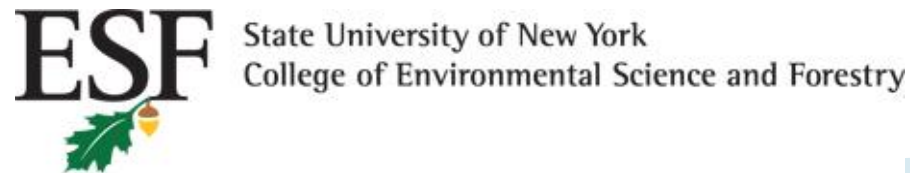
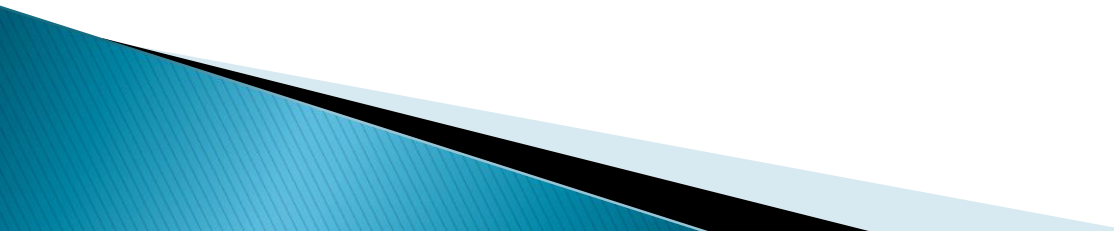


# Campus Delivery: The Nuts and Bolts of a "We'll Get It For You" Model

Ruth Owens & Heidi Webb



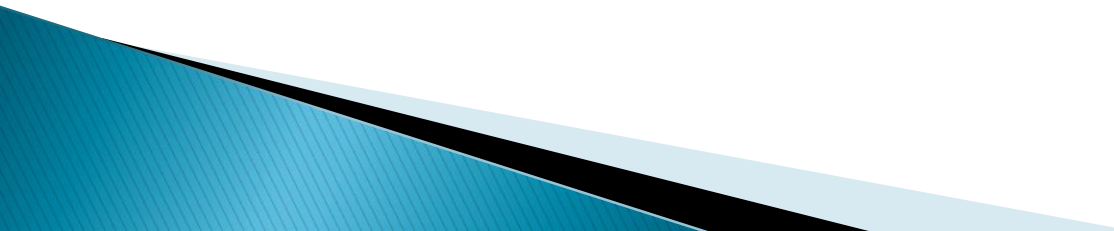
# Overview

- ▶ Physical delivery of books and other items
  - ▶ Set up in ILLiad (webpages, queues, emails)
  - ▶ Workflows in ILLiad and ALEPH
  - ▶ A little about document delivery (articles)
- 

