

**ILL Staff Breakout Session Group #1**  
**Facilitators: Michelle Parry/Greig Kiehl**  
**Reporter: Donna Davidoff**

Renewals

What to do? We want to honor due dates, so may try to find from another place instead. Can call other library – may get a second renewal, etc. Most seemed agreeable to a phone call for extra renewals. Occasionally a student will call lending library – not good!

Should there be a consistent policy re loan period and renewals in IDS? Be nice for patrons to have more consistent dates. Last year – agreed that we would use 28 days for a loan. 2 weeks is usual default for renewals in ILLiad. Should it be 4 weeks?

Renewal notices – would be nice to have approved renewals send automatic e-mail  
Discussed problem of patron requesting renewal and message pops up that gives date, but date may be changed/denied by other library – how to fix? Be nice to have pop-up message say something like Thanks for renewal, Check your ILLiad record for confirmation... Genie thinks there is a way to change pop-up message! Genie also said there is a way to turn off automatic renewals –will go into queue, etc.

Why do we keep seeing renewal requests after limit we have set? Shouldn't this be stopped via the system? Genie says we can do recall. She'll look into role of system to deflect persistent renewal requests.

Lost book policies

Price of book + processing fee of \$20 (FIT)

Cost of books set elsewhere in library – not choice of ILL.

Checking out books

Will keep book on shelf for 7 days – in notification e-mail “will keep book here for 7-10 days...” (Cobleskill) – good idea!

Notify people more than once?- Genie says they have been asked to have automatic reminder e-mail set up and they are looking into that.

Brockport created special queue (?) for circulation which allows them only to check things out. Geneseo has a computer that circ uses only for checking out. Cobleskill has ILL and circ integrated staff anyway. Genie is on this!—may even have a Web page for this so circ staff can check in and out.

Notes field

Can hide notes field from patron—can let them see only their notes. Can “edit customer” and add user notes – patron won't see.

Staff on weekends?

Cobleskill has librarian doing ILL on weekend. Also has a clerk on Sunday doing ILL. No one else. Greg mentioned table on IDS site that shows date/time that ILL borrowing requests are made – could adjust work flow accordingly.

Burning issues: LAND problems—delivery times need to be consistent.

Trusted sender – anyone beyond IDS? Cortland has all of SUNY. No one else has extended beyond this. Greg mentioned that you can crop in Odyssey.

Neat idea: Cobleskill has IDS libraries go to separate queue – instead of “awaiting request processing” these requests go to IDS queue. Can get help from OCLC.

How do we motivate using chart? Don't get scared! Depends on so many factors: people, hours, etc. We just do the best we can – we are already motivated and hard-working! Just a tool to coordinate work, staff.

Scanner – Oswego has a new scanner Konica 420, which will copy, fax, scan.

## **ILL Staff Breakout Session Group #2**

**Facilitator: Beth Posner**

**Reporter: Carrie Eastman**

### Introductions

#### Suggested topics or other concerns:

##### **-LAND labels**

Potsdam, what is better? Print on white paper and use yellow plastic sleeves to put white labels in? Rather than print labels on yellow paper.

However, some of us are using customized labels, not the ILLiad generated labels

**-LAND bags**-options if we don't have blue bags? Best to use blue to keep the confusion for the delivery persons low

##### **-2008 Objectives-questions/issues/concerns?**

45% fill rate-how can we accomplish this? Use availability server for articles, loans will be a harder stretch-but make sure we have things ready for pick-up on time

How is the avail server working? CUNY Grad doesn't use it for older or more obscure things

Sign up for avail server once only

**-What types of things are not getting filled and why?** Would this be good information? The IDS Team does do an annual report, we should be able to look at this collectively and analyze

Using reasons for no accurately is key (can we get a report through ILLiad servers?-ask Mark)

Also, thinking about this report in relation to collection development, for example, if we don't buy second copies, should we?

Would be a great way to start thinking about collaborative collection development, at least across the SUNYs

**-Do we lend current year materials?** Some do, some don't-some are battling with collection development librarians, we need to remove the barriers  
Some of us don't borrow a second copy if ours is checked out, the philosophy is starting to change

**-Recall** is a shaky matter with faculty, better with students

Incentive for returned recalls? Most, not for faculty, yes for students

Others don't have fines for students at all

Some say fines for students are working

Policies vary on loan periods (such as semester loans)

**-Blocks in ILLiad**, can put “blocked” after patron’s name-but also need to know who is blocked in the ILS, a challenge to keep all the information straight  
How do we know to block someone in ILLiad if they are blocked in Banner?  
Can we get Banner to communicate with ILLiad?-ask Genie Powell {Genie says we have protocol issues here to make sure everything is talking to each other correctly, with INSIP some libraries can give information well, but not receive. They have had to do testing with every single vender, Cirsi was one that was going well but hit roadblocks. The process is slowed down considerably, very messy. More complicated to implement, but not given up on it, back burner until they can figure how to get this to work.}  
Is there a way to do this without a protocol program? Maybe, Genie will talk to Mark Sullivan.

