

To boldly go where we have never gone: Implementation of ILLiad WebCirc

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UNIVERSITY OF WISCONSIN-MADISON

2016 ILLIAD CONFERENCE

Agenda

Overview/History

Decision making process

Implementation process

Next steps

UW-Madison campus and ILL

42 campus libraries



UW-Madison ILL by the numbers

174,358 Borrowing, Lending, Document Delivery transactions processed

21,000 Borrowing nonreturnables filled

42 campus libraries

26 scanning libraries

22 Pick-up locations

7 Full-time staff

5.5 FTE's in student assistants

Circulation prior to conversion

1. Check into ILLiad – Update to Checked out to Customer
2. Give to circulation staff to create temporary record in Voyager
3. Route item to one of the pick-up locations.
4. Notify patron that item is available

****DO NOT REMOVE THIS BAND****

Pick Up Library: Memorial Library



Transaction Number: 2595787
IL Number: 141165610 OSU

ILL-

LASTNAME,FIRSTNAME

Title: Profiles of best practices in academic library interlibrary loan
Author: Kelsey, Paul

Number of Items: 1

There is a nonrefundable \$15 processing fee for any overdue ILL item. Check your My MacCat account for a possible renewal. Renewals are not guaranteed and are granted at the discretion of the lending library.



UW Madison Interlibrary Loan
Email: gzmilk@library.wisc.edu
Phone: 608 262 1193

****DO NOT REMOVE THIS BAND****

1

LASTNAME,FIRSTNAME

****DO NOT REMOVE THIS FLAG****

IL Number: 141165610 OSU

3/21/2015

Title/Author: Profiles of best practices in academic library interlibrary loan/Kelsey, Paul

Pick up Library: Memorial Library

****DO NOT REMOVE THIS FLAG****

Handle with Care: No
In Library Use Only: No

OSU TR-2894787



Interlibrary Loan
Univ. of Ill.-Madison
1400 S. Mathews Ave.
Champaign, IL 61820-1008

SHIP TO:
Ohio State University Libraries
Interlibrary Services
1699 Neil Avenue Mall
Columbus, OH 43210

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The Good, Bad, and the Ugly of the Old Process

GOOD

One account for patron

One system for circulation desk staff

BAD AND UGLY

Double entry

Delay in delivery to hold shelf

Hard to manage due dates

Hard to manage overdues



Should We Stay or Should We Go

STAY – How do we circulate ILL items in Alma

- What is the loan period
- What is the holding library
- Standardize across UW-System

GO – ILLiad WebCirc

- Some UW-System libraries use it
- Can circulation staff learn two systems
- Can patrons manage items in two systems



Who Made the Decision

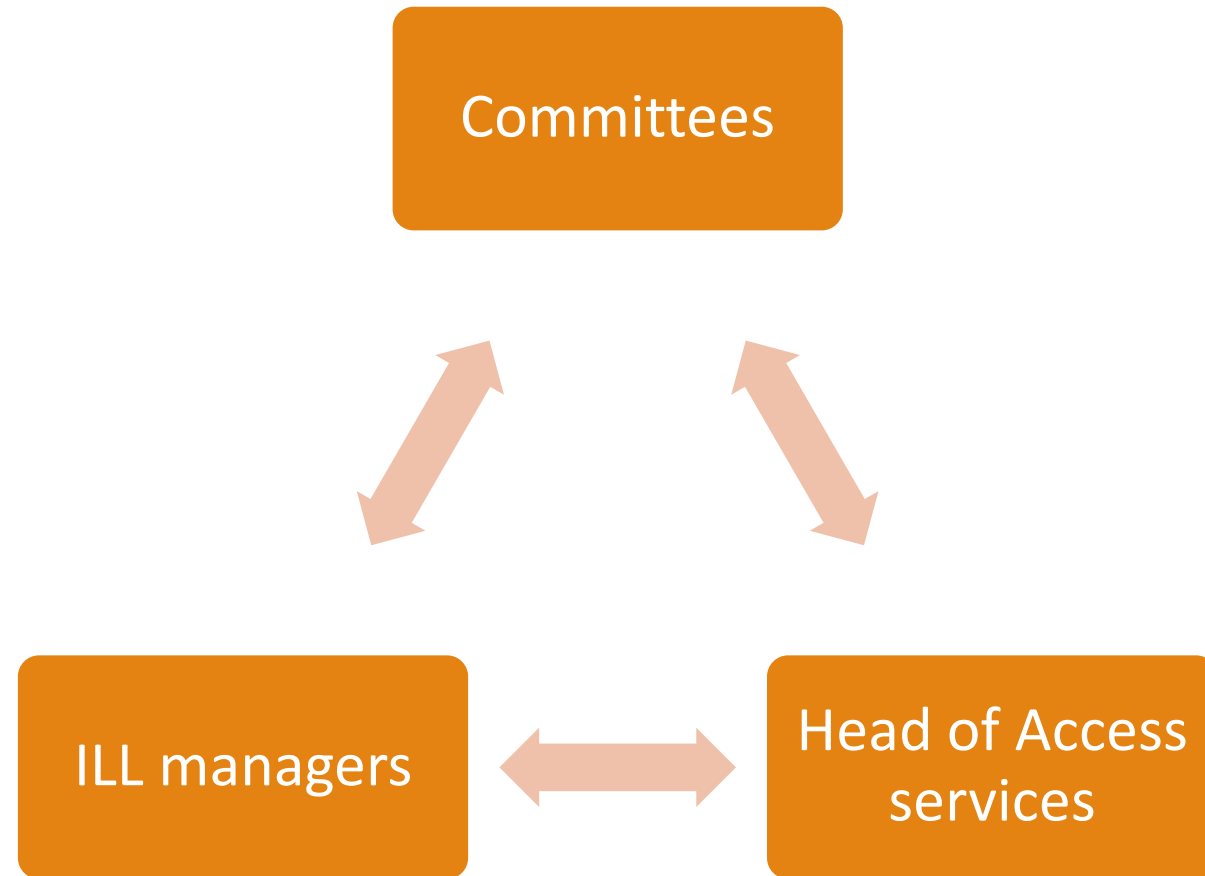
Alma Fulfillment Committee (Consortial Level)