# Why Campus Delivery?

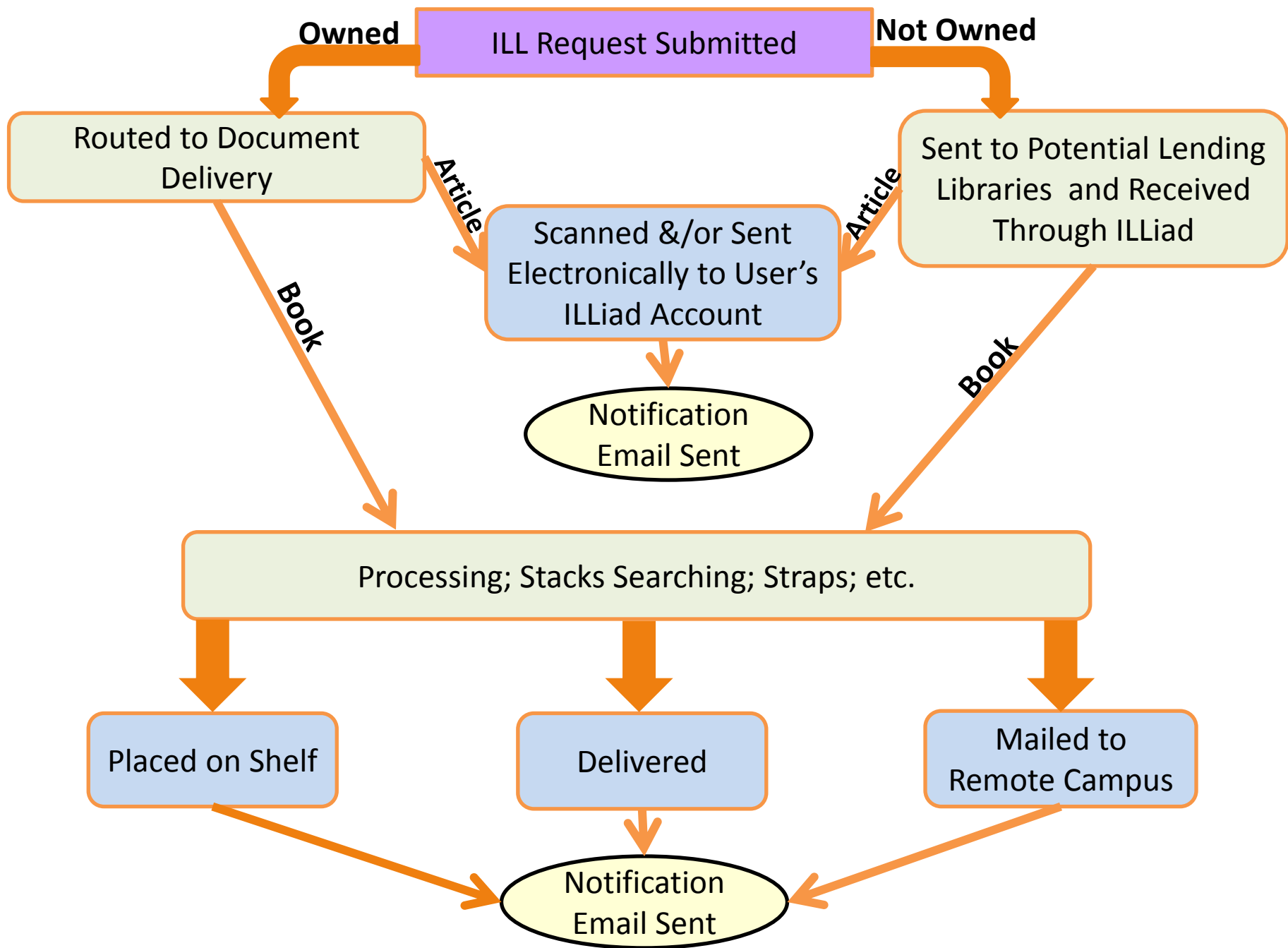
- ▶ Why not?
  - We're a small campus
  - Manageable number of loan requests
  - Solution to cancelling locally owned items
- ▶ Three parts:
  - Deliver ILL borrowing books to offices
  - Deliver Moon Library owned books to offices
  - Deliver Moon Library and ILL books to remote campuses

# How It Works

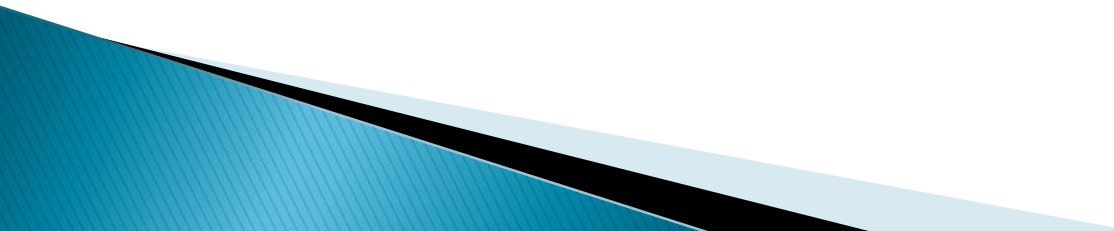
- ▶ Physical delivery is only available to faculty, staff, and graduate students on the main Syracuse campus
  - ▶ Patrons select Campus Delivery and enter office location in ILLiad account
  - ▶ Maintain a list of Campus Delivery Users
  - ▶ ILL books come in, are processed, checked out, and delivered
- 

# How It Works

- ▶ Locally owned items that are requested through ILLiad:
  - Processed through Document Delivery
  - Undergraduates/No Campus Delivery: Placed on hold, notification email sent using ILLiad
  - Campus Delivery: Checked out in ALEPH, notification email sent using ILLiad, delivered to office
  - Remote Campuses: Checked out in ALEPH, notification email sent, placed in mail



