Best Practices Institute

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IDS Project Best Practices Institute

Borrowing, Document Delivery, and Lending Workbook

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Workbook also available online at:

http://idsproject.org/tools/bestpractices.aspx
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Quick Reference

My ILLiad – OCLC HOSTED

OCLC support: **1-800-848-5800**, **menu options: 1, 4, 3, 1**

My ILLiad URL: __________________________.illiad.oclc.org

My Campus IP ranges: ____.___.____.___ – ____.___.____.___.____

SQL Server Name: __________________________ Database: __________________________

My ILLiad – LOCALLY HOSTED

If your installation is NOT OCLC hosted, write in your support person: __________________________

My ILS (Catalog)

ILS Make & Model: __________________________

Server address: __________________________

Z39.50 Username: _______ Password: _______ Port: ______

**Did you know?**

Your institution’s firewall needs to open certain ports for ILLiad? For more info, see Quick Reference Link #1.

**People I can call for help**

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## My Implementation Plan

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### Notes

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How to use the links in this workbook

Each chapter in the workbook is full of helpful links. To spare you the trouble of typing each one into your browser by hand, we created an online index of links on the Institute’s website: [http://tinyurl.com/IDS-Institute](http://tinyurl.com/IDS-Institute)

Once you visit the index, just navigate to the chapter you’re reading and match the number of the link on the page to your workbook. It’s that easy!
Borrowing: Request Processing: Automation & Strategies

Chapter 1. Direct Request

What is it?

Direct request enables unmediated borrowing request processing within limits that you set in your OCLC direct request profile.

How does it help?

Even simple, routine borrowing requests take time to manually process. Enabling direct request in ILLiad and creating a direct request profile with OCLC allows you to automate routine processing so you can spend time doing other things.

Links to get you started – http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding direct request.
2. ILLiad 8 Documentation regarding direct request.
3. OCLC has an overview for direct request.

Tip:

Your OCLC direct request profile can specify a custom holdings path – allowing you to limit your direct request processing to specific lending libraries and groups of libraries – if you have not created custom holdings paths, see the custom holdings section.

Planning for and setting up Direct Request

A role playing exercise to understand the benefit of enabling direct request:

- Assemble several library staff members in a line. Have the first person play the request customer, the last person play a lending library, and the others to play ILL processing steps.
• Give the requester two index cards with a requests item written on them. One card should have an additional label of ‘direct request.’

• Give the follow processing cards to the process players (don’t look at the cards):
  o “Request submitted on the weekend, wait until Monday”
  o “ILL staff is backed up manually finding lenders for requests, wait until they get to your request”
  o “Staff on lunch break, wait until they return”

• The requester first passes the non-direct request through the line, each process player reads their card then passes the request down the line until it reaches the lending library. Next the requester takes the direct request item and walks it past the process line directly to the lending library.

• The lending library reads the following from a card: “congratulations, the borrowing library gets the credit for a quick turnaround time… without lifting a finger!”

Planning for direct request and creating your direct request profile.

• OCLC has a planning guide for direct request. See Chapter 1: Link #4 at http://tinyurl.com/IDS-Institute.

Quick list of direct request profile criteria before unmediated processing is executed:

• For whom will you allow direct request, which patron statuses?
• Will you allow direct request for fee-based items?
• What bibliographic formats will be processed by direct request? Books, DVDs, etc.
• How many minimum lenders must own the item?

Chapter Summary

• Library staff should be able to describe the benefits of direct request for both library customers and staff.
• Library staff should understand that unmediated direct request processing is limited to the criteria specified in the library's OCLC direct request profile.
• Library staff should be able to measure a reduction in manual transaction processing after enabling direct request.
Chapter 2. Custom Holdings

What is it?

This tool is critical for speeding up processing, streamlining and customizing the borrowing workflow. It automatically organizes possible lenders, and even the selection of lenders based on the criteria you choose. Custom holdings do this by looking at the groups of OCLC symbols you created and arranging them in hierarchical paths. Many libraries arrange groups of lenders by delivery method, cost, due dates, turnaround times, or region. Build a strategy according to your priorities.

How does it help?

Custom holdings provide a significant time and cost savings. It automates the selection of lenders and customizes selections based on your criteria. It can almost eliminate the need to check policies directory while processing requests.

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding Custom Holdings and EMST.
2. ILLiad 8 Documentation regarding Custom Holdings.
3. OCLC has a How to Create Custom Holdings with a flash-based demo.
4. ShareILL.org has great Custom Holdings lists, including Free AV Lenders!
### Table 1. An example of how you might organize your Custom Holdings.

<table>
<thead>
<tr>
<th>Returnables (Books, Media)</th>
<th>Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  IDS (free)</td>
<td>IDS (Free)</td>
</tr>
<tr>
<td>2  Libraries on a Local Delivery (free) (ex. RRLC)</td>
<td>Recip Group w/ Odyssey (free)</td>
</tr>
<tr>
<td>3  Libraries on a State Delivery (free) (ex. NY (@/S) on LAND)</td>
<td>Odyssey Free libraries (LVIS, NY (@/S))</td>
</tr>
<tr>
<td>4  NY (@/S) not on LAND (free)</td>
<td>Ariel (free) libraries</td>
</tr>
<tr>
<td>5  LVIS Northeast</td>
<td>Free libraries that deliver email</td>
</tr>
<tr>
<td>6  LVIS Southeast</td>
<td>Free libraries that deliver mail</td>
</tr>
<tr>
<td>7  LVIS MidWest</td>
<td>$5IFM</td>
</tr>
<tr>
<td>8  LVIS West</td>
<td>$10IFM</td>
</tr>
<tr>
<td>9  $5 IFM</td>
<td>$11IFM</td>
</tr>
</tbody>
</table>

Some libraries break these out extensively, while others cluster them together in smaller Customs Holdings Groups (ex. $5-$10IFM, $11IFM-$15IFM)

**Tip:**

To track changes in charging in a more detailed Custom Holdings arrangement, an Excel spreadsheet that details the library symbol, their charge for Books and for Copies may be helpful. When you receive your current month IFM charges, or receive an update to charges on the ILL Listserv, and you need to note the change in a charge, you’ll know which group to delete from, and which group to place the symbol in.
Setting up or re-examining your Custom Holdings

1) What Custom Holdings Paths will you need? Books, Serials, Audio, Video?

2) What Custom Holdings Groups will you have? And what symbol(s) are in that Group

<table>
<thead>
<tr>
<th>Name of your Path (e.g. “Loans” or “Copies”)</th>
<th>Name of your Group (e.g. “10IFM” or “Recip”)</th>
<th>Symbols</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>8</td>
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</tbody>
</table>

Chapter Summary

Once you have established your Custom Holdings Groups (and the symbols that belong in it), then you can assign them to the appropriate Custom Holdings Paths you created.

The end result will be much faster identification of your favorite lending partners (the freebies!), a quicker identification of those that charge, and a free mind when you take off on vacation knowing your replacement will know who your favorites are!
Chapter 3. Copyright

What is it?
Copyright and clearing Copyright is an everyday part of the ILL process for article requesting. Knowing, understanding, and complying with the CONTU guidelines is an integral part of ILL.

The most important guideline for borrowing is the “Rule of Five,” which states that a library may not request more than 5 articles, published fewer than five years from the date of the request, from a particular journal in a given year. It is standard practice to retain records for three years once copyright permission is granted.