Sub-Committee

- Charged to discuss how implementation will impact ILL work
 - Lending - loan periods, patron status
 - Borrowing – Circulation of ILL materials
- **Members**
 - ILLiad users UW-Madison
 - Borrowing and Lending units
 - Circulation supervisors



How the Decision Was Made



Concerns and Resolutions

Patrons will have to use two systems to manage items

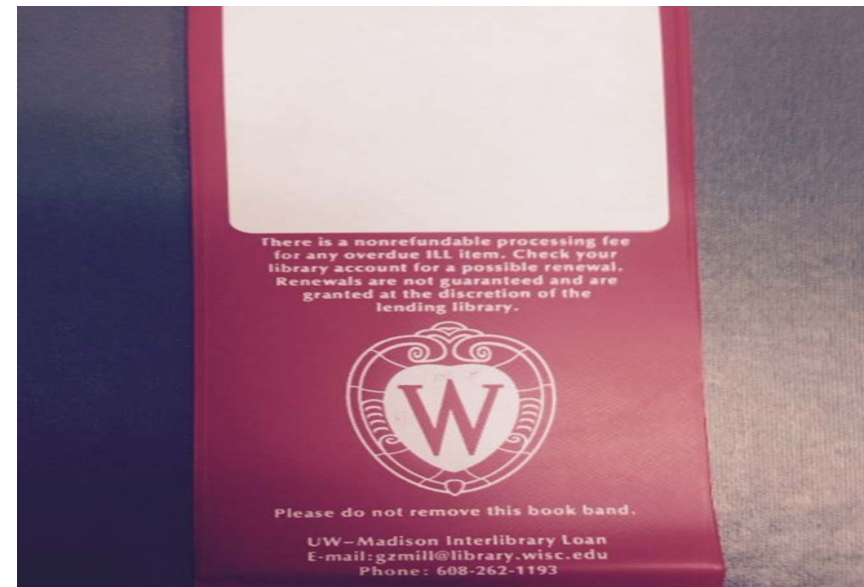
- Notify patrons in advance about upcoming changes
- Future possibility of ILLiad and Alma talking

Staff will have to learn and use two systems

- Stagger effective dates so staff will have enough time to learn both systems
- Provide adequate training to staff

How to distinguish interlibrary loan items from UW-Madison or UW-System

How to determine if ILL item should be processed with new or old workflows



Implementation Preparation– ILL

Research ILLiad WebCirc

- Read current documentation
- Discuss with colleagues
- Discuss with Atlas staff