**-Renewals**, renewals denied and patron refuses to return  
Can we set in Customization Manager be set to increase # of renewals?  
Can suggest patrons ask for another copy from another library? Sure!

**-ILL borrowing limits**  
Some are putting in limits for students, about 15 active requests per student  
How can we flag the # of requests? It can be done in customization manager.

**-Serials-if you have a choice to borrow hard copy or eSerials, which do you do?**  
What makes the fill rate better? We tend to still feel that it print is more reliable.  
A matter of training on lending side, but also we have a lot of eSerials are embargoed for the recent year or six months?  
Any trouble training on lending eSerials? Yes, full-time staff tend not to have students do this.

**-Lost books policy**  
IDS group does not have a policy, should we or do it independently?  
The big picture, are that many books actually lost. Shall we bring it up for discussion next year?  
Damaged books and other items are a problem-things are not packed properly.  
Then, there is the times when libraries get items that don’t have anything to do with us  
Also, mis-delivered items to libraries that are close  
LAND is good about paying for lost or damaged items  
Lost book lists come from Nylink (no regularity)

**-Checking things out/Borrowed Items**  
Some just use ILLiad-some wait for patron to show up, some check out prior to pick-up  
In library use only items-better to keep in ILL office (create a “dummy” book to get them to go to ILL office)  
Some use both ILLiad and ALEPH (easier for notices to go out and block patrons)-usually depends on whether overdues are working in ILLiad or not-firewall problems?  
Inter-relationships between ILL offices and Circulation are not strong enough to have good cross-training for seamless check out for all ILL items.

**-Notices to borrowing libraries**, email is working for some and they love it  
new email manager supposedly works ok in 7.2, different from the standard client  
Some cannot reply to overdue emails coming from other libraries, they get bounced  
because no return address is coming up  
{Genie-a separate key, lending email from address that needs to be set}

### **-Lending Web Page**

Really only useful if one does a lot of non-OCLC lending, not many of us do any of this

### **-Notes field**

To do with requesting a title with specific requests, need lending library needs to see those notes easily.

Note after title is helpful

Yes, notes field at top would be excellent-ask Genie Powell {There is a format field in OCLC form. Assuming both sides are using ILLiad. But if it isn't automatically imported into ILLiad . . . if it is it would make sense. Genie will look into this further and talk to Mark Sullivan}

### **-Copyright**

We are not comfortable with this, we aren't sure we are doing this right  
CUNY Grad-pays various delivery services, so have to check what they have already paid-the five list on the right is helpful

### **-Training students**

Manuals for some become obsolete so quickly, given up

CUNY Grad-Getting students to write up different procedures for various tasks and see what is missed or covered

Geneseo-step by step instruction for ILLiad AND contracts for students

No one is doing short videos on how to do specific tasks

Atlas is starting to do this for certain ILLiad processes (but creating short videos takes at least 5 hours)

LCEasy is a place to train students to learn certain things

Some students have more responsibility than others, based on experience and ability

Others train students incrementally based on ability

### **-How much do you pay students?**

Donna Howe can help Old Westbury's inquiry, especially different levels

CUNY Grad pays a little more per hour to start, but they are in an expensive area

Some have a scale based on performance, or how long they have been there, or what students are paid elsewhere on campus, some are all the same

Some libraries allow ILL students to have more flexible hours and other perks

### **-Staff, do you have enough?**

Most of us get more students, but are not reliable because they come and go

Sonja sent a document earlier reflecting how ILL volumes require certain # of FTEs to handle it (she will resend this)

Fredonia had reduced their staff because automation has allowed them to streamline workflows

Geneseo, with a lot of help, they have been allowed to do much more (customized reports, etc.) because workflows are streamlined

**-Deflection of eSerials**

Is it done outside of IDS? Yes and no, depends on the number of requests each library gets for eSerials

**-Anonymous Questions/Concerns for Directors**

Scanners-working scanners

-color, is there a high demand for those quality images in medical or science or art articles

**Reported back to larger ILL staff group at end.**

**Summary for larger group:**

- Concerns over 45% fill rate-can it really be done?
- Blocks-ILLiad communicating with Banner (Genie is looking into this to see if it can be done earlier)
- Serials-still inclination to request print editions as opposed to eSerials editions, better fill rates. Probably due to a need for better training on the lending side to fill eSerials requests
- Copyright-there still an issue over how to handle copyright in general
- Training Students-no standardized training, think about something workable in relation to workflows (e.g. Geneseo's station system)
- Adequate staff to handle the volume of transactions we each have

## **ILL Staff Breakout Session Group #3**

**Facilitator: Harriet Sleggs**

**Reporter: Chris Sisak**

### **Summary for larger group**

#### **Borrowing Check out procedures**

- Are they checked out to patrons when the item comes in? Do you check out when the customer comes to pick up the item?
- Where are the items picked up? Circ where there may be longer hours? In an ILL office where the ILL policies regarding renewals gone over with the patron?
- We discussed the possibility of a second automatic e-mail reminder on 'your item is here come pick it up!' We were told this would be a new upcoming enhancement. WhooHoo!

