

Integrating ILLs

**Combining consortial loan
programs with ILLiad workflows**

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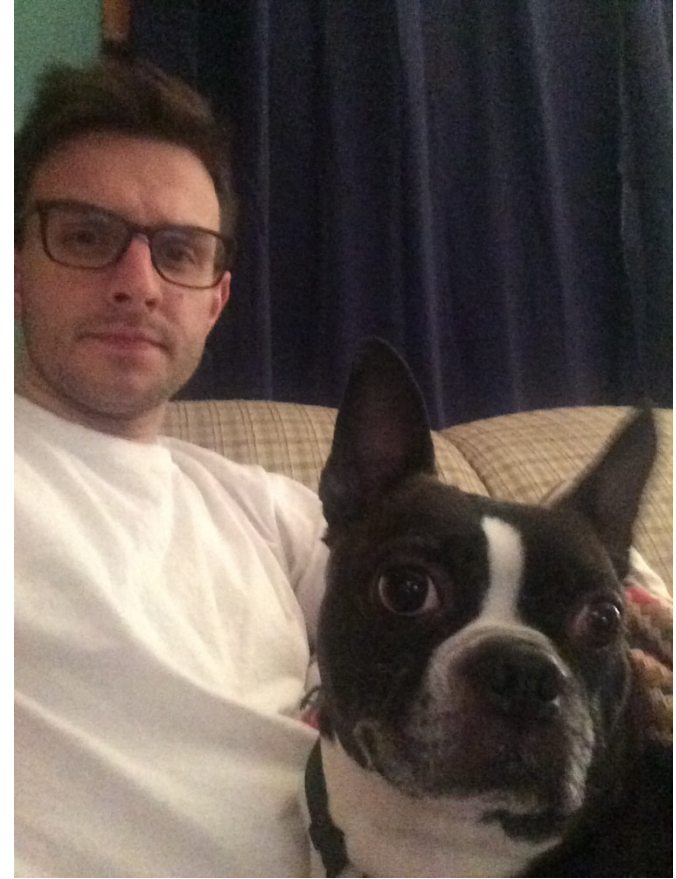
DePauw University (IDU)

Goals & Objectives

- Workflow
- Comparison
- Dis/Advantages
- For the future

Background

- Me! Kayla Birt Flegal
- DePauw University & University Libraries
- PALNI



PALshare

“Support opportunities for shared processes, services, and information resources.”

- PALNI-wide resource sharing through Worldshare Management Services (WMS)
- Direct hold/loan to patrons of other libraries, not a loan between libraries.