Draft documentation

Draft training materials

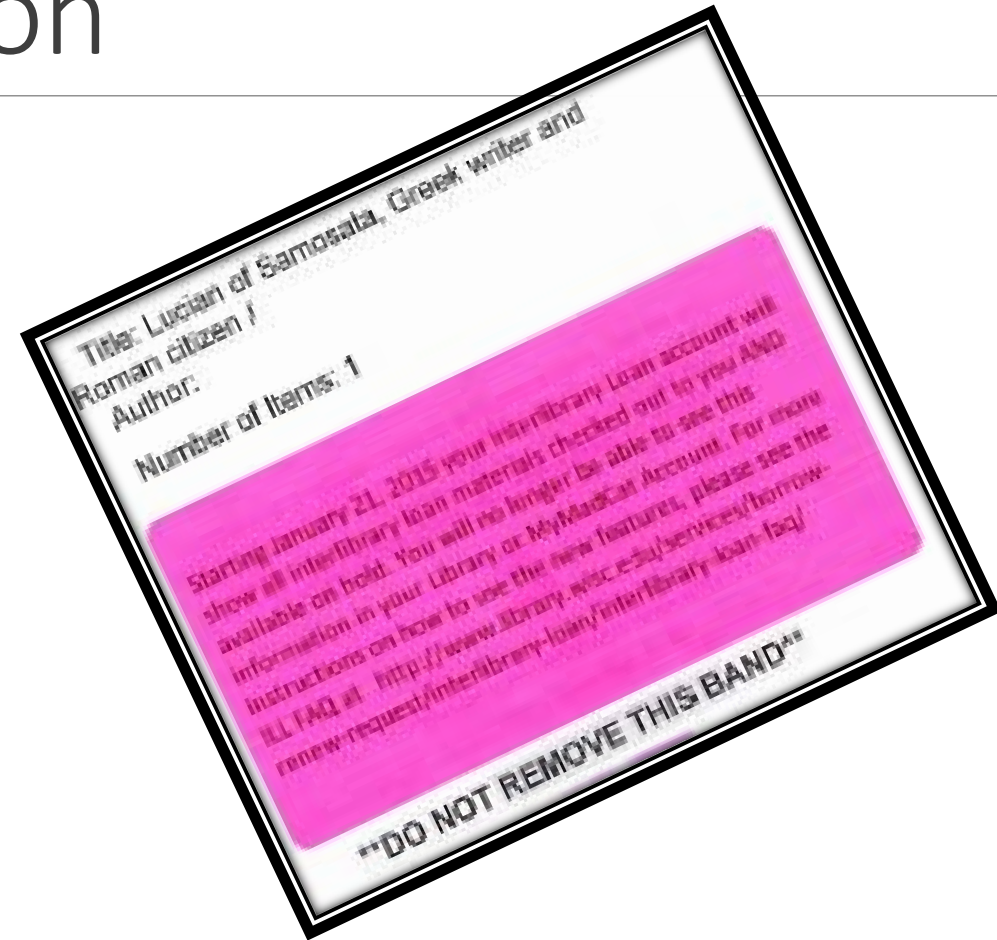
Patron Communication

From ILL office

- On the ILLiad request form
- In the patron's MadCat (or library) account
- Included in e-mails sent from ILL to patron
- On the FAQ page
- Handouts at circulation desk and reference desk
- High visibility labels on ILL band

From Associate Director of Public Services

- ILL missing from original draft
- WE ARE HERE!!!



When to use ILLiad WebCirc

NEW PROCESS



OLD PROCESS

****DO NOT REMOVE THIS BAND****

Pick Up Library: Memorial Library



Transaction Number: 2595767
IL Number: 141185610 OSU

ILL-

LASTNAME, FIRSTNAME

Title: Profiles of best practices in academic library interlibrary loan

Author: Kelbey, Paul

Number of Items: 1

There is a nonrefundable \$15 processing fee for any overdue ILL item. Check your My MadCat account for a possible renewal. Renewals are not guaranteed and are granted at the discretion of the lending library.



UW-Madison Interlibrary Loan
Email: gzmil@library.wisc.edu
Phone: 608-262-1193

****DO NOT REMOVE THIS BAND****

Outside Sticker

1. Transaction number
2. Pick-up location
3. Citation information
4. Due date
5. Number of pieces
6. Restrictions:
 - Library Use Only
 - No renewals
7. Removal of this band may incur a \$5 fine



TN: 2595767

Pick-up location: **College Library**
FEHRENBACH, CLARA

Title: Profiles of best practices in academic library
interlibrary loan
Author: Kelsey, Paul

Due Date: **03/16/15** Pieces: **1**

Removal of this band may incur a \$5 fine.

Restrictions:
NO RENEWALS



TN: 2595811

Pick-up location:
HARRIS, STEPHANIE

Title: Managing in the middle : the librarian's
handbook /
Author:



Due Date: **03/17/15** Pieces: **1**

Removal of this band may incur a \$5 fine

Restrictions:
NO RENEWALS
LIBRARY USE ONLY

Inside Flag

1. Patron's name
2. Patron's e-mail address
3. Lending library mailing address used as a return label

<p>FEHRENBACH, CLARA</p> <p>CLARA.FEHRENBACH@WISC.EDU Please do not remove this flag</p> <p>Interlibrary Loan Univ. of WI- Madison 728 State Street, Room b106f Madison, WI 53706-1494</p> <p>SHIP TO: OSU ILL: : 141165610</p> <p>Ohio State University Libraries Interlibrary Services 1858 Neil Avenue Mall Columbus, OH 43210</p> <p>GZM TN:2595767</p> 	<p>HARRIS, STEPHANIE</p> <p>STEPHANIE.HARRIS@WISC.EDU Please do not remove this flag</p> <p>Interlibrary Loan Univ. of WI- Madison 728 State Street, Room b106f Madison, WI 53706-1494</p> <p>SHIP TO: CGU ILL: : 141168238</p> <p>University of Chicago Library ILL 1100 East 57th Street, JRL 123 Chicago US-IL 60637-1596 US</p> <p>GZM TN:2595811</p> 
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Circulation Staff Training

Staff are now required to learn and operate two systems

Focus on commonalities

- Both systems web-based
 - Links to log-in should appear in same location on staff page
 - Created short permalink (<http://go.wisc.edu/illwebcirc>) for ILLiad WebCirc

Participants of training would have to train others

- Use Google Doc for sign-up
- Cheat sheet that staff could share with others

Example of WebCirc Cheat Sheet

HOW to ACCESS: <http://go.wisc.edu/illwebcirc>

The screenshot shows the ILLiad Web Circulation interface. It features a navigation menu with 'Main', 'Requests', 'Users', 'In Trans It Items Received', and 'In Trans It Items Returned'. The 'Main' menu includes 'Home', 'Change Site (GZM)', 'Change Password', and 'Logoff hweltn'. The 'Quick Tasks' section has a text input for 'Enter transaction number' and buttons for 'Mark Received', 'Check Out', 'Mark Returned', and 'Renew'. The main content area has a search bar and a table with columns 'Transaction', 'Title', 'Author', 'Username', and 'Status'. The table is currently empty with the message 'No data to display'.

How to Receive Materials (when item arrives from ILL office):

1. ILL items will arrive in the Red Box and can be identified with a red vinyl book band.
2. Scan the barcode into the field next to "Mark Received."
3. Click the "Mark Received" button.

How to Check Item Out to Patron (when patron comes to pick up item):

1. Verify patron identification.
2. Scan the barcode into the field next to "Check Out."
3. Click the "Check Out" button.
4. If the check-out is successful you will see "Transaction # was successfully checked out."
5. If the check-out is unsuccessful, you will see "Transaction # is not available for Check Out." You will need to call ILL before giving item to patron (608) 262-1193 (Monday-Friday 8am-4pm). If you are unable to reach ILL staff, please e-mail the office gzmill@library.wisc.edu with the Transaction number.
6. If the item is Library Use Only it will have LIBRARY USE ONLY printed on the sticker. These materials CANNOT be checked out. Please follow your library's procedures for library use only materials.
7. Library Use Only materials can remain on the hold shelf until their due date.

How to Return Item to ILL office (when patron returns item):

1. If the book has the red vinyl book band attached:
 - a. Scan the barcode into the field next to "Mark Returned"
 - b. Click "Mark Returned" button.
 - c. Mark the ILL Label with an R to flag it as returned.
2. If the red vinyl band is missing, affix a note that the item is not returned and put it in the Red Box for ILL. If possible, inform the patron of the band removal fee (\$5).
3. If the pieces are missing, affix a note that the item is not returned and put it in the Red Box for ILL.

ILL renewals can be done though a patron's ILL Account at <https://madison.hosts.atlas-sys.com/illiad/logon.html>

ILL Staff Training

Detailed procedures were provided earlier

Actual testing of entire process occurred on day of implementation



Reference staff training

ILL items will have a red band (reusable)

Removal of this band may incur a \$5 fine

Overview of Sticker

Problems

The red vinyl bands didn't work well with paperback books and smaller items

- Created RED paper bands instead

Limited test environment

- First item checked in did not route correctly

Temporary dual maintenance

- Red bands = New process
- White bands = Old process



The Good, Bad, and the Ugly of the New Process

GOOD

Reduced time from ILL office to hold shelf

Real-time overdue and overdue notifications

Accurate due dates and real renewal requests

BAD AND UGLY

Two systems for patrons

Two systems for staff

ILL staff has to correct circulation staff's mistakes

Mistakes with Library Use Only materials

Hard to manage fines for overdues



Lessons Learned

1. Keep everyone in the loop
2. Start early, start early, start early
3. Sometimes you have to PUSH and SCREAM !



Next Steps

Similarities to our campus circulation procedures

- Missing-in-transit reports
- Hold shelf expire reports

Other possibilities

- Reminder to pick-up item after XX days

Another training session

Questions

Have you implemented text notifications?

- Not yet

How many bands have you lost?

- Less than 5

What percent of paper bands do you use?

- Maybe 10%

Why do you fine for band removal?

- The vinyl bands are reusable and were expensive to purchase.