How does it help?

While many libraries report ILL transactions for copyright clearance at the end of the calendar year, more frequent tracking and reporting may have added benefits. Copyright costs may increase throughout a year and direct purchasing from publishers, once copyright limits have been reached, can save a library anywhere from $5 to $25.00 and more per transaction.

Also, putting into place a simple Copyright Clearance for older articles bypass routing rule will streamline your borrowing for older articles and shorten turnaround times.

Getting started - http://tinyurl.com/IDS-Institute

1. CONTU Guidelines on Photocopying under Interlibrary Loan Arrangements.
2. ILLiad 8 Documentation regarding Clearing Copyright.
3. Copyright Clearance Center.
4. Get It Now from the Copyright Clearance Center
Figure 1. Copyright Clearance vs. Publisher Pricing Decisions Flowchart
Tracking and paying your Copyright on a monthly basis

Once again, while many libraries report ILL transactions for copyright clearance at the end of the calendar year, more frequent tracking and reporting may have added benefits. Copyright costs may increase throughout a year and direct purchasing from publishers, once copyright limits have been reached, can save a library anywhere from $5 to $25.00 and more per transaction.

What you need to initially get started:

1) An account at the Copyright Clearance Center.
2) Enter your **CCC Username and Password** into your Customization Manager
   a. Key: **Borrowing|Copyright|CCCUsername**
   b. Key: **Borrowing|Copyright|CCCPassword**

Important and detailed overview info:

- ILLiad 8 Documentation regarding **Clearing Copyright**: [http://tinyurl.com/IDS-Institute](http://tinyurl.com/IDS-Institute), Chapter 3: Link #2.

In the Awaiting Copyright Clearance queue in a nutshell:

Once you hit the limit of five requests, and you wish to track, record and submit the copyright through ILLiad you will need to:

- <click> **Search** in the **Awaiting Copyright Clearance** screen to look up the Copyright prices.
- If you are requesting this through traditional ILL means (from another library and not from a publisher), <click> **Save CCC Information**. The request then forwards to
Alias, Rapid, or into the Awaiting Request Processing Queue and the CCC pricing info is included.

**Once a month:**

Pick a date when you will process and report your copyright (the first of the month?).

**In ILLiad:**

- <click> System Tab
- <click> Web Reports and log in
- <select> Administrative|Copyright
- <select> begin and end dates and Generate Report

**There are three categories in the report:**

1) Requests that are ‘Finished’ and need reporting,
2) ‘Outstanding’ requests (yet to be filled by a library) that have saved payment info
3) Copyright usage you’ve reported to the CCC this year

**In ILLiad:**

- <Click> Borrowing Tab
- <highlight> Process Copyright icon and <select> Submit Copyright Orders
- Enter in a Begin Date and an End Date
- <click> Load Copyright
- <click> Refresh Fees (Fees may have changed since you saved your payment information. See Figure 2).

**Help!**

Oops! Clicked that CCC button by accident and didn’t mean to record the pricing info? Go into the record and <click> Remove Payment icon. That’s it!
No changes were noted in the example above, so:

- <click> Submit Copyright Order,
- Box pops up to confirm you want to report these to the CCC,
- <click> Yes if correct, or otherwise No (then make necessary corrections before continuing).
- When they are submitted the note “Copyright Orders Submitted” pops up in the lower left.
Tip:
Oops! Made a mistake with your order after you hit the submit button in ILLiad? Never fear! Log into your Copyright Clearance Center account on the CCC website and edit the order before they invoice you. Make sure to reflect any changes you make in the ILLiad request.

Planning

1) How do you report Copyright?
   a. Yearly
   b. Monthly
   c. Quarterly
   d. No budget for Copyright, no more requests are put through once limit of five is reached

2) If you report Copyright, have you:
   a. Checked into reporting it monthly/quarterly through ILLiad? If not, why?

   b. Checked into pricing comparison workflow to see if those “over 5s” are more cost-effective to purchase directly from the publisher or from a Get It Now model?

3) Still confused about Copyright and Copyright reporting through ILLiad and the CCC? Contact your IDS Mentor or a local IDS library in your area for more info.
Chapter 4. Email Routing

What is it?

Email routing uses a combination of custom email templates in combination with transaction status changes to allow libraries to create their own customized processing actions.

How does it help?

Some ILL staff learn they can process unusual transactions that don’t fit into the standard ILLiad workflow by manually changing statuses and sending email outside of the ILLiad client. But, these workarounds require extra time, tedious mouse clicking, and cutting & pasting, etc. Email routing can help you reduce some of these workaround to a custom procedure requiring only a few mouse clicks.

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding Email Routing.
2. ILLiad 8 Documentation regarding Email Routing.

Tips:

The email routing table is in System|Email|Email Routing in the Customization Manager.

If you leave ‘default to name’ and ‘default to address’ blank in the email routing table, ILLiad will automatically fill in the fields with the patron data from the transaction.

Setting up and using an Email Routing

For this example set up we will create an email routing to process requests for articles available on the Web.
• Create a new email template by modifying one from the Workflow Toolkit or one of your existing templates.

• Add a new entry to the email routing table in the Customization Manager. Key elements are:
  
  o Default from name and address. The library’s email contact.
  
  o Default status. This is the status/queue to which ILLiad will move the transaction when the routing is executed.
  
  o File name loan and article. The file name of your custom email template.

• When you are processing requests and want to execute your custom email routing select the routing from the email menu in the request view:

  ![Email Routing Menu]

  **NOTE:** Email routing allows the library to change the status of a transaction to any status the library wants to use or create. Libraries should consider the best status to use for their workflow and services. In our example for an item available on the Web, the transaction could be moved ‘canceled’ status. But, the ILL staff performed a service by finding the article on the Web and emailing the URL to the patron. Changing the status to ‘request finished’ better reflects the work and services performed by the ILL department.

• The ILLiad client will open an email window with the transaction data merged into the template. Cut and paste the Web URL into the email body then send the message to finish the transaction.

**Chapter Summary**

The library will be able to create and email routing – email template and corresponding email routing table changes in the Customization Manager.

The library will be able to analyze their workflow to identify manual processing that can be streamlined with email routing.
Chapter 5. Cancellations

What is it?

Cancellation processing does not involve any specific method, but is an opportunity to provide valuable service to library customers.

How does it help?

Instead of simply cancelling requests that cannot be filled you can offer assistance or ask follow up questions to better serve library customers.

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding cancellations.
2. ILLiad 8 Documentation regarding cancellations.

Tips:

The standard table of cancellation reasons is in the Customization Manager under Borrowing|Cancellations|ReasonsForCancellation

The default email template for a cancellation is ‘cancel.txt.’

Set up cancellation processes that best fit your workflow

- Create a list of situations where you cancel requests. Look for common reasons and group requests.

- Suggest alternate actions beyond a simple cancellation that would be helpful for the customer. Here are some ideas to help get you started:

If library staff explores a variety of alternate actions they should find there are few times when a request can only be cancelled without further assisting the customer. Take advantage of the linking possibilities and other service contacts in your library. Think of ILL requests not only as requests for items, but also as an opportunity to engage your customers.
**Tips:**

The ILLiad Customization Manager key name for Odyssey Trusted Sender is ‘OdysseyAutoElecDel’ under Odyssey/Trusted.