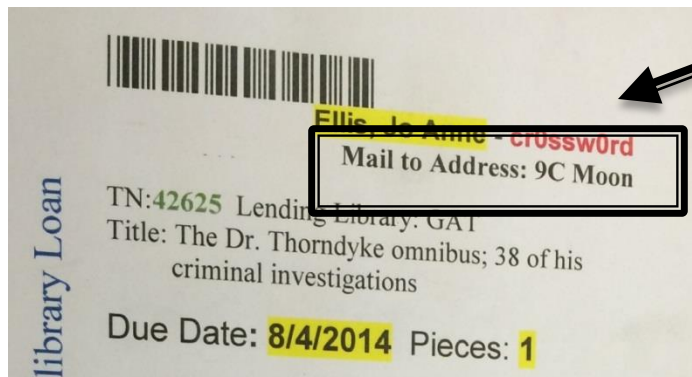
# Part 1: Deliver ILL Borrowing Books to Campus Offices

- ▶ Add delivery options in user webpages which link to ILLiad user profile
    - Undergraduates do not see the Campus Delivery option
  - ▶ Create email notification of delivery
  - ▶ Update strap template
  - ▶ Train staff
- 

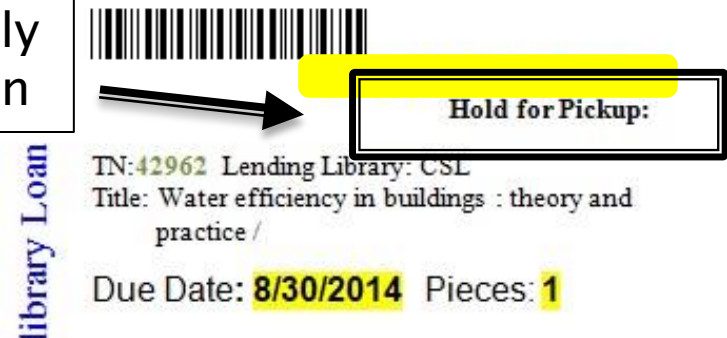
# Straps

Campus Delivery =  
Mail to Address

No Campus Delivery =  
Hold for Pickup



The only  
addition

