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

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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
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
ILL Request Submitted

**Owned**
- Routed to Document Delivery

**Not Owned**
- Sent to Potential Lending Libraries and Received Through ILLiad

- Scanned &/or Sent Electronically to User’s ILLiad Account
- Notification Email Sent

**Processing; Stacks Searching; Straps; etc.**

- Placed on Shelf

- Delivered

- Mailed to Remote Campus

- Notification Email Sent
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

Template Addition:

<<Users_LoanDeliveryMethod>> - <<Users_Saddress>>
Straps in Action!
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
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
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 or 315–470–6723 with any questions. Thank you!

~ESF Moon Library ILL Staff
Behind the Scenes: Key Fields

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?*

* 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
Website Changes – Backend

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

```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?

<table>
<thead>
<tr>
<th>Aleph</th>
<th>ILLiad</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td><strong>Pros</strong></td>
</tr>
<tr>
<td>◦ Holds</td>
<td>◦ Email Notifications</td>
</tr>
<tr>
<td>◦ Pull lists</td>
<td>◦ Delivery options</td>
</tr>
<tr>
<td>◦ Shelf list reports</td>
<td>◦ Interface</td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td>◦ Fewer steps to request</td>
</tr>
<tr>
<td>◦ Email notice capability</td>
<td>◦ Doesn’t matter if:</td>
</tr>
<tr>
<td>◦ Unintuitive interface</td>
<td>◦ We own it</td>
</tr>
<tr>
<td>◦ Complicated User Input</td>
<td>◦ It’s already checked out</td>
</tr>
<tr>
<td>◦ No easy way to add delivery option</td>
<td></td>
</tr>
<tr>
<td>◦ Difficult to add delivery location</td>
<td></td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td><strong>Cons</strong></td>
</tr>
<tr>
<td>◦ Extra step with Aleph</td>
<td>◦ Extra step with Aleph</td>
</tr>
<tr>
<td>◦ Check out</td>
<td>◦ Check out</td>
</tr>
<tr>
<td>◦ Place on hold</td>
<td>◦ Place on hold</td>
</tr>
</tbody>
</table>
Doc Del Loan Pull Slips

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
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 or (315) 470–6723.
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
System Names:
- ILLDDLoanNotify
  - Local copy held at main desk for pickup
- ILLDDLoanDeliveryNotify
  - Local copy delivered to office
ID Number
– scan into Aleph

Campus Delivery Location

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

Straps – Print Template: DocDelLoanLabels

ID#

Call Number: «Transactions_CallNumber» - Title: «Transactions_LoanTitle»

CHECKED OUT TO:
«Users_LastName», «Users_FirstName»

«Users_LoanDeliveryMethod» - «Users_SAddress»

TN: «Transactions_TransactionDate»

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»
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

<table>
<thead>
<tr>
<th>NVTGC</th>
<th>GroupName</th>
<th>LabelName</th>
<th>LabelValue</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL</td>
<td>Site</td>
<td>Adirondack Ecological Center</td>
<td>AEC</td>
</tr>
<tr>
<td>ILL</td>
<td>Site</td>
<td>Main Campus</td>
<td>MC</td>
</tr>
<tr>
<td>ILL</td>
<td>Site</td>
<td>Other Location</td>
<td>OT</td>
</tr>
<tr>
<td>ILL</td>
<td>Site</td>
<td>Ranger School</td>
<td>RS</td>
</tr>
</tbody>
</table>
Technical Considerations

- Website

```
*Department: Environmental Studies
Primary Location:
- Main Campus
- Adirondack Ecological Center
Choose a New Password:
- Case sensitive
Re-enter Password
```
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
EDS & ILLiad – the Backend

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

<table>
<thead>
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<tbody>
<tr>
<td>RuleNo</td>
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<tr>
<td>NewProcessType</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
</tr>
<tr>
<td>RuleDescription</td>
</tr>
</tbody>
</table>
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?

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- Heidi Webb
  - hjwebb@esf.edu

OCLC Symbol: VXF