If you have trouble finding something in the Customization Manager, you can use the ‘search’ box to search key names and values.

If you want to see an article that has been automatically delivered to the Web, just use this URL: http://<your ILLiad host>/illiad/pdf/<transaction number>.pdf

For example: http://hosted.illiad.oclc.org/illiad/pdf/12345.pdf

<table>
<thead>
<tr>
<th>Cancellation situation</th>
<th>Helpful action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer submitted a request for a foreign language item...</td>
<td>Use an email routing to contact customer and confirm they want an item in the particular language.</td>
</tr>
<tr>
<td>The requested item is available in one of the library’s subscription databases...</td>
<td>Use an email routing message to notify customer, include link to library’s database portal. Cc. a reference librarian who can help the customer.</td>
</tr>
<tr>
<td>The request is a duplicate of another already submitted...</td>
<td>Use a custom cancellation reason to inform customer.</td>
</tr>
</tbody>
</table>

**Chapter Summary**

The library will be able to use the Customization Manager to customize the cancellation reason table and create email routings.

The library will review common reasons they cancel items and think of alternate action they could take to provide help to customers.
Borrowing: Effective Post-Receipt Workflow

Chapter 6. Odyssey Trusted Sender

What is it?

Odyssey Trusted Sender allows you to indicate a lending library reliably sends good electronic document copies and then automates the delivery of that trusted library’s documents.

How does it help?

When electronic delivery processing is mediated by library staff the electronic document must be downloaded from the server, visually inspected for quality, and then uploaded to the server. The file transfer time is wasteful and unnecessary for libraries that send quality copies. When you use Odyssey Trusted Sender documents are delivered directly to the Web and patrons are automatically notified. As soon as the lending library sends the document, the transaction is complete!

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding Odyssey Trusted Sender.
2. ILLiad 8 Documentation regarding Odyssey Trusted Sender.

Understanding how Odyssey Trusted Sender works

A library skit illustrating Odyssey Trusted Sender:

- Get four library staff members to play the following roles: lending library, Odyssey server, borrowing library, and the requesting customer. Have each play stand in the four corners of the meeting room.

- Give two excellent quality article copies to the lending library player.

- Act out the skit in Appendix D.
Chapter Summary

- Library staff will understand how Odyssey Trusted Sender saves time for library customers and staff.
- Library staff will know how to view articles that have been delivered to Web.
- Library staff should be able to report quicker turnaround times while performing less manual processing.
Chapter 7. Multiple Address Sites

What is it?

When branches of a library system share an OCLC symbol, you may not know where to return them. ILLiad allows for multiple addresses to be listed under one symbol, and alerts staff to when a new location sends an item, allowing you to add, make changes and save the necessary address information so that you can print out the correct return label when the time comes.

How does it help?

By returning items directly to the correct library, library staff who receive items for other branches do not have to find the correct address themselves and re-mail material. Loans will be returned more quickly, as well, leaving less chance for loss or staff time following up on missing items that are still in transit, or possibly sitting on the wrong library's question shelf.

Getting started - http://tinyurl.com/IDS-Institute

1. ILLiad 8 Documentation regarding The Lender Address Form.
2. ShareILL.org explains more about multiple address sites.

Workflow Steps

1) When you check in an item from a new library, a new branch, or when the old address has changed in OCLC, an Address Screen will pop up first.
2) Look at the top left address – the OCLC information – and compare it to the bottom left, making any changes by clicking on the down arrow keys next to each field.
   a. If the changes are for the same library, just click on Save on top.
   b. If the address is for another location entirely, check to see if it is already listed on the right side of the screen.
      i. If so, click on that address to choose it (and make sure it is exactly the same.)
      ii. If not, add the new address by using the arrows and then click on New.

Have you ever returned a book to the wrong library location? Branches that share an OCLC symbol, but not an address, can be identified when checked in...if you know what to look for!
Try this at work!

Check some of the Suffolk Cooperative Library System (SDE) to see if you already have multiple addresses listed. Can you think of any other multiple-address lenders?

Chapter Summary

Now that you know how to handle multiple locations and address changes, pass this information on to everyone who checks in interlibrary loans at your library.

Items can then be returned to the correct location faster, with less confusion for all!
Chapter 8. Web Circulation

What is it?

The ILLiad Web Circ module allows sites that use a remote desk for circulating ILL materials to have access to ILLiad circulation functions without having the ILLiad Client installed on circulation workstations.

With the Web Circ module, users can log into a restricted web view of ILLiad and check items out, check items in, renew, and mark an item as In Transit. Permissions can be restricted so the staff using the Web Circ module only have access to that module and cannot use the ILLiad Client, Web Reports or any ILLiad administrative tools.

How does it help?

Using the ILLiad Web Circ module can eliminate the need to print Loan Slips (check-out slips), and records the exact time/date when the patron picked up and/or returned the item for more precise tracking.

Getting started - http://tinyurl.com/IDS-Institute

Tip:

One or more Web Circulation activities such as – **Check Out**, **In Transit**, **Check In**, and/or **Renew** - may be disabled by setting **WebCircEnable[Web Circ Key Name]** to **No** in the Customization Manager.

So, if you only want your pick-up point to **Mark In Transit** and not **Check In** (which would update your OCLC status to Returned) you would mark **WebCircEnableCheckIn** as **No** and **WebCircEnableMarkInTransit** as **Yes**.

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**Table 2. Web Circ settings in the Customization Manager.**

<table>
<thead>
<tr>
<th>Key</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WebCircEnableCheckOut</strong></td>
<td>will change the transaction status of the request to <strong>Checked Out to Customer</strong></td>
</tr>
<tr>
<td><strong>WebCircEnableCheckIn</strong></td>
<td>will change the transaction status of the request to <strong>Awaiting Return Label Printing</strong></td>
</tr>
<tr>
<td><strong>WebCircEnableMarkInTransit</strong></td>
<td>will change the transaction status of the request to <strong>In Transit</strong>.</td>
</tr>
<tr>
<td><strong>WebCircEnableRenewal</strong></td>
<td>process in ILLiad Web Circulation is very similar to the renewals that users can request themselves in the borrowing DLL.</td>
</tr>
<tr>
<td><strong>WebCircEnableCirculationForBlockedUsers</strong></td>
<td>Configures whether staff users can check out and renew for blocked users. If this value is set to false, a quick check out or renewal will cause the VerifyUserCleared status message to display.</td>
</tr>
</tbody>
</table>
Setting up Web Circulation at your Library

1) Discuss with the staff at your pick-up point the various functions of Web Circulation. What are you both comfortable having them do? (Check Out, Renewals, etc.). Will only Staff handle ILL transactions? Or will Student Assistants help?

2) Locate your Web Circulation page so you can bookmark/place it on the appropriate workstation’s desktop for easy access. The web page is usually:
https://(your server name)/ILLiad/WebCirc/Logon.aspx

3) Have apprehensive staff? Consider a test pilot before going ‘live’ with Web Circulation.

Chapter Summary
Web Circulation can be a big timesaver, paper saver, and can narrow down precisely the time and date the patron came to retrieve, or return, the item.
Chapter 9. Print Templates

What is it?

ILLiad uses Microsoft Word mail merge templates to print transaction paper forms.

How does it help?

