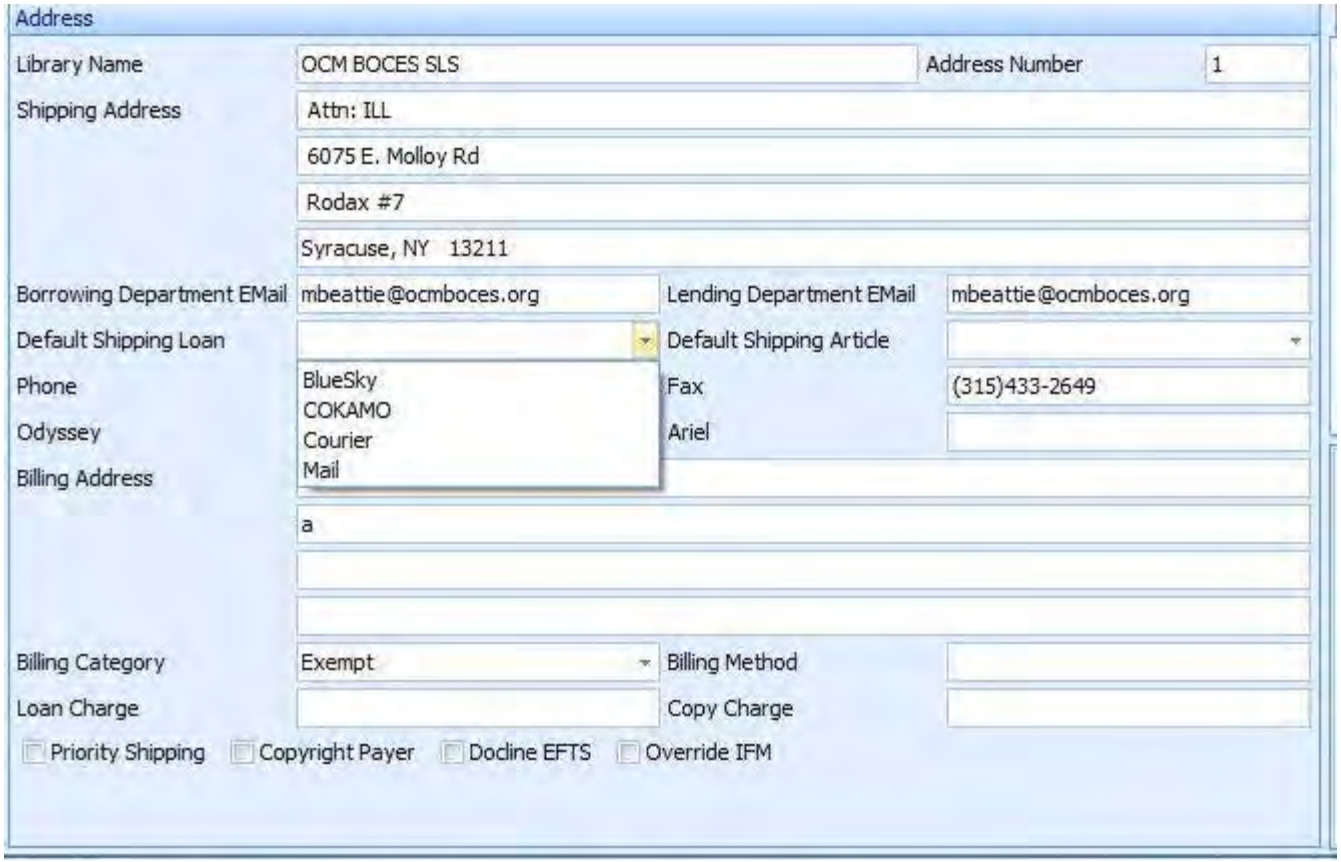
Processing requests



Add the address



Selecting Default Shipping Loan



Search the catalog

- **Z search**
- **Check for availability**
- **Copy item information**
- **Request move to awaiting stack searching**

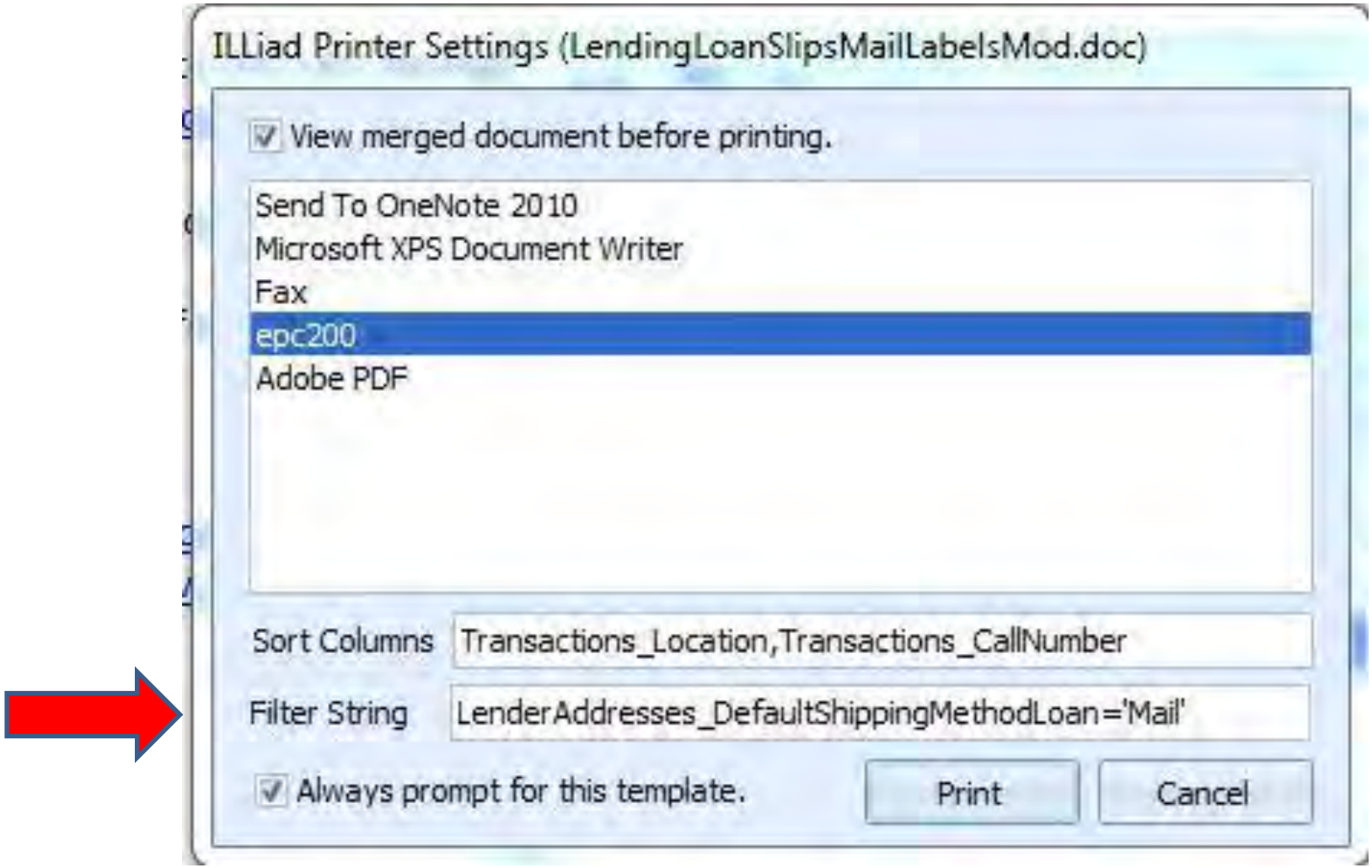
Printing stack search items

- **ILLiad is set to que up 4 custom templates – one for each of the 4 delivery types**
- **Delivery types are mail, courier, Blue sky and CoKaMo**

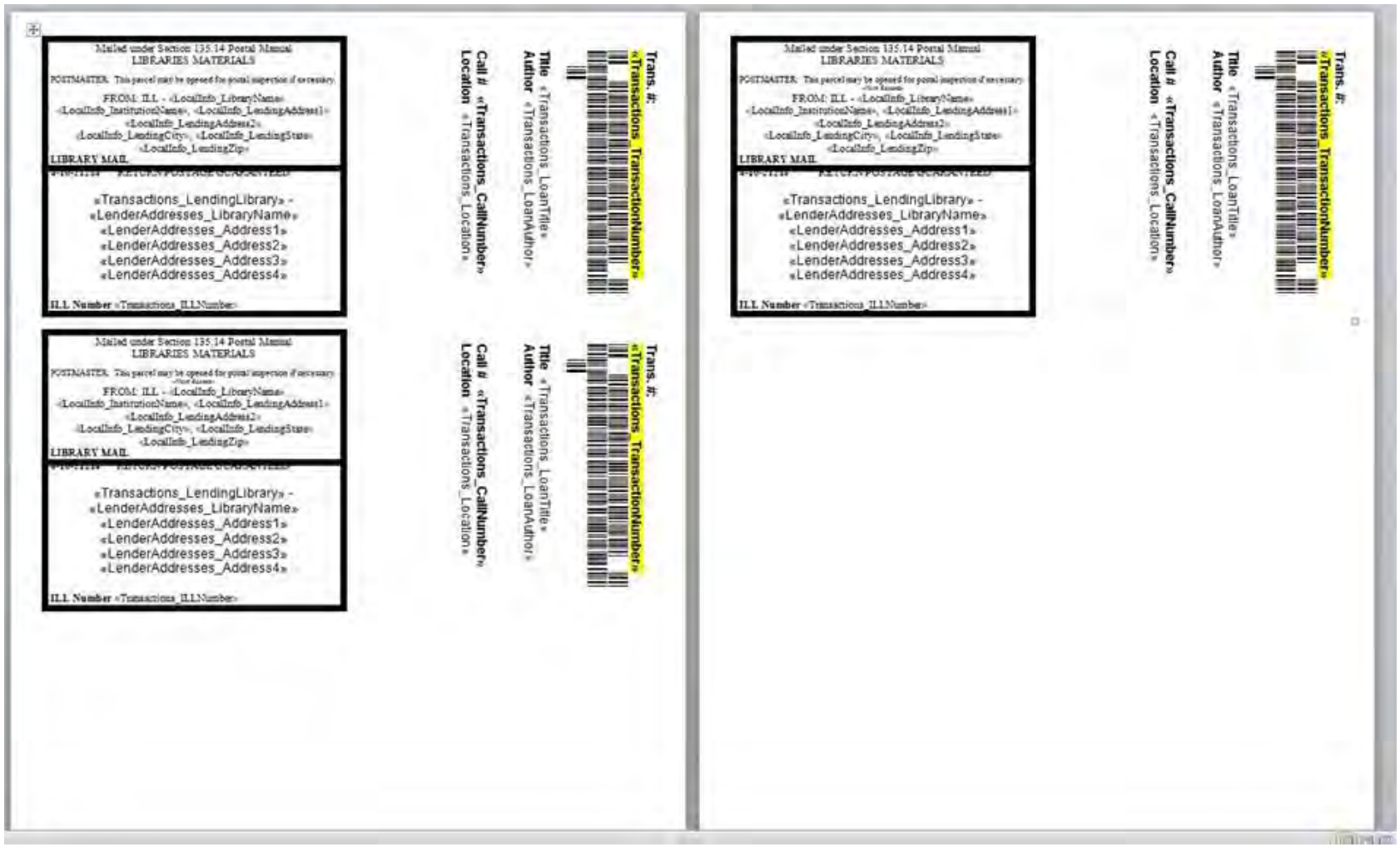
Remember my 1st goal to “cut paper use and increase efficiency”?

- **Combined the pull slip with the shipping label**
- **This reduced paper consumption and eliminated the matching of shipping labels at the end of the process**