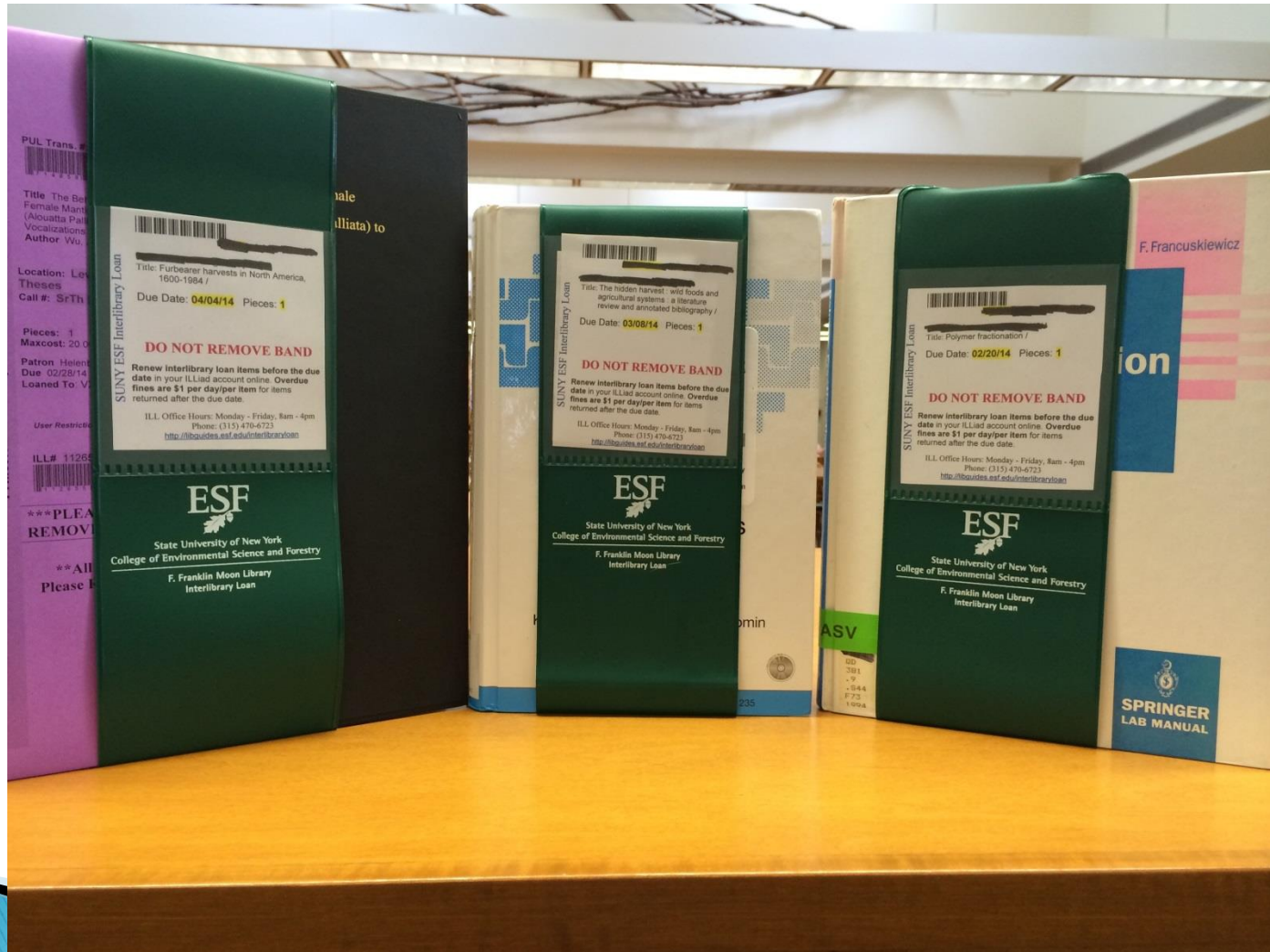


Template Addition:

<<Users\_LoanDeliveryMethod>> - <<Users\_Saddress>>



# Straps in Action!



# Campus Delivery Notification – Borrowing

Dear \_\_\_\_\_

A loan that you requested:

Title: Modern Electronic Structure Theory

Author: D. R. Yarkony

TN: 42404

has arrived and is now being delivered to:

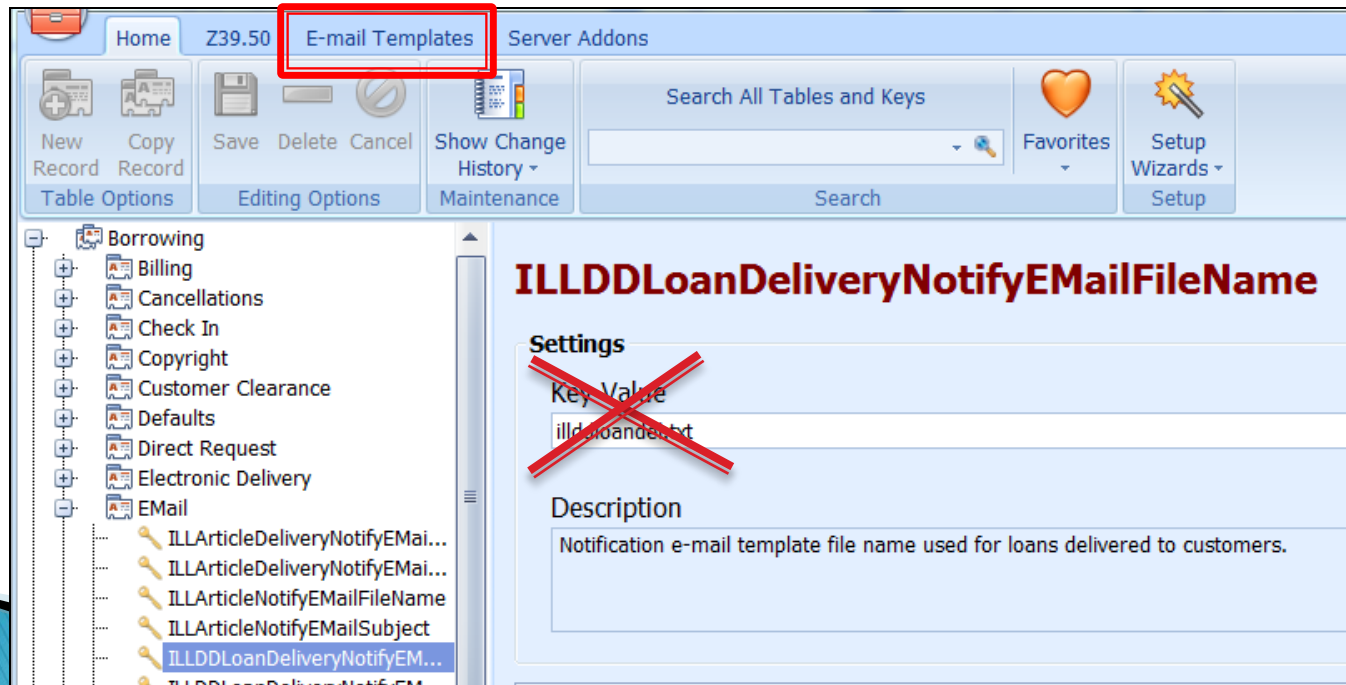
121 Jahn Lab

If you do not receive your loan within one week, please let us know.