ILLiad®

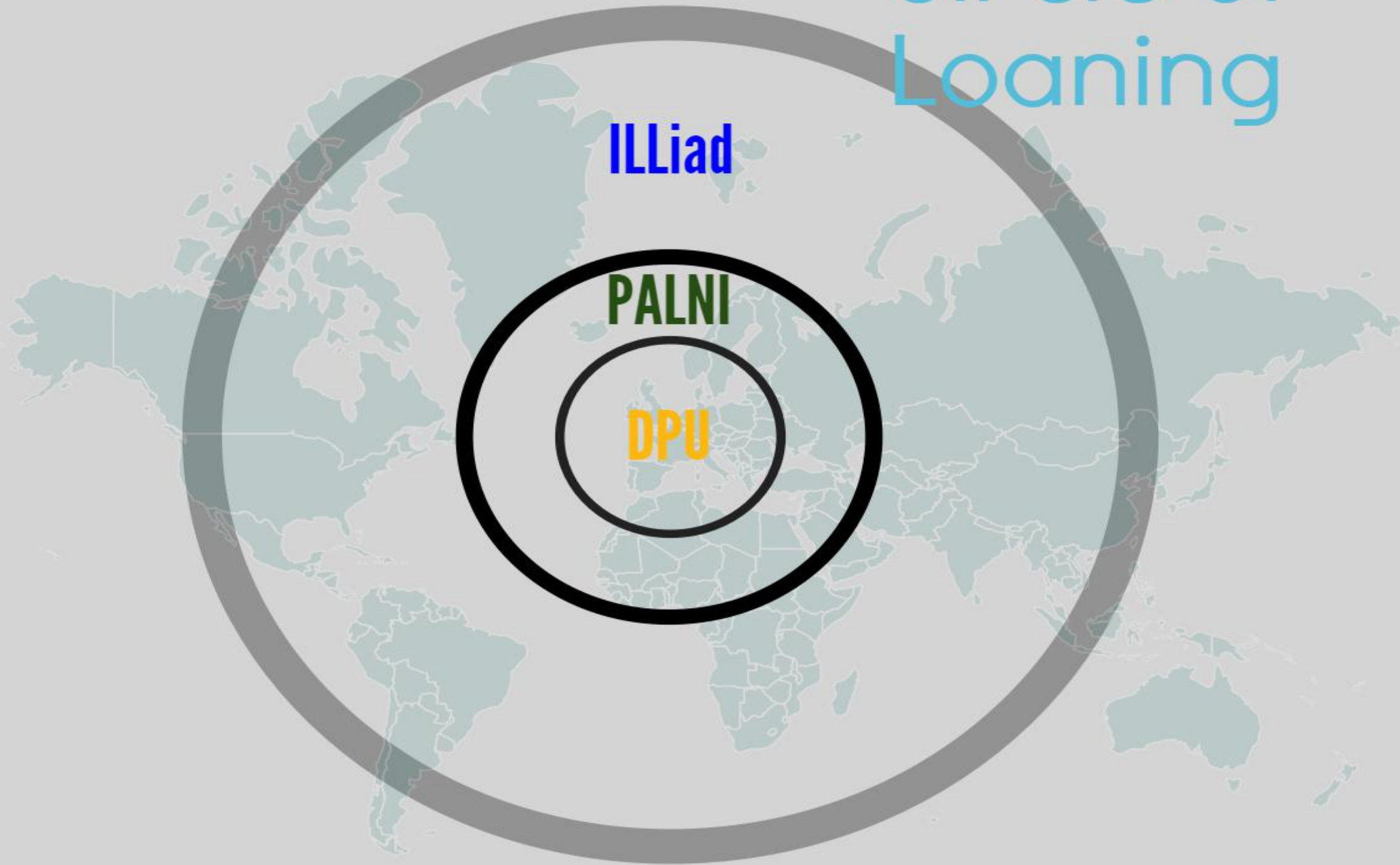
Loan Time	60 days for monographs 14 days for media	Dependent on lending library
Renewals	No renewals	Yes, if approved by lending library
Items available for loan	Books & Media	Books, media, and electronic & print journal articles

Circle of Loaning

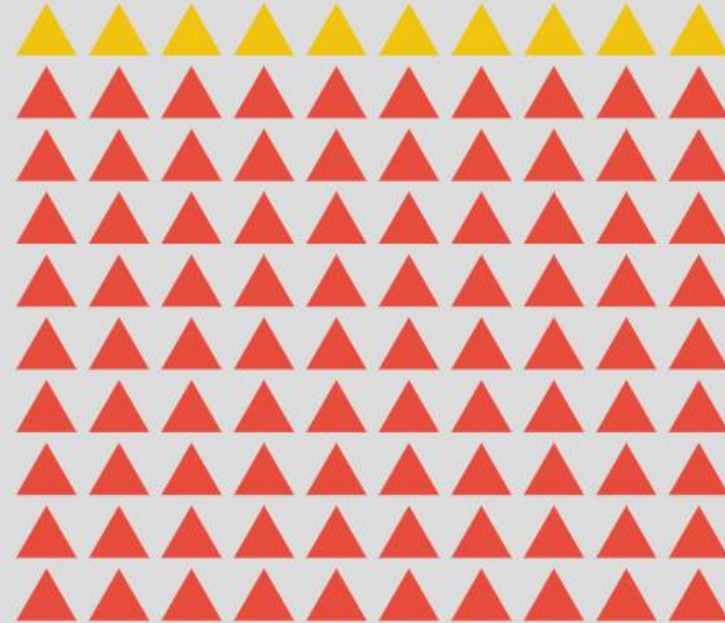
ILLiad

PALNI

DPU



Volume of loans per system



■ PALshare ■ ILLiad

Fall 2015 Filled Loan Requests

PALshare Lending Workflow

WMS Pull List

Updated: 03/13/2016 7:04:34 PM

Call Number	Format	Title	Shelf Location	Barcode	Enumeration	Patron Name	Borrower Category	Free Text	Request Date
Horror K		The walking dead : a continuing story of survival hor...	Recreational Reading	39307012971358		Heather	IFC Staff		03/11/2016 3:09:05 PM