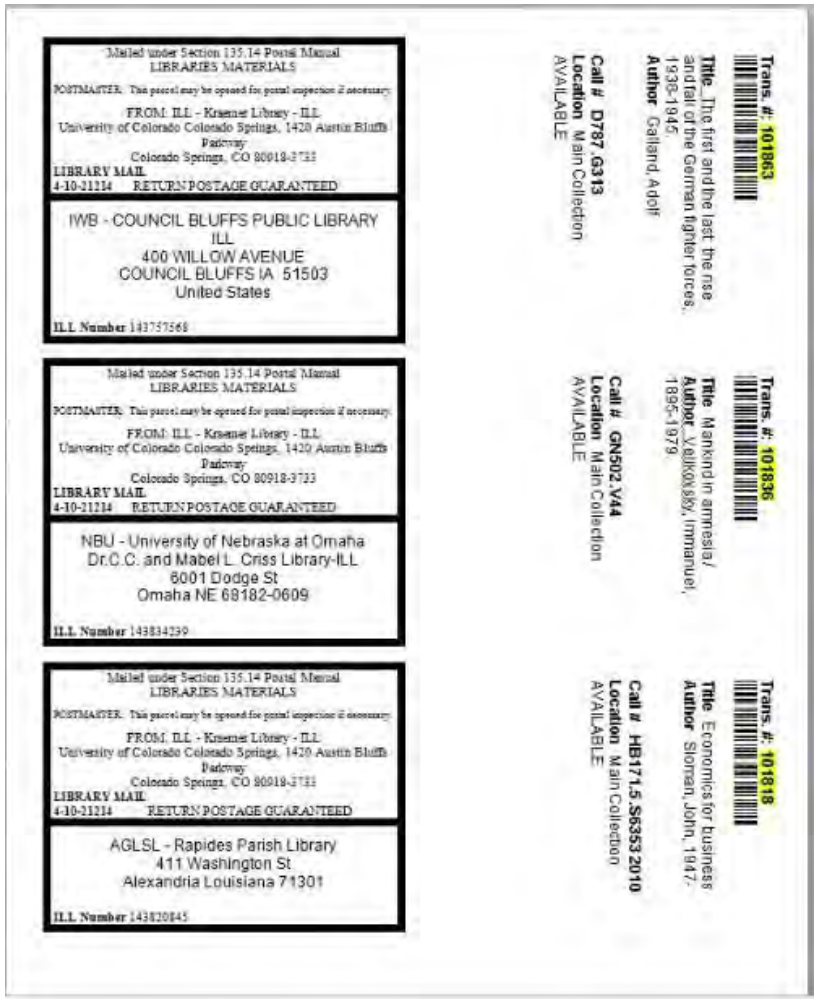
Filtering Requests to the Template



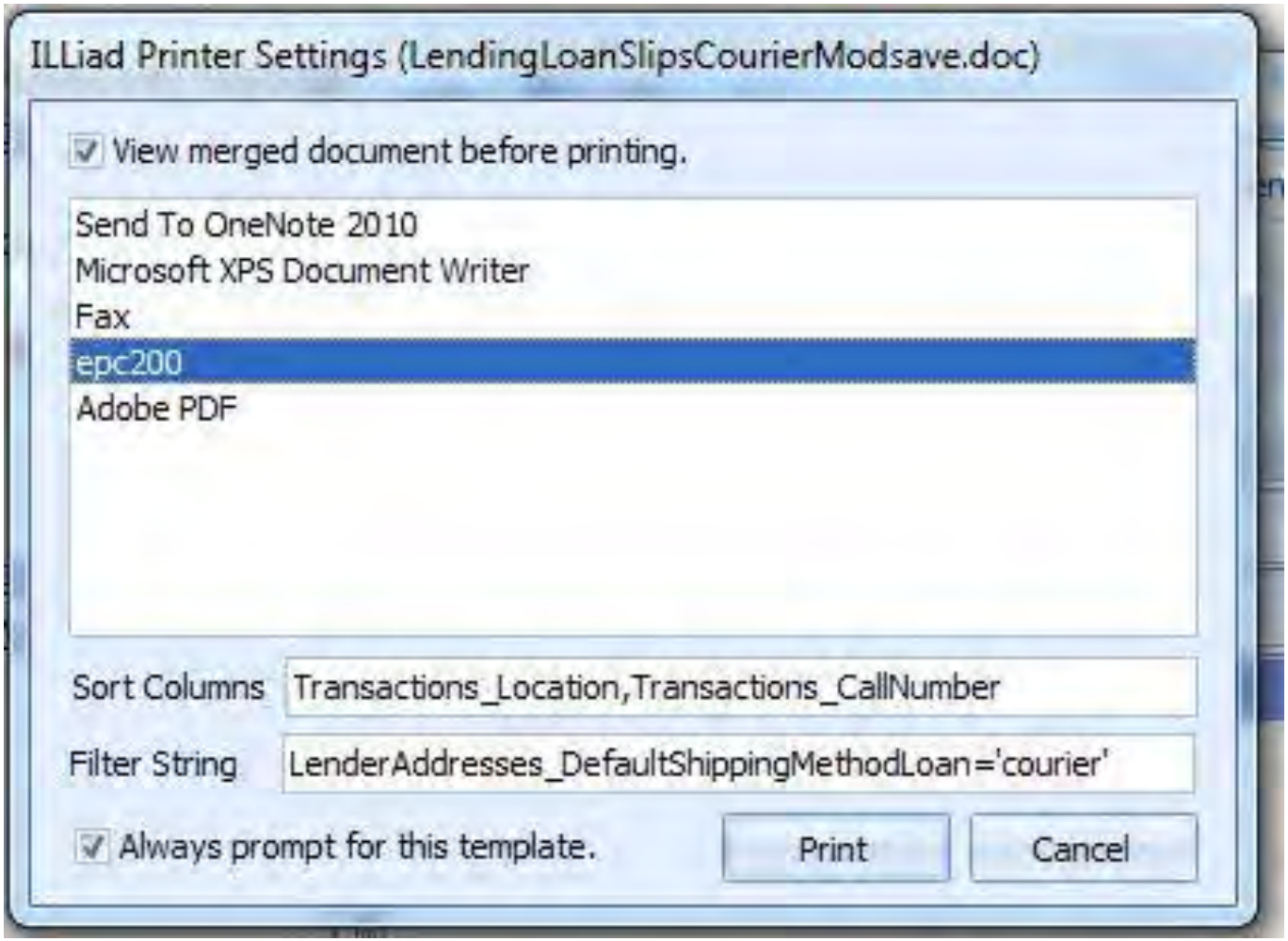
Unmerged Mail Template



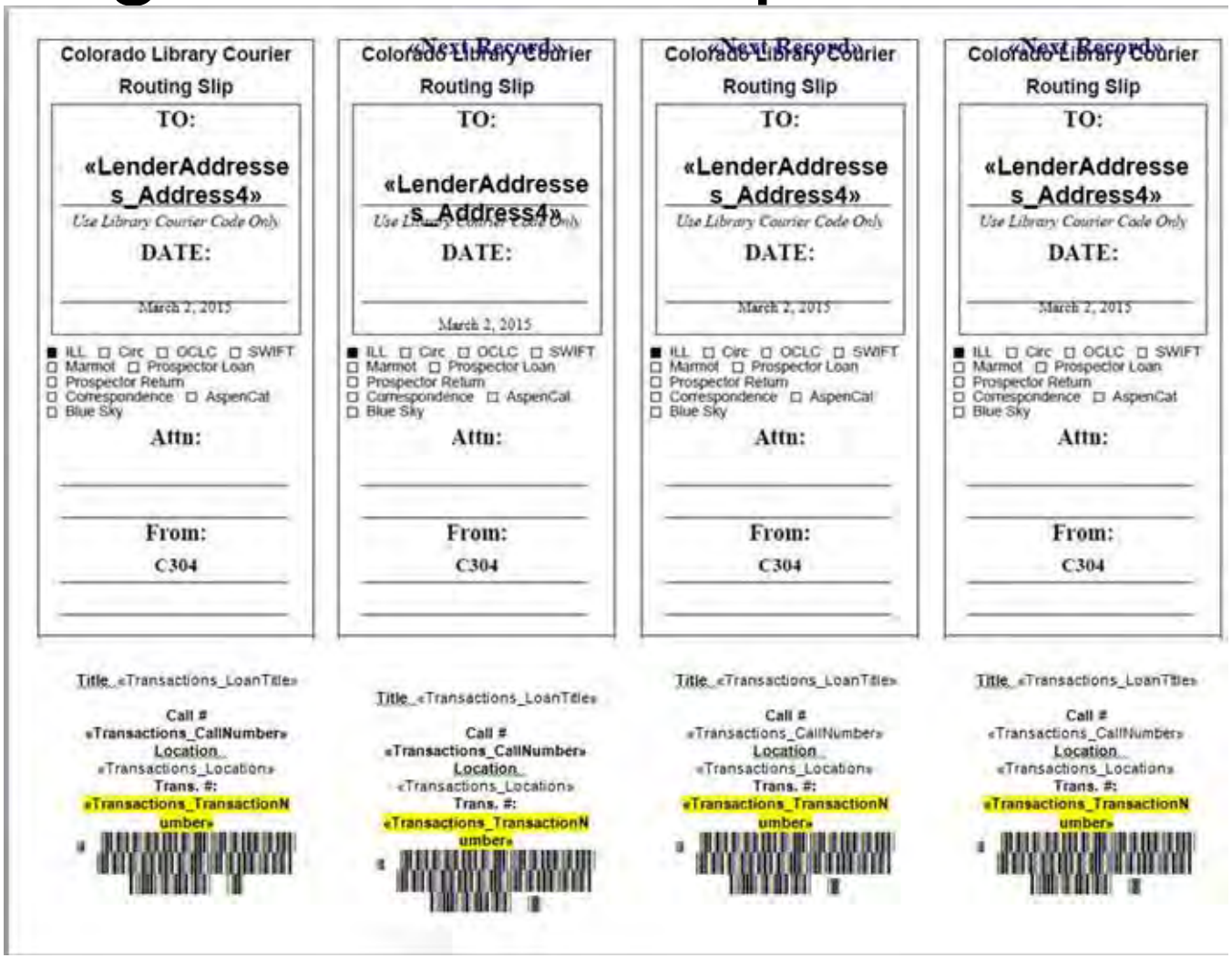
Merged Mail Slips



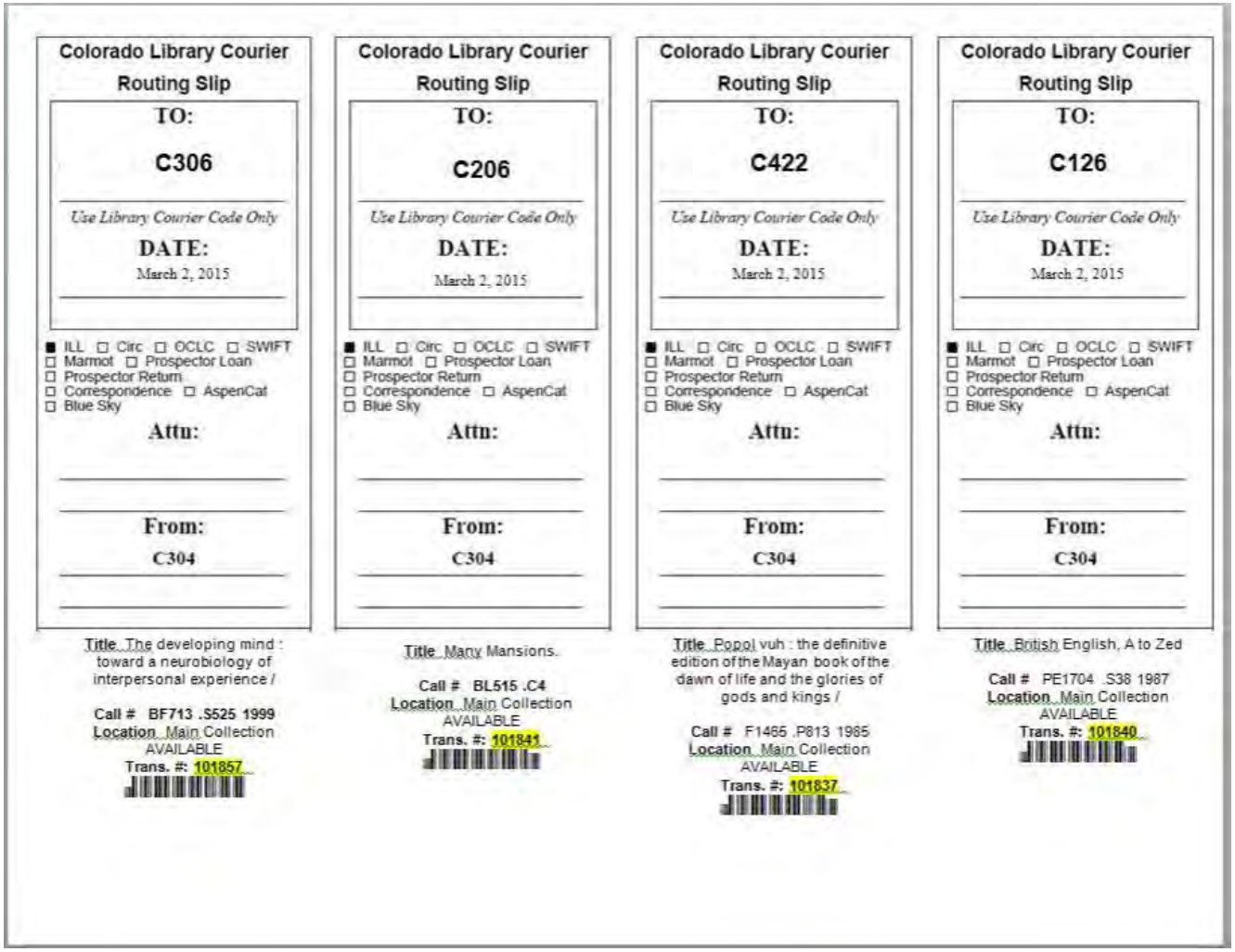
Courier Filtering



Unmerged Courier Slip



Merged Courier Slip



Colorado Library Courier Routing Slip

TO: C306

Use Library Courier Code Only

DATE: March 2, 2015

■ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
☐ Blue Sky

Attn:

From: C304

Title The developing mind : toward a neurobiology of interpersonal experience /

Call # BF713 .S525 1999
Location Main Collection
AVAILABLE
Trans. #: 101857

Colorado Library Courier Routing Slip

TO: C206

Use Library Courier Code Only

DATE: March 2, 2015

■ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
☐ Blue Sky

Attn:

From: C304

Title Many Mansions.

Call # BL515 .C4
Location Main Collection
AVAILABLE
Trans. #: 101841

Colorado Library Courier Routing Slip

TO: C422

Use Library Courier Code Only

DATE: March 2, 2015

■ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
☐ Blue Sky

Attn:

From: C304

Title Popol vuh : the definitive edition of the Mayan book of the dawn of life and the glories of gods and kings /

Call # F1465 .P813 1985
Location Main Collection
AVAILABLE
Trans. #: 101837

Colorado Library Courier Routing Slip

TO: C126

Use Library Courier Code Only

DATE: March 2, 2015

■ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
☐ Blue Sky

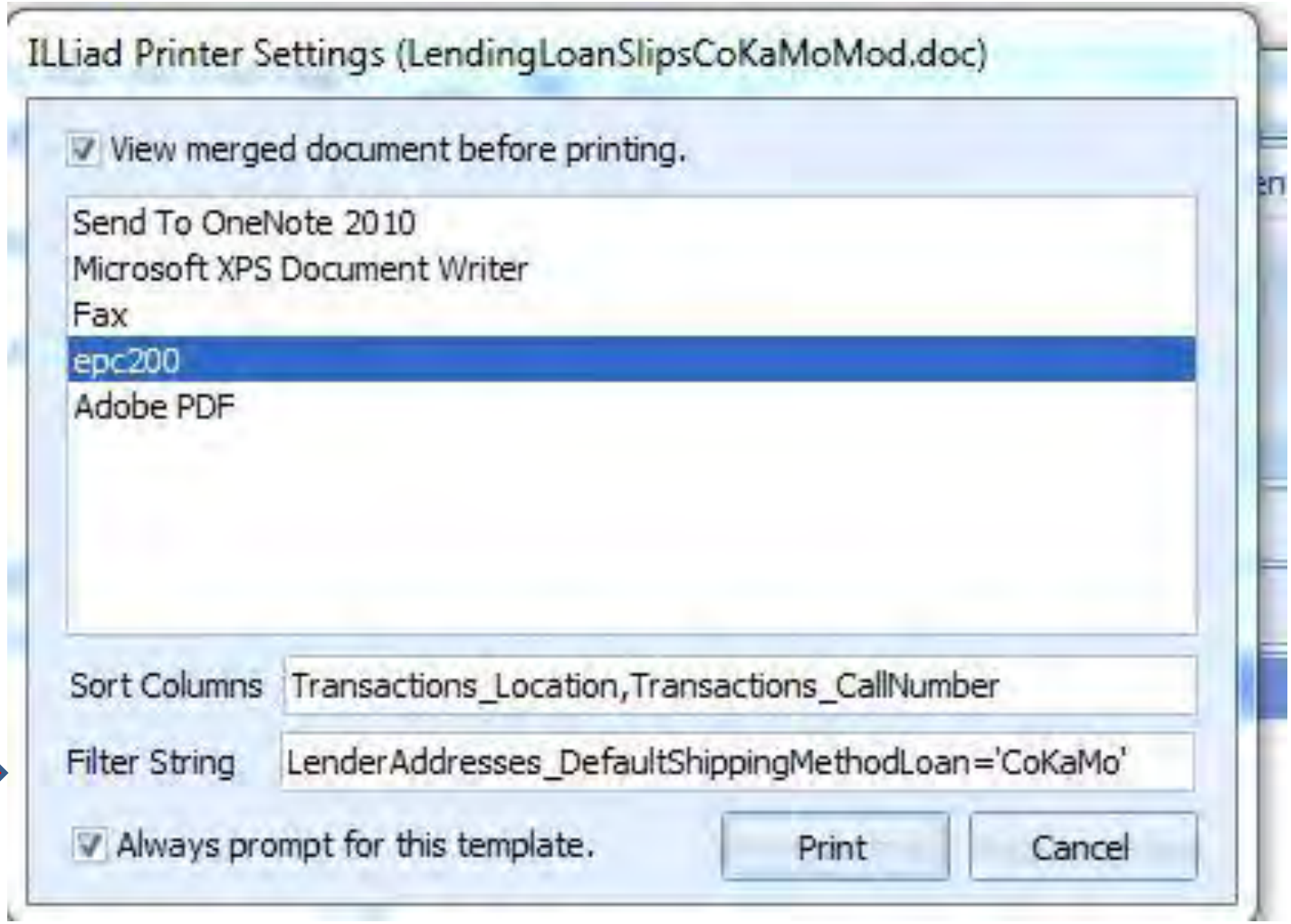
Attn:

From: C304

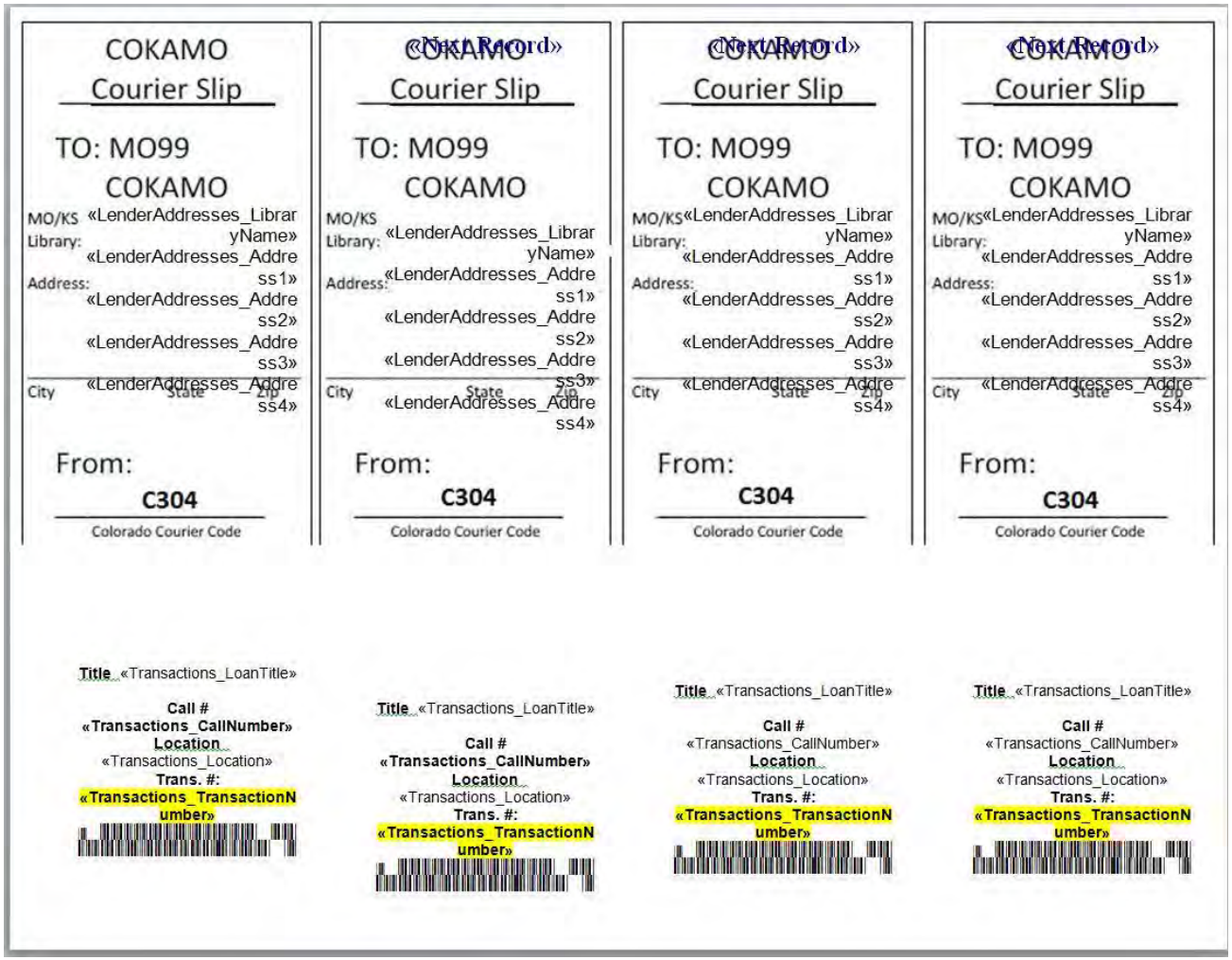
Title British English, A to Zed

Call # PE1704 .S38 1987
Location Main Collection
AVAILABLE
Trans. #: 101840

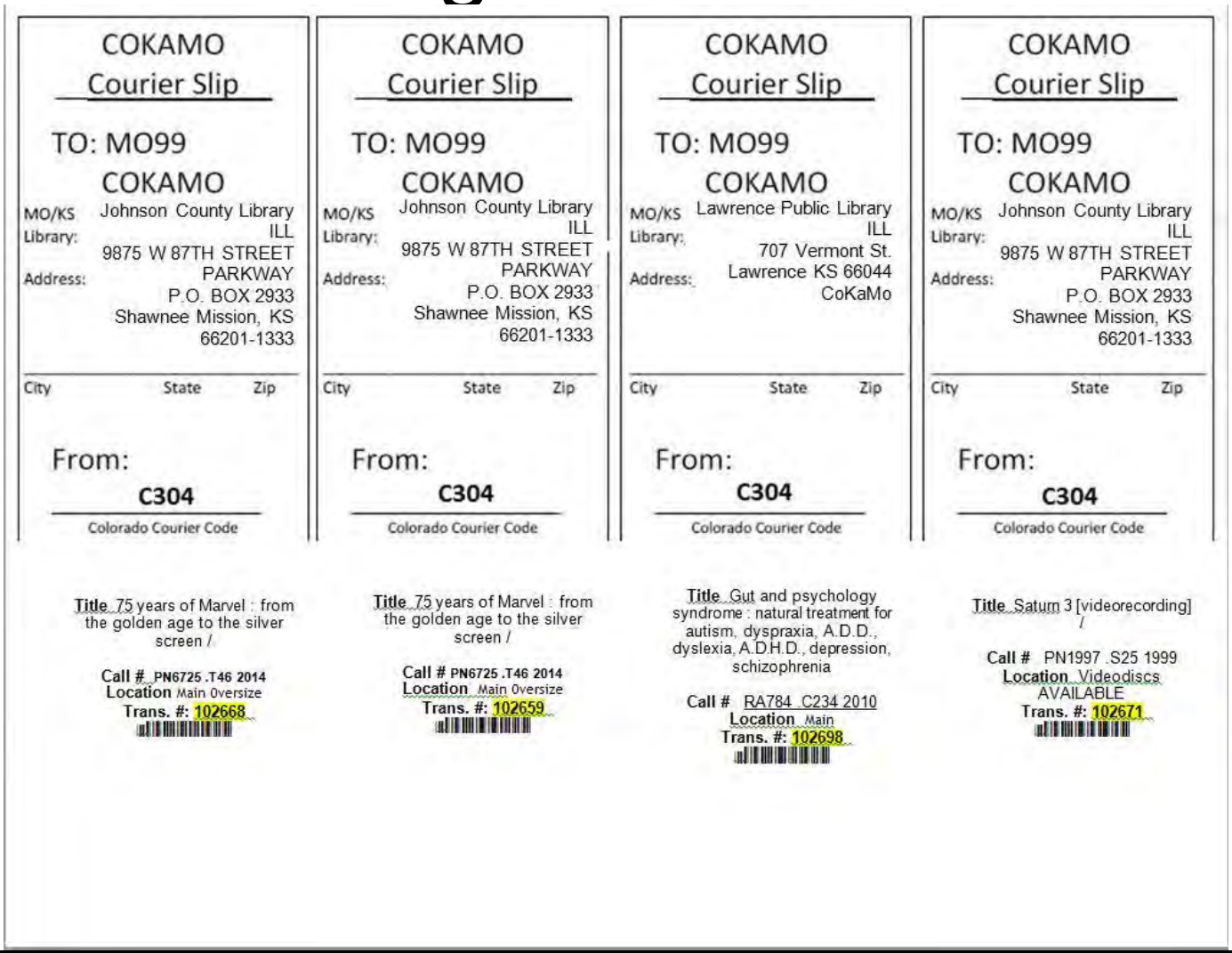
Filtering CoKaMo



Cokamo Template Unmerged



CoKaMo merged



COKAMO
Courier Slip

TO: MO99
COKAMO

MO/KS Library: Johnson County Library ILL
Address: 9875 W 87TH STREET PARKWAY
P.O. BOX 2933
Shawnee Mission, KS 66201-1333

