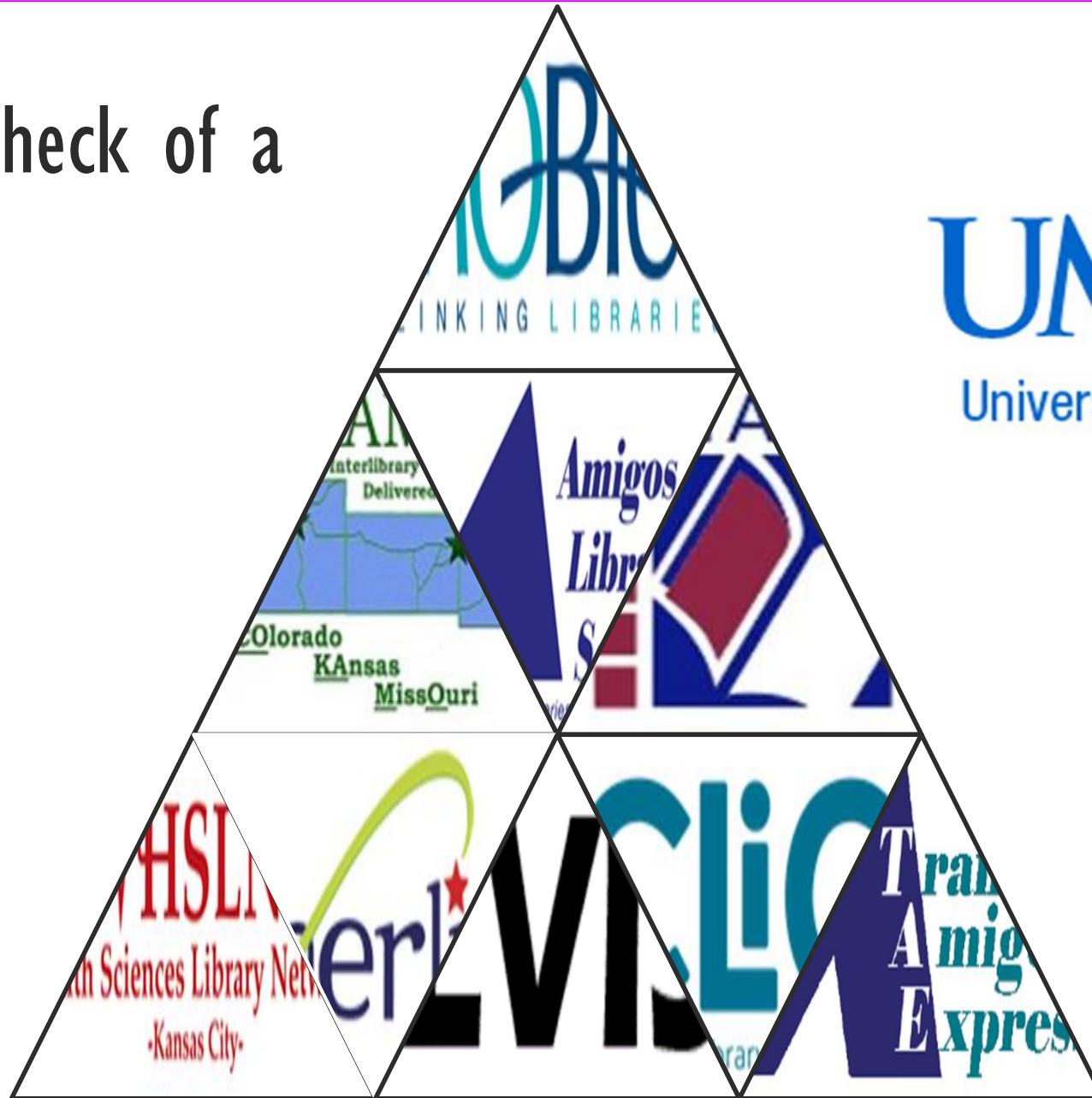


Managing Courier and Reciprocal Borrowing Relationships in ILLiad



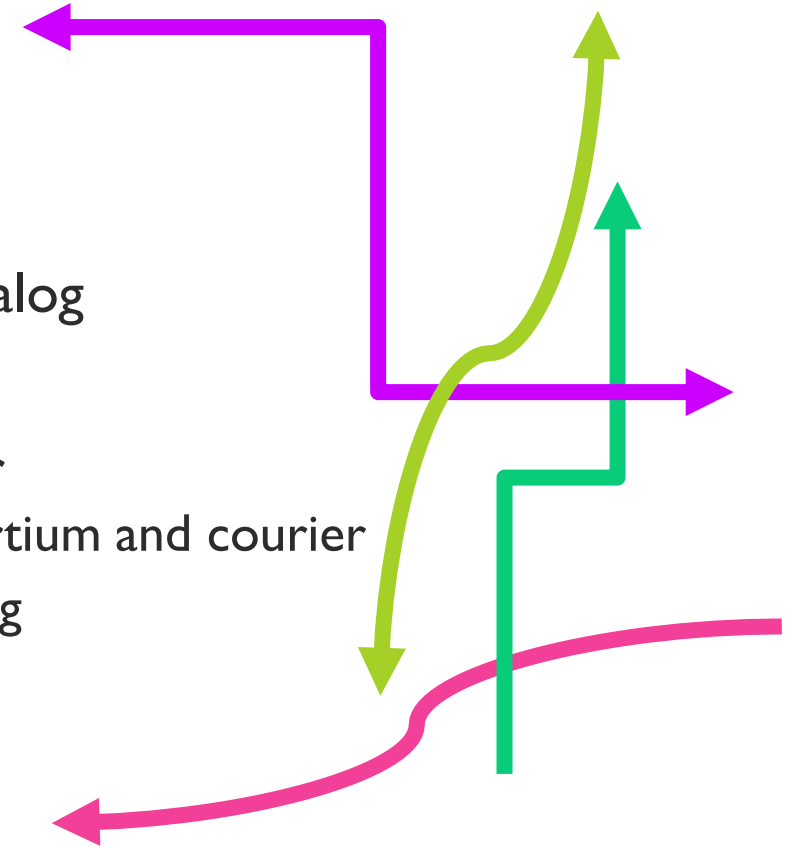
Jen Salvo-Eaton
University of Missouri-Kansas City
2016 ILLiad Conference

We're in one heck of a
love triangle.



What's going on at UMKC?

- Part of the University of Missouri system with a shared catalog
 - Direct consortial borrowing through the shared catalog
- Part of state-wide academic library consortium and courier
 - Connects us to a Colorado state-wide academic library consortium and courier
 - Direct consortial borrowing through a shared consortial catalog
- Part of a Kansas City Metro courier
 - Connects to two other multi-state courier systems
 - With “understood” reciprocal borrowing
- Part of LVIS (Libraries Very Interested in Sharing) and the Amigos Resource Sharing Agreement – free reciprocal borrowing agreements



Types of Relationships

Courier agreements

Reciprocal borrowing agreements

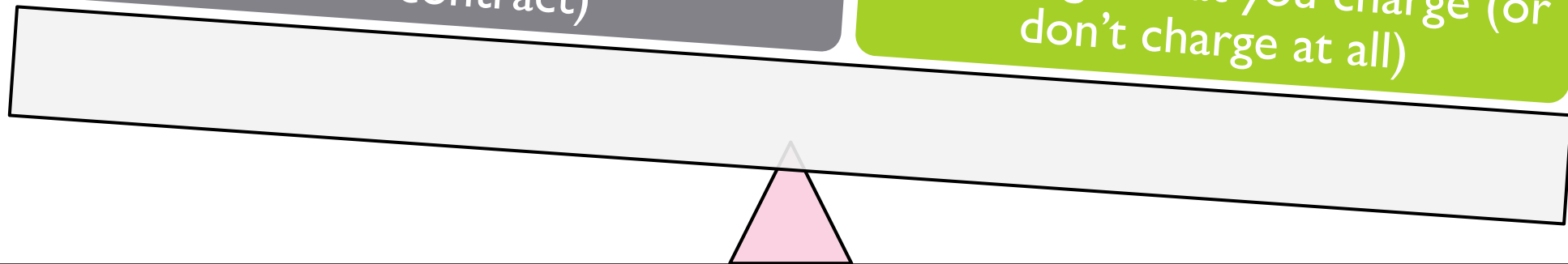
Formal or informal

Specific labels and/or packaging

Sometimes in combination with a courier agreement

Pay annual membership price (or sign other contract)