Questions and comments regarding Interlibrary Loan policies and procedures may be directed to [moon@esf.edu](mailto:moon@esf.edu)

# Email Templates

- ▶ File name in “EmailFileName” fields doesn’t matter
- ▶ System defined names



# Email Templates – con't.

- ▶ System Names should be:
  - ILLLoanNotify
    - ILL held at main desk for pickup
  - ILLLoanDeliveryNotify
    - ILL delivered to office

# Campus Delivery Note

Hello!

This book was delivered by Moon Library staff on \_\_\_\_\_. It was delivered according to the delivery preferences you set in your ILLiad account. This item is currently checked out to you in your ILLiad account. Please return it to Moon Library by the due date or request a renewal online. Contact the ILL office at [moon@esf.edu](mailto:moon@esf.edu) or 315-470-6723 with any questions. Thank you!

~ESF Moon Library ILL Staff

# Behind the Scenes: Key Fields

The screenshot shows a library user profile page. At the top, there is a navigation bar with 'Home' and a user icon. Below it is a toolbar with icons for 'Change Password', 'Print User', 'Logon to Web', 'Add Request', and 'Cleared Status'. The 'Cleared Status' section includes buttons for 'Cleared', 'Not Cleared', 'Blocked', and 'Disavowed'. The main content area has tabs for 'User Information', 'Requests', 'Accounts', and 'Email History'. The 'Details' section contains various fields for user information, including 'User Name', 'Last Name', 'First Name', 'ID Number', 'Status', 'Department', 'Organization', 'Site', 'Email Address', 'Phone', 'Fax', 'Location', 'Expiration Date', 'Request Limit', and 'ILLiad Authentication'. Below this are sections for 'Local/Mailing Address' and 'Other/Notification Address'. The 'Delivery Methods' section includes 'Notification Method', 'Delivery Method', 'Loan Delivery Method', and 'Electronic Delivery'. Two arrows point to specific fields: one points to the 'Other/Notification Address' header, and another points to the 'Loan Delivery Method' dropdown menu.

Local/Mailing Address		Other/Notification Address		Delivery Methods	
Address	9 Moon	Address	9A Moon	Notification Method	E-Mail
City	Syracuse	City		Delivery Method	Hold for Pickup
State	NY	State		Loan Delivery Method	Mail to Address
Zip	13210	Zip		Electronic Delivery	Yes
Country		Country			

Campus Delivery Location:  
«Users\_SAddress»

Campus Delivery or Pickup at  
Circulation Desk:  
«Users\_LoanDeliveryMethod»

# Website Changes

- ▶ New User Registration page
- ▶ Change User Information page

## Campus Delivery - Faculty/Staff/Graduate Students

Would you like books and other physical items delivered to you?\*

Yes  No

\* Limited to Main Campus Only

If Yes, Enter your Main Campus Office / Mailbox Location

Moon 9A

# Website Changes – Backend

- ▶ Altered code on:
  - NewUserRegistration.html
  - ChangeUserInformation.html
- ▶ Caveat
  - We chose to display “Yes” & “No” instead of “Mail to Address” and “Hold for Pickup”
    - Fields won’t auto-populate from ILLiad database

```
<fieldset>
  <h4>Campus Delivery - Faculty/Staff/Graduate Students</h4>
  <label for="LoanDeliveryGroup">
    <span class="field">
      <span class="#ERROR name="ERRORLoanDeliveryGroup"><b>Would you like books and other physical items delivered to you?* </b></span><br />
      <span class="note">* Limited to Main Campus Only</span>
    </span>
    <input type="radio" id="DeliveryGroup" name="LoanDeliveryGroup" size="1" class="f-radio" value="Mail to Address" > Yes &nbsp;&nbsp;&nbsp;
    <input type="radio" id="DeliveryGroup" name="LoanDeliveryGroup" size="1" class="f-radio" value="Hold for Pickup" checked> No<br />
  </label>

  <label for="SAddress">
    <span class="field">
      <span>If Yes, Enter your Main Campus Office / Mailbox Location</span>
    </span>
    <input id="SAddress" name="SAddress" type="text" size="40" class="f-name" value="#PARAM name="SAddress"><br />
  </label>
</fieldset>
```