City State Zip

From:
C304
Colorado Courier Code

Title 75 years of Marvel : from the golden age to the silver screen /

Call # PN6725 .T46 2014
Location Main Oversize
Trans. #: 102668

COKAMO
Courier Slip

TO: MO99
COKAMO

MO/KS Library: Johnson County Library ILL
Address: 9875 W 87TH STREET PARKWAY
P.O. BOX 2933
Shawnee Mission, KS 66201-1333

City State Zip

From:
C304
Colorado Courier Code

Title 75 years of Marvel : from the golden age to the silver screen /

Call # PN6725 .T46 2014
Location Main Oversize
Trans. #: 102659

COKAMO
Courier Slip

TO: MO99
COKAMO

MO/KS Library: Lawrence Public Library ILL
Address: 707 Vermont St.
Lawrence KS 66044
CoKaMo

City State Zip

From:
C304
Colorado Courier Code

Title Gut and psychology syndrome : natural treatment for autism, dyspraxia, A.D.D., dyslexia, A.D.H.D., depression, schizophrenia

Call # RA784 .C234 2010
Location Main
Trans. #: 102698

COKAMO
Courier Slip

TO: MO99
COKAMO

MO/KS Library: Johnson County Library ILL
Address: 9875 W 87TH STREET PARKWAY
P.O. BOX 2933
Shawnee Mission, KS 66201-1333

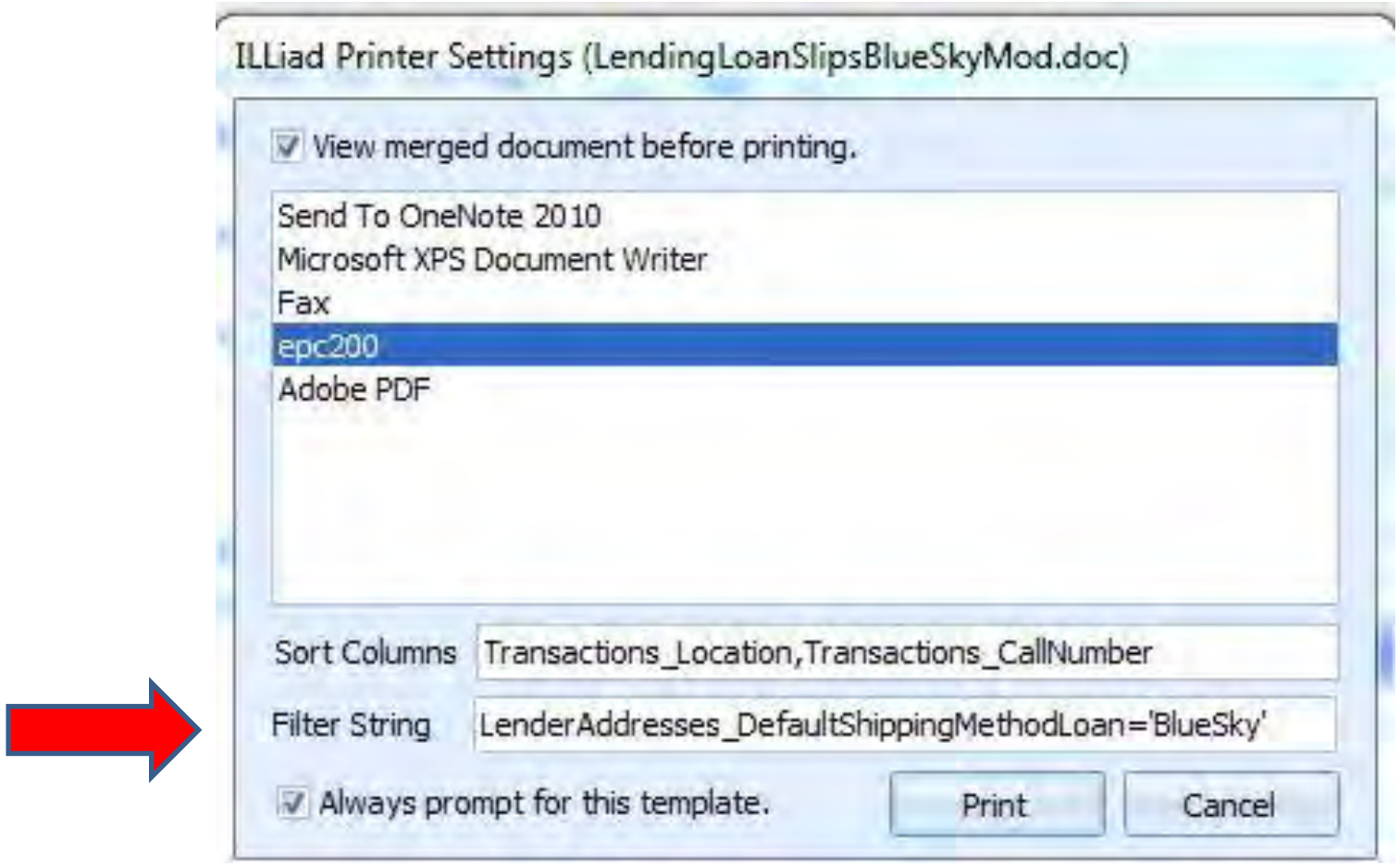
City State Zip

From:
C304
Colorado Courier Code

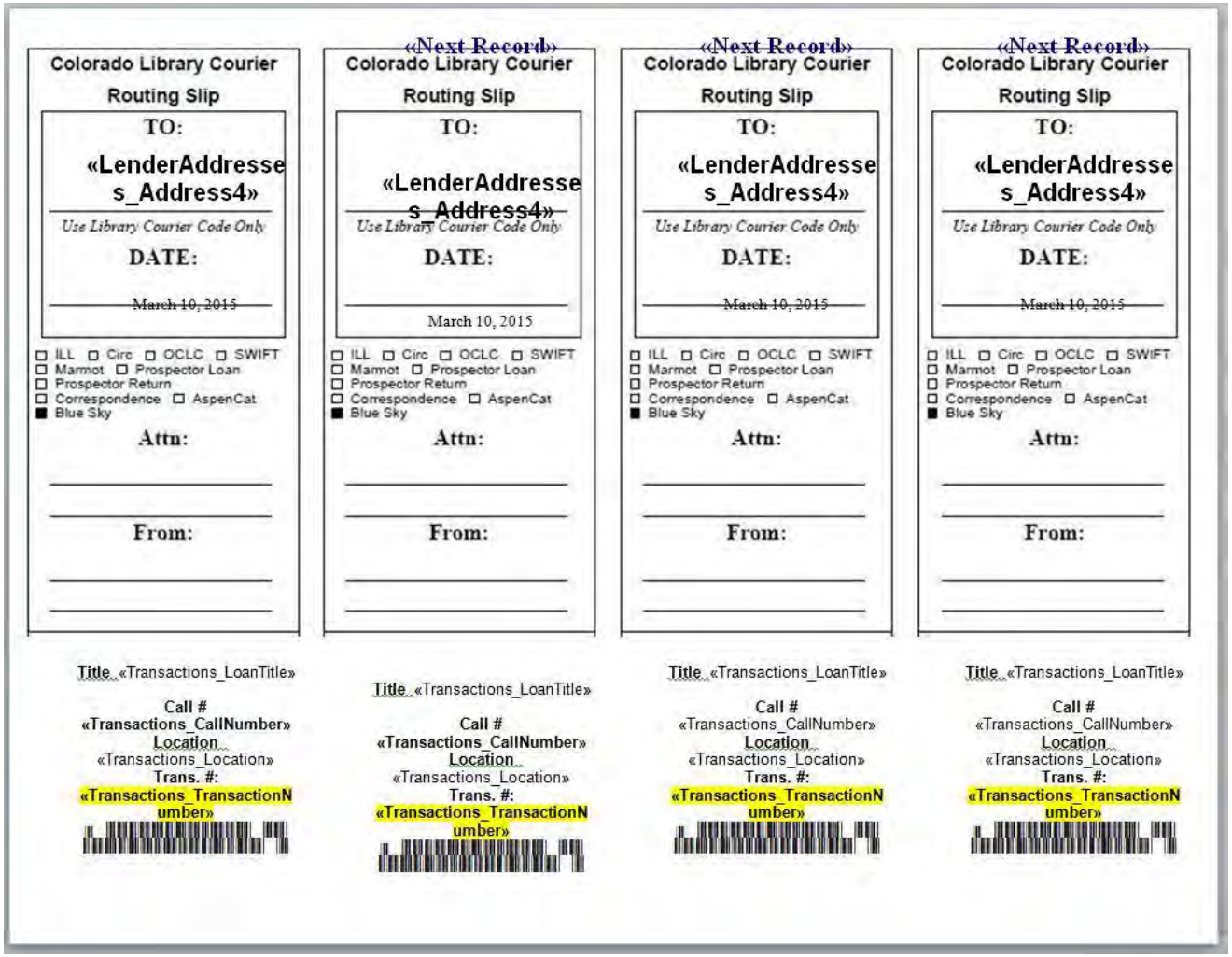
Title Saturn 3 [videorecording] /

Call # PN1997 .S25 1999
Location Videodiscs
AVAILABLE
Trans. #: 102671

Filtering Blue Sky Express



Blue Sky Template Unmerged



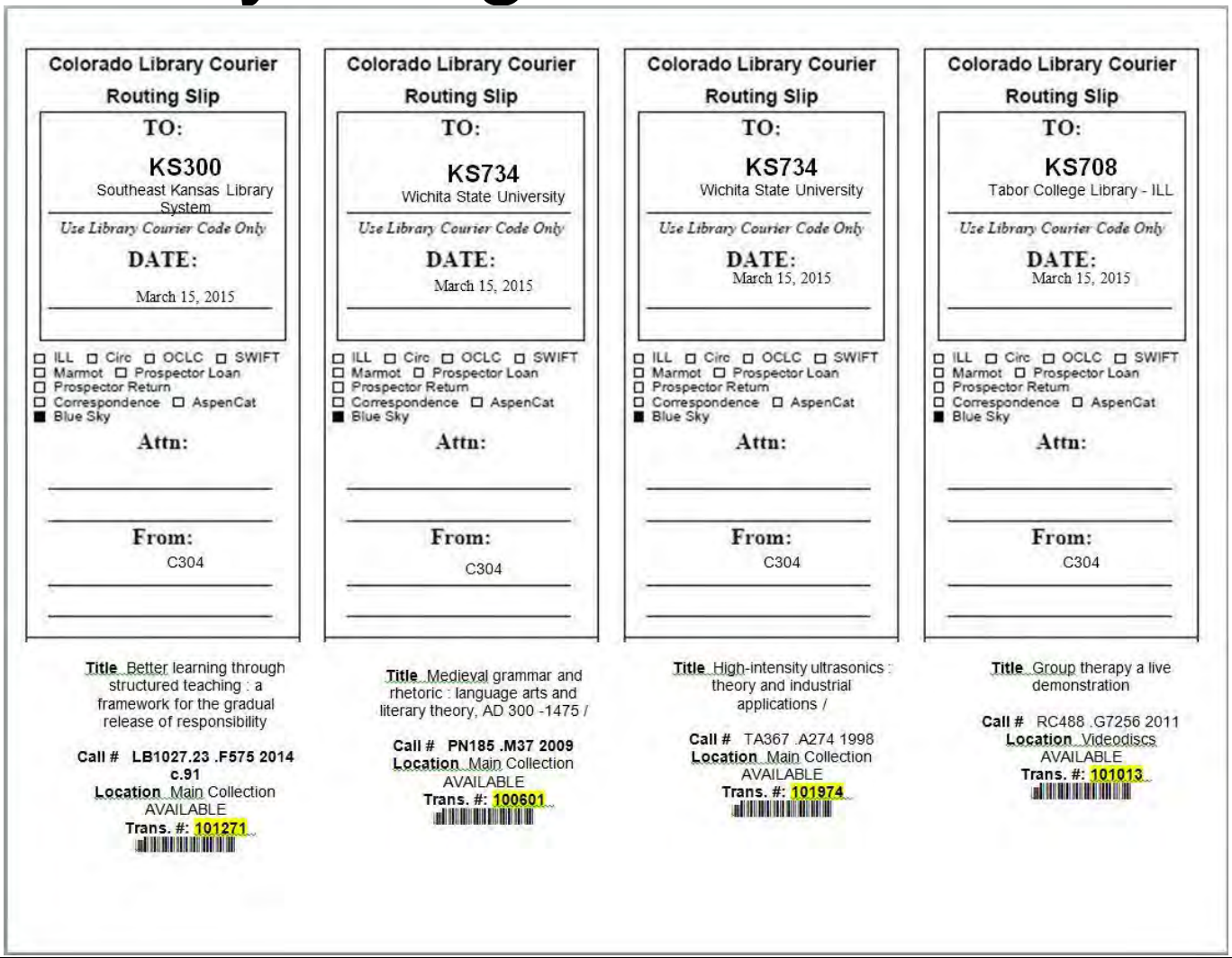
Colorado Library Courier
Routing Slip
TO:
«LenderAddresses_Address4»
Use Library Courier Code Only
DATE:
March 10, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
Title «Transactions_LoanTitle»
Call #
«Transactions_CallNumber»
Location
«Transactions_Location»
Trans. #:
«Transactions_TransactionNumber»

«Next Record»
Colorado Library Courier
Routing Slip
TO:
«LenderAddresses_Address4»
Use Library Courier Code Only
DATE:
March 10, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
Title «Transactions_LoanTitle»
Call #
«Transactions_CallNumber»
Location
«Transactions_Location»
Trans. #:
«Transactions_TransactionNumber»

«Next Record»
Colorado Library Courier
Routing Slip
TO:
«LenderAddresses_Address4»
Use Library Courier Code Only
DATE:
March 10, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
Title «Transactions_LoanTitle»
Call #
«Transactions_CallNumber»
Location
«Transactions_Location»
Trans. #:
«Transactions_TransactionNumber»

«Next Record»
Colorado Library Courier
Routing Slip
TO:
«LenderAddresses_Address4»
Use Library Courier Code Only
DATE:
March 10, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
Title «Transactions_LoanTitle»
Call #
«Transactions_CallNumber»
Location
«Transactions_Location»
Trans. #:
«Transactions_TransactionNumber»

Blue Sky Merged



Colorado Library Courier
Routing Slip
TO:
KS300
Southeast Kansas Library System
Use Library Courier Code Only
DATE:
March 15, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
C304

Title Better learning through structured teaching : a framework for the gradual release of responsibility
Call # LB1027.23 .F575 2014 c.91
Location Main Collection
AVAILABLE
Trans. #: 101271

Colorado Library Courier
Routing Slip
TO:
KS734
Wichita State University
Use Library Courier Code Only
DATE:
March 15, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
C304

Title Medieval grammar and rhetoric : language arts and literary theory, AD 300 -1475 /
Call # PN185 .M37 2009
Location Main Collection
AVAILABLE
Trans. #: 100601

Colorado Library Courier
Routing Slip
TO:
KS734
Wichita State University
Use Library Courier Code Only
DATE:
March 15, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
C304

Title High-intensity ultrasonics : theory and industrial applications /
Call # TA367 .A274 1998
Location Main Collection
AVAILABLE
Trans. #: 101974

