Working Together to Get It For Them

ILL and Document Delivery at the UNT Libraries
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UNIVERSITY OF NORTH TEXAS

- 37,000 + Students
- 4 libraries in Denton
- 2 Remote storage facilities in Denton
- UNT at Dallas
- UNT Dallas College of Law
- UNT New College at Frisco (no library facility)
Stats: 2014/2015

- **Borrowing:**
  - Processed 18,000+ requests
  - 1,089 faculty ILL book deliveries

- **Document Delivery:**
  - Processed 3,600+ requests
  - 1,438 faculty UNT book deliveries

- **Online Holds:** 22,800+
2011: ACCESS SERVICES

CIRCULATION + INTERLIBRARY LOAN = ACCESS SERVICES
Library Services Desk
Our Full-Time Staff

- Interlibrary Loan - Borrowing
  - ILL Librarian
  - Borrowing Supervisor
- Circulation Support Services (Doc Del)
  - Circulation Support Services Supervisor
  - Document Delivery Manager
  - Online Holds Manager
Branch Libraries

- Library Specialists:
  - Eagle Commons Library
  - Discovery Park Library
  - Remote Storage (Library Annex)
- Staff assist with Borrowing, Document Delivery, and Lending
Advantages

- Reorganization: Staff dedicated to Document Delivery services
- History of collaboration
- Experience
- Strong customer-service attitude
- Location
ILLiad Collaboration: ILL and Document Delivery

- 2009 Distance Learning
- 2009 Remote Storage
- 2009 Faculty Article Delivery
- 2011 Articles for All!
- 2011 Faculty Book Delivery
- 2014 Online Holds (Sierra)
Remote Storage Requests (2009)

- ILL staff route requests to Document Delivery
- Awaiting Document Delivery processing
  - Custom Email sent to Remote Storage staff
  - Email routing sends request to “Awaiting Document Delivery Stacks Searching”
- Remote Storage staff scan articles via ILLiad
Distance Learning Services  (2009)

- Unique set of ILLiad web pages based on status “Dist Learning”
- Delivery locations: Home or other campus location
- Notification emails for new locations
Routing Rule Match String

- u.Status = ‘Dist Learning’ and t.DocumentType = ‘Reserves’
- Sends requests for Reserve items to “Awaiting Document Delivery Processing”
Faculty Article Delivery (2009)

- Unique set of web pages based on status “Faculty”
- Copy Request Form
  - Cited Date field: At UNT/Not UNT
  - “At UNT” items automatically routed to “Awaiting Document Delivery Processing”
Routing Rule Match String

- u.Status = ‘Faculty’ and t.CitedDate = ‘At UNT’
Article Delivery for Everyone (2011)

- Why?
  - Providing research support to our customers
  - Moving more items to Remote Storage
  - ILL staff route requests to Awaiting Document Delivery processing
Doc Del Item Not Found?

- Doc Del Routes to Borrowing
- Custom queues:
  - Lynne’s Requests
  - Pam’s Requests
Custom Emails for Branch Libraries + Email Routing

- Scan article for Document Delivery
- Pull book for Document Delivery
- Requests Routed to “Awaiting Document Delivery Stacks Searching”
- Doc Del staff use pull slips to monitor requests
Faculty Book Delivery (2011)

ILL Staff Route
Request to Doc Del

Item Found

Notification Email: Loan Will Be Delivered

Not Found? ILL
Faculty Book Delivery: ILLiad + Online Holds

- ILL Staff Route Request to Doc Del
- Doc Del Staff Place Hold
- Item Found
- Notification Email: Loan Will Be Delivered

Not Found? ILL
UNT Faculty Book Delivery

- Campus mail
  - Conferred with Campus Mail services before implementing
- Reusable mailers: Faculty can return mailers to us via Campus Mail
- Delivery Time: About 24 hours
- No problems with lost items
UNT Faculty Book Delivery

UNT Libraries - Access Services Document Delivery

DEPARTMENT:_________________________

NAME:__________________________

UNT Libraries - Document Delivery

circ@unt.edu (940)565-2413

Please return mailer by inter-campus mail to Libraries-Access Services for reuse.
Online Holds - Sierra (2014)

- 25 holds at a time
- Self-Service Hold shelf (Willis Library): 24/7
- 8 additional pickup locations
- Items remain on hold shelf for 5 days
- 2,100+/month; about 7% not picked up
- Item not available? ILL
Self-Service Hold Shelf

Step 1: Locate Your Item

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Items are arranged alphabetically by last name

First 3 letters of your last name
Last 4 digits of your UNT ID Number
Date Hold item will be removed from shelf

Step 2: Checkout the Item

Items may be checked out at the Library Services Desk, the Self-checkout machine, or at the 24 Center Desk if the Library Services desk is closed.