Find item on shelf and 'Check In' to WMS



- Assist Patrons
- Check In
- Discover Items
- Reports
 - Pull List
 - Clear Hold Shelf

Check In

Send Women screenwriters today : their lives and words / to Saint Joseph's

Item Barcode: Check In

Check In Mode: Auto

Check In Date: 03/14/2016

Receipt Option: Network Printer

Title	Barcode	Check Out Date	Due Date	In Date	Patron Name	Action
Women screenwriters today : their lives and words /	38307012352246			03/14/2016 4:40:32 PM		SEND TO: Saint Joseph's (Saint Joseph's College)

Clear Receipt



- Place a PALshare label on the item.
- Fill in 'Pick Up Location' with the destination library's name.
- Send via statewide courier service.
- Item typically arrives in 1-4 days.

PALNI

 **PALShare**

PATRON

DUE DATE

PICK UP LOCATION

60 Day Loan

How did we do? <http://smarturl.it/palshare>

OWNING LIBRARY: DEPAUW UNIVERSITY

DATE PLACED ON HOLD SHELF

DO NOT REMOVE THIS LABEL

PALNI

PALshare Borrowing

The screenshot shows a library website interface. At the top, the DEPAUW UNIVERSITY Libraries logo is visible. A search bar contains the text "librarian stereotype". To the right of the search bar are buttons for "Library Links" and "Kayla". Below the search bar, there are links for "Advanced Search", "View Filters", "27 Results", "Chat with a librarian", and "My List".

The main content area displays search results. The fifth result is highlighted: "5. [The image of librarians in cinema, 1917-1999](#) by [Ray Tevis, Brenda Tevis](#)". Below the title, there is a small book cover image, the text "Print book ©2005", "OCLC Number: 57243261", "Database: WorldCat", and "Held by: PALNI Libraries".

A "Place Hold" dialog box is overlaid on the search results. The dialog box contains the following information:

- Place Hold** (with a close button)
- Kayla, you are requesting a hold for:
- [The image of librarians in cinema, 1917-1999](#)
- by [Ray Tevis, Brenda Tevis](#)
- Print book ©2005
- OCLC Number: 57243261
- Database: WorldCat
- Held by: PALNI Libraries

Below the book information, there is a "Pickup location" dropdown menu set to "Roy O. West Library".

There is a section for "Set hold schedule (optional)" with a checked radio button. It includes two sub-sections:

- Set hold request dates:** with input fields for "Start hold" (mm/dd/yyyy) and "End hold" (mm/dd/yyyy).
- Set hold not needed dates:** with input fields for "From" (mm/dd/yyyy) and "To" (mm/dd/yyyy).

At the bottom of the dialog box are "Cancel" and "Submit" buttons.

In the background, the search results continue with "6. [Feminist thought in American...](#) by [Christina D. Baum...](#)", "7. [Stereotype and status : librari...](#) by [Pauline Wilson](#)", and "8. [You don't look like a librarian : shattering st...](#) by [Ruth Kneale](#)".

PALshare Borrowing Workflows

Requests Arriving

- Checking the item in:
 - Notifies the lending library that item arrived
 - Notifies patron that item is ready
 - Notifies borrowing library of patron information for Holds Shelf

Requests Returning

- Checking the item in:
 - Removes item from the patron account.
 - Marks the item 'in transit' in WMS
 - Item ready for outgoing mail

Assist Patrons

Check In

Discover Items

Enter barcode

Go

My Library Holdings

Keyword

Search Clear

Advanced Search

Reports

Check In

Item Barcode: Check In

Check In Mode: Auto

Check In Date: 03/14/2016

Receipt Option: Network Printer

<input type="checkbox"/>	Title	Barcode	Check Out Date	Due Date	In Date	Patron Name	Action
No data to display							

Clear Receipt

How do they compare?