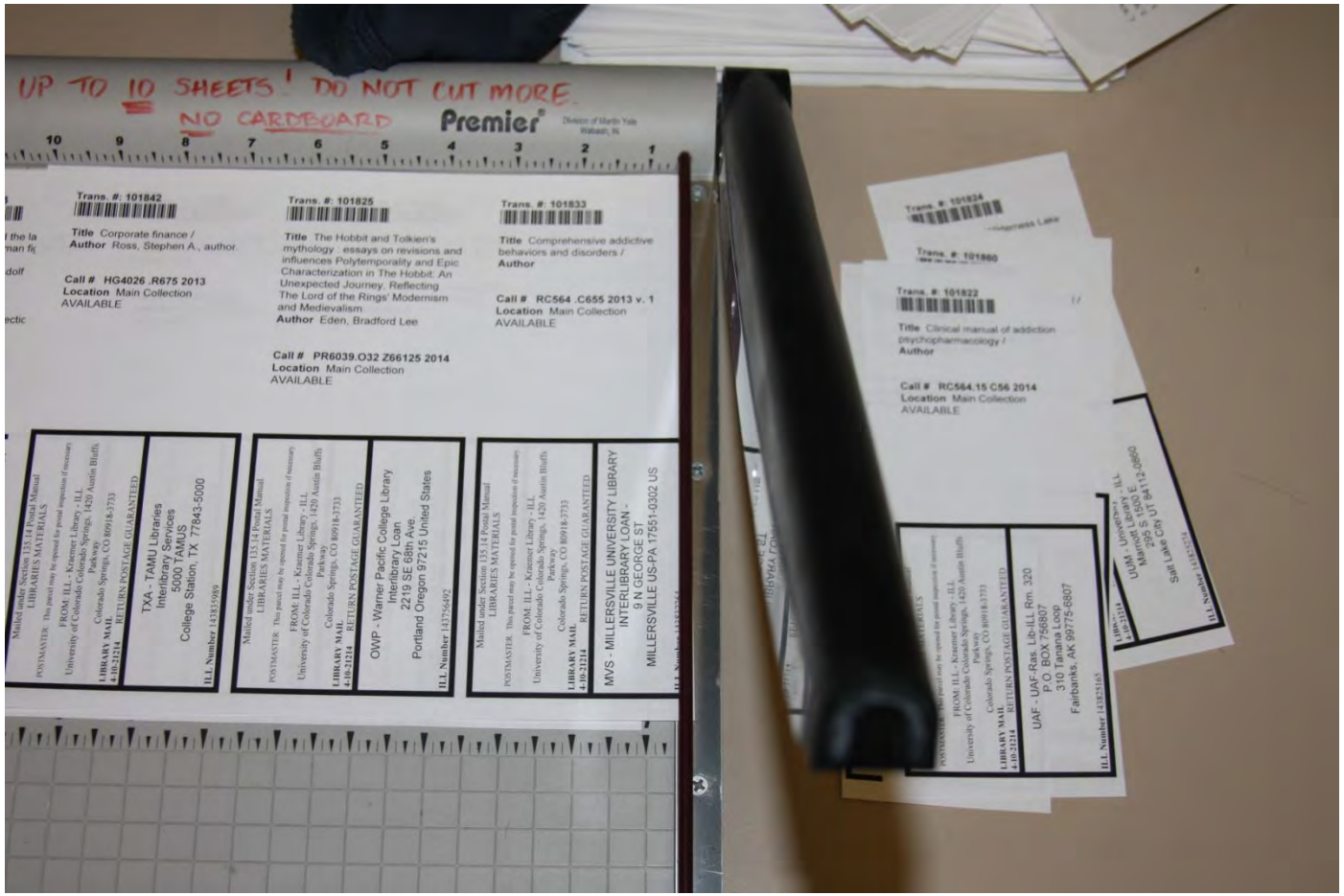
Colorado Library Courier
Routing Slip
TO:
KS708
Tabor College Library - ILL
Use Library Courier Code Only
DATE:
March 15, 2015
☐ ILL ☐ Circ ☐ OCLC ☐ SWIFT
☐ Marmot ☐ Prospector Loan
☐ Prospector Return
☐ Correspondence ☐ AspenCat
■ Blue Sky
Attn:
From:
C304

Title Group therapy a live demonstration
Call # RC488 .G7256 2011
Location Videodiscs
AVAILABLE
Trans. #: 101013

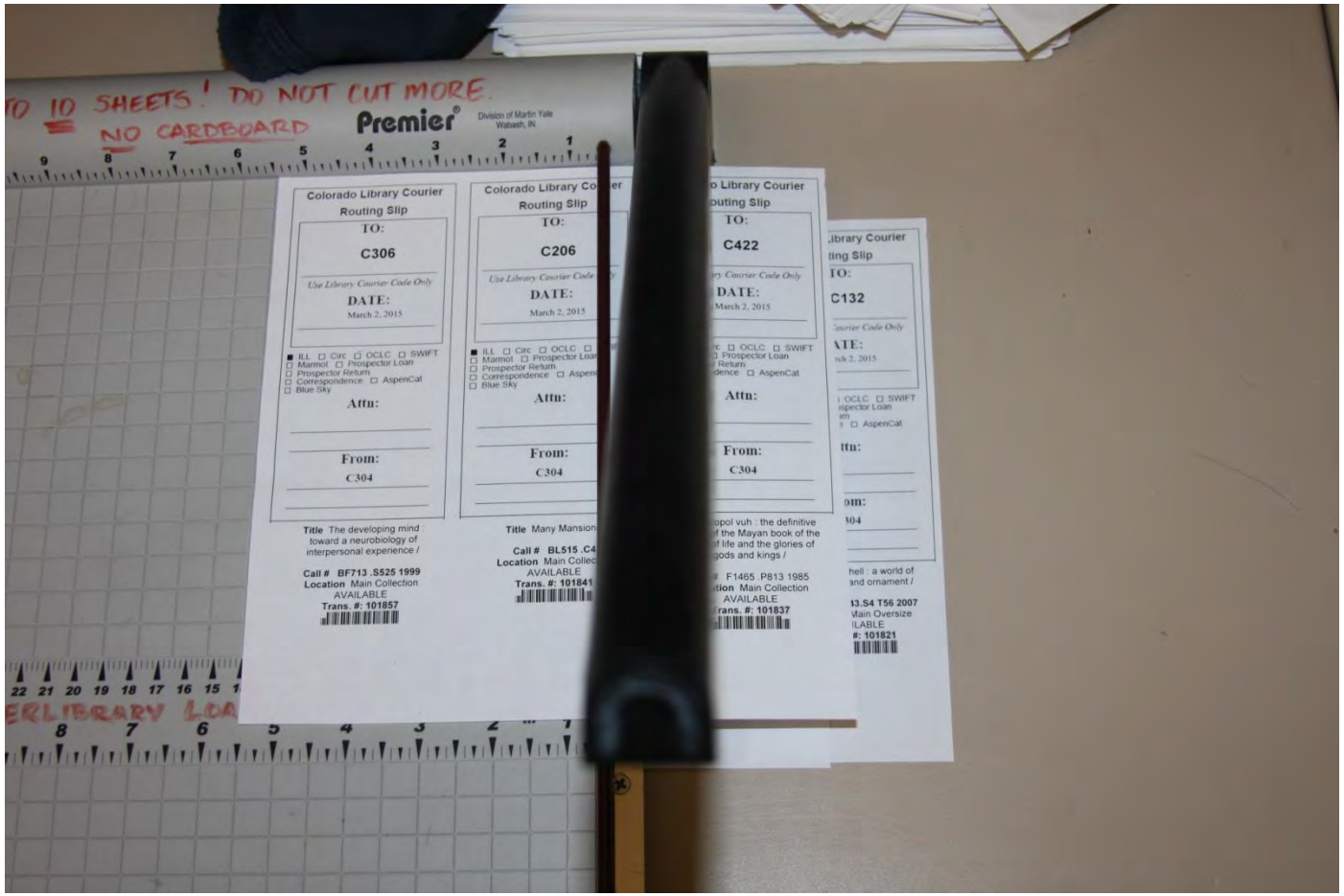
Templates are sorted by location and call number then printed

- **Properly cut each delivery type creates a stack of pull slips in call number order**

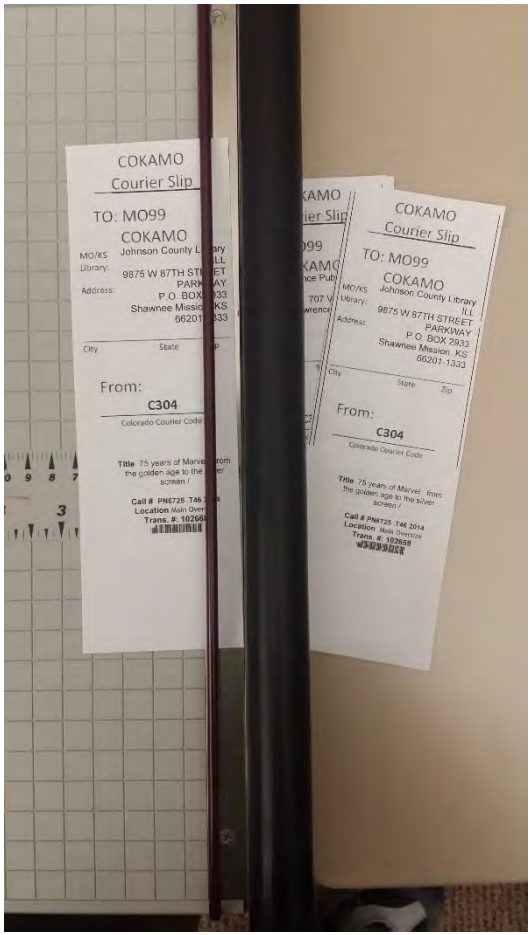
Mailing cut and stacked in call number order



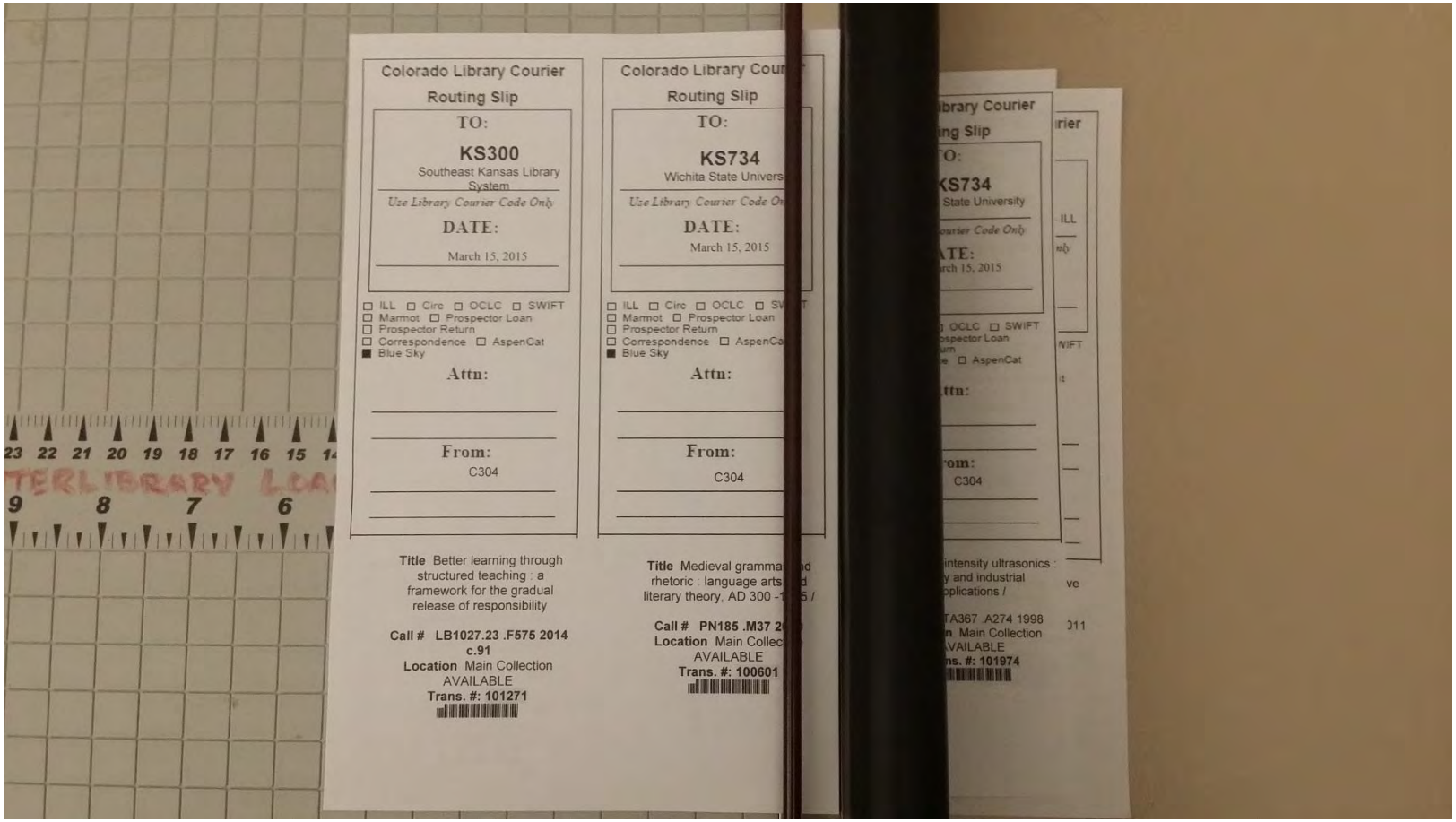
Courier cut and stacked into call number order



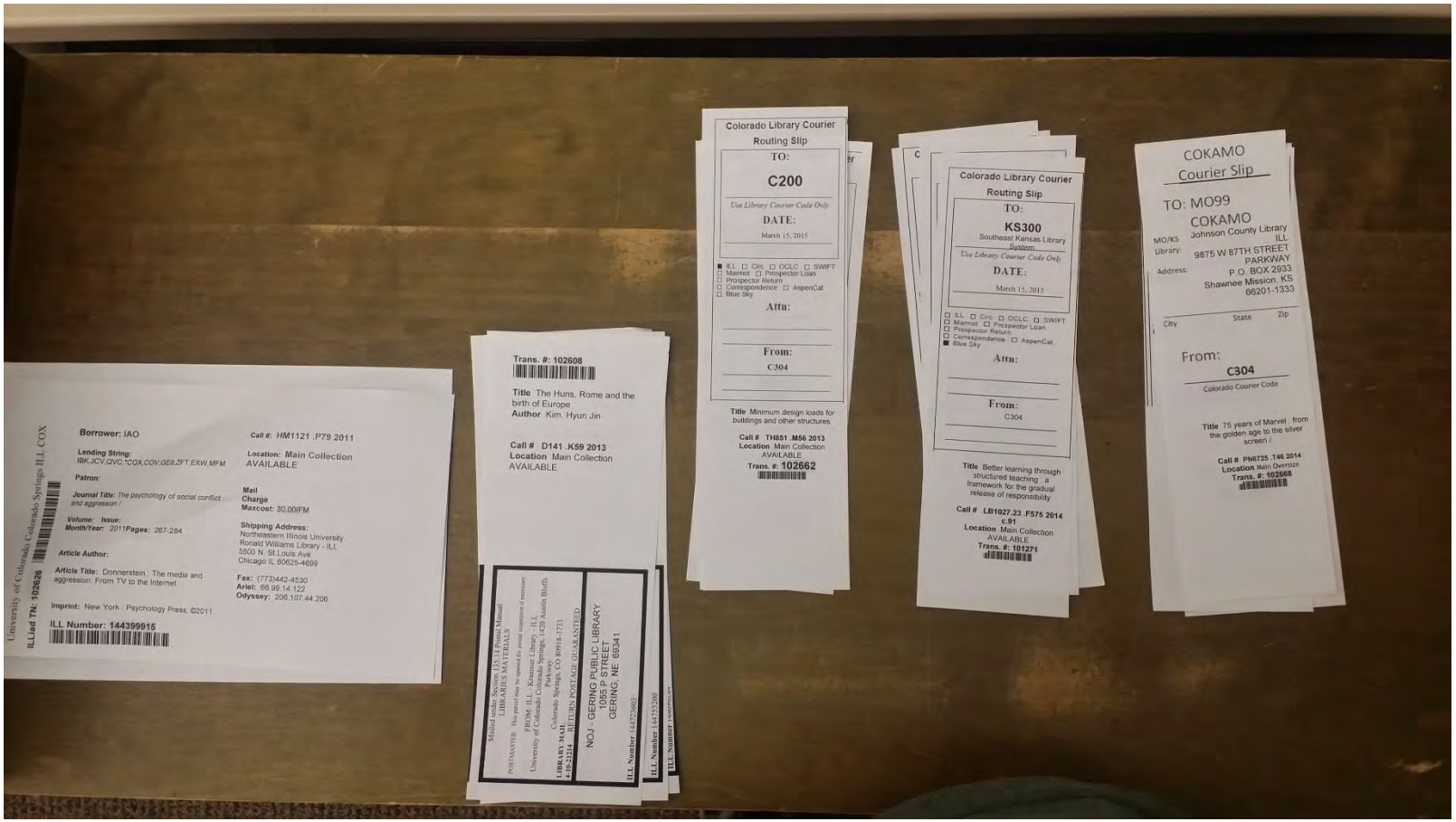
CoKaMo cut and stacked in to call number order



Blue Sky cut and stacked in to call number order



Ready for stack searching

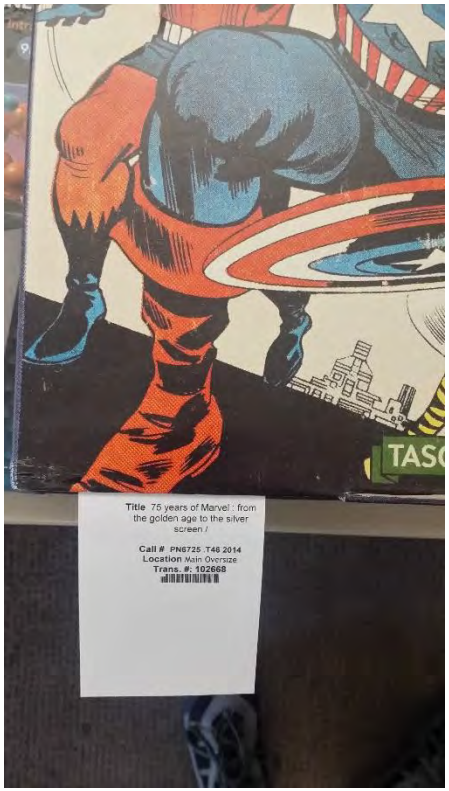


Searching the stacks/Pulling materials

- **The materials are collected in order by call number**
- **Items collected are placed in call number order on the cart**
- **Important for a later step**