If you are not able to locate your hold item, or if you no longer need your hold, please visit the Library Services Desk for assistance.
ILLiad Request Fields

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<thead>
<tr>
<th>Citation Information</th>
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<tr>
<td>Cited In</td>
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<td>Date</td>
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<table>
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<tr>
<th>Date</th>
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<tr>
<td>11/24/2015</td>
<td>Catalog record: <a href="http://ill.library.unt.edu/record=b1000171~S12">http://ill.library.unt.edu/record=b1000171~S12</a></td>
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Catalog Request: Routing Rule

- `t.RequestType = 'Article'` and `t.CitedIn LIKE '%Catalog Request%'`
- Routes article requests originating from online catalog directly to Document Delivery module.
UNT Book Requested Via ILLiad Instead of Online Hold

- Request Routed To Doc Del
- Hold Placed for Doc Del Staff
- Item Found: Update ILLiad Request
- Item Routed to Pickup Location
- Hold notification sent to patron

Not Found? ILL
Spring 2015: Doc Del Overhaul

- Doc Del queues all moved to Doc Del module
- Doc Del emails all moved to Doc Del module and updated
- New Doc Del custom emails created
- Routing rules reviewed and modified
- Reasons for Cancellation
New Doc Del Custom Emails:

- New custom emails created for Doc Del: Cover common scenarios encountered by Doc Del staff
- Request Change Notification
  - “...exceeds copyright restrictions for electronic delivery. It has been changed to a Loan by the Document Delivery staff and will be delivered to your preferred delivery location.”
New Doc Del Custom Emails

- Requested Item Unavailable
  - “...is currently unavailable. The Document Delivery staff has routed this request to ILL Borrowing to determine if an alternate copy may be obtained.”
Doc Del Reasons for Cancellation

- Available - E-Resource
- Available - Library Use Only
- Available - Reserve Item
- Duplicate Request
- We are unable to complete the request by your deadline
- Other
E-books for Distance Learners

- Purchasing E-books
  - Document Delivery staff route request to “Pam’s Requests” with a note
  - Ordered via Gobi
  - Custom Flag
  - Patron notified when item available
Expanded Delivery Locations

- Eagle Commons Library (ECL)
  - Graduate Student Library Advisory Board (GSLAB) suggested the delivery location
  - ECL Library Specialist processes incoming/outgoing items
Expanded Delivery Locations

- UNT Dallas College of Law Library
  - No courier service between campuses
  - Doc Del mails both UNT books and ILL books to Law Library
  - Tracking numbers recorded in ILLiad
Expanded Delivery Locations

UNT New College at Frisco
- No library facility at this time
- UNT books mailed to home address
- No ILL books, but may be able to purchase an e-book
Frisco: Routing Rule

- t.RequestType = ‘Loan’ and u.NVTGC = ‘Frisco’
- Routes all Frisco loan requests to Doc Del
Troubleshooting

- Webcirc Checkouts
- Eagle Commons Library delivery
- Doc Del Processing at branch locations
WebCirc Troubleshooting
### Webcirc Troubleshooting

#### ILLiad Checkouts

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Webcirc Troubleshooting

- Custom Email: Over Due/Not Checked Out

“Due to a technical problem, this item may not have been checked out to you. Please review any Interlibrary Loan items you currently have and return overdue items. If you still need an overdue item for your research, you may submit a new request.”
Eagle Commons ILL Delivery Issue

Coming?

Going?
Processing Document Delivery Article and Loan Requests – Discovery Park – ECL - Annex

Print out the loan or article request and look up the borrowing request by the Transaction Number in ILLiad.

Locate the requested item on the shelf:

If the item is not found, or if there are any other issues that prevent request processing, place a note in the ILLiad request and route the request to the Availing DD Resolution queue.

Place the printed slip in the book and put it in the courier box for the desired pick-up location. Home & ILL requests should be sent to Willis. They will be marked found upon receipt at their destination.

Scan and save the requested article or book chapter.

Select “Update Stacks Search” in the DD module. Search by the Transaction Number.

Select “Mark Found” Scan Now” and go to the request scanning pop up window.

Verify that each page is legible and that the scan is complete. Cropping, rotating, and editing features are only available for requests saved as ‘TIIF’ files. Select “Send via Odyssey” once verified.

In Sierra, place a hold in the patron’s name, include the Transaction Number in the hold note. Process hold and place on shelf.

In ILLiad, select “Update Stacks Search” in the DD module. Search by the Transaction Number.

Select “Mark Found”.

Add Note

Recent notes

This item was not on the shelf.