# Website Changes – Backend

- ▶ Undergraduates only have the option to “Hold for Pickup”
- ▶ Altered code for ChangeUserInformation–Undergraduate.html

```
<label for="LoanDeliveryGroup">  
  <input type="hidden" id="DeliveryGroup" name="LoanDeliveryGroup" size="1" class="f-name"  
  value="#PARAM name="LoanDeliveryGroup">" >  
</label>
```

# Actual Delivery Logistics

- ▶ Keep a list of Campus Delivery participants for reference
  - ▶ 8 users signed up
  - ▶ 8 deliveries to 4 users
  
  - ▶ Look for department mailbox or secretary if user is not in office indicated, try again next day
  - ▶ Tricky to notice “Mail to Address” on strap
  - ▶ Positive feedback
- 

# Part 2: Deliver Moon Library Books to Campus Offices

- ▶ ILL requests for items owned by Moon are no longer cancelled
- ▶ Routed to and processed in Doc Del
  - Awaiting Stacks Searching → In Stacks Searching → Update: Mark Found → Contact Customers
- ▶ Either:
  - Checked out in ALEPH and delivered
  - Placed on hold through ALEPH
- ▶ ~10 Moon books processed this way

# Why not use our ILS?

## Aleph

### ▶ Pros

- Holds
- Pull lists
- Shelf list reports

### ▶ Cons

- Email notice capability
- Unintuitive interface
- Complicated User Input
  - No easy way to add delivery option
  - Difficult to add delivery location

## ILLiad

### ▶ Pros

- Email Notifications
- Delivery options
- Interface
  - Fewer steps to request
- Doesn't matter if:
  - We own it
  - It's already checked out

### ▶ Cons

- Extra step with Aleph
  - Check out
  - Place on hold

# Doc Del Loan Pull Slips

SUNY ESF Interlibrary Loan

Trans. #: XXXXX



Title Venomous Animals of the World

Author Backshall, Stephen

Call # QL100 .B34 2008 Moon Library Books -  
Oversize

Patron Owens, Ruth

Due 9/8/2014

|

ILL Office Hours: «LocalInfo\_LendingHours»

Phone: «LocalInfo\_LendingPhone» 90210

# Held in Moon Email Notification

Dear \_\_\_\_\_

A loan that you requested:

Loan Title: Learning to Manage Global Environment Risks

Loan Author: Clark, William

TN: 42042

was available at Moon Library and is available for pickup at the Main Circulation desk. Please pick it up within two weeks from today.

Questions and comments regarding Interlibrary Loan policies and procedures

may be directed to [moon@esf.edu](mailto:moon@esf.edu) or (315) 470-6723.

# Campus Delivery Email Notification

Dear \_\_\_\_\_

A loan that you requested:

Title: Birds: a visual guide

Author: Joanna Burger

TN: xxxxx

was available at Moon Library and is now being delivered to:

121 Jahn Lab

If you do not receive your loan within one week, please let us know.

The item is checked out to you in the ESF Libraries catalog. To renew this item in the future, please visit your library account at:

<http://esf.sunyconnect.suny.edu:4510/F/?func=BOR-INFO>

Questions and comments regarding Interlibrary Loan policies and procedures may be directed to [moon@esf.edu](mailto:moon@esf.edu)

# Email Templates – Doc Del

- ▶ System Names:
  - ILLDDLoanNotify
    - Local copy held at main desk for pickup
  - ILLDDLoanDeliveryNotify
    - Local copy delivered to office



# Straps – Print Template: DocDelLoanLabels

Campus Delivery  
Location

«LocalInfo\_InstitutionName» Campus Delivery

ID#:    

Call Number: «Transactions\_CallNumber» -  
Title: «Transactions\_LoanTitle»

**CHECKED OUT TO:**  
«Users\_LastName», «Users\_FirstName»  
«Users\_LoanDeliveryMethod» - «Users\_SAddress»

TN: «Transactions\_TransactionNumber»  


Due Date: September 8, 2014

Thank you for using ESF Moon Library's new campus delivery service! This item has been delivered to the main campus office or mailbox you indicated in your ILLiad account. You may update your account information at any time. Please remember to renew or return this item by the due date.