Placement of pull slips in materials

- **Leave transaction barcode exposed**



Items not on shelf / fold for cancelling/ hand off to circulation to locate/declair lost

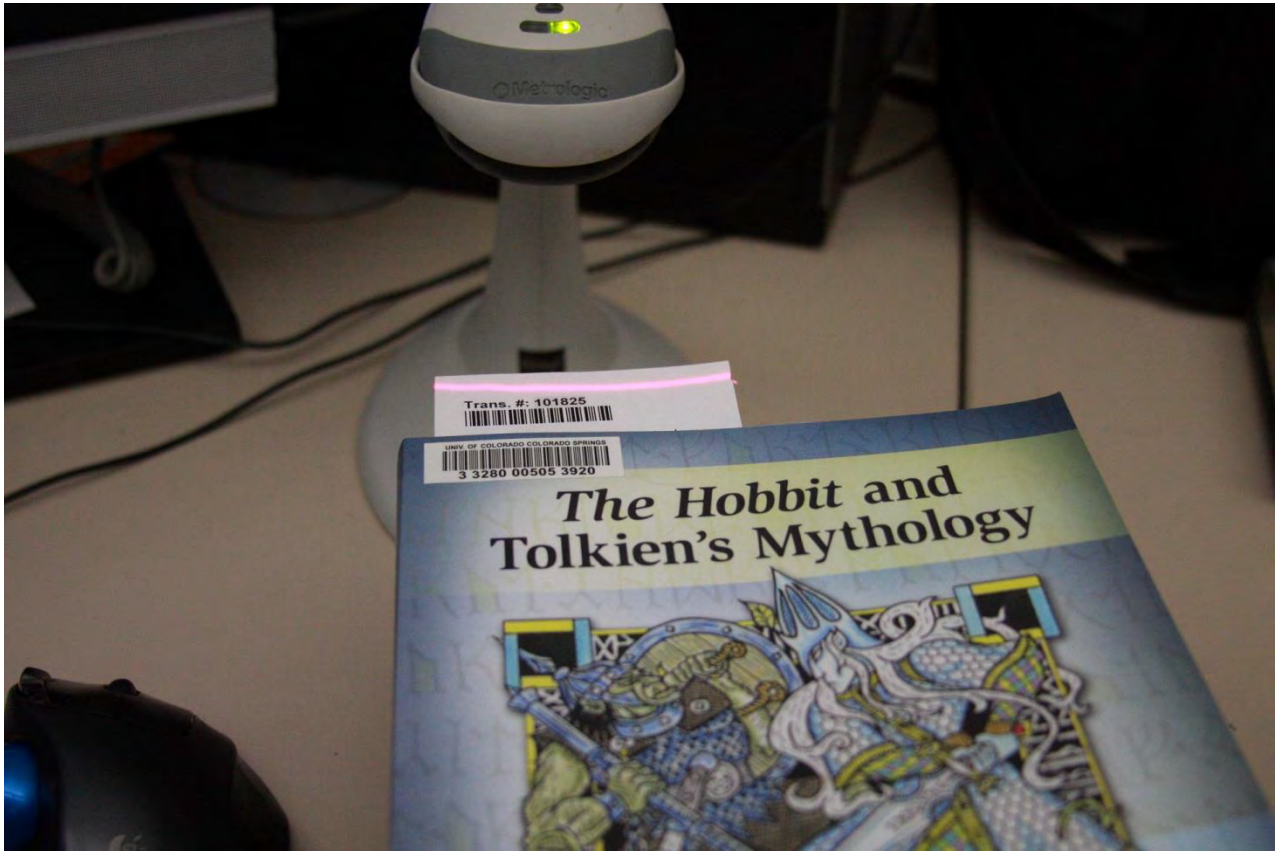
When collecting materials place on kart in call number order

After all loan materials are collected

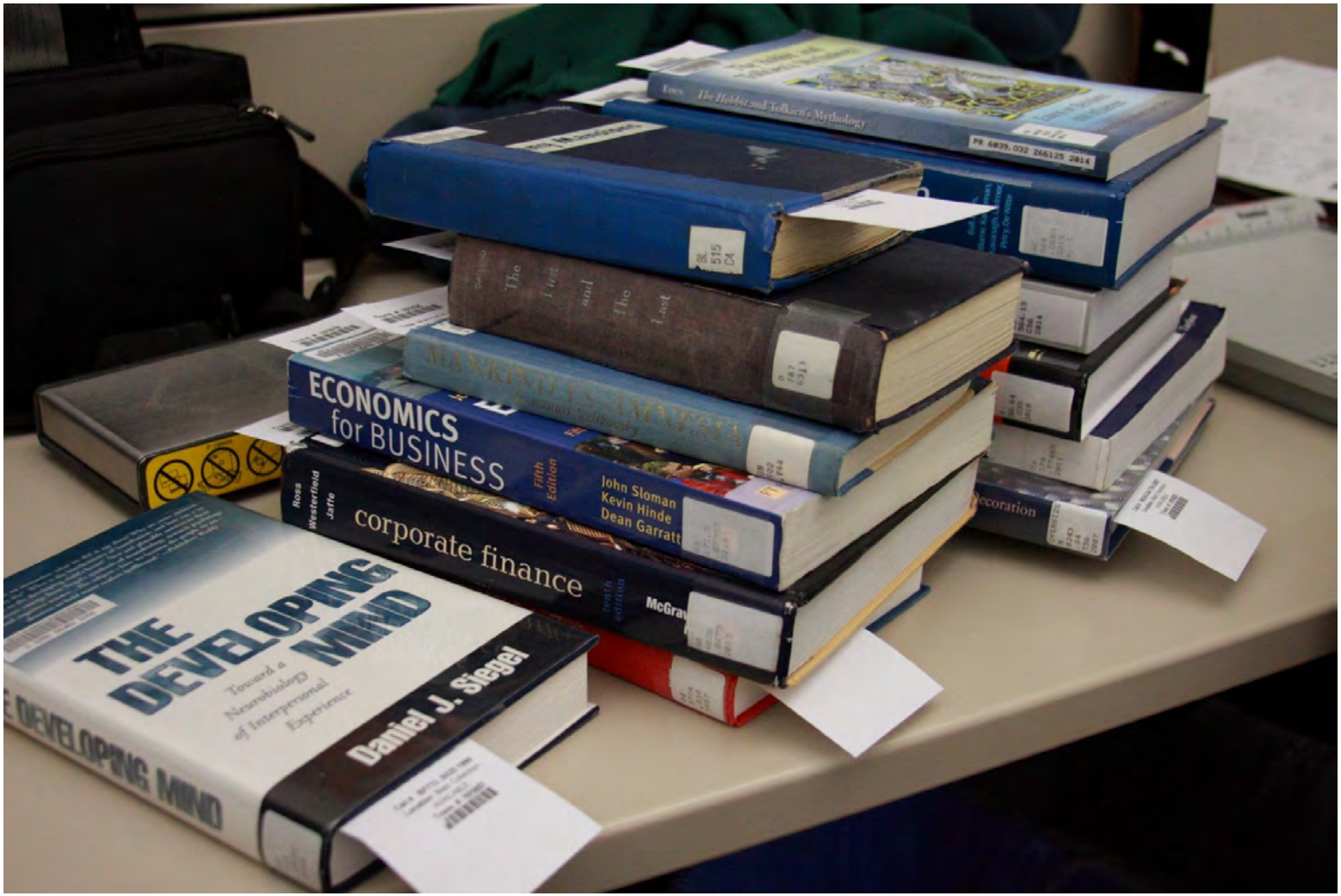
Marking as found

- **I start in reverse call number order**
- **After marking found I place the items to the right of my monitor**
- **place the materials in call number order on my desk as I am marking them found**

Mark found


Trans. #: 101825
3 3280 00505 3920
The Hobbit and
Tolkien's Mythology

Items set to right



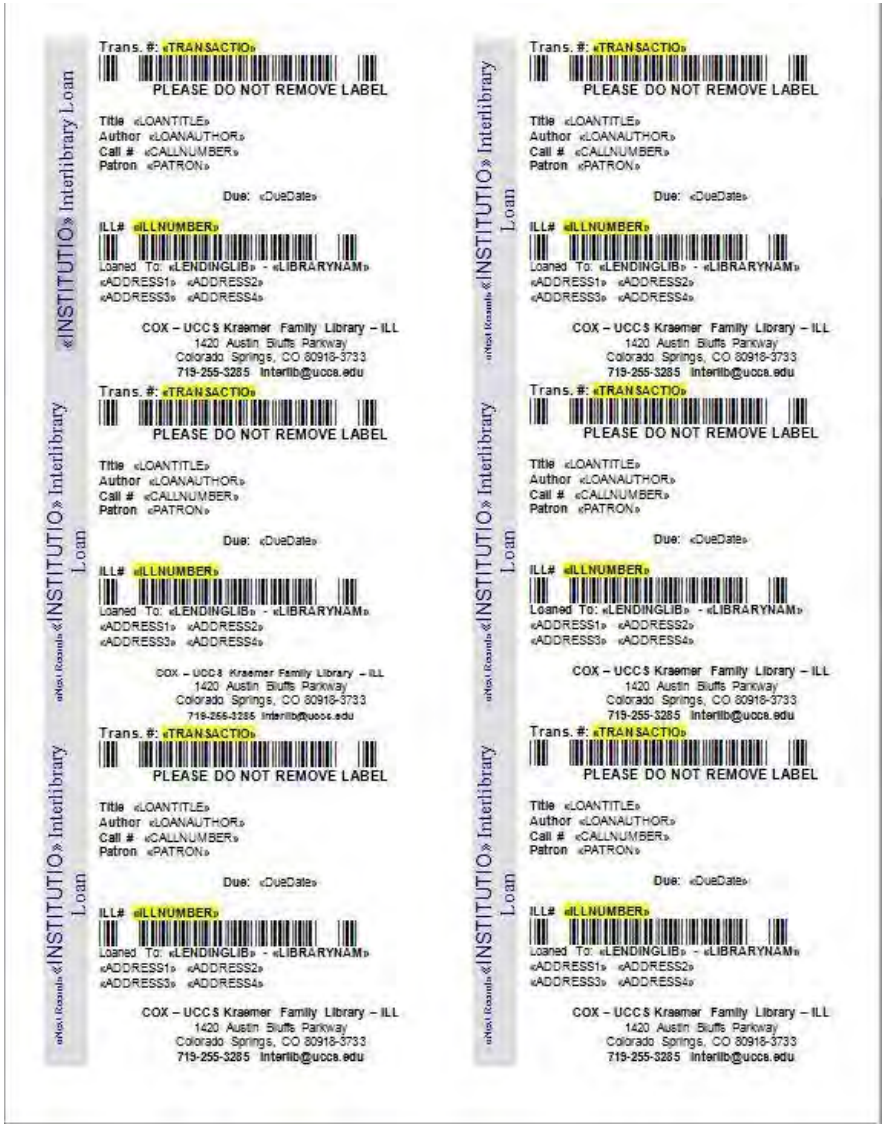
Everything on the desk to the right is awaiting

- **Check out in circulation(we use Sierra)**
- **Desensitization**
- **And a removable sticky book label**

Pressing ship in ILLiad

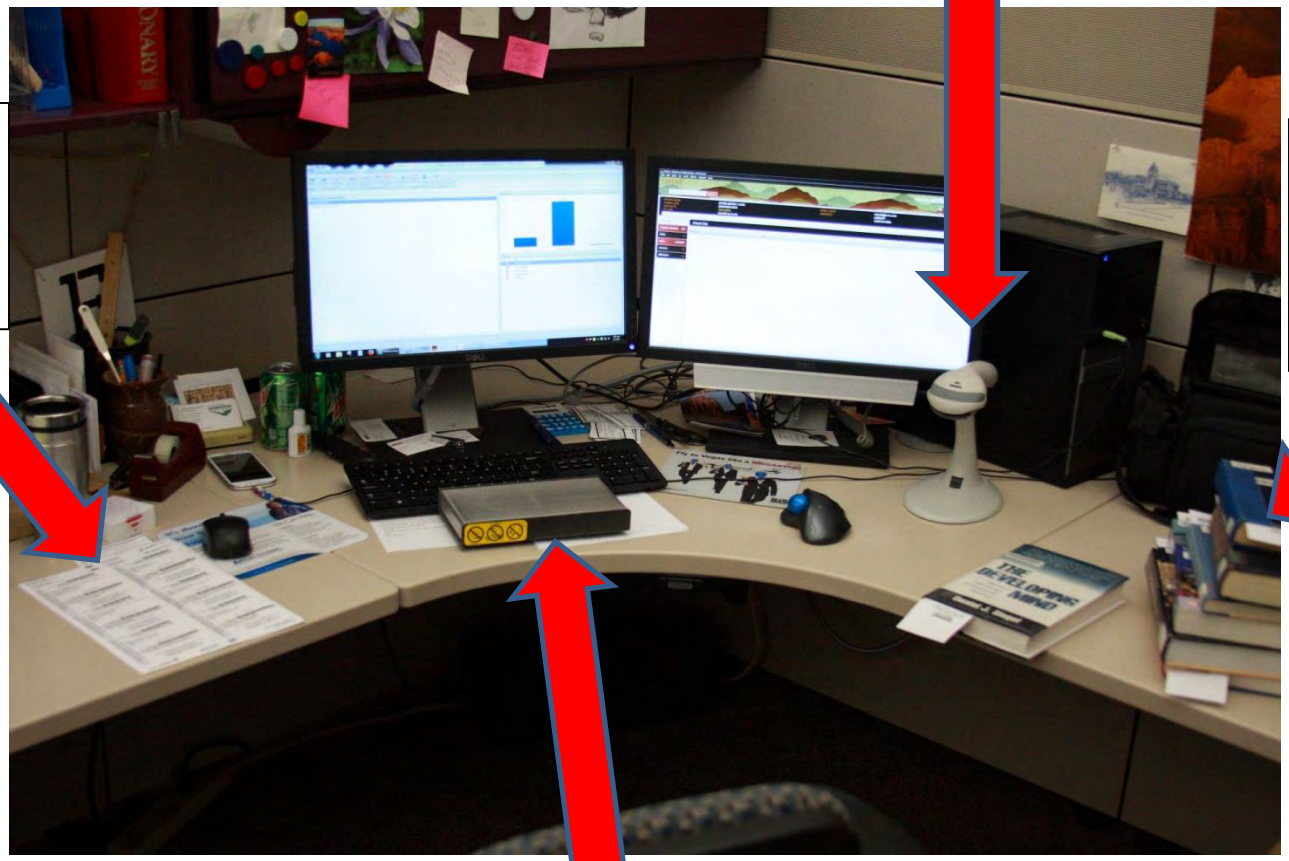
- **What pulls up are the templates for the Avery 64/64 removable book labels**
- **These are sorted in call number order**