We charge what you charge (or don't charge at all)



Relationship Issues

- ✓ **Mailing labels** for courier groups
- ✓ **Fee structures** (or no fees) for reciprocal borrowing groups
- ✓ **Priority lending processing** for requests from reciprocal borrowing groups
- ✓ **Specific loan periods** for requests from reciprocal borrowing groups
- ✓ Maximize your **borrowing power**
- ✓ **Overlapping** agreements
- ✓ Keeping information current
- ✓ **Evaluate** for effectiveness

Courier Agreements & Mailing Labels

For this you'll need:

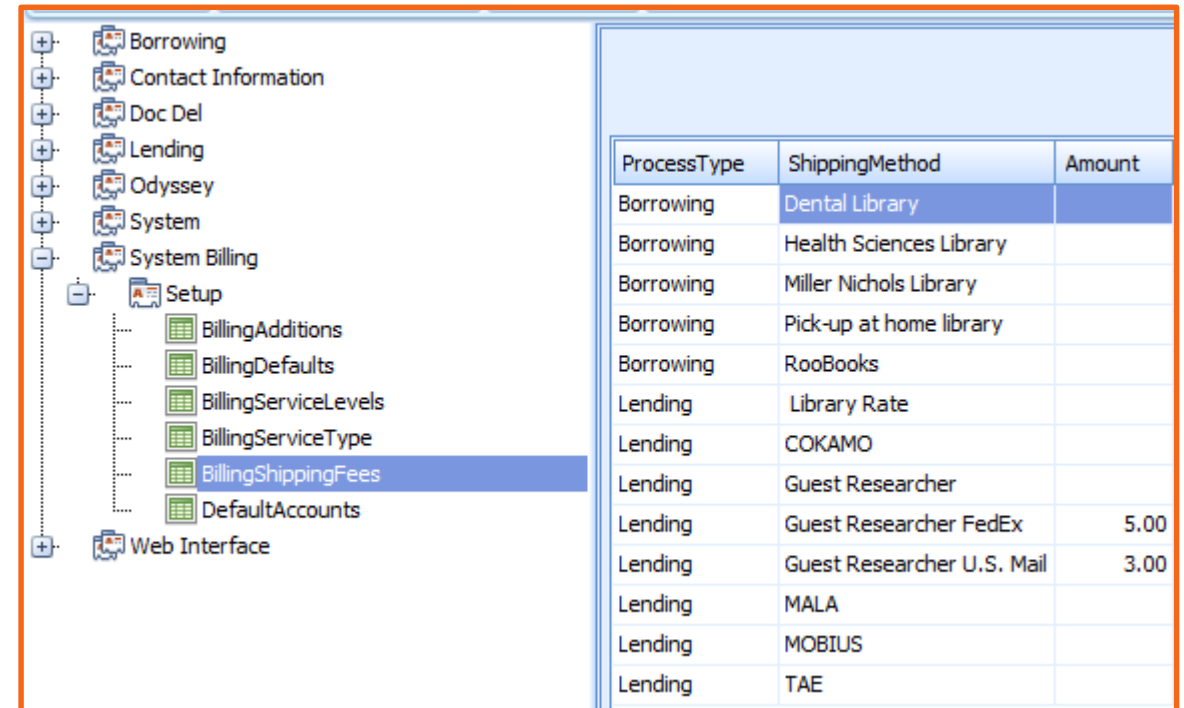
1. A print or digital **courier label sample**
2. A **list of participating courier libraries**, addresses, and courier codes (or use the label maker)
3. To customize shipping methods in the **ILLiad Customization Manager**
4. To customize the **ILLiad client layout**
5. To customize the **ILLiad print templates**:
 - BorrowingReturnAddressLabels.doc
 - LendingLoanShippingLabels.doc **or** LendingLoanSlips.doc (where's *your* shipping label?)

Courier Agreements & Mailing Labels

Customize Shipping Methods

- In **System Billing** → **Setup** → **BillingShippingFees** table, create shipping methods for couriers with **ProcessType = Lending**
- These will apply to Borrowing as well, for return address labels

Tip: For your default shipping method - add a space before the **ShippingMethod** to make it appear first on your A-Z dropdown list (see “ Library Rate”)



The screenshot shows a database management interface with a tree view on the left and a data table on the right. The tree view includes categories like Borrowing, Contact Information, Doc Del, Lending, Odyssey, System, System Billing, Setup, and Web Interface. Under Setup, several tables are listed, with BillingShippingFees highlighted. The data table on the right has three columns: ProcessType, ShippingMethod, and Amount. It contains 13 rows of data, including entries for Dental Library, Health Sciences Library, Miller Nichols Library, Pick-up at home library, RooBooks, Library Rate, COKAMO, Guest Researcher, Guest Researcher FedEx (5.00), Guest Researcher U.S. Mail (3.00), MALA, MOBIUS, and TAE.

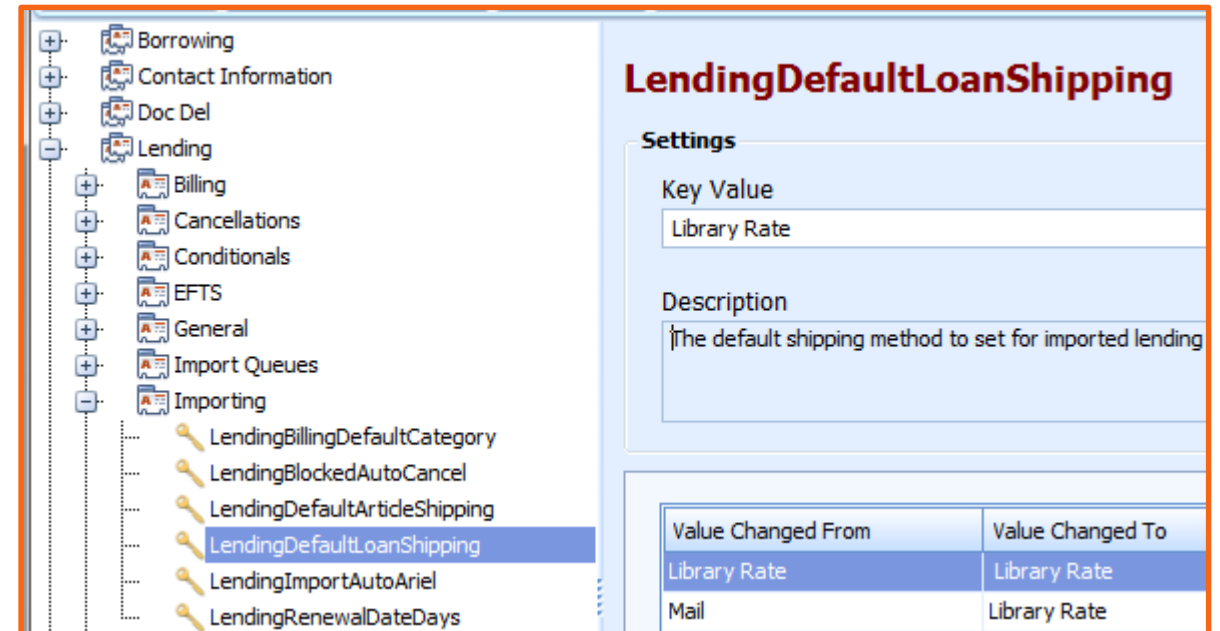
ProcessType	ShippingMethod	Amount
Borrowing	Dental Library	
Borrowing	Health Sciences Library	
Borrowing	Miller Nichols Library	
Borrowing	Pick-up at home library	
Borrowing	RooBooks	
Lending	Library Rate	
Lending	COKAMO	
Lending	Guest Researcher	
Lending	Guest Researcher FedEx	5.00
Lending	Guest Researcher U.S. Mail	3.00
Lending	MALA	
Lending	MOBIUS	
Lending	TAE	

Courier Agreements & Mailing Labels

Customize Shipping Methods

- Check your **Lending** → **Importing** → **LendingDefaultLoanShipping** & **LendingDefaultArticleShipping** keys to make sure they match an available shipping method

Tip: Add a space before the Key Value here to correspond with the default **ShippingMethod** tip on the previous slide.



The screenshot displays a software configuration window. On the left is a tree view with categories like Borrowing, Contact Information, Doc Del, Lending, Billing, Cancellations, Conditionals, EFTS, General, Import Queues, and Importing. Under the 'Importing' category, several keys are listed, with 'LendingDefaultLoanShipping' selected and highlighted in blue. On the right, the configuration details for 'LendingDefaultLoanShipping' are shown. It includes a 'Settings' section with a 'Key Value' field containing 'Library Rate' and a 'Description' field containing '(The default shipping method to set for imported lending)'. Below this is a table with two columns: 'Value Changed From' and 'Value Changed To'. The table contains three rows: 'Library Rate' (changed from Library Rate to Library Rate) and 'Mail' (changed from Mail to Library Rate).

Value Changed From	Value Changed To
Library Rate	Library Rate
Mail	Library Rate

Courier Agreements & Mailing Labels

Customize ILLiad Client Layout

- In the **Lender Address** screen, right click to “Customize Layout”
- Rename and move some unused fields
- All numerical codes in one, all letter codes in another (makes it easier to sort and spot mistakes)

Shipping Information

Library Name - Dept/Attn	Al Harris Library - Interlibrary Loan Dept.	
Street Address	100 Campus Drive	
City, State ZIP	Weatherford, OK 73096	
Country		
Default Shipping Loan	TAE	COKAMO or TAE Site # 601
Default Shipping Article	TAE	TAE or MALA Hub Code OKC

Standardize your address info!

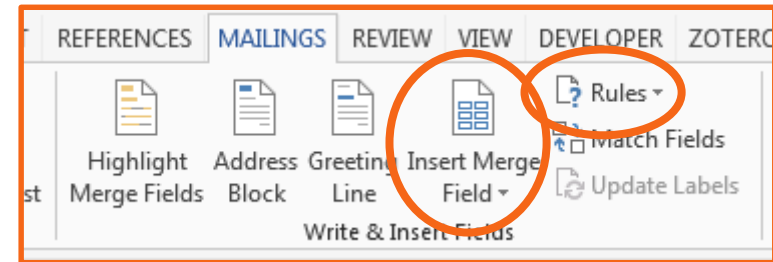
Used to be “Library Loan Charge” & “Library Copy Charge”

Dropdown menu from
System Billing → Setup →
BillingShippingFees table

Courier Agreements & Mailing Labels

Customize ILLiad Print Templates

- Create courier-formatted mailing labels and make ILLiad print them
- Find the ILLiad print template for **BorrowingReturnAddressLabels.doc**
- Make a COPY of the template first (it gets complicated)
- Use the “If...Then...Else” rule from **Microsoft Word: Mailings → Rules**
- Use **Microsoft Word: Mailings → Insert Merge Field** dropdown menu



```
{ IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "COKAMO" " Mid-America Library  
Alliance  
1-877-600-9699 | www.mid-americalibraryalliance.org  
  
FROM: University of Missouri-Kansas City Miller Nichols Library  
800 East 51st Street  
Kansas City, MO 64110  
  
TO: COKAMO Code { MERGEFIELD LenderAddresses_LibCopyCharge } - { MERGEFIELD LA_LibraryName }  
c/o MALA, 15624 E. US Highway 24  
Independence, MO 64050  
  
MALA CODE: MCI  
" } { IF { MERGEFIELD LenderAddresses_DefaultShippingMethodLoa } = "TAE" " Mid-America Library
```

Courier Agreements & Mailing Labels

Customize ILLiad Print Templates

String as many of these
“If...Then...Else...”
statements together as
you need

```
{If LenderAddresses_DefaultShippingMethodLoa = "COKAMO" "  
  From: UMKC  
  To: COKAMO Code {LenderAddresses_LibraryCopyCharge} - {LA_LibraryName}  
      c/o MALA, 15624 E. Highway 24  
      Independence, MO 64050 "" }
```

```
{If LenderAddresses_DefaultShippingMethodLoa = "TAE" "  
  From: UMKC  
  To: {LenderAddresses_LibraryLoanCharge}/{LenderAddresses_LibraryCopyCharge} -  
      {LA_LibraryName} - {LA_Address1}  
      {LA_Address2}  
      {LA_Address3}  
  Ship via Trans-Amigos Express
```

What will these look like
when they print?

Courier Agreements & Mailing Labels

Customize ILLiad Print Templates

From: UMKC

To: **COKAMO Code C200 - University of Colorado at Boulder**
c/o MALA, 15624 E. Highway 24
Independence, MO 64050

From: UMKC

To: **15/DAL** University of North Texas Libraries – Interlibrary Loan
1155 Union Circle
Denton, TX 76203
Ship via Trans-Amigos Express

- Formats and fonts to **match** your courier labels
- **Alt + F9** to toggle to field code view
- Don't use courier labels for some libraries? **Make return flags instead!**

Courier Agreements & Mailing Labels

Customize ILLiad Print Templates

- Don't forget your lending templates!
- LendingLoanShippingLabels.doc or LendingLoanSlips.doc
- Where's *your* shipping label?

Tip: Conserve paper by customizing your LendingLoanSlips.doc template with a shipping label too! Bypass shipping label printing with a routing rule.

Our return address

Request information (loan slip)

Shipping label (borrowing library's address)

RuleNo	20
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Shipping Label Printing
MatchString	t.RequestType = 'Loan' or t.RequestType = 'Article'
NewProcessType	Lending
NewTransactionStatus	Item Shipped
RuleDescription	Bypass printing lending shipping labels.

Fees or Free of Charge Agreements

For this, you'll need:

1. Knowledge of the **agreement's specifications** on charges
2. A **list of participating libraries**, their addresses, and their symbols
3. To customize billing categories in the **ILLiad Customization Manager**
4. To create groups in the **ILLiad Client**
5. Customize **ILLiad Client layout** to display groups and billing categories

Fees or Free of Charge Agreements

Customize Billing Categories

- In **System Billing** → **Setup** → **BillingDefaults** table, establish billing categories and charges for articles and loans.
 - Name categories after your specific agreements or group them by common charges

The screenshot shows the ILLiad Customization Manager (salvoeatonj) interface. The left sidebar contains a tree view with categories like Borrowing, Contact Information, Doc Del, Lending, Odyssey, System, System Billing, Setup, and Web Interface. The 'BillingDefaults' table is selected under the 'Setup' category. The main window displays a table with the following data:

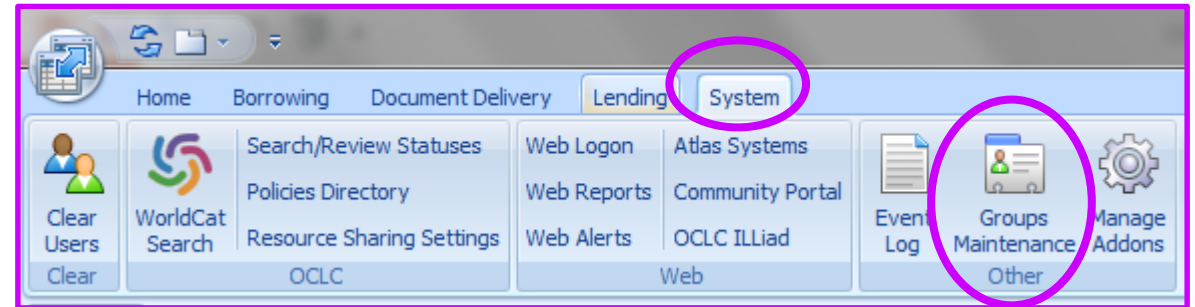
ProcessType	DocumentType	DefaultAmount	Category	Range1Pages	Range1Amount	Range2Pages	Range2Amount	Range3Pages	Range3Amount
Lending	Article	15.00	Default	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Article	0.00	Exempt	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Article	5.00	Five	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Article	20.00	For-Profit	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Article	20.00	Guest-Researcher	30	0.00	9999	0.50	9999999	0.00
Lending	Article	18.00	International	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	15.00	Default	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	0.00	Exempt	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	5.00	Five	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	20.00	For-Profit	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	10.00	Guest-Researcher	9999999	0.00	9999999	0.00	9999999	0.00
Lending	Loan	24.00	International	9999999	0.00	9999999	0.00	9999999	0.00

Why create groups?

- Facilitates regular maintenance
- Works with Web Reports
- Can customize loan periods
- Can be used to create routing rules

Route incoming lending request from group members to a custom queue

RuleNo	19
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Lending Request Processing
MatchString	t.LendingLibrary in (select lenderstring from groupslink where group number = '25')
NewProcessType	Lending
NewTransactionStatus	Awaiting Guest Researcher Processing
RuleDescription	Routes incoming GR requests to a custom queue.



Override your default lending loan period for specific groups

Group Name	Guest Researchers
Lending Due Date Override	30
Group ID	25

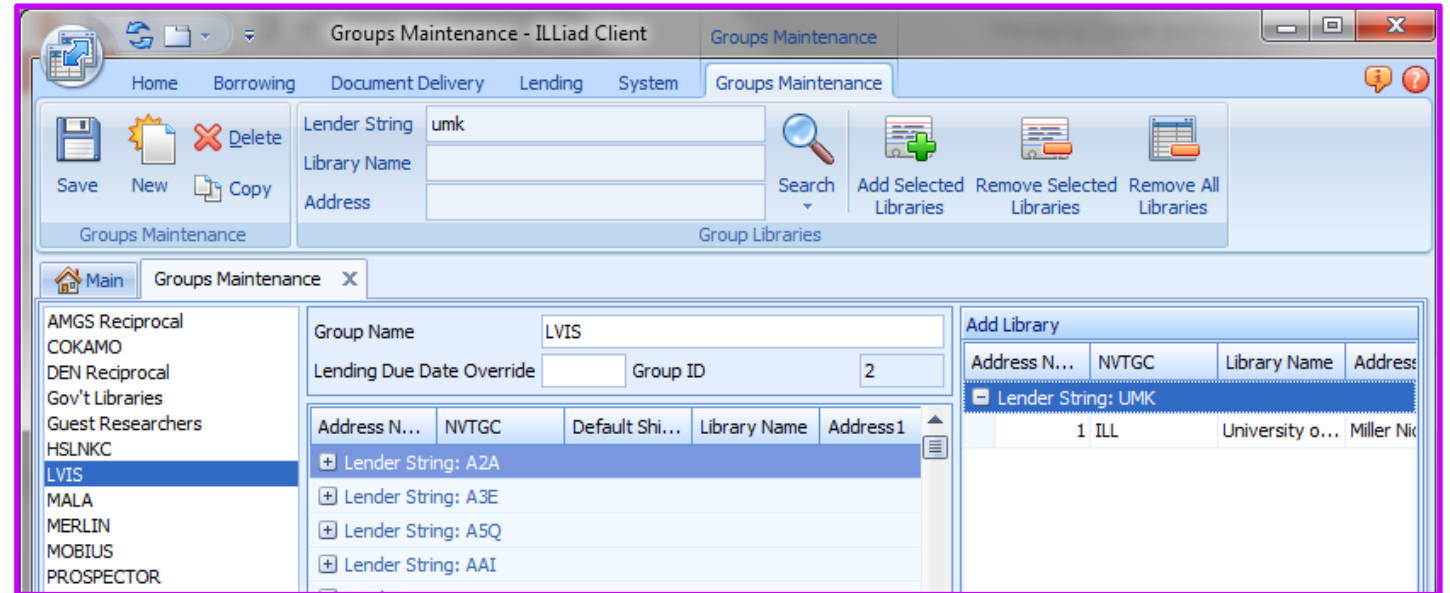
Run ILLiad canned web reports for specific groups

Borrowing - Fill Rate Statistics																											
Begin Date	2/1/2016																										
End Date	3/1/2016																										
Groups By Site	<table border="1"> <thead> <tr> <th>Sites</th> <th>Groups</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> All</td> <td><input checked="" type="checkbox"/> All</td> </tr> <tr> <td><input type="checkbox"/> ILL</td> <td><input type="checkbox"/> MOBIUS</td> </tr> <tr> <td></td> <td><input type="checkbox"/> LVIS</td> </tr> <tr> <td></td> <td><input type="checkbox"/> HSLNKC</td> </tr> <tr> <td></td> <td><input type="checkbox"/> MERLIN</td> </tr> <tr> <td></td> <td><input type="checkbox"/> AMGS Reciprocal</td> </tr> <tr> <td></td> <td><input type="checkbox"/> MALA</td> </tr> <tr> <td></td> <td><input type="checkbox"/> Gov't Libraries</td> </tr> <tr> <td></td> <td><input type="checkbox"/> PROSPECTOR</td> </tr> <tr> <td></td> <td><input type="checkbox"/> DEN Reciprocal</td> </tr> <tr> <td></td> <td><input type="checkbox"/> Guest Researchers</td> </tr> <tr> <td></td> <td><input type="checkbox"/> COKAMO</td> </tr> </tbody> </table>	Sites	Groups	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input type="checkbox"/> ILL	<input type="checkbox"/> MOBIUS		<input type="checkbox"/> LVIS		<input type="checkbox"/> HSLNKC		<input type="checkbox"/> MERLIN		<input type="checkbox"/> AMGS Reciprocal		<input type="checkbox"/> MALA		<input type="checkbox"/> Gov't Libraries		<input type="checkbox"/> PROSPECTOR		<input type="checkbox"/> DEN Reciprocal		<input type="checkbox"/> Guest Researchers		<input type="checkbox"/> COKAMO
Sites	Groups																										
<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All																										
<input type="checkbox"/> ILL	<input type="checkbox"/> MOBIUS																										
	<input type="checkbox"/> LVIS																										
	<input type="checkbox"/> HSLNKC																										
	<input type="checkbox"/> MERLIN																										
	<input type="checkbox"/> AMGS Reciprocal																										
	<input type="checkbox"/> MALA																										
	<input type="checkbox"/> Gov't Libraries																										
	<input type="checkbox"/> PROSPECTOR																										
	<input type="checkbox"/> DEN Reciprocal																										
	<input type="checkbox"/> Guest Researchers																										
	<input type="checkbox"/> COKAMO																										

Fees or Free of Charge Agreements

Create Groups in ILLiad Client

- In **System** → **Groups Maintenance**
 - Select **New**, then name your group (keep it short)
 - Once saved, Group ID automatically assigned (use this in routing rules)
 - Add libraries by entering symbol in **Lender String** field and **Search** for Lender Address record



Fee or Free of Charge Agreements

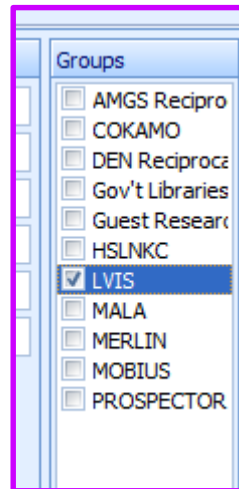
Customize ILLiad Client

Adjacent groups and billing category fields – helps you spot errors

Policies Directory says LVIS!

[ATLANTA REG COUN FOR HIGHER EDUC](#), [CENTER FOR RES LIBR GROUP/LINDA HALL LI](#), [GEORGIA ONLINE DATABASE](#), [GIF-N AM COORD COUN ON JAPANESE LIBR RES](#), [LIBRARIES VERY INTERESTED IN SHARING](#), [LYRA](#), [OCLC RES SHARING/KNOWLEDGE BASE PART](#), [OCLC TRAINING & ILLIAD PARTICIPANT](#), [SO6 GAC/UL](#), [SOLINE](#)

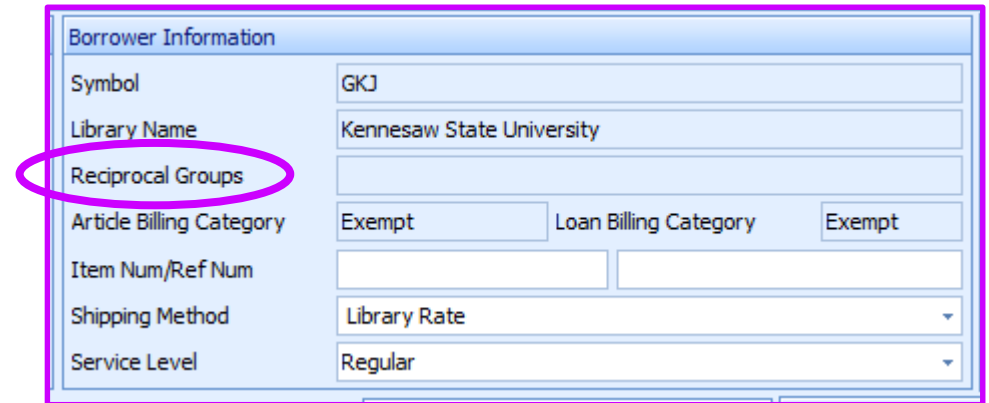
In Lender Address record, update their group membership in ILLiad groups



A screenshot of the ILLiad Groups list. The list contains several groups with checkboxes next to them. The 'LVIS' group is selected, indicated by a checked checkbox and a blue highlight.

Group Name	Selected
AMGS Recipro	<input type="checkbox"/>
COKAMO	<input type="checkbox"/>
DEN Reciproce	<input type="checkbox"/>
Gov't Libraries	<input type="checkbox"/>
Guest Researc	<input type="checkbox"/>
HSLNKC	<input type="checkbox"/>
LVIS	<input checked="" type="checkbox"/>
MALA	<input type="checkbox"/>
MERLIN	<input type="checkbox"/>
MOBIUS	<input type="checkbox"/>
PROSPECTOR	<input type="checkbox"/>

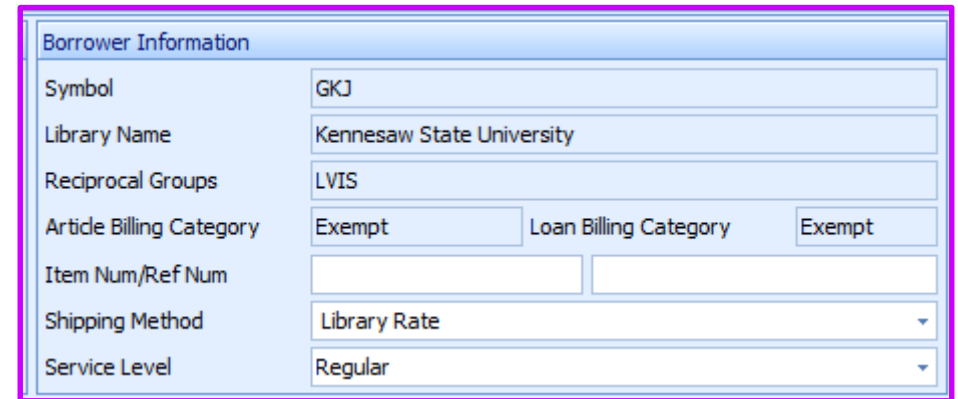
Why are they exempt from billing? Hmm...



A screenshot of the ILLiad Borrower Information form. The 'Reciprocal Groups' field is circled in purple. The form shows the following information:

Borrower Information	
Symbol	GKJ
Library Name	Kennesaw State University
Reciprocal Groups	
Article Billing Category	Exempt
Loan Billing Category	Exempt
Item Num/Ref Num	
Shipping Method	Library Rate
Service Level	Regular

Ah! They're exempt because they're in LVIS.



A screenshot of the ILLiad Borrower Information form, similar to the one above, but with 'LVIS' entered in the 'Reciprocal Groups' field.

Borrower Information	
Symbol	GKJ
Library Name	Kennesaw State University
Reciprocal Groups	LVIS
Article Billing Category	Exempt
Loan Billing Category	Exempt
Item Num/Ref Num	
Shipping Method	Library Rate
Service Level	Regular

Priority Lending Processing

For this you'll need:

1. A **list of symbols** for libraries to receive priority processing
2. Establish a group in **ILLiad Client**
3. Create a custom queue in **ILLiad Customization Manager**
4. Create a **routing rule** to custom queue for a group

or...

1. Create **import queues** in ILLiad Customization Manager
2. Create **custom queues** in ILLiad Customization Manager

Priority Lending Processing Using Groups

- Create group in ILLiad Client: **System Tab → Groups Maintenance**
- Group ID will appear when you save

Group Name	Guest Researchers
Lending Due Date Override	30
Group ID	25

The screenshot shows the ILLiad Customization Manager interface. On the left is a tree view with 'System' expanded to 'CustomQueues'. On the right, a table lists various queues. Below the table is an 'Edit Row' section for the selected queue.

QueueName	ProcessType	NVT...
Awaiting Acquisitions Review	Borrowing	ILL
Awaiting Conditional Processing	Borrowing	ILL
Awaiting DEN DD Stacks Searching	Doc Del	ILL
Awaiting Direct Request Sending	Borrowing	ILL
Awaiting HSL DD Stacks Searching	Doc Del	ILL
Awaiting LIB USE ONLY Notification	Borrowing	ILL
Awaiting MERLIN Processing	Borrowing	ILL
Awaiting MNL DD Stacks Searching	Doc Del	ILL

QueueName	ProcessType	NVTGC
Awaiting Priority Lending Processing	Lending	ILL

Create a custom queue in ILLiad Customization Manager: **System → CustomQueues**

RuleNo	19
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Lending Request Processing
MatchString	t.LendingLibrary in (select lenderstring from groupslink where group number = '25')
NewProcessType	Lending
NewTransactionStatus	Awaiting Guest Researcher Processing
RuleDescription	Routes incoming GR requests to a custom queue.

Create a routing rule in the ILLiad Customization Manager **System → Routing** to route incoming lending requests from group members to a custom queue using the **Group ID**

Priority Lending Processing Using Import Queues

Create a custom queue for priority processing

The screenshot shows a tree view on the left with 'Import Queues' selected. On the right, the 'BorrowerStatus' table is displayed with the following data:

Borrower	Status	NVTGC
0	Awaiting Lending Request Processing	ILL
1	Awaiting Conditional Request Processing	ILL
2	Awaiting Renewal Request Processing	ILL
ABC	Awaiting Priority Lending Processing	ILL
XYZ	Awaiting Priority Lending Processing	ILL

The screenshot shows a tree view on the left with 'CustomQueues' selected. On the right, the 'CustomQueues' table is displayed with the following data:

QueueName	ProcessType	NVT...
Awaiting Acquisitions Review	Borrowing	ILL
Awaiting Conditional Processing	Borrowing	ILL
Awaiting DEN DD Stacks Searching	Doc Del	ILL
Awaiting Direct Request Sending	Borrowing	ILL
Awaiting HSL DD Stacks Searching	Doc Del	ILL
Awaiting LIB USE ONLY Notification	Borrowing	ILL
Awaiting MERLIN Processing	Borrowing	ILL
Awaiting MNL DD Stacks Searching	Doc Del	ILL

Below the table is an 'Edit Row' form with the following values:

QueueName	Awaiting Priority Lending Processing
ProcessType	Lending
NVTGC	ILL

In the **Lending** → **Import Queues** → **BorrowerStatus** table, create an entry for each library symbol assigned to that queue

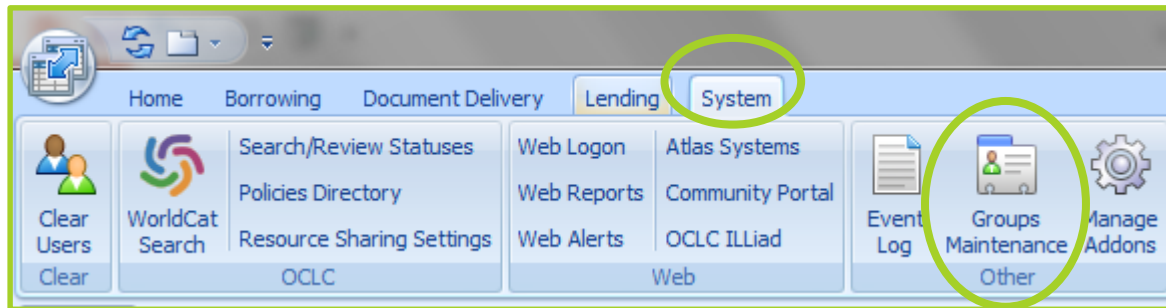
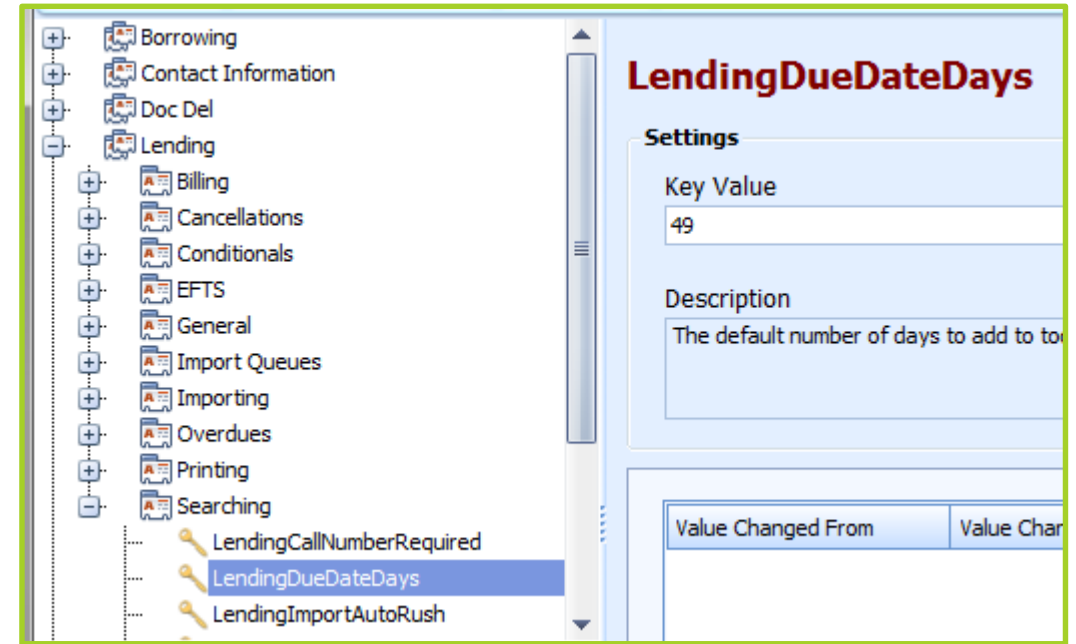
Specific Loan Periods

For this you'll need:

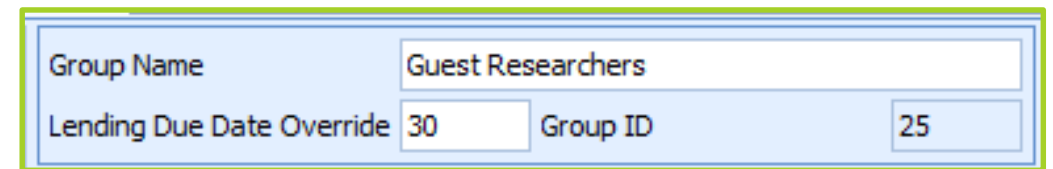
1. A **list of libraries** to receive specific loan period
2. To establish a group for these in **ILLiad Client**
3. To assign **Lending Due Date Override** to the group

Specific Loan Periods

- Default loan period is set by a Key Value in ILLiad Customization Manager: **Lending** → **Searching** → **LendingDueDateDays**
- Override for a group in ILLiad Client

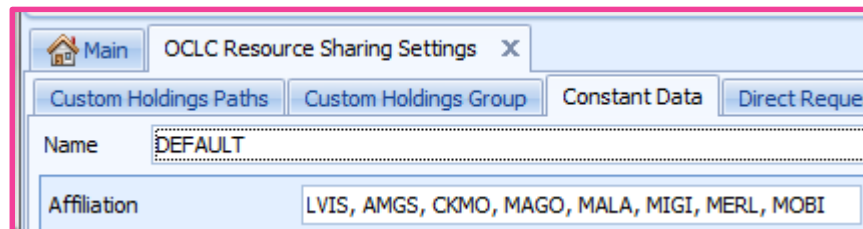
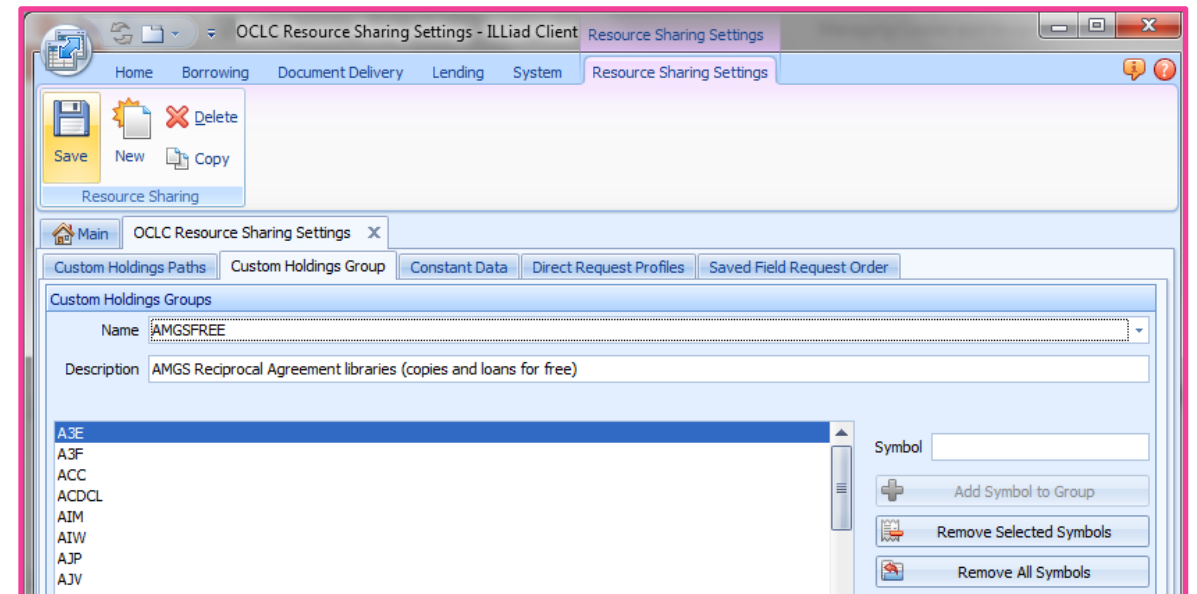
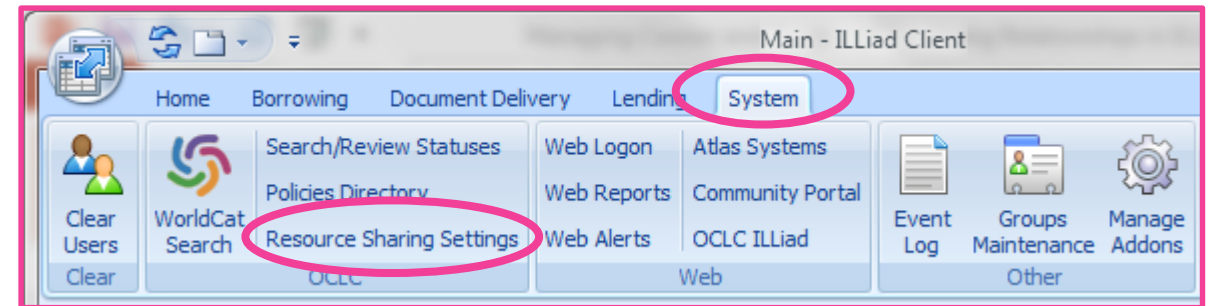


Lending Due Date Override can be larger or smaller than the default loan period



Maximize Your Borrowing Power

- Custom Holdings groups and paths to prioritize borrowing from reciprocal and courier groups
- Direct Request profiles for unmediated requesting from groups you can count on
- List your affiliations in your Constant Data



Overlapping Agreements

- Libraries in multiple relationships with you? Multiple connection points to couriers?
 - Pick the strongest or closest relationship (the one you're least likely to lose)
 - Develop some guidelines for how you choose to handle this and be consistent
 - Helps you evaluate your actual use of the relationship, rather than potential use
- Agreements have the same terms
 - Simplify as much as possible
 - Ex. billing categories for each agreement vs. one billing category for agreements with similar charges
- What is most beneficial to your patrons? Elevate those agreements.
 - Faster service
 - Longer loan periods
 - More likely to supply

Keeping Information Current Using Checklists

IMPLEMENTATION CHECKLIST

Mailing Labels & Courier Groups in ILLiad

WHAT YOU'LL NEED

- Examples of courier mailing labels
- A list of participating libraries, addresses, and courier codes (or use the label maker)
- Access to customize the ILLiad Client layout
- Access to the ILLiad Customization Manager
- Access to customize the ILLiad print templates
- Time and labor to create and/or edit ILLiad address records for participating libraries

1. CUSTOMIZE SHIPPING METHODS IN CUSTOMIZATION MANAGER

- In System Billing → Setup → BillingShippingFees table, create shipping methods for couriers with ProcessType = **Landing**.
- Check your Landing → Importing → LandingDefaultLoanShipping & LandingDefaultArticleShipping keys to make sure they match an available shipping method.
- Optional: to ensure your default shipping method appears at the top of the dropdown menu in the ILLiad Client, add a space before the shipping method name you want to appear first on the list. Example: instead of "Library Rate" enter " Library Rate".
 - Set your Landing → Importing → LandingDefaultLoanShipping & LandingDefaultArticleShipping keys to match your preferred default shipping method; enter a space in front of the name to be consistent with the change made above.

2. CUSTOMIZE THE ILLIAD CLIENT LAYOUT

- On the Lender Address screen, right click and select "Customize Layout."
- Repurpose unused fields for any courier codes.

ILLiad documentation for customizing the client layout:

<https://prometheus.atlas-sys.com/display/ILLiad/Customizing+the+Client+Layout>

3. ENTER AND STANDARDIZE ADDRESSES FOR COURIER LIBRARIES

- With your list of participating libraries, ensure that you have a record for each courier library in ILLiad. You may need to create address records for some libraries if you do not have existing records.
- Enter address information the same way for each library. (Ex. street is always in the Address 2 field)
- Customize ILLiad Client layout to rename any fields on the Lender Address screen and avoid ambiguity.
- Using the dropdown menus in the Lender Address record, assign each library to a Default Shipping Loan and Default Shipping Article method for the appropriate courier group.

4. CUSTOMIZE THE ILLIAD PRINT TEMPLATES

- Find the BorrowingReturnAddressLabels.doc template and make a COPY; work from the copy
- String together "If...Then...Else" statements in each label field; include a statement to ensure a label will print a shipping method is not assigned and the shipping method field is blank.
- Apply the same changes to your LandingLoanShippingLabels.doc (or your LandingLoanSlips.doc, if your shipping labels live there).

ILLiad documentation for print templates: <https://prometheus.atlas-sys.com/display/ILLiad/Print+Templates>

Created by Jen Sehn-Sater, Head of Resource Services & Graduate Student Services at the University of Missouri-Kansas City Libraries, to accompany the 2014 ILLiad Conference presentation "Maximize Courier and Reciprocal Borrowing Relationships in ILLiad."

MAINTENANCE CHECKLIST

Courier and/or Reciprocal Groups in ILLiad

GROUP NAME:

USING A GROUP ROSTER LAST UPDATED:

START OF UPDATE:

DATE OF COMPLETION:

WHAT YOU'LL NEED:

- A list of participating libraries (organized A-Z by OCLC symbol works best)
- Access to ILLiad Client: System Tab → Groups Maintenance
- Access to ILLiad Client: System Tab → Resource Sharing Settings

1. UPDATE GROUPS IN GROUPS MAINTENANCE

- Locate your group in the ILLiad Client: System Tab → Groups Maintenance
- Scroll down your list of participating libraries and compare to the list of OCLC symbols in your group, noting any that need to be added or removed. You will need these notations later.
- For those that need to be added: enter their symbol in the landing string field and add to the group. Once added, open their Lender Address record and assign the appropriate billing category and/or shipping method based on affiliation. *Note: for new members, you may need to create address records for them before you can assign them to a group. Remember to also assign the correct billing category and/or shipping method.*
- For those that need to be removed: click on their address record to open it. Change their billing category and/or shipping method if necessary. Save changes and close their address record. Remove them from the group.

2. UPDATE GROUPS IN CUSTOM HOLDINGS

- Locate your group in the ILLiad Client: System Tab → Resource Sharing Settings → Custom Holdings Groups
- Scroll down your list of participating libraries and compare to the list of OCLC symbols in your group, noting any that need to be added or removed. (You may use the notations you made in the previous step.)
- For those that need to be added: enter their symbol to add the library to the group.
- For those that need to be removed: remove the symbol from the group.
 - Consider adding the removed symbol to another Custom Holdings group, based on your remaining affiliations with that library (this is when those overlapping agreements come in handy).

Created by Jen Sehn-Sater, Head of Resource Services & Graduate Student Services at the University of Missouri-Kansas City Libraries, to accompany the 2014 ILLiad Conference presentation "Maximize Courier and Reciprocal Borrowing Relationships in ILLiad."

Keeping Information Current

- Generate group rosters using the OCLC Policies Directory
- Delays in updating?
- Roster on the group's website

Welcome
University of Missouri-Kansas City (UMK)
Miller Nichols Library; Health Sciences Library; Dental Library [Sign Out / Help](#)

Search

Institution Information

Search By
Group Symbol
LVIS
Countries (0)
States/Provinces (0)

1 - 20 of 2991 Results

[Display Symbols](#) [« First](#) [1](#) [2](#) [3](#) [4](#) [5](#) [Next »](#)
[Last »](#)

INSTITUTION ▲	SYMBOLS	SUPPLIER	DAYS TO RESPOND	FEES	LOCATION
Aarp. Res Information Center	NGR	No	Copies: 4 days Loans: 4 days	Copies: 0.00 USD Loans: 0.00 USD	Washington , DC US
			Copies: 4		

[ATLANTA REG COUN FOR HIGHER EDUC](#), [CENTER FOR RES LIBR GROUP/LINDA HALL LI](#), [GEORGIA ONLINE DATABASE](#), [GIF-N AM COORD COUN ON JAPANESE LIBR RES](#), [LIBRARIES VERY INTERESTED IN SHARING](#), [LYRA](#), [OCLC RES SHARING/KNOWLEDGE BASE PART](#), [OCLC TRAINING & ILLIAD PARTICIPANT](#), [SO6 GAC/UL](#), [SOLINE](#)

Symbols

A07 A1T A2A A3E A5Q AA3 AAI AAL AAN AAU AB0 ABF ABI ABJ AC4 AC6 ACT ACY AD# AEI AEJ AEK AEU AEZ AF3 AFB AFP AFQ AFU AGH AGM AHE AHS AHW AIC AID AIM AIR AJR AKC AKD AKH AKK AKP AKR AKU AL5CW ALGPI ALK ALR AMC AMH AML AMN AMO AMP ANC ANE ANG ANM ANO ANPPL ANTCH AP4 AP5 AP8 APPUL ARGDA ARGOS ARGSE ARMRL ARTIB AS4 ASB ASC ASHDL ASJ ASL ASP AST ASTON ASU ASX ASZ AUG AUV AV@ AVE AVF AVL AVMAR AVW AWC AXJ AY@ AYP AZ1 AZD AZE AZH AZK AZM AZN AZO AZP AZT AZY B2A B3H B4C B4N B5N BA6 BAB BAL BAY BAZ BBH BC@ BCF BCI BCM BCN BCO BCP BCW BCZ BDR BEA BEN BER BET BFI BGI BHS BIC BJE BJF BJJ BJK BJM BKE BKL BKM BKS BKY BLC BLL

Keeping Information Current

- How often should you update groups?
 - At least annually
 - Take advantage of slow periods
 - Keep tabs on when groups update their rosters
 - Keep records of when you last updated (use the checklist!)
- Pay attention to listserv announcements
 - Managers: train and task a staff member with following listservs and updating as needed
- Communicate to your department
 - Clear guidelines and procedures
 - No one should be editing groups or changing shipping methods willy-nilly

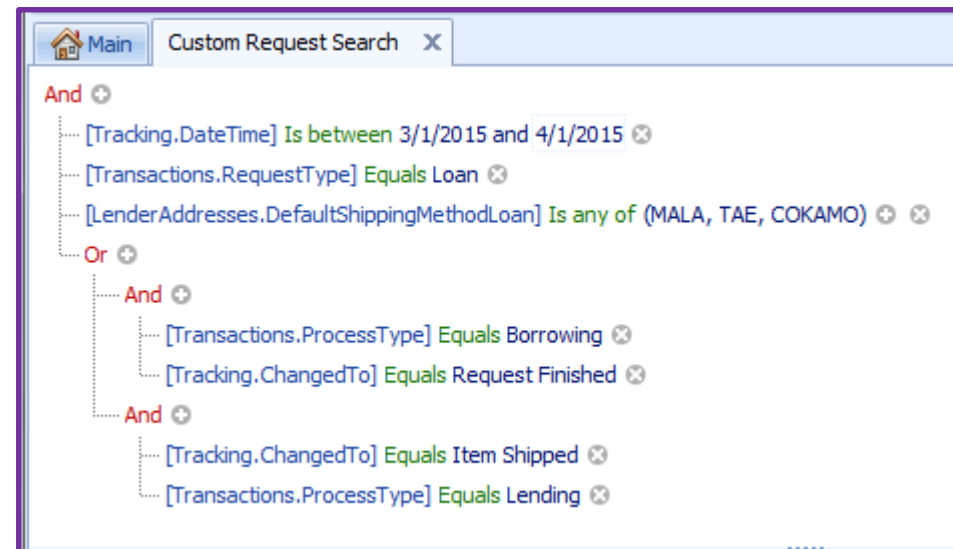
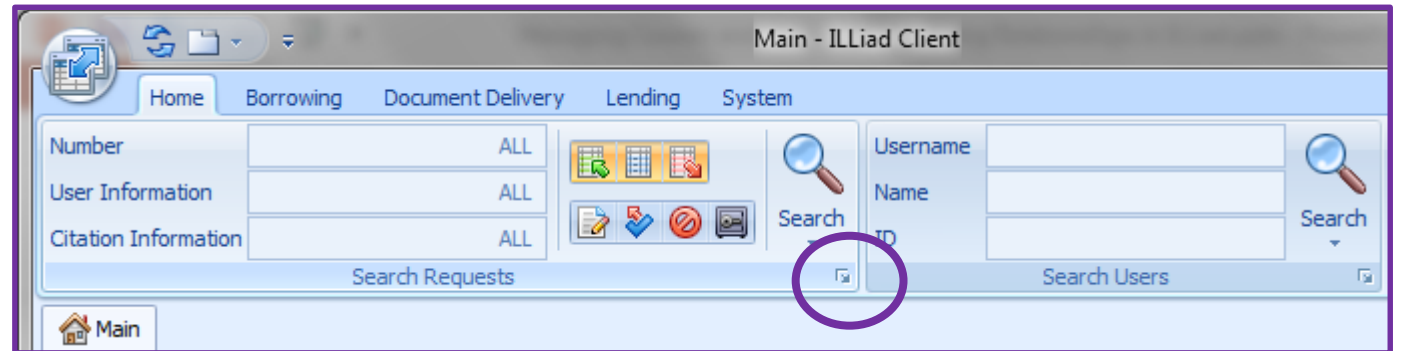
Evaluate for Effectiveness

For this you'll need:

1. To identify **what you want to know** (what do you want to measure?)
2. Access to **ILLiad Web Reports**
3. Access to **ILLiad Custom Search** (in ILLiad Client)
4. Knowledge of **Microsoft Excel** and using formulas
5. (Optional) To connect your ILLiad SQL database with **Microsoft Access**

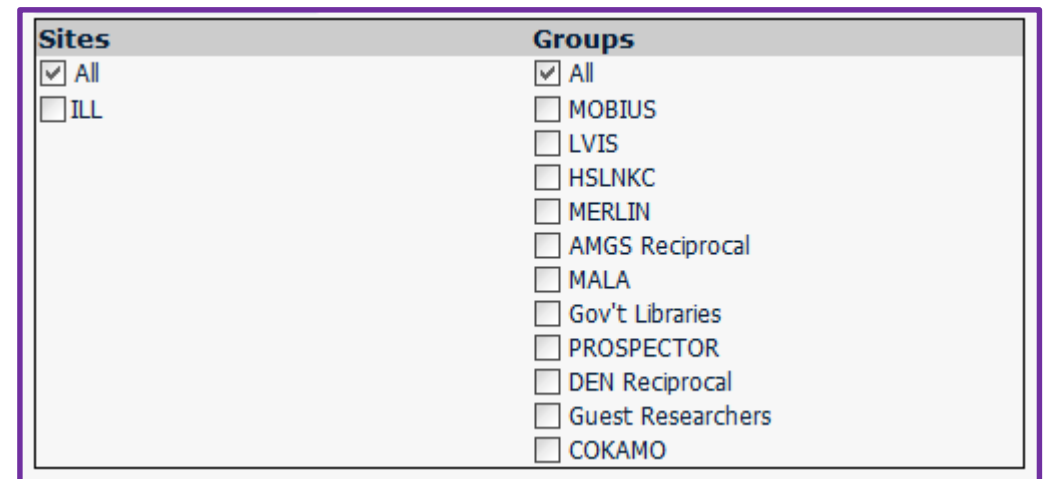
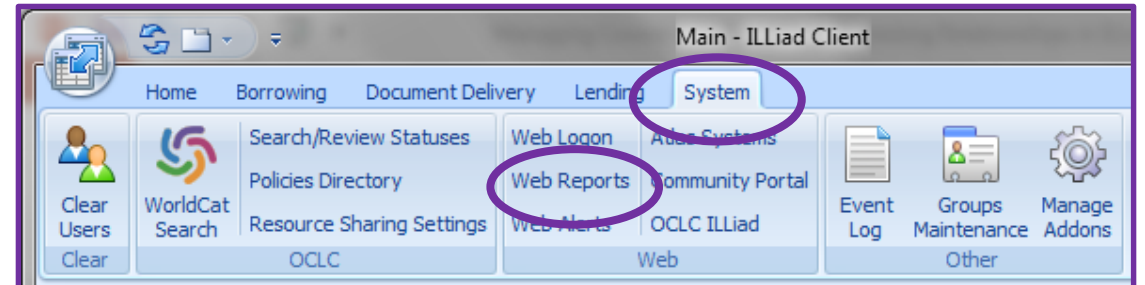
Evaluate for Effectiveness Courier Groups

- How many items you ship through a courier
 - Borrowing returns + lending loans
- Use Custom Request Search
- Can export to Excel
- Variations on this search can produce:
 - How many items you receive from courier libraries
 - How many items you lend to courier libraries
 - How many items you ship through regular mail



Evaluate for Effectiveness Courier Groups

- Use ILLiad Web Reports
- Easier if you create groups in ILLiad Client
 - But gets complicated with multiple group affiliations (develop consistent guidelines!)
- Web Reports:
 - Borrowing → Who We Borrow From
 - Lending → Who We Lend To
 - Borrowing & Lending → Fill Rate Statistics
 - Borrowing & Lending → Turnaround Time
 - Lending → IFM Charges
 - Administrative – Lending Library (for evaluating individual library performance)



Evaluate for Effectiveness Reciprocal Borrowing Groups

- Are you being charged when you shouldn't?
- OCLC Statistics: IFM Reports
 - <http://www.stats.oclc.org/>
 - ILL Fee Management Program Borrower Report
 - Review monthly charges (compare to ILLiad groups lists)
 - Task a staff member!
- Docline EFTS Reports
 - Reports → Monthly Statement for previous month

[About WorldShare Interlibrary Loan](#)
[Comments](#)
[Help](#)

Period: February 2016

ILL Fee Management Program Borrower Report

REPORTING PERIOD: February 2016
 INSTITUTION: UNIV OF MISSOURI, KANSAS CITY
 SYMBOL: UMK

Lender Symbol	Institution Name	Request Count	ILL Fee
Show All Requests		Total	102 \$3741.00
AAM	AUBURN UNIV AT MONTGOMERY	1	\$5.00
AUM	UNIV OF MASSACHUSETTS AMHERST	1	\$15.00
AZS	ARIZONA STATE UNIV	6	\$60.00
AZU	UNIV OF ARIZONA	2	\$40.00
BGU	BOWLING GREEN STATE UNIV	1	\$20.00
BNG	STATE UNIV OF NEW YORK, BINGHAMTON LIBR	1	\$15.00

Detailed Borrow Summary for MOUMKC

Lender LIBID	Request #	Citation
CAUCDA	38500444	Nursing (Auckland, N.Z.) - Vance, De 2013():67-75
CAUCDA	38526772	Magnesium Research : Official Organ Of The International Society - K?Seoglu E;Talaslioglu A;G?N?L A;Kula M 21(2):101-8
CAUCDA	38546434	Arquivos Brasileiros De Cirurgia Digestiva : Abcd = Brazilian Arc - Valezi A;Herbella F;Mali-Junior J;Marson A;Biazin C 26(2):120-3
CAUSTA	38406394	2015 Expert review of anticancer therapy - 15(1):17-26
CAUDN	38419859	1995 Implant Society : [Periodical] - 6(1):12-4

Evaluate for Effectiveness

Ultimate Library Challenge



- Why are you staying in a relationship if it's **not working**?
- Try to improve
 - The key to good relationships is...**communication**!
- It's time to break up
 - Make your case with **evidence**, not anecdote

All relationship issues take time to work out.

- Commit your time/staff time
- Enlist student or volunteer help
- Take advantage of slow periods
- Do one piece at a time
- You may not get it right the first time
- You get out of it what you put into it



QUESTION TIME!

Thanks for attending!