#### **Ejournals**

Save paper – change your word documents into TIFF files, copy/paste your TIFF file coversheet into the e-journal article TIFF file, save and deliver. Print whatever is left. But during break Mark, Harriet and I were able to discuss this process with Genie and hopefully we'll have an easier process of things in the future.

#### **Lost books on LAND**

- What's the process and how do you get money from LAND for lost books
    - E-mail is sent out to all LAND libraries to search their departments for the book
    - LAND will reimburse via check
  - And for replacement costs - libraries have their own in-house policies.
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#### 1) Renewals – How are other ILL staff handling situations such as this?

- Some encounter difficulty getting students to return items by the due date.
- If borrowing library calls lending for a renewal lending libraries are generally very flexible – even if general renewal policy is no. Will extend if no one else needs, hasn't been out for an excessive time already.
- Are duplicate titles requested again (and again) for same patron? Most libraries place request again in the system and get it from another library. Some have conflicting policies.
- Borrower Notes can be added to the renewal request that this is a special instance if library generally does not allow renewal on item.
- The length of the date that patrons are given when they hit the renewal button in ILLiad, gives time for lending library to respond. How long is your extended date.
- Discussed how to edit the renewal date in the lending side – edit the date in the date field, save changes, and respond 'yes' to the renewal.

#### 2) Textbooks – lending/borrowing?

- How do you identify a "textbook?" Do you lend/borrow them?
  - In local system as 'on reserve' – generally no, unless extreme case.

- Respecting the due date if you do receive in a textbook – some like to keep them out the entire semester.
- Sometimes students just want an article

What about Reference Books? Exceptions are made

What about ‘checked out’ items?

- Most will borrow them, those that don’t do make exceptions – faculty have borrowed for months...

### 3) Lost books

- How do you get money from LAND for lost books
  - E-mail is sent out by Nylink to search for the book
  - LAND will reimburse via check
- Borrowing library would bill and forward check on to lending library
- Libraries have their own policies in-house and should keep them.

### 4) Checking out Borrowed items

- Are they checked out to patrons as they come in?
- Would it be better to check it out when they come in? This would allow for tracking of when they came in.
  - Some say yes, and they also give them the renewal info, borrowing spiel.
  - Renewal info on book band and collection development possibility on the book band.
  - Some students come to get the materials out if they are ‘checked out’ on the hold shelf
  - Second automatic e-mail reminder on ‘your item is here’ would be great new feature enhancement! (told this was in the 8.0 enhancement. WhooHoo!)
  - Check out at circ desk allows students/faculty for longer hours to come in and pick up. Geneseo has it set up where circ/IDS service point students check books out on ILLiad right at the circ desk.

### 5) Ejournals

- Save paper – change your word documents into TIFF files, copy/paste your TIFF file coversheet into the e-journal article TIFF file, save and deliver.

### 6) Notes field

- Most agree it is in a good location. But it might be nice if it would stand out more – color might be nice – not the default note, but one put in by the staff.
- On the Lending Side - If communication needed within the project – maybe CAPITALIZE it in the notes fields to catch the other members’ eyes.



## 7) Lending Web Pages

- a. OCLC counts and Lending Web Pages counts won't match up.
- b. How do other libraries know about the Lending Web Pages?
  - i. Some have them as separate from ILL web pages, some have them as integrated
  - ii. Need to find out if you can deliver items electronically and have PDFs up on their (the Borrowing Library's) account (much like our student's accounts are).

DocLine – and ICICL – and ISO requests. do the requests come into ILLiad?

## 8) Copyright

- Do you use it in ILLiad? How do you use it?
- Do you pay up front, quarterly, twice a year, annual?
- Do you use need to come in before midnight on the 31<sup>st</sup> to get the data out before it is wiped ☺ or can you still get the prior year after it changes over
- Some do final check to make sure you don't pay copyright on items owned.
- Some confusion remains ☺

## 9) How much responsibility do you give your student aids?

- Tasks
  - Borrowing – receive items in, check in check out, deliver them to faculty,
  - Lending - pulling materials, copying, scanning, delivery,
  - Basic borrowing when vacations are schedules
  - Cross training between components – borrowing and lending, or circulation and ILL
  - Some are allowed to train the new ILL students.
  - Stations are numbered. Students are trained to check the stations for work to be done. Example – shipping station (Land, UPS), copying stations, lending returns, lending articles to be gathered.

## 10) Faculty/Staff delivery service

- Can be in their offices and request material
- Question about getting faculty in the library in the first place. Some faculty just don't come to the library
- Some cancel and provide url links for articles in the message, or attach article to email.
- Delivering to them via electronic through ILLiad, placing documents up on the server and delivering through the borrowing module vs the doc delivery module, using a symbol to represent themselves as a borrowing library.