Avery 64/64 Removeable Book Labels Unmerged

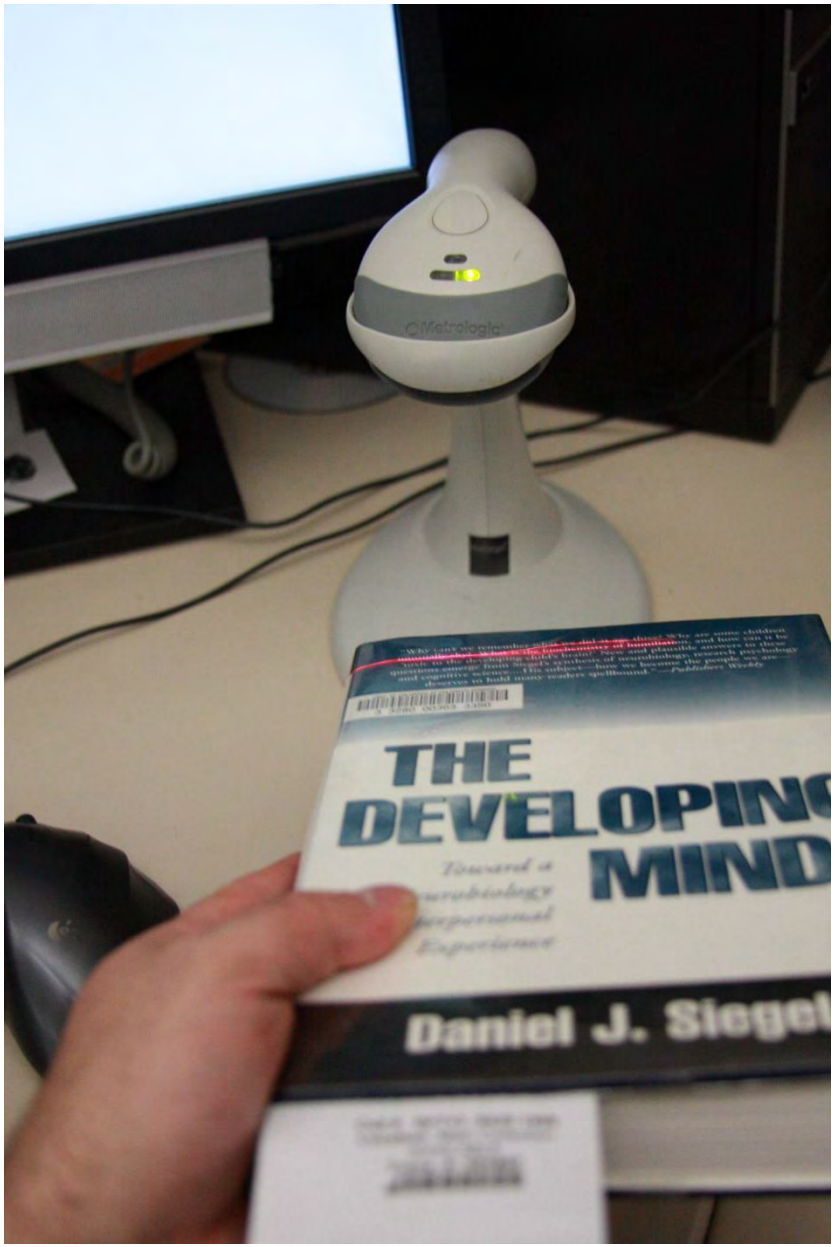


Avery 64/64 Removeable Book Labels merged

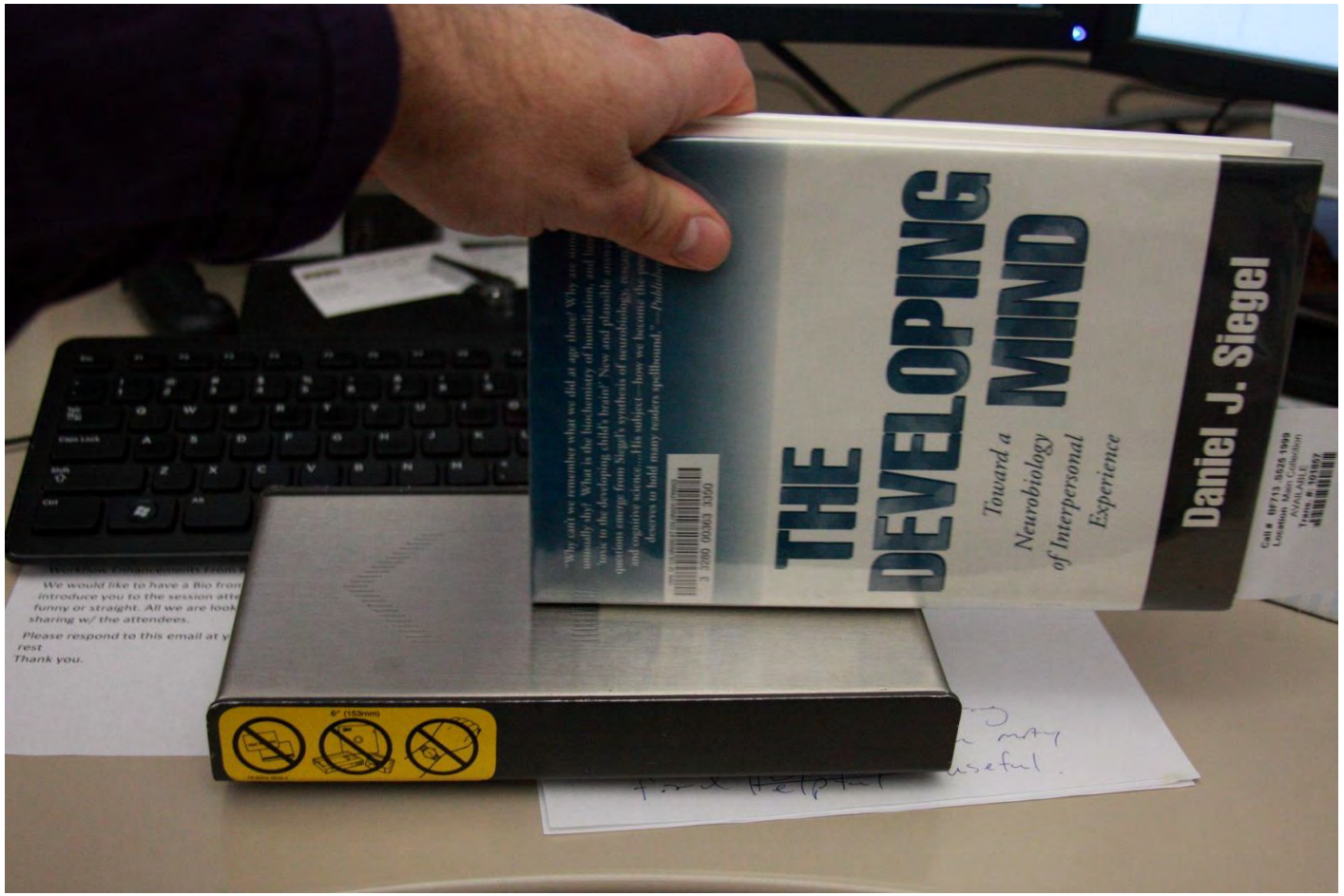
I then place the stack of labels to the left



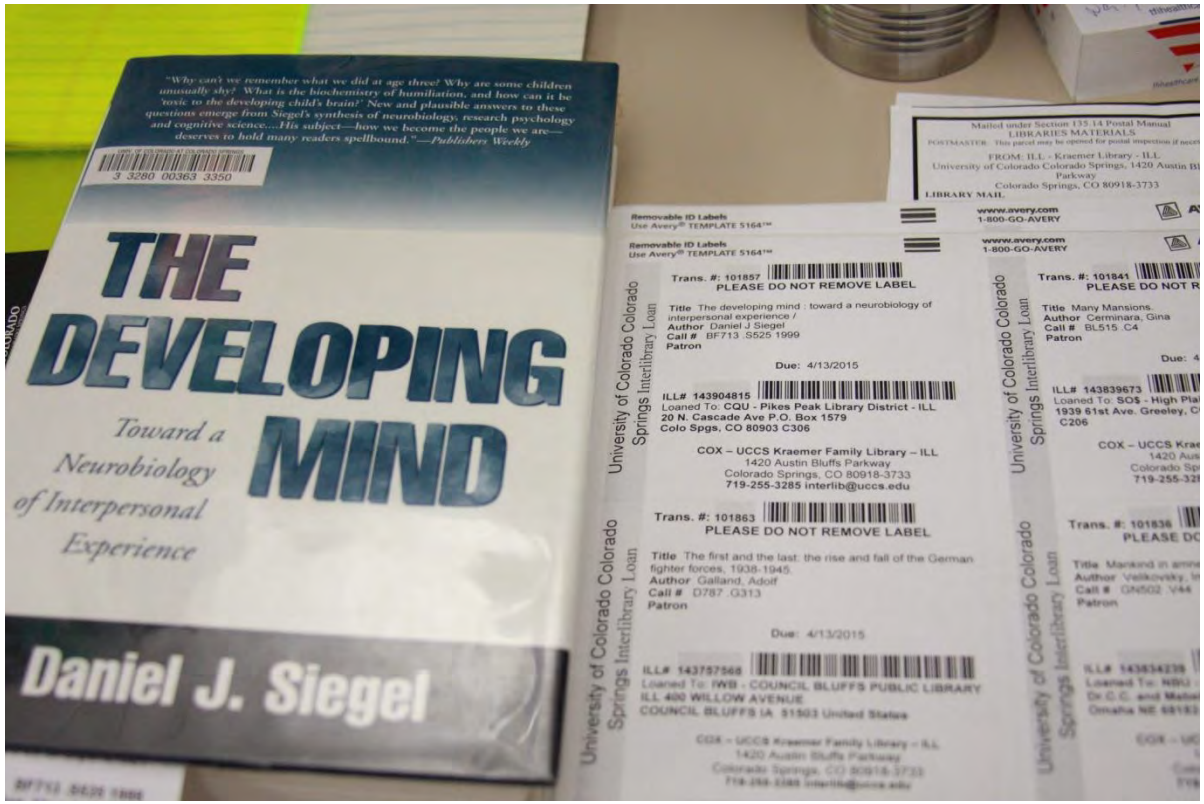
Check out



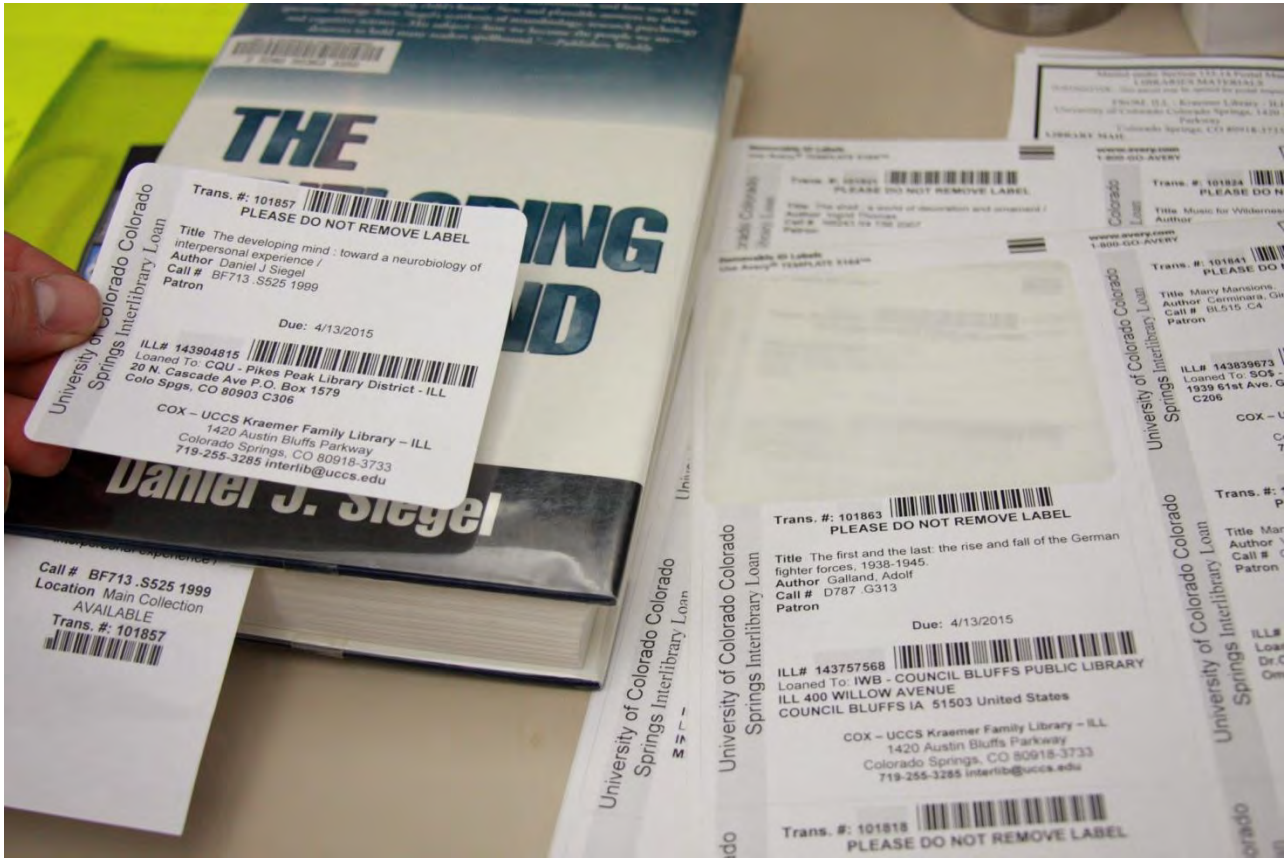
Desensitize



Book label


THE DEVELOPING MIND
Toward a Neurobiology of Interpersonal Experience
Daniel J. Siegel
Trans. #: 101857
PLEASE DO NOT REMOVE LABEL
Title The developing mind : toward a neurobiology of interpersonal experience /
Author Daniel J Siegel
Call # BF713 .S525 1999
Patron
Due: 4/13/2015
ILL# 143904815
Loaned To: CQU - Pikes Peak Library District - ILL
20 N. Cascade Ave P.O. Box 1579
Colo Spgs, CO 80903 C306
COX – UCCS Kraemer Family Library – ILL
1420 Austin Bluffs Parkway
Colorado Springs, CO 80918-3733
719-255-3285 interlib@uccs.edu
Trans. #: 101863
PLEASE DO NOT REMOVE LABEL
Title The first and the last: the rise and fall of the German fighter forces, 1938-1945.
Author Galland, Adolf
Call # D787 .G313
Patron
Due: 4/13/2015
ILL# 143757568
Loaned To: IWB - COUNCIL BLUFFS PUBLIC LIBRARY
ILL 400 WILLOW AVENUE
COUNCIL BLUFFS IA 51503 United States
Trans. #: 101841
Title Many Mansions.
Author Cerminara, Gina
Call # BL515 .C4
Patron
ILL# 143839673
Loaned To: SO$ - High Pla
1939 61st Ave. Greeley, C
C206
University of Colorado Colorado Springs Interlibrary Loan
LIBRARY MAIL
Removable ID Labels
Use Avery® TEMPLATE 5164™
www.avery.com
1-800-GO-AVERY

If collected in call number order correctly the 1st book label will match the first item and so forth

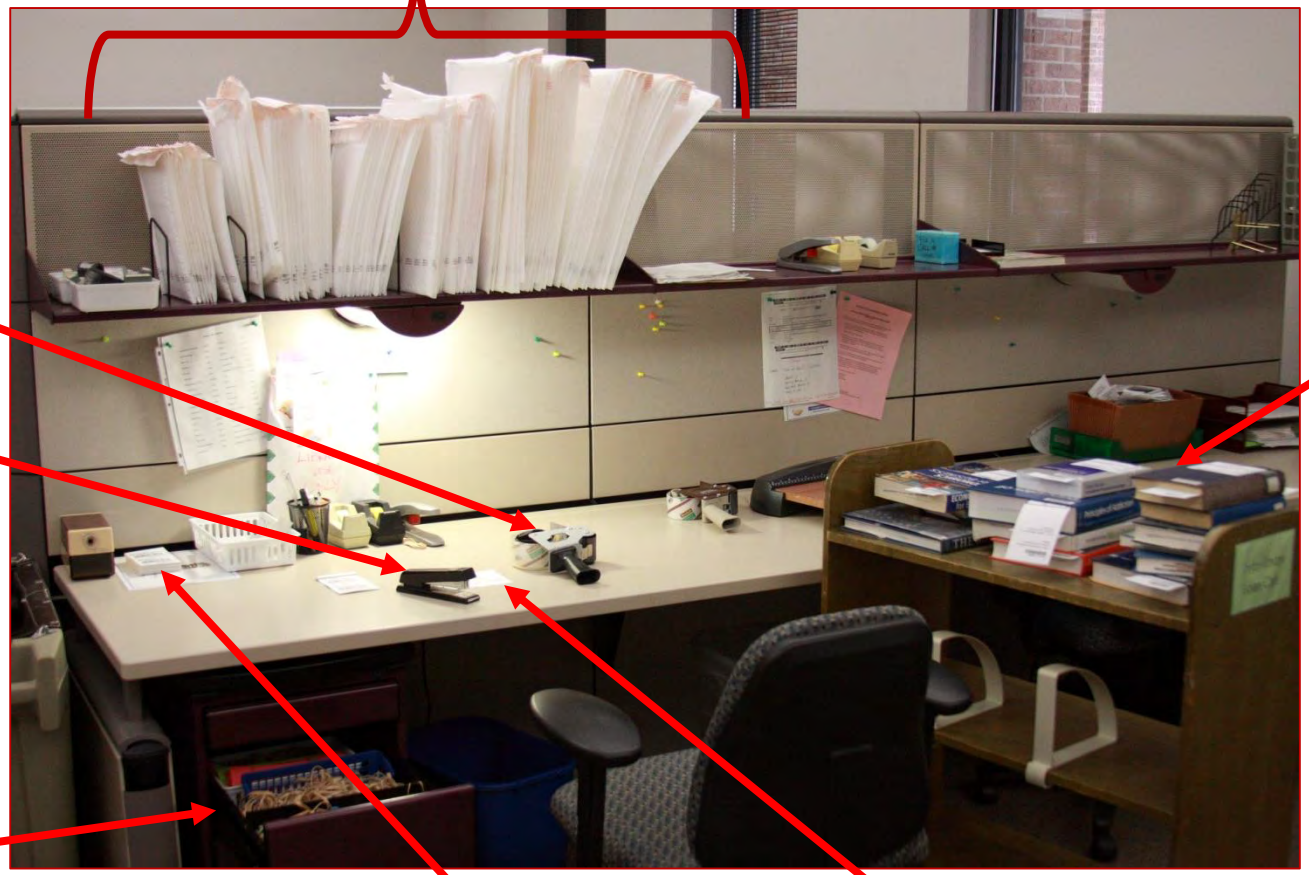


Run all items marked found through this 3 step process

- **Check out**
- **Desensitize**
- **Book Label**
- **Then gather materials and move to shipping station**