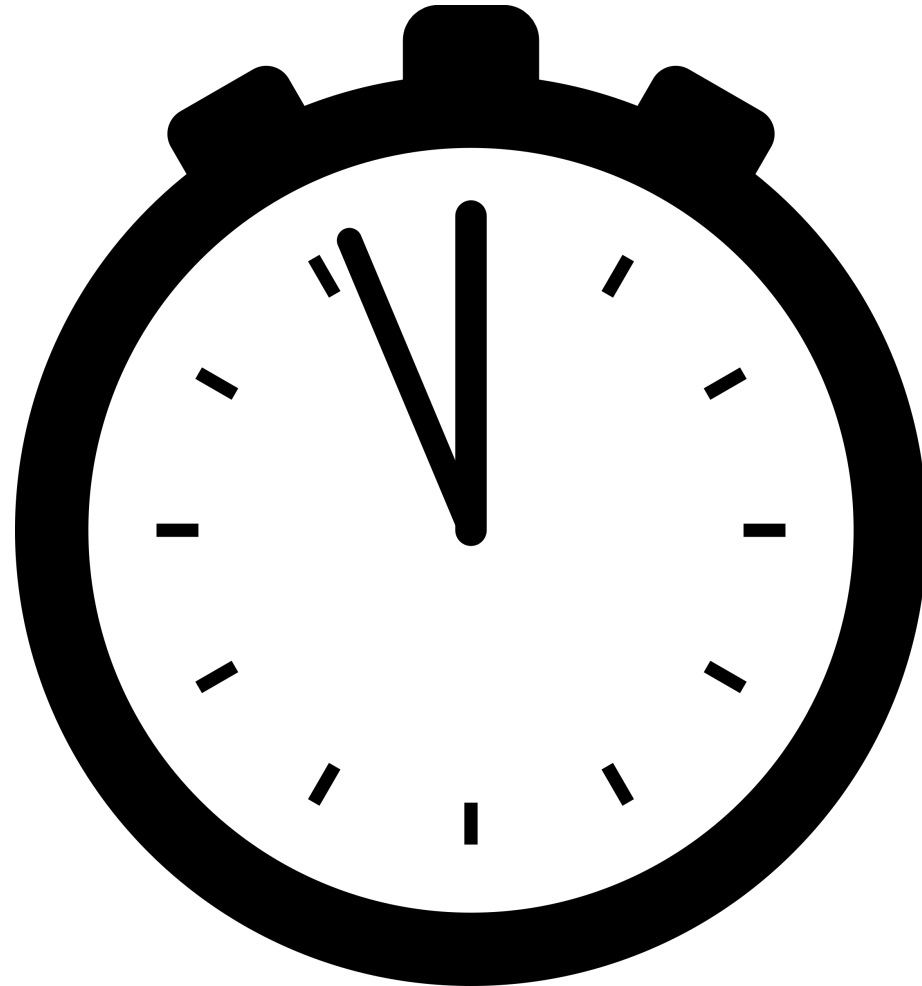
PALshare

- Check pull list. First pulled (and checked in), first served.
- Item sent via state courier
- Item checked in to WMS, placed on Hold Shelf.

ILL

- ILL staff checks availability, makes targeted requests, goes into lending stream.
- After request is accepted, items are sent via courier (if from IN) or USPS
- Item checked in to ILLiad, and placed on ILL Shelf.

How does PALshare affect ILL workflow?



Patron perspective

You can get this item for me? Great!

Points of confusion:

- Marketing
- Different loan periods
- Renewals
- Multi-volume requests
- Two buttons

Place hold 

Anderson University

Check Availability

Butler University

Check Availability

Earlham College

Check Availability

Goshen College

Check Availability

University of Indianapolis

Check Availability

 Libraries Worldwide

3,843 Libraries

Request Item 

Search location:

11 East Larabee Street, , Greencastle, US-IN



Advantages

- Integrates well with WMS
- Utilizes state courier, a service for both
- Automates requests and emails well
- Patron satisfaction

Disadvantages

- Two separate systems...two sets of oversight, management
- Data gathering
- Confusion for circulation workers and staff

For the future...

- Cannot look at it as PALshare v. ILL – they are not directly comparable
- Continue to consistently meet with PALshare partners
- Multi-volume requests, data gathering in PALshare
- Patron and circulation worker training

Clearing up the confusion in order to achieve harmony!