Questions?  
«LocalInfo\_GeneralEMailAddress» |  
«LocalInfo\_GeneralPhone»

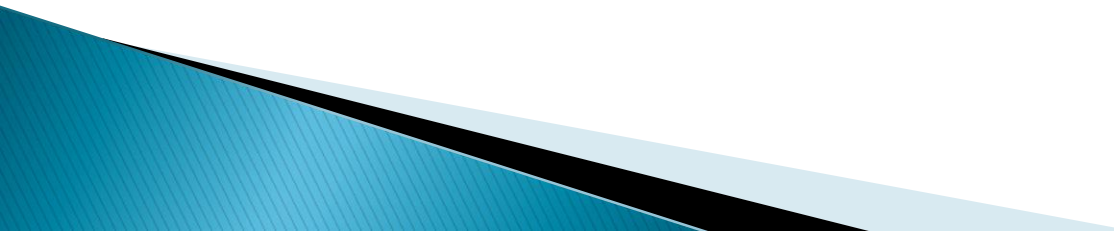
ID Number –  
scan into  
Aleph

Manually need  
to add due date  
for the semester  
loan in Aleph

# Part 3: Deliver ILL and Moon Library Books to Remote Campuses

- ▶ Library users at Adirondack locations can now receive items
- ▶ Primarily faculty
  - Users need to update their ILLiad user profile
- ▶ Request Moon books through ILLiad
  - Queue: *Remote Site ILL Requests*
  - Routed to Doc Del if owned
- ▶ ILL books treated like campus delivery but sent through mail
  - Mail to Address: Ranger School or AEC

# Implementation Decisions

- ▶ Remote field sites – drove decision making
  - ▶ What are we sending?
    - ILL and local books
  - ▶ How are we sending items?
    - Mailing via USPS
  - ▶ How are users signing up?
    - Choosing an off campus location upon registration
    - We manually add their address
- 

# More Key Fields to Unleash the Magic!

- ▶ Custom Drop Down
- ▶ Customization Manager
  - System -> General -> CustomDropDown

CustomDropDown				
NVTGC	GroupName	LabelName	LabelValue	
ILL	Site	Adirondack Ecological Center	AEC	
ILL	Site	Main Campus	MC	
ILL	Site	Other Location	OT	
ILL	Site	Ranger School	RS	

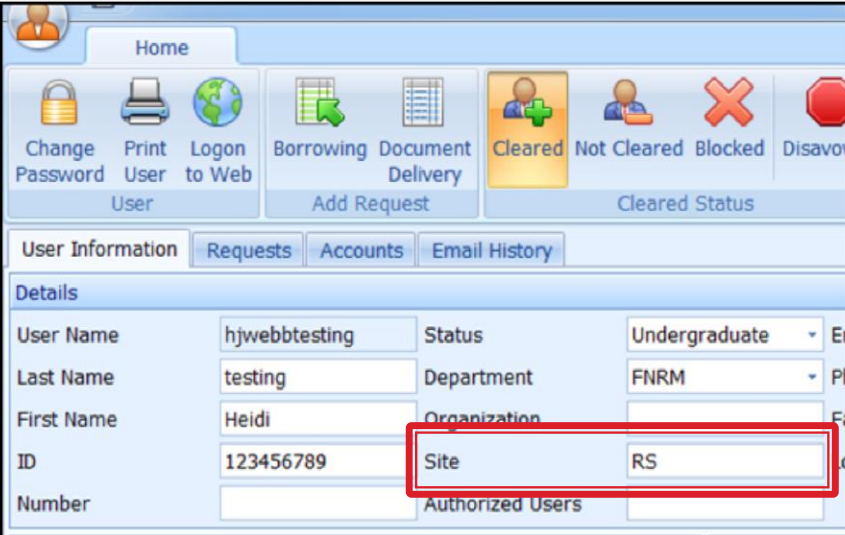
# Technical Considerations

## ▶ Website

<b>* Department</b>	Environmental Studies
<b>Primary Location:</b>	Main Campus
<b>Choose a New Password</b>	Main Campus Main Campus Adirondack Ecological Center Main Campus Other Location Ranger School
Case sensitive	
<b>Re-enter Password</b>	

# Technical Considerations

## ▶ Routing Rules



The screenshot shows a web application interface with a navigation bar at the top containing icons for 'Change Password', 'Print User', 'Logon to Web', 'Borrowing', 'Document Delivery', 'Cleared', 'Not Cleared', 'Blocked', and 'Disavow'. Below the navigation bar are tabs for 'User Information', 'Requests', 'Accounts', and 'Email History'. The 'Details' section contains a form with the following fields:

User Name	hjwebbttesting	Status	Undergraduate
Last Name	testing	Department	FNRM
First Name	Heidi	Organization	
ID	123456789	Site	RS
Number		Authorized Users	

The 'Site' field, containing the value 'RS', is highlighted with a red rectangular box.

RuleNo = (Pick a number useful to you. It's actually our last rule because we want the electronic requests to automatically go to the user.)

RuleActive = Yes

ProcessType = Borrowing

TransactionStatus = Awaiting Request Processing

MatchString = (u.Site = 'RS' or u.Site='AEC' or u.Site='OT') =

Essentially the LabelValues that you want to go into their own queue.

# Technical Considerations

- ▶ Queues

QueueName = Remote Site ILL Requests  
ProcessTye = Borrowing  
NVTGC = ILL

# EBSCO Discovery Service (EDS) Integration



OneSearch @ ESF Libraries

Moon Library @ SUNY E

Keyword

Search

[Basic Search](#) [Advanced Search](#) [Search History](#)

Search Results: 1 - 10 of 3,227

Relevance  Page Options  Share

1. [Hawks in flight : the flight identification of North American raptors / Pete Dunne, David Allen Sibley, and Clay Sutton.](#)



Book

By: Dunne, Pete. Boston : Houghton Mifflin Harcourt, 2012. 01/01/2012 ix, 335 p. : ill. (chiefly col.) ; 24 cm. Language: English, Database: ESF Libraries Catalog

**Subjects:** Birds of prey -- North America -- Identification; Birds -- Identification; Birds -- North America -- Identification

[See Item in ESF Libraries Catalog](#)

[Request Item from the Library](#)

Location	Call No.	Status	Due Date
Moon Library Books	QL696.F3 D86 2012	Regular Loan	Available



# EDS & ILLiad – the Backend

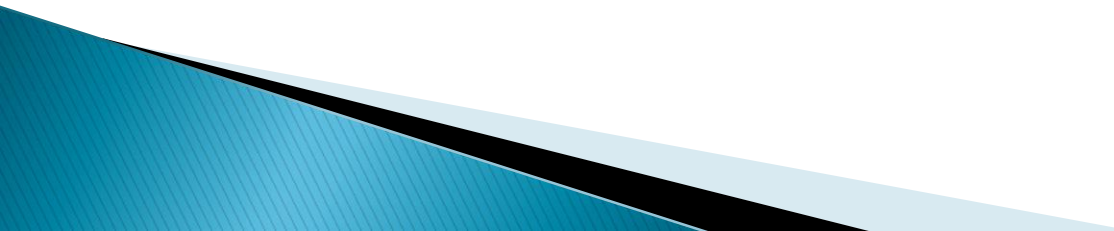
- ▶ OpenURL includes Cited In field
- ▶ Routing Rule to send all of these requests into the “Awaiting Document Delivery Processing” queue

Edit Row	
RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.CitedIn = 'EBSCO:cat02986a'
NewProcessType	Doc Del
NewTransactionStatus	Awaiting Document Delivery Processing
RuleDescription	Routes incoming patron requests from OneSearch that are locally held to Document Delivery for processing.

# Articles

- ▶ Not physical delivery, electronic
  - ▶ Borrowing requests for articles we have in print or in databases are routed to Doc Del
  - ▶ Scanned and sent through ILLiad to user
  - ▶ They never know the difference!
  - ▶ Helpful for users at remote campuses or those in the field
- 
- ▶ 460 articles in 2013–2014
  - ▶ 160 articles in 2012–2013\*

# Moving Forward

- ▶ Collect feedback from users of campus delivery
  - ▶ Continue to improve delivery services for remote campuses
  - ▶ Advertise!
  - ▶ Delivery now, pick up in the future?
- 

# Questions?

- ▶ Ruth Owens
  - [rmowens@esf.edu](mailto:rmowens@esf.edu)
- ▶ Heidi Webb
  - [hjwebb@esf.edu](mailto:hjwebb@esf.edu)

OCLC Symbol: VXF



State University of New York  
College of Environmental Science and Forestry