The shipping station

Jiffy Bags 2's, 3's,4's, 5's and 6's



Items awaiting shipping

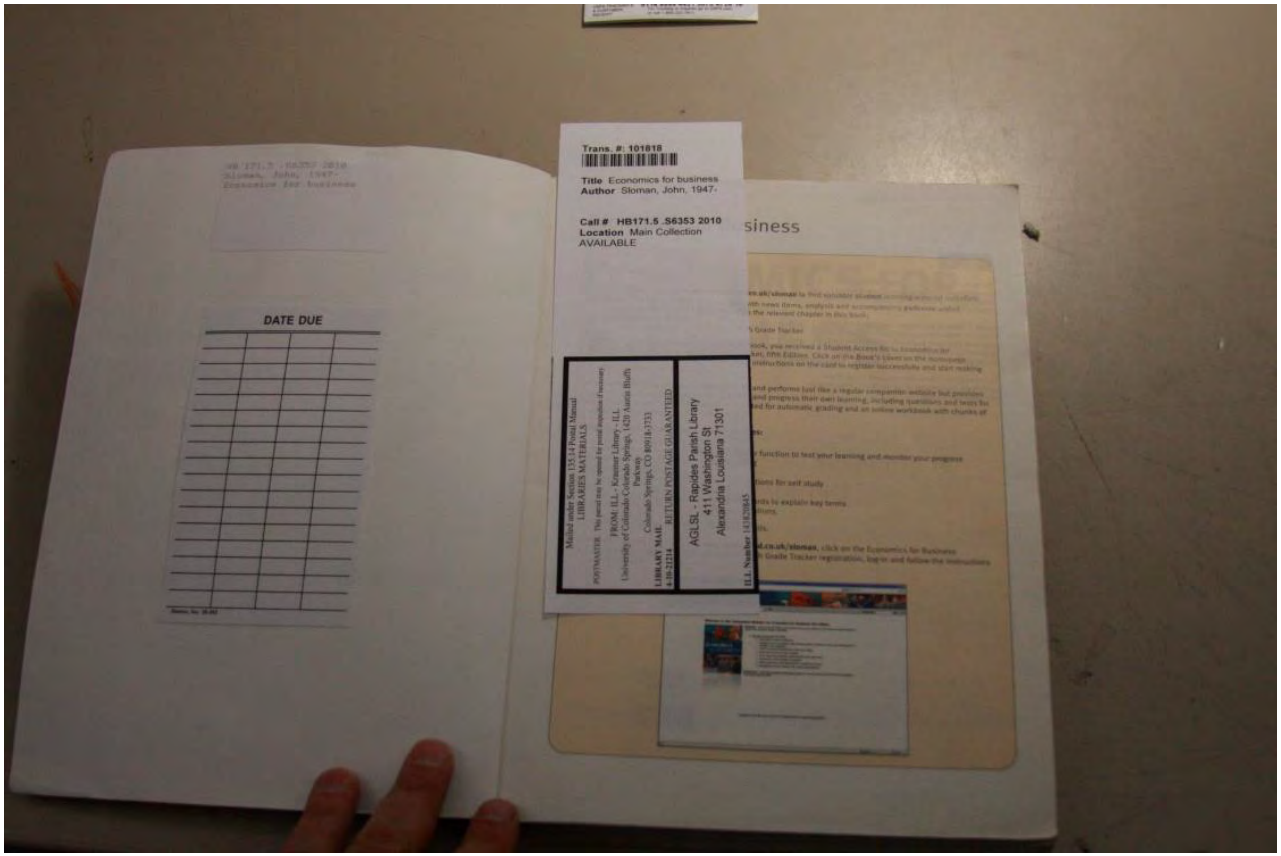
Packing tape, stapler

Rubber bands

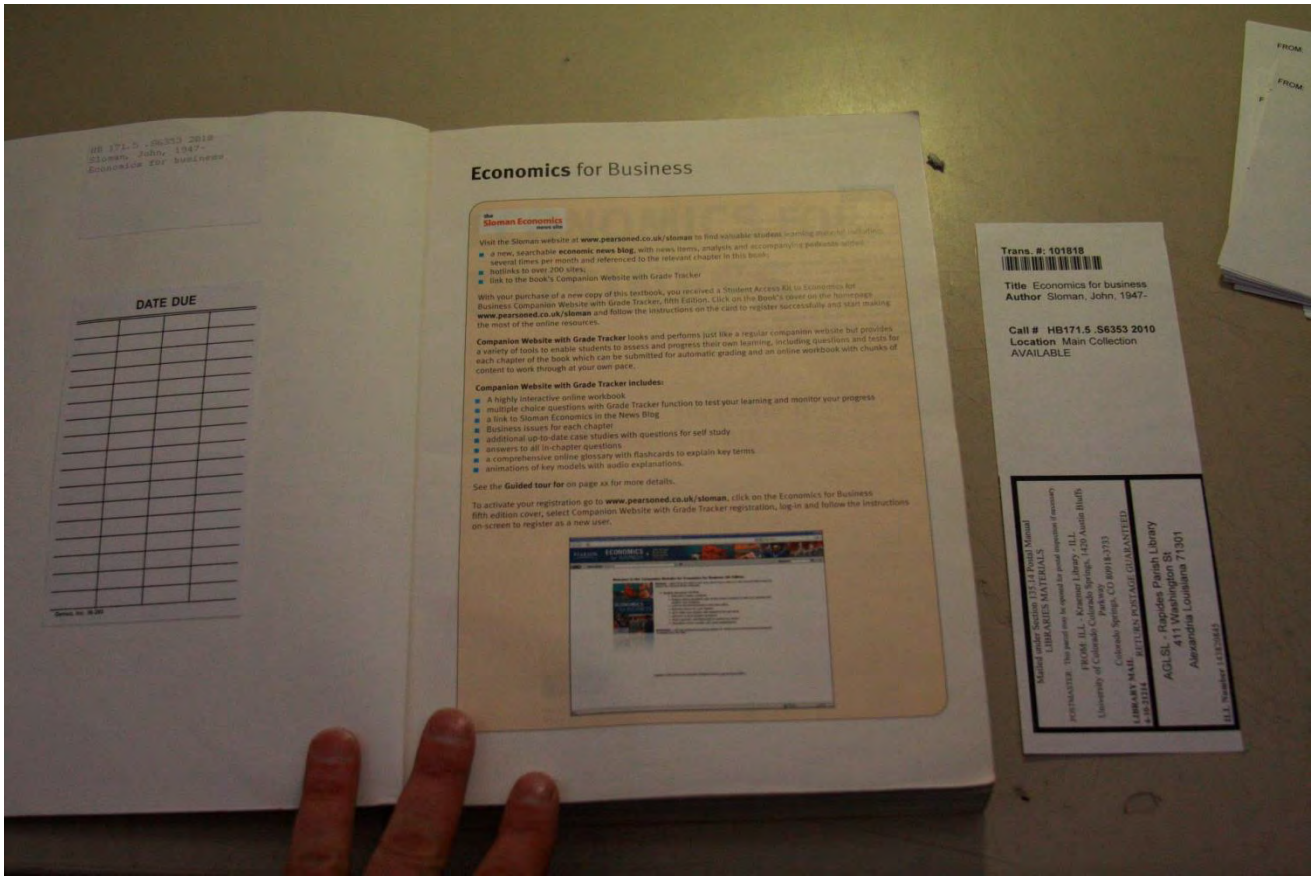
USPS tracking number stickers

Return Labels

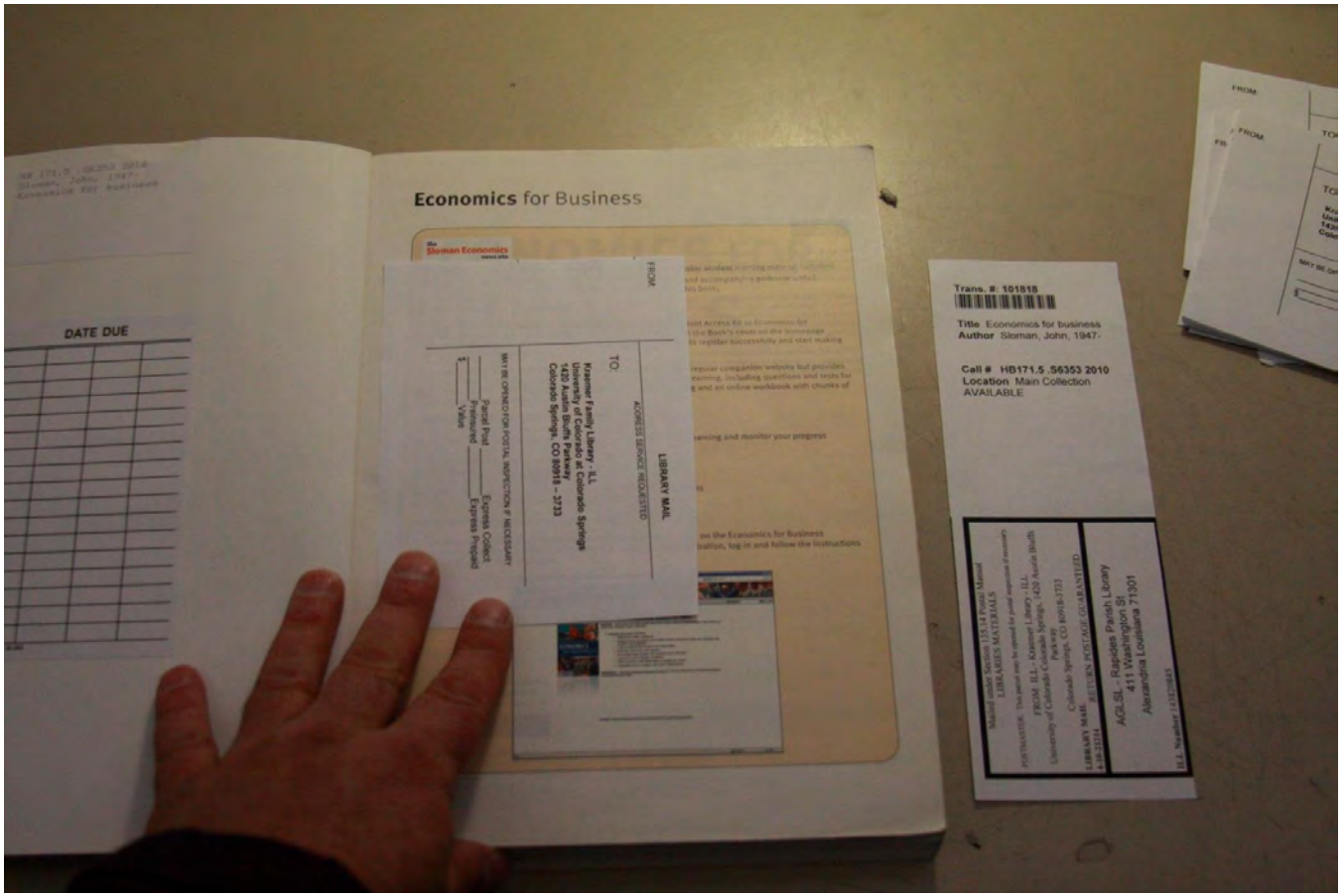
Mail is the first shipping priority



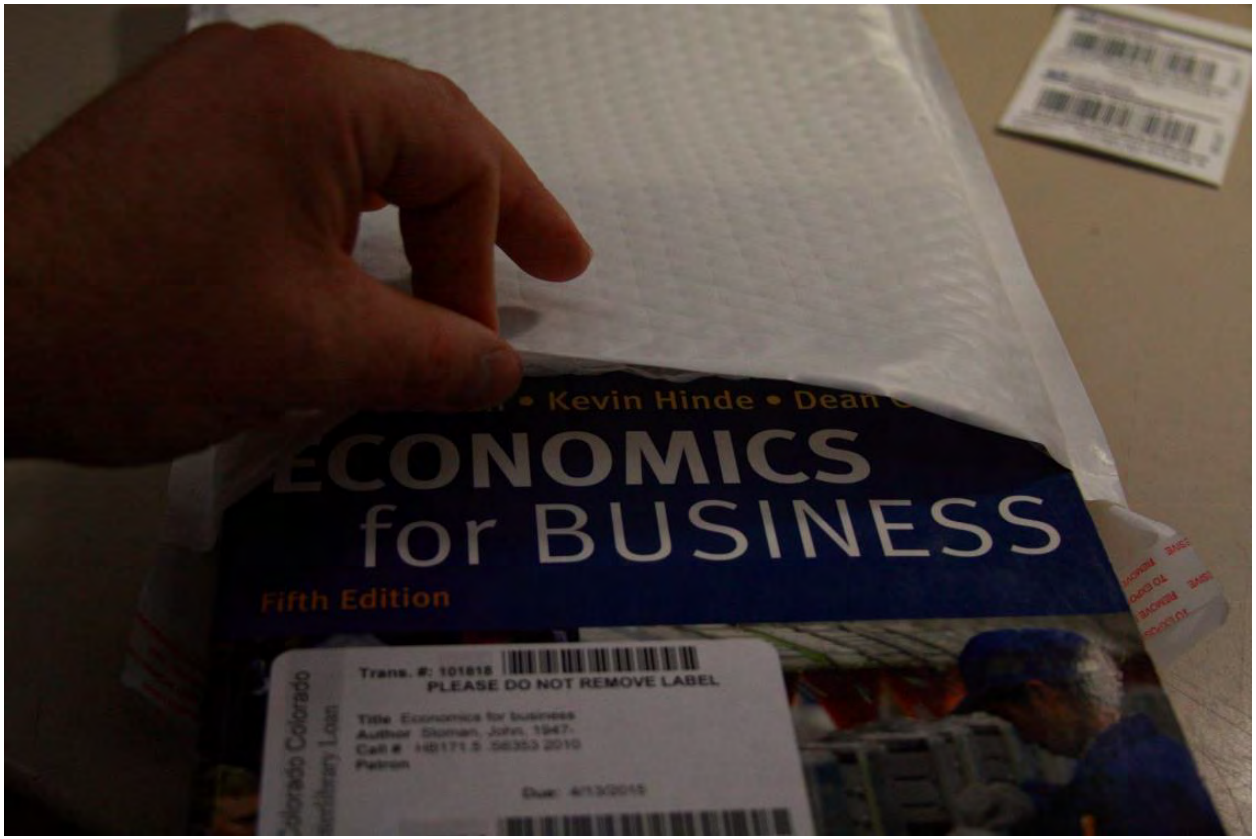
Set the combination label aside



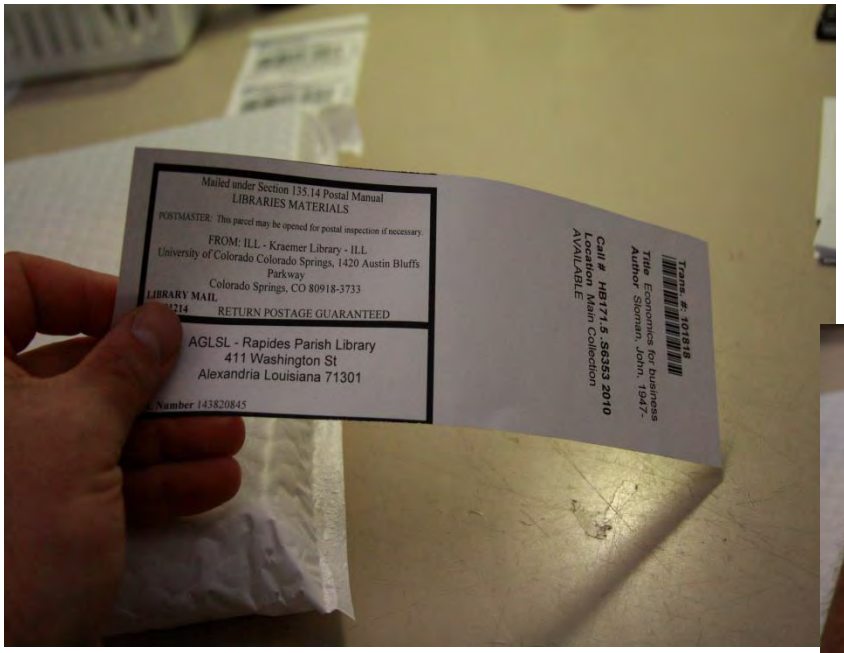
Place a return label inside the cover

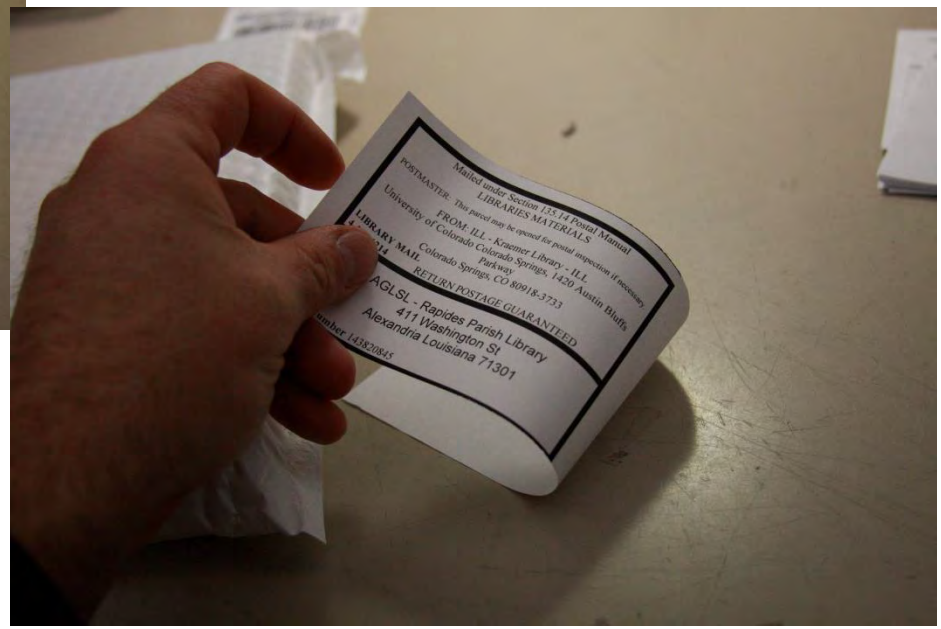


Select the appropriate sized jiffy bag and seal the book in



Pick up and fold combination shipping label pull slip





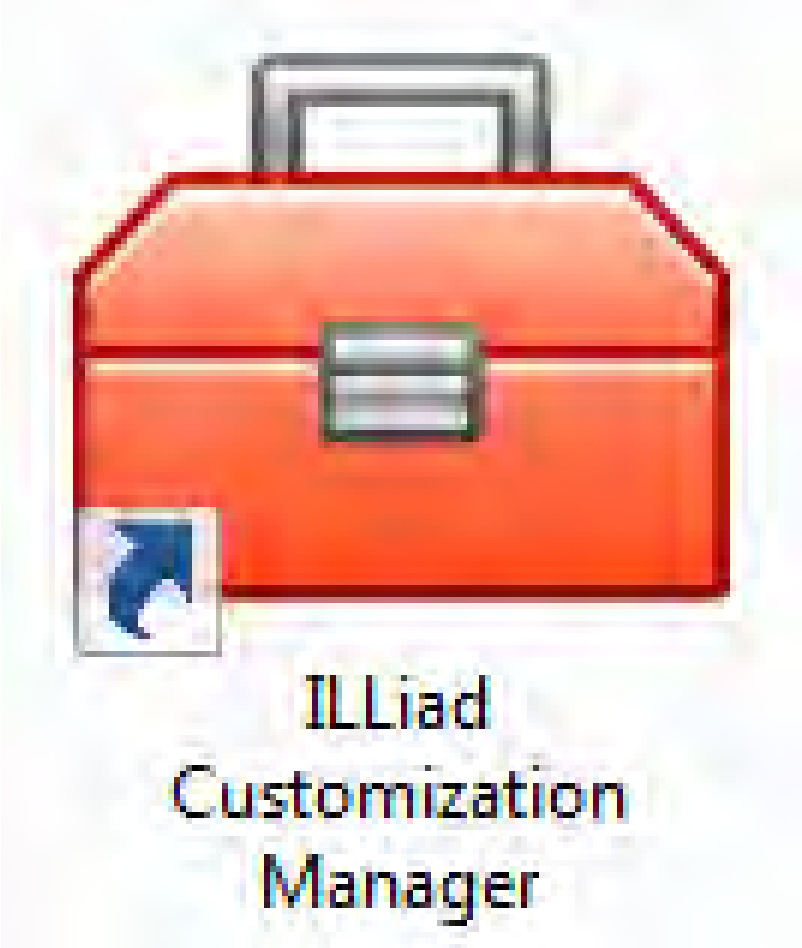
Tape the shipping label and place a USPS tracking number on parcel