When properly managed, one set of print templates can be used by all ILL workstations, and paper form data can be formatted to fit the needs of staff using forms to process requests.

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Instructions regarding print templates.
2. ILLiad 8 Documentation regarding print templates.

Tips:

Each print template has an associated Microsoft Excel spreadsheet file that contains the transaction data for the batch of requests you are working on.

Microsoft Word allows the use of conditional rules to make print templates interactive – print special notes when a transaction contains specified data.

A ‘path’ is computer jargon for the location of a file in a computer system.

Set up your print templates

- Most higher education libraries are on campus computer networks where staff can access ‘shared’ folders. Move your templates into a shared folder, and then put the ‘path’ into the ILLiad Customization Manager under System|General|PrintDocumentsPath. (Remember to add a trailing forward slash “/” to the end of your directory or this won’t work.)

- Gather samples of your paper forms and have staff review them for any problems. Some things to consider:
o Are fonts and white space ideal for readability?

o Is any important data missing?

o Is there any unnecessary data?

o Could data be better grouped for clarity?

• Draft a mock up of improved paper forms, and then revise your templates.
  
o Take a look at the customized print templates in the Workflow Toolkit for ideas about how you can improve your templates, or just use them at your library: http://tinyurl.com/IDS-Institute Chapter 9, Link #3.

**Chapter Summary**

• The library will be able to consolidate their print templates into a single shared folder location.

• The library will review their print templates and identify possible improvements.

• The library will be able to modify their print templates.
Borrowing: Special Messages & Connection Manager

Chapter 10. Stale Request Processing

What is it?

There are several ways to catch transactions that are “stuck” or just not in OCLC anymore, but that you have not yet received:

1) ILLiad Web Report – Outstanding Requests
2) OCLC Special Messages – Borrowing (and Lending)
3) ILLiad Request Sent queue

How does it help?

This helps your patrons get their requests more quickly...which makes your ILL department look good, as well!

Getting started - http://tinyurl.com/IDS-Institute

1. ILLiad 8 Documentation regarding Web Reports in general at:
2. About the Outstanding Request Report specifically.
3. About Special Messages for Borrowing.
4. OCLC has information about Special Messages in its Resource Sharing Users Guide.

Follow up with requests that have never been received and have not showed up in your Unfilled queue either...before patrons call you to enquire/complain!
**Tips:**

To check for problems in your ILLiad Request Sent queue:

- Double click to get to the list of transactions
- Make sure they are in date/transaction number order by clicking on the TN field on top and seeing the lowest number listed first
- Double click the lowest TNs and look at when they were sent (in the Date field), their OCLC status, and their ILLiad transaction status.
- Follow up!
  - Resend the request to more lenders if the transaction is no longer active in OCLC
  - Contact the lender if it was sent awhile ago and seems to be lost
  - Contact the patron if the request is very old to make sure they still need the item

---

**Try this in your library**

1) Check all three ways to find old requests.
2) Follow up with patrons and other libraries to fill or cancel them.

---

**Chapter Summary**

If you do this regularly – say, once a week – it will not take long.

- You will improve your turnaround time...
- You will help patrons get items more quickly....
- All before any patrons – or staff at other libraries – call you!
Chapter 11. Customer Management

What is it?

There are several different methods to authenticate users – Basic Authentication, ILLiad Exclusive Authentication, LDAP, implementing a User Gateway, etc. Whichever way your library chooses to clear users for interlibrary loan privileges, it is important to keep on top of verifying, merging, and disavowing. Of particular importance is the routing rule that prohibits un-cleared users’ requests from automatically going through Direct Request.

How does it help?

The routing rule prevents un-cleared users from requesting items they potentially may not be able to request due to their status at your institution. Various authentication methods can help expedite your patrons’ requests and decrease the amount of time between request submission and receipt of item.

Lightweight Directory Access Protocol (LDAP) is a local network directory service. If available at your institution, ILLiad can use it to automatically authenticate your users. When a user attempts to login to the ILLiad webpages, it will check against your institution’s user directory using LDAP. If the username exists, then the user is granted access. Otherwise the user will not be able to logon to ILLiad.

There are many benefits to using LDAP, which is utilized at many institutions:

- You no longer have to manually verify and clear customers, saving you time.
- Users do not have to maintain another username and password just for ILLiad.
- Staff do not have to worry about resetting lost passwords.
- Staff can still block, disavow, and create users.

For information about LDAP at your institution, contact your information technology department.
Getting started - http://tinyurl.com/IDS-Institute

1. Learn about Clearing Customer Authentication from Atlas.
3. LDAP Authentication from Atlas.
4. Atlas documentation for Deleting/Blocking Users in the ILLiad Database.

Caution!
Deleting records using the Database Manager is permanent. Always back up your data first. If you are hosted by OCLC, then contact them if you are considering deleting patron records.

In the Customization Manager:

• <Open> System|Routing|Routing

This rule should have the following settings:

- Process Type = Borrowing
- Transaction Status = Awaiting Request Processing

By adding and u.Cleared = ‘Yes’ to the end of your match string this will send all ‘Unclear’ customer requests into your Awaiting Request Processing queue for staff to process once authentication has occurred.
Chapter 12. Clearing Errors and Flagged Requests

What is it?

You can follow up with errors in ILLiad 8 by checking the System box for red stop signs on the lower right hand corner of the screen. Possible problems in Borrowing include:

- Customization Manager Errors
- Flagged Requests
- Outgoing Email

How does it help?

By looking at these errors, you can make sure requests have been updated correctly in OCLC and ILLiad and that all transactions are moving through the system as they should be.

Getting started - http://tinyurl.com/IDS-Institute

1. Atlas/ILLiad has instructions regarding **Errors**.
2. OCLC has information on how to deal with problems in WCRS by checking **Special Messages**.

Workflow Steps:

1) Double click on the errors on the lower right of your main ILLiad screen under System.
2) Open the first transaction and compare the OCLC status (on the right upper box) to the ILLiad status (on the lower left hand corner.)
3) If all is well, and the item has either been Finished in OCLC (or Delivered to Web) and is not found on OCLC, clear the error by clicking on the red Connection Manager Error button. Use the down arrow key to go to the next transaction in that section.
4) If there is any problem, follow up by contacting the lending library and/or the patron and figuring out if the request needs further attention.
5) When you get to the end of a section go back to the Error screen and click on the next section to deal with those.
6) For email problems, check the patron email and send again or contact OCLC if you are hosted or your systems contact if your library hosts ILLiad.
Tip:

If you look at these every day, then it will not take long to deal with them.

There are several types of Connection Manager errors including Received Not Allowed Here, Record Not Found, Renewal Not Allowed Here, and Return Not Allowed Here. (There are also several error messages in Lending.)

Figure 4. Example of a request with a connection manager error. (Credit: Atlas Systems, https://prometheus.atlas-sys.com/x/ooEfAg)

Try this at work!

If you see any red error signs, click on them and go through them one by one.

Chapter Summary

Now you can follow up with transaction and system errors, solving problems before you get calls from patrons or other libraries!
Chapter 13. Customizing Layouts

What is it?

ILLiad 8 enables you to customize the screens you are looking at, allowing you to hide unused fields from view, bring other favorites forward onto your desktop, and move the entire layout around.

How does it help?

Spending a little time customizing your layouts, or those seen by your student help, can reduce eye strain, reorganize information according to what you want to see, and improve processing time.

Getting started - http://tinyurl.com/IDS-Institute

- Learn how to customize your layouts in 9 minutes or less with this Atlas video!
- Detailed ILLiad 8 Documentation regarding Working with Client Layout & Design.

Re-examining your own layouts

1) Start with your main screen – borrowing, lending, document delivery tabs.
   a. Can you group into folders ‘non-active’ requests categories?
   b. Or, what do you not want your student/staff help to be concerned with, what can you hide away?

2) When customizing a request screen sometimes it helps to take a screen shot of your current template, print it, then mark it up – what needs to go (non-applicable fields), what would you like to see up top and viewable upon opening, and more importantly is the question, where do you want to see it located?

3) Customize away! And don’t forget to view Atlas’s 9 minute free video on How To! It has a handy tip on how to copy your new template to other log-ins at your library!

Tip:

When traveling to other ILLiad libraries, stop to check out their customized designs. Find a good one? These files are easy to borrow from others!
From seeing all of this...

To organizing similar requests into categories...

So, you immediately see only what needs to be attended to right now!

Figure 5. Illustration of customizing the Home tab.
Chapter 14. Customizing Queues

What is it?

Custom Queues allow you to set up holding queues to which you can route transactions in the ILLiad client. These queues are available in each module of ILLiad and, once created, appear in the Request Groups on the Home Page and under the Route menu on the Request Form. The EMailRouting and Routing tables can also use them as destination queues.

For example, to create a queue called "Awaiting Reference Staff Processing" so that your reference staff would be able to review certain requests when needed, you would add a custom queue in the CustomQueues table.

How does it help?

Custom Queues are a great way to designate and/or pull out requests that require special handling by placing them in a Queue for appropriate staff handling. You can also use them in conjunction with e-mail templates and now with Version 8.1 they can be excluded from the barometer count.

For example, to create a queue called “Awaiting Lending Library Invoice”. Customer A made contact that they lost their ILL book. After emailing the Lending Library an inquiry requesting an Invoice for Replacement, the lost book request would be routed to this queue. This takes it out of the “Checked Out to Customer” queue (avoiding accidental sends of overdue notices to Customer A who contacted you), and allows you to see immediately invoice requests you need to follow up on.

Getting started - http://tinyurl.com/IDS-Institute

• Atlas has Creating Custom Queues documentation.
• Information regarding the Barometer Exclusions table.
Questions to help you examine your workflows and how Custom Queues could help you

1) Do you have requests you’d like to break out of the regular routine queues:
   a. Requests for other staff members/departments to work on or examine?
   b. Requests awaiting a response or a further action?

2) Can you tie any of these in with an email template and then a routing rule into your newly created queue?

3) Have an idea for a queue? Share or query on the Listservs to see if anyone else has created it. Why reinvent the wheel?

Tip:
Just upgraded to version 8 and missing your Awaiting Extensive Searching queue?
For instructions, visit [http://tinyurl.com/IDS-Institute](http://tinyurl.com/IDS-Institute), Chapter 14, Link #3.

In the Customization Manager:
- <Open> System|Custom Queues|Custom Queues
- <click> New Record
- <Type> [the Name of your Queue] in Queue field
- <Type> [the Process (ie. Borrowing, Lending)] in the Process field
- <click> Save

Example:

<table>
<thead>
<tr>
<th>QueueName</th>
<th>NVTGC</th>
<th>ProcessType</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Lending</td>
<td>ILL</td>
<td>Borrowing</td>
</tr>
<tr>
<td>Lending Library</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 15. Buy vs. Borrow

What is it?

ILL is not free, even in the absence of lender fees. Costs like shipping, staff time, license/subscription fees, copyright, and office supplies sure can add up. When all of those costs combine, you can sometimes be faced with a $15-$25 transaction (or more)—perhaps only for a $5-$10 item. That’s why it can make a whole lot of sense to buy the item instead: articles from publishers or document providers, and books/media from Amazon or other sellers.

Although it helps if your ILL department has a credit card, it’s not required. For example, articles can be purchased via the Copyright Clearance Center’s Get It Now service with monthly invoices (at a negotiated flat fee of $24/article). Books and media can be purchased from your preferred vendors, which may allow you to use purchase orders. The key is a sensible workflow: Have you considered integrating your Acquisitions and ILL requests into ILLiad using the Getting It System Toolkit (GIST)? Can the cataloging process be expedited for these on-demand titles? Do you have the discovery addons you need to quickly make informed decisions?

Addons: Search & Purchase within ILLiad

Addons allow you to easily search for and purchase books and articles with many popular services and vendors available. Best of all, you can do this without leaving your ILLiad client.

To learn more, see Appendix B. “Addons” in the back of the workbook.

How does it help?

Not only can purchasing a book or article save you money, it almost guarantees better turnaround time for your patrons and, in the case of books/media, can also improve your collection diversity. For articles, you can often pay less to purchase a copy than to pay
copyright royalties. For books and media, purchasing can make the most sense if the combination of lender fees and return shipping cost more than a new or used copy of the item itself (in many cases you can even get free shipping, such as with Amazon Prime).

**Getting started - [http://tinyurl.com/IDS-Institute](http://tinyurl.com/IDS-Institute)**

1. Getting It System Toolkit (GIST) is a system that promotes [purchase-on-demand & enhanced ILL](http://tinyurl.com/IDS-Institute).
2. Copyright Clearance Center (CCC) GetItNow Service [for simple & fast article purchasing](http://tinyurl.com/IDS-Institute).
3. Check out the ILLiad Addons Directory for [helpful purchasing & cataloging addons](http://tinyurl.com/IDS-Institute).
4. The Workflow Toolkit has some information about adopting a purchasing workflow in ILL.

**Tip:**

Making a purchase in ILL? We recommend using a custom Lender Address record simply called “Vendor.” Not only will this allow you to easily track and search for your purchases in ILLiad, but marking it as a “Copyright Payer” also prevents purchased articles from accidentally appearing in your copyright orders.

**Activity:**

For the following scenarios determine whether you would buy or borrow each item.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Buy or Borrow?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A $15 book available only from one lender who charges $20.</td>
<td></td>
</tr>
<tr>
<td>An article pre-print only available online.</td>
<td></td>
</tr>
<tr>
<td>A New York Times bestseller, held by many libraries but often “In Use on Loan.”</td>
<td></td>
</tr>
<tr>
<td>Your patron needs an easy-to-find book—<em>tomorrow!</em></td>
<td></td>
</tr>
<tr>
<td>An article with a $39 copyright royalty, but also available from CCC Get It Now.</td>
<td></td>
</tr>
</tbody>
</table>
Planning:

1. What criteria are important to consider for purchasing items?

__________________________________________________________________________

2. For whom are you willing to purchase?

__________________________________________________________________________

3. How will you pay for these purchases? Is there a set budget?

__________________________________________________________________________

4. Who will do the purchasing (i.e. ILL clerk, ILL manager, acquisitions clerk, etc.)?

__________________________________________________________________________

5. Are there any local procurement or accounting practices required by your institution?

__________________________________________________________________________

6. Which ILLiad addons will you need for making purchases?

__________________________________________________________________________

Chapter Summary

With the available addons for book vendors, such as Amazon and GOBI, as well as the Google and CCC Get It Now addons for articles, you’ll find that making purchasing decisions is quick and easy.

Because local practices vary, it is important to check with your administration to ensure that you are following the necessary accounting practices. These need to be included into your workflow.

Plan a workflow with your colleagues in acquisitions and technical services. GIST is one way to facilitate this from within ILLiad. For more information, visit http://gist.idsproject.org.
Document Delivery: Sustainable Workflow

Chapter 16. Overview of Document Delivery

Document delivery is an enhanced service we can offer our patrons that delivers research materials directly to their desktops or offices quickly and efficiently.

ILLiad enables libraries to deliver items they hold directly to their patrons. Articles can be downloaded or scanned and delivered electronically to a patron’s desktop through his or her ILLiad account. Books and tangible items can be retrieved by ILL or circulation staff and put on hold or delivered directly to the patron’s office or mailing address.

Getting started - http://tinyurl.com/IDS-Institute

1. Workflow Toolkit Document Delivery Workflow.
2. ILLiad Document Delivery Instructions.
3. Workflow Toolkit Odyssey Helper Instructions.
4. ILLiad ILLiad Odyssey Helper instructions.

Document Delivery Processing

Transactions that are eligible for document delivery originate in borrowing. Once it is determined that the requested item is held locally, it is routed into the document delivery module.
Document Delivery Processing

Item Received into Borrowing

Awaiting Copyright Clearance

Awaiting Request Processing/Do we Own?

No
Proceed with Borrowing

Yes

Electronic Article

Print Article

Book or Other Tangible

Download PDF

Route to "Awaiting DD Stacks Searching"

Route to "Awaiting DD Stacks Searching"

Save PDF or TIF in Images File as TN

Print Pull Slip

Print Pull Slip

Route to "In DD Stacks Searching"

Scan/Save document to Images file as TN

Pull Item/ Deliver to Circulation or Ship to Patron

Odyssey Helper

Odyssey Helper

Update Item as "Found"

Notify Customer

Awaiting Copyright Clearance
Figure 6. Document Delivery tab on the home screen.

Figure 7. The Document Delivery Ribbon.
Easily route a locally held request to Document Delivery.

Didn’t find what you were looking for in the stacks? Don’t worry – you can always route the transaction back to borrowing!

Things to consider before implementing Document Delivery:

To whom will you offer this service?
- Faculty
- Staff
- Graduate Students
- Distance Education Students
- All

How will returnables be delivered to your patrons?
- Held at Circulation
- Campus Mail
- Home Delivery
- Via US Postal Service
- Via other carrier
- Postage/Return postage prepaid?

What formats will be eligible for Document Delivery?
- Electronic articles
- Print articles
- Books
- Media
Chapter 17. Automated Routing to Document Delivery

What is it?

The Routing Rule for Document Delivery that moves requests from Awaiting Request Processing in Borrowing to In DD Stack Searching in Document Delivery. This can be used for articles retrieved electronically and saved for delivery in your Images (Odyssey Helper) folder.

How does it work?

It bypasses the Document Delivery status queues Awaiting Document Delivery Processing and Awaiting DD Stack Searching and the printing of pull slips. You will need a special queue on the Borrowing side to start the routing rule, as your existing Route to Document Delivery button/icon routes borrowing requests into the Awaiting Document Delivery Processing.

Setup

This is a 2 step process:

1) Creating the queue In Doc Del Stacks Searching:
   - In the Customization Manager open System|Custom Queues|CustomQueues
   - <click> **New Record** icon
   - <type>

<table>
<thead>
<tr>
<th>Queue</th>
<th>In Doc Del Stacks Searching</th>
</tr>
</thead>
<tbody>
<tr>
<td>NVTGC</td>
<td>ILL (this may vary for NVTGC sites)</td>
</tr>
<tr>
<td>Process Type</td>
<td>Borrowing</td>
</tr>
</tbody>
</table>

   - <click> **Save**

2) Creating the Routing Rule:
   - In the Customization Manager open System|Routing|Routing
   - <click> **New Record** icon
   - <type>

<table>
<thead>
<tr>
<th>Rule No</th>
<th>(your preference)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Active</td>
<td>Yes</td>
</tr>
<tr>
<td>Process Type</td>
<td>Borrowing</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>In Doc Del Stacks Searching</td>
</tr>
<tr>
<td>Match String</td>
<td>t.RequestType = 'Article'</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>New Process Type</td>
<td>Doc Del</td>
</tr>
<tr>
<td>New Transaction Status</td>
<td>In DD Stacks Searching</td>
</tr>
<tr>
<td>Rule Description</td>
<td>Direct routing of e-journal article requests into In DD Stacks Searching to avoid printing pull slips in Doc Del Module for those in Images folder (your preference)</td>
</tr>
</tbody>
</table>

Your Routing Rule Number will vary depending on your own Routing Rule hierarchy.

Figure 9. Routing rule in the customization manager.
Chapter 18. “Hold for Pick Up” and “Mail to Address”

What is it?
ILLiad was designed for two types of user services; Hold for Pick Up service is for users who pickup and drop off items at the Library, the Mail to Address service is for remote users – those you deliver items to; that could be a department or office in a nearby building, or mailing the item to the user’s home or work.

How does it help?
Hold for Pick Up is the default service and most common setting, however, more often now, libraries are developing services to reach their remote users – rather than creating redundant request systems or ad hoc practices designed to flag requests in ILLiad, use these two settings wisely to design your workflow and automate processes for on-site users, remote or distance education users, or even custom branch library services.

How does it work?
Users can select or edit their Delivery groups to identify the service they want; Hold for Pick Up or Mail to Address through ILLiad web pages.

Tip 1:
Libraries often remove “Mail to Address” as a drop down value on the ILLiad create and edit user information because they don’t want to offer a delivery service to users.

The default ILLiad delivery group for Loans and Copy have associated email files that notify users to either come in to pick up an item (books, videos, or printed articles), or that the item will be sent to their Address; details: http://tinyurl.com/ILLiademail

After retrieving items and updating Found for items “In DD Stacks Searching”, ILLiad prompts the need for some items to be mailed or “In Awaiting Shipping Labels” status. Details: http://tinyurl.com/ILLiadprinting
**Tip 2:**
We recommend automatically skipping printing shipping labels, and instead customizing the Paging Slip to have Mail To Address when and where you need it:


Chapter 19. “Circulation-Friendly” Print Templates

What is it?
You have the ability to design your pull slips to include information that makes retrieving, holding and checking out items easy for your Circulation Desk or ILL staff.

How does it help?
Highlighting the Call Number and Location on pull slips makes for easy retrieval from the library stacks. By making the patron's name clearly visible, items can be easily placed on a hold shelf. Including the Transaction date on the pull slip enables Circulation staff to identify and pull stale items from the hold shelf.

How does it work?

Figure 10. Sample Document Delivery pull slip.
Lending: Setting a Solid Foundation

Chapter 20. Share and Share Alike

What is it?
Determine the who, where, what, and why of lending.

How does it help?
The right policies and partnerships can help prevent confusion and allow a smoother lending process.

Getting started - http://tinyurl.com/IDS-Institute

1. For IDS Members: Workflow Toolkit Instructions regarding TPAM.
2. All others: use OCLC Usage Statistics “Lender GIS” and “ILL Reciprocity” reports.
3. ILLiad 8 Documentation regarding Conditional Requests.
4. OCLC has a Policy Directory that lists the lending and copying policies of all WorldCat Resource Sharing libraries.
5. The International Coalition of Library Consortia has links to over 200 library consortia around the world.
Tip:

Be a social butterfly and make professional connections with your peer institutions! Visit these sites at [http://tinyurl.com/IDS-Institute](http://tinyurl.com/IDS-Institute) Chapter 20.

<table>
<thead>
<tr>
<th>Link #6: ShareILL. This community-driven blog connects you to finding aids and tools; resources for managing your ILL operation; and professional development resources.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link #7: ILL-L Listserv. This WebJunction listserv connects ILL professionals from across all types of libraries. It is an essential subscription for all ILL staff.</td>
</tr>
<tr>
<td>Link #8: Workflow Toolkit Listserv. Subscribe to the WorkflowToolkit-L listserv and discuss best practices.</td>
</tr>
<tr>
<td>Link #9: ILLiad Group on WebJunction. Get official updates from Atlas Systems and OCLC, and connect with other ILLiad users.</td>
</tr>
</tbody>
</table>

Evaluate your lending workflow by asking yourself and your lending coworkers the following:

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is every loan cancelation 100% accurate? If yes, how do you know? Who should be notified about inaccurate holding records? If no, what can and should be done to correct this?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Is every loan transaction conducted in a courteous manner? If yes, how do you know? If no, what can and should be done to correct this?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Is every loan transaction conducted in an efficient manner? If yes, how do you know? If no, what can and should be done to correct this?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Are bottlenecks or delays experienced at any point in the lending workflow?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Are there any steps in the process that do not provide value?</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Chapter Summary

1) Know your own policies by heart and know where to find everyone else’s.

2) Do unto others. Don’t cancel without considering a conditional response first.

3) Learn by teaching. Communicate with peers to stay current on new trends and techniques.
Chapter 21. Effective, Efficient Environments

What is it?

Develop an ILLiad layout that supports your unique needs.

How does it help?

ILLiad can be as flexible as you make it. Save time and shorten workflows with thoughtful alterations.

Getting started - http://tinyurl.com/IDS-Institute

1. ILLiad 8 Documentation regarding *Client Layout and Design*.
2. ILLiad 8 Documentation regarding *ALA Requests*.
3. ALA has a fact sheet about *ALA Requests* that includes forms and more information resources at.
4. The ILLiad documentation also has a great explanation of *Lending Web Pages*.

Don’t worry about making mistakes, because you can always “Restore Default Layout” and start fresh!

Figure 11. The Customize Layout menu in the ILLiad client.

One size doesn’t always fit all. Simplify lending by customizing layouts and web pages.
Tip:
Make sure that your client and web page changes are reflected in Customization Manager settings. For more information about the Customization Manager, check out: http://tinyurl.com/IDS-Institute Chapter 21, Link #5.

Make better decisions, starting today:

Environmental impacts: office paper use

Lending Paper Flow: Copy

![Diagram of Lending Paper Flow: Copy]

Lending Paper Flow: Loan

![Diagram of Lending Paper Flow: Loan]

Check out the ILLiad Workflow Toolkit for time-saving tips on automating workflow, templates, and eliminating paper processes: http://toolkit.idsproject.org

See the rest of the slide show at http://tinyurl.com/IDS-Institute Chapter 21, Link #6.

Take Aways:

- Go green—and catch up with everyone else by going paperless and providing online lending forms.
- You’re the boss of your own ILLiad. Make it work for you by customizing templates and web pages to meet your workflow needs.
- Don’t forget to turn on your Lending Web Pages! Each lender should receive a password.
Lending: Improving Workflow without Sacrificing Quality

Chapter 22. Efficient Search and Retrieval

What is it?

It is important to understand that ILLiad is not a tool that does only two things, submitting and filling requests for other institutions. ILLiad is capable of helping the user to reduce time when accomplishing daily responsibilities if the user actually applies it as a program. The reason why ILLiad 8 is by far the most efficient model is due to the special features that are included from the original upgrade of ILLiad 8 and the ability to implement newer ones.

How does it help?

The most useful feature that ILLiad 8 introduced to the users is addons. Numerous addons had been created to fulfill daily responsibilities without leaving the ILLiad program, which means less time to click around and more to cross out the daily check list. The most efficient aspect of the addons is the fact that each one has a unique ability to accomplish a different type of workflow, such as fulfilling loans and articles.

Another element that will potentially save time is activating the CopyTitleToClipboard feature on ILLiad. With the activation, the user will not have to highlight to copy and paste the title to do a search. Instead, the title would automatically be copied already, so all the user will have to do is paste and search.

Getting started - http://tinyurl.com/IDS-Institute

1. Learn how the steps to Install Additional Addons from Alias.
2. ILLiad 8 Documentation regarding Addons.
3. Interested in creating your own addon? Learn more from Atlas.
4. Browse the ILLiad Addons Directory to find your favorite addons:
5. IDS Workflow Toolkit’s instructions for CopyTitleToClipboard:
6. Atlas video tutorial for CopyTitleToClipboard
Helpful Addons for Lending Processing:

- **Serials Solutions Search** – Addon automatically performs search within the lending library’s catalog and informs the user of any copyright restrictions to prevent distributing the article.

- **Innovative/Aleph** – Addon automatically performs search for the request within the lending library’s catalog.
Chapter 23. Keeping Organized

What is it?

Custom Queue is a feature that allows the ILLiad Client user to organize the program to know where each request should be routed into depending on which affiliate it is receiving from. Each custom queue can be created from the Customization Manager and later organize each affiliate’s request on Group Maintenance.

How does it help?

By creating Custom Queues, it allows the ILLiad Client to recognize each library’s request and immediately directs them into the appropriate queue. If your library has multiple affiliations with different policies, this can potentially reduce the time from identifying each library while filling the request.

Getting started - http://tinyurl.com/IDS-Institute

1. Atlas explains how to Configure Custom Queues.
2. IDS Project Workflow Toolkit instructions regarding Routing Rules for Lending.

1) Go to System in the Customization Manager.
2) Go to Custom Queue and click on the Custom Queue table.
3) Click New Record to create a new custom queue.
4) Fill in the Queue Name and identify whether the queue belongs to Borrowing, Doc Del, or Lending.

Figure 12. Creating a custom queue in the Customization Manager.
How to keep organized and avoid policy mistakes

Identify your affiliates and agreements with them:

<table>
<thead>
<tr>
<th>Affiliation Groups</th>
<th>Library Use Only?</th>
<th>Max Cost</th>
<th>Preferred Shipping</th>
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Chapter 24. Billing

What is it?

The ILL Fee Management (IFM) is a feature provided by OCLC to prevent unnecessary time and money spent on processing invoices. OCLC is capable of tracing each activity made between each library. With this resource, IFM immediately knows when to charge or credit the library’s OCLC account and streamlines the billing system. This financial feature can easily be activated on ILLiad by changing the payment method from your Constant Data’s max cost.

How does it help?

Once IFM is activated your OCLC account will automatically credit/charge for each request filled by/for your library. This will essentially reduce the extra time and costs spent on processing invoices. OCLC keeps a chart of the activities used with IFM, so it becomes easier to work or collect statistics for the department. By using IFM, you may relieve the accounting department from the extra workload and help to become more eco-friendly as well.

Billing Libraries Not Using IFM

Although IFM is the most convenient billing option to choose, some institutions might not see the value of it. However, IFM is not the only option given to reduce the time given to paper invoices. ILLiad also has the Billing Manager, which needs to be activated from ILLiad Staff Manager. Unlike IFM, Billing Manager is used for organizing and saving invoices within a time period to be sent manually to other institutions in batches. This method still consumes less time and costs compared to processing paper invoices.
Getting started - http://tinyurl.com/IDS-Institute

1. IDS Project Workflow Toolkit’s Instructions regarding **ILL Fee Management**.
2. OCLC showing how IFM works.
3. OCLC has a **Savings Calculator** to calculate the savings from using IFM.
4. OCLC statistics module contains IFM borrowing and lending reports.
5. IDS Project Workflow Toolkit’s instructions regarding **Billing Manager**:
6. Learn the **Billing Manager Basics** for Atlas:

---

**Figure 14. The Billing Manager workflow.**

**Figure 15. Typical billing workflow without IFM.**
How to activate IFM in ILLiad:

1) Go to System tab and click into Resource Sharing Settings
2) Go to Constant Data tab and choose Default on the scroll down bar
3) Go to Max Cost section and choose IFM on the type scroll down bar
4) Of course, do not forget to save.

How Billing Manager Works:

1) When requests are filled from ILLiad, the invoices will be waiting for processing in the Billing Manager until the user decides to generate and send out the invoices in a batch.
2) The billing information will be merged into the appropriate LendingBillingManagerInvoice template
3) Either email or postal mail to the appropriate institutions
Appendix

Appendix A. Odyssey Scanning & Odyssey Helper

What is it?

Odyssey Helper is an ILLiad module that batch processes scanned articles for document delivery and lending. By sending all your scanned articles in a network folder, you can batch the uploading and updating process for all your document delivery and lending.

How does it help?

Reduce the work of handling scanned requests individually, saving your staff a great deal of time and speeding up your article request processing. This simple application can save a great deal of time compared to manually updating and sending individual requests.

How does it work?

Odyssey Helper works by matching scanned TIFFs or PDF’s to specific lending (or document delivery) transactions. If those transactions are in the correct status, then Odyssey Helper can send all of them at once.

![Process multiple transactions with the click of one button!](image)

Process multiple transactions with the click of one button!
Appendix B. Addons

What is it?

Addons are much like web browser extensions in that they add additional functionality to the ILLiad client. Each addon appears as an extra tab within an ILLiad request, allowing you to very easily include them in your workflow. Many addons act as mini-web browsers that will automatically search for the loan or article you are trying to find.

Some even allow you to automatically copy data from the website into the ILLiad request, while others (such as the Serials Solutions and SFX addons) combine data from external resources to make important information easier to get.

Figure 16. Example of the Serials Solutions addon. Note the ILL licensing information next to the Resource.

How does it help?

Because anyone can develop and contribute to the growing number of available addons, there are numerous ways they can help your workflow. In general, though, here are a few key points:

• No more toggling between ILLiad and your web browser for frequently used resources (such as your catalog, journal finder, Google, etc.)
• E-journal license data integrated with your e-journal holdings (available in both the Serials Solutions and SFX addons with the ALIAS API)
• Automates tedious manual searching—no more copying & pasting or typing titles into search boxes
• Flexibility: share addons over a network just like print and email templates, then each staff member can decide which addons to turn on or off in their client

Getting started - http://tinyurl.com/IDS-Institute

1. ILLiad 8 Documentation regarding Addons.
2. Interested in creating your own addon? Learn more from Atlas.
3. Browse the ILLiad Addons Directory to find your favorite addons.
4. Addons are written in the LUA programming language.

![Image of ILLiad interface]

**Figure 17.** The Serials Solution addon allows you to easily check your holdings and your licenses.

**Tip:**

To save your staff extra trouble, configure the addon in your client first so all they need to do is turn it on.
Activity

Part 1. In Column A below, write down the websites or resources you commonly use during request processing (i.e. your library catalog, journal finder, Google, etc.). Then, browse the ILLiad Addons Directory. Did you find a matching addon? If so, indicate that in Column B.

<table>
<thead>
<tr>
<th>A. Websites/resources you commonly use</th>
<th>B. Available as addon?</th>
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Part 2. For each available addon, run through the following installation checklist:

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<tr>
<th>Addon Name</th>
<th>1. Download</th>
<th>2. Unzip to Addons folder</th>
<th>3. Configure</th>
<th>4. Share</th>
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Appendix C. Network Scanning Essentials

What is it?

Network scanning is where you have your scanner configured to send files over the network to a computer. The folder where the scans are received is then shared so it is accessible from other computers on the network.

How does it help?

Network scanning helps because it eliminates the need to transport files from one machine to another in order to send them through Odyssey.

How does it work?

If you have a stand-alone scanner (usually also a copier), you will probably need to ask IT for help. Otherwise, check the manual for the specific device. If you have a smaller scanner, you only need to share the folder where the scans are stored.

Tech Tip:

- The mapped drive needs to be the same letter on all computers.
- Remember to use the ILLiad transaction number as the file name when scanning.
- These options are usually turned off by default.
Addendum D. Odyssey Trusted Sender: a comedy in two acts.

The Players:

The Lending Library – with a collection envied by all

The Library Customer – a student burning the midnight oil

The Borrowing Library Staff – dedicated to filling customer demand

The Odyssey Server – never sleeps, never eats, always delivers

Act I

Library Customer: “I really need this article for my paper, I’ll request it through ILL.”

Lending Library: “We have the article you need, we’ll scan it and send it to you.” (Lending Library walks an article copy to the Odyssey Server, then returns to their corner.)

Borrowing Library Staff: “Look at all these electronic documents I have to process! I hope I can finish before I leave to attend the IDS conference. There must be an easier way to do this!”

Odyssey Server: “Boy, there are a lot of electronic documents in the queue, I think I’ll go ahead and deliver them.” (Odyssey Server begins to walk the article over to the Library Customer, but is stopped by the Borrowing Library Staff...)

Borrowing Library Staff: “Stop right there! I better look at that first.” (Odyssey Server walks the article over to Borrowing Library Staff, then returns to their corner.)

“Well, this article looks good, I’ll deliver it.” (Borrowing Library Staff walks the article back to the Odyssey Server, then returns to their corner.)

Odyssey Server: (while walking the article to the Library Customer...) “I so glad I can finally deliver this article!”

Library Customer: “This article is just what I needed, and the quality is so good!”

Act II
**Borrowing Library Staff:** “Hurray! I just won an all expenses paid trip to Hawaii. I think I’ll turn on Odyssey Trusted Sender before a leave.”

**Library Customer:** “I need one more article for my research.”

**Lending Library:** “We have that one too, we’ll scan it and send it through Odyssey.”

(Lending Library walks a second article copy to the Odyssey Server, then returns to their corner.)

**Odyssey Server:** “Even though I’m just a mindless computer I’ve been enabled to trust the quality of this copy... (while walking article to Library Customer) ...and now I can deliver it without delay to an eager student.

**Library Customer:** “Another great article! It looks great, and it arrived so fast! How do they do it?!?”

**Borrowing Library Staff:** “It sure is nice under these palm trees... I think I could get used to Odyssey Trusted Sender!!!”