These items are ready to ship

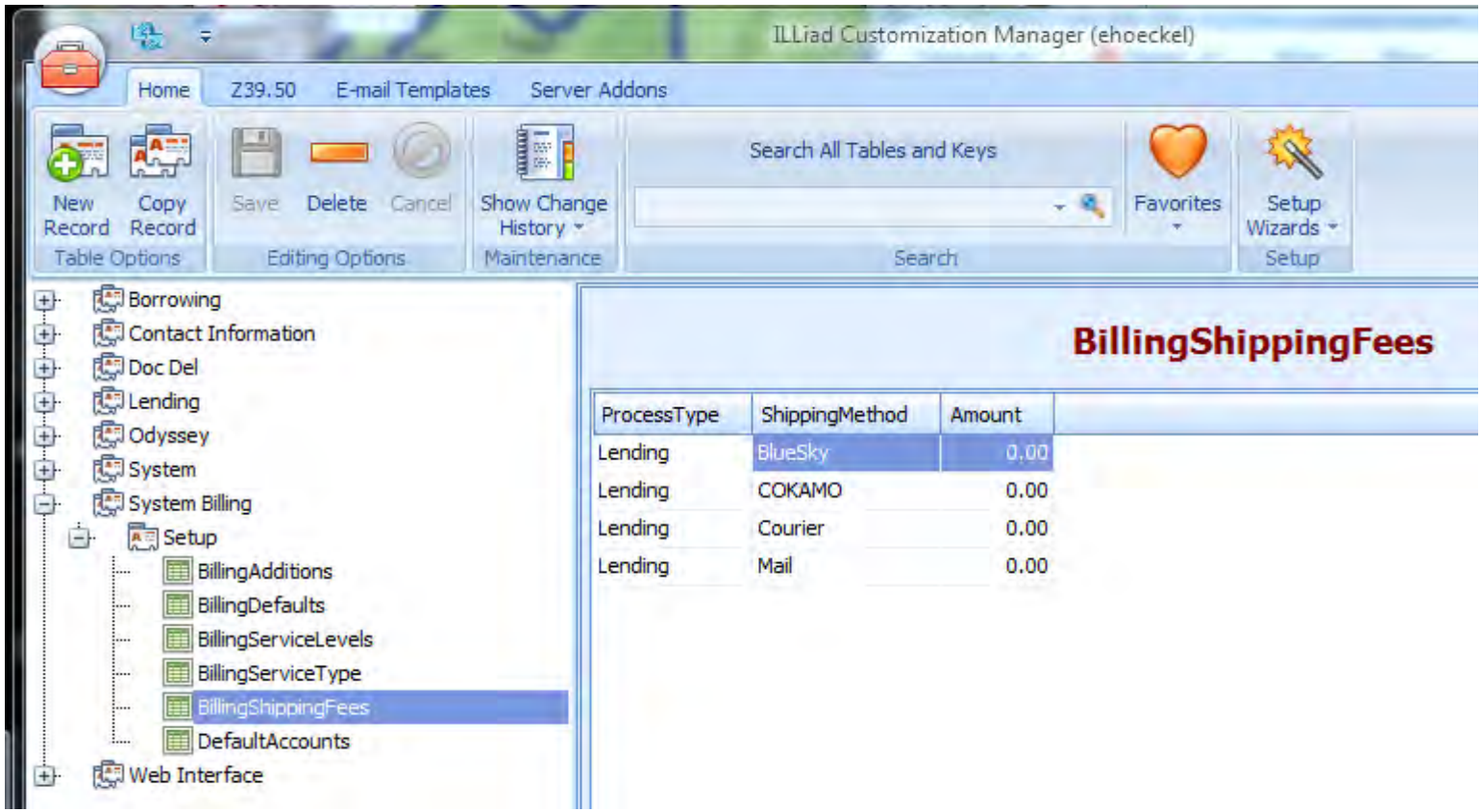
Courier Items are even easier process

How to set this up

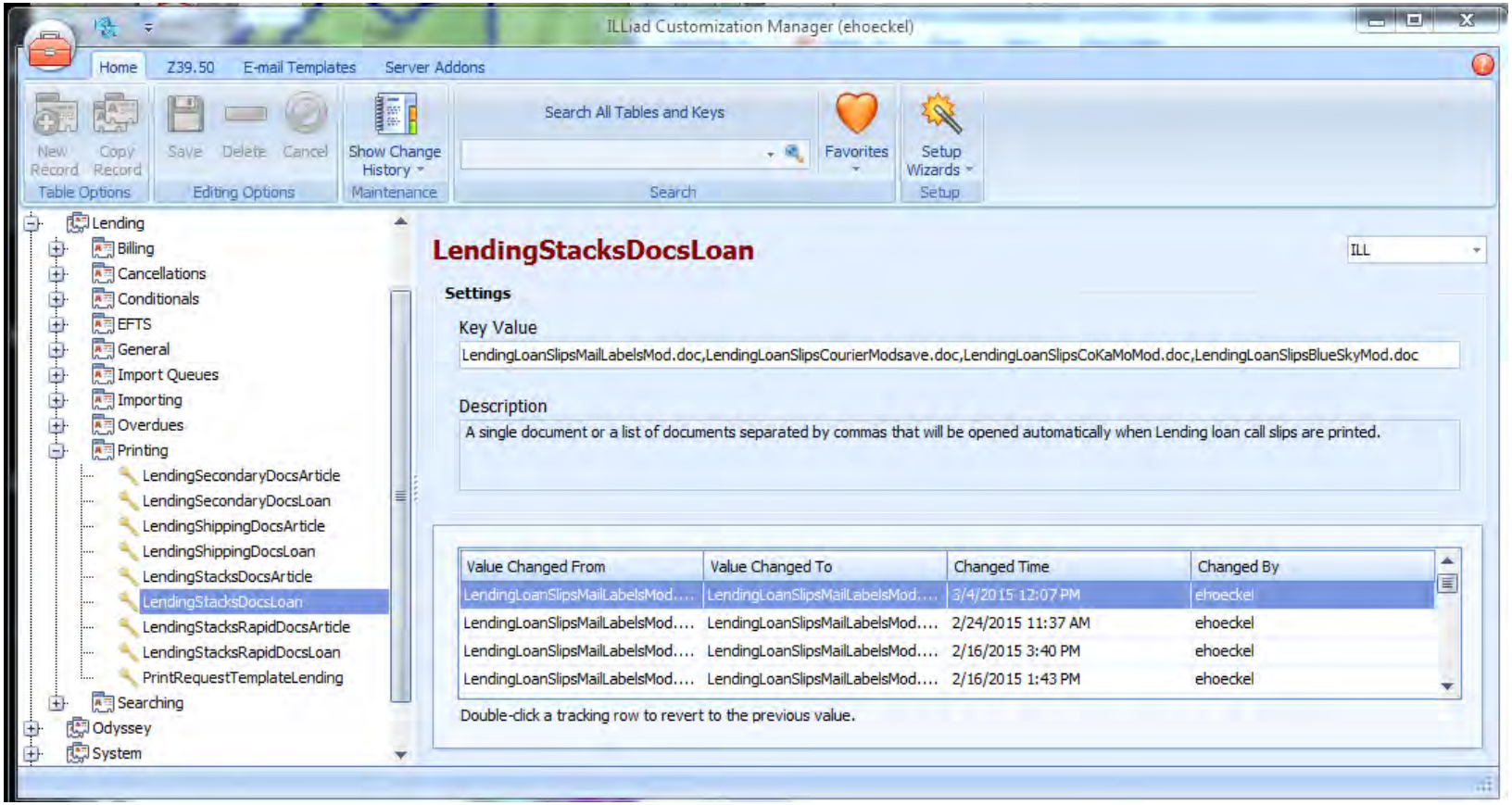
- **Create templates - ILLiad 8.5 documentation written for Word 2007**
- **Custumization manager settings - que up templates,**
- **add default shipping options - Billing manager – define filter for template**
- **Sorting by location and call number**


ILLiad
Customization
Manager

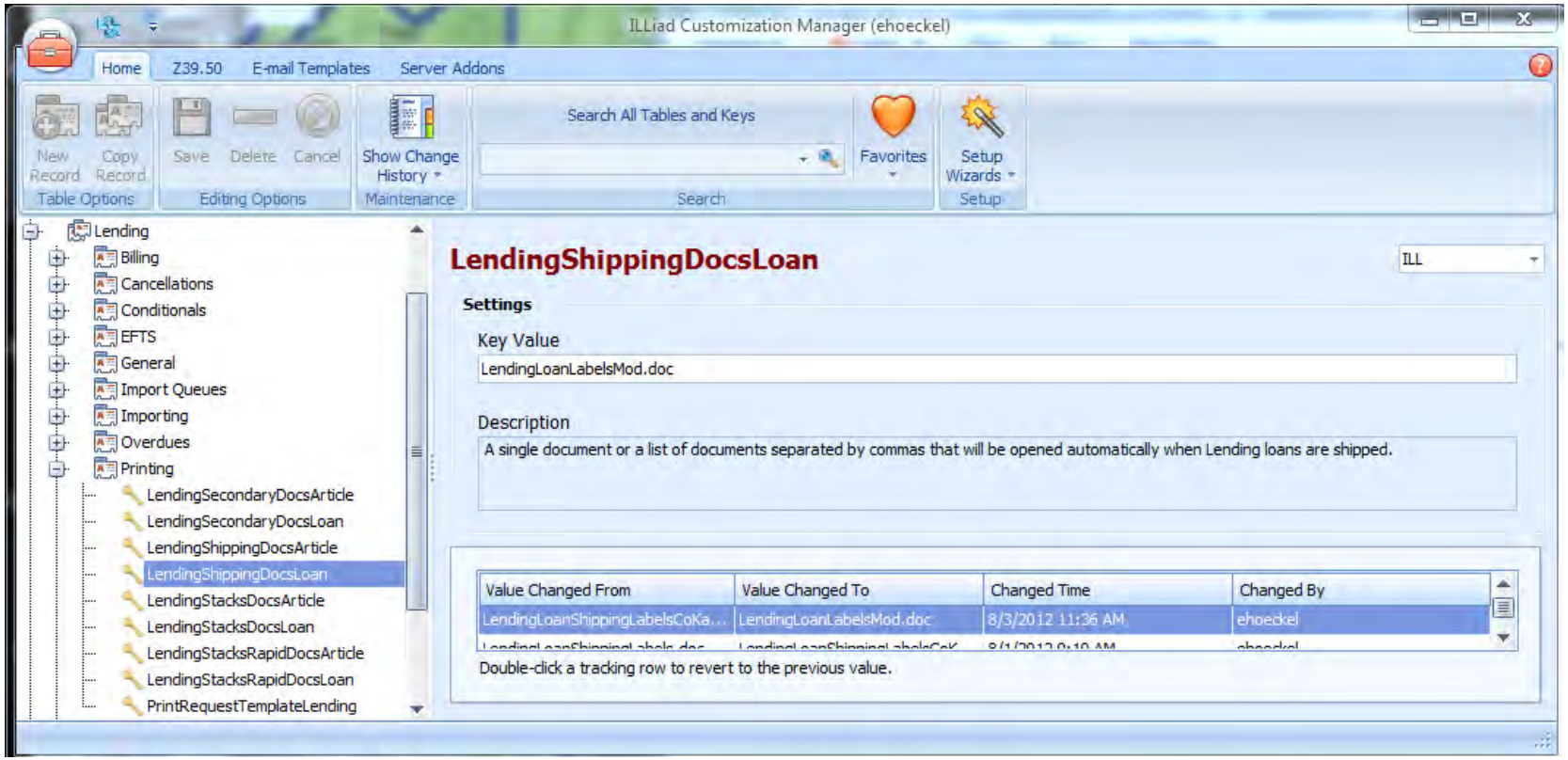
Changing Shipping Options System Billing/Setup/Billing Shipping Fees



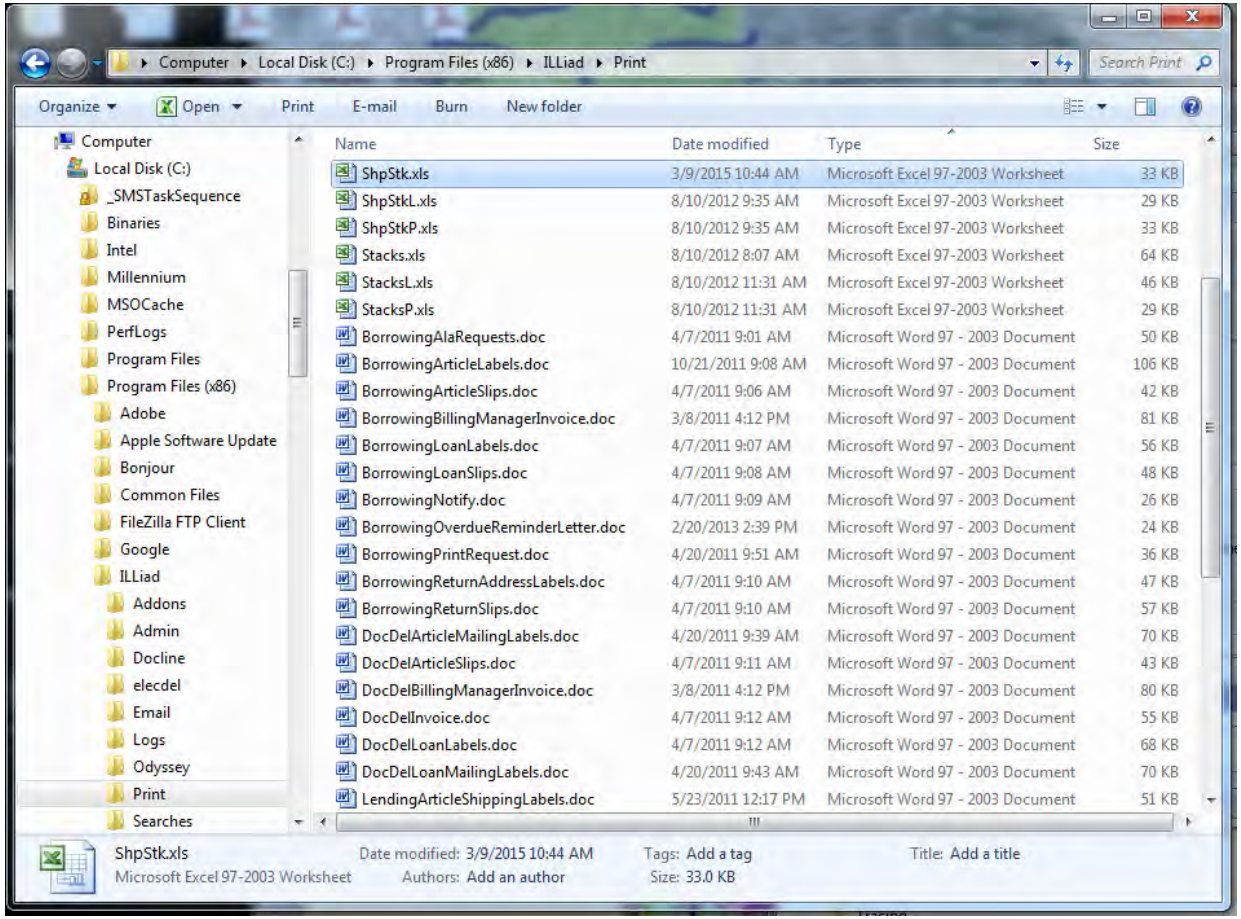
Queuing Up Stack Search Documents Lending/Printing/LendingStacksDocLoan Change the Key Value the template names



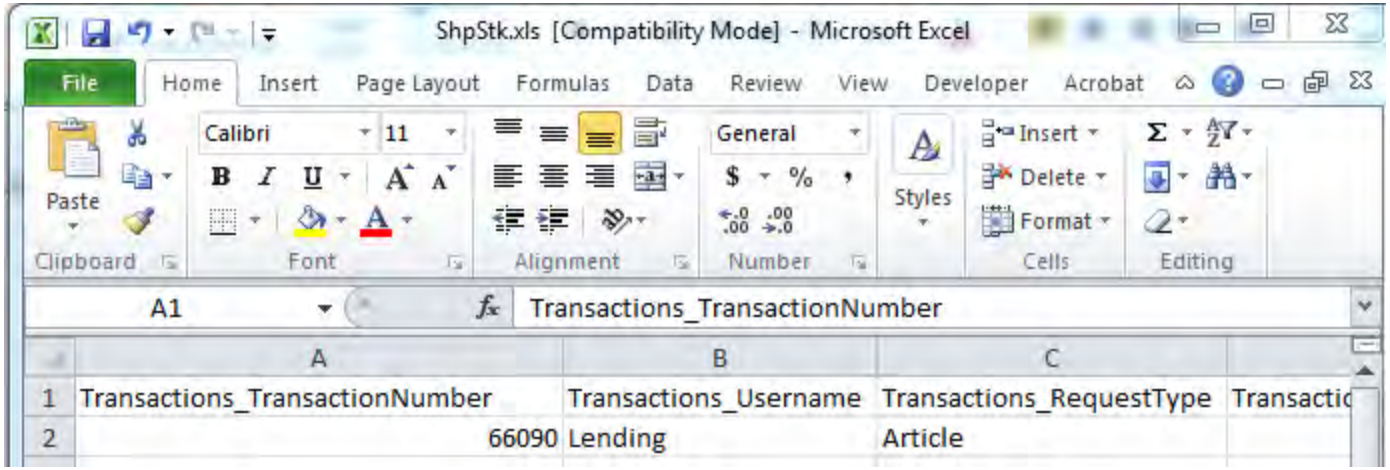
Queuing up book labels Lending/Printing/Lending ShipDocsLoan Chang the Key Value to Template Name



Default print directory
C:Program Files (x86)/ILLiad/Print



Mergfields listed in line 1 of xcel documents in print folder



Questions???

Thank You

University of Colorado
Colorado Springs

University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus