Tips, tricks, and change: getting your resource sharing department out of the storm and into calmer waters

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Indiana State University

Great Lakes Resource Sharing Conference (Toledo, OH.) June 6, 2014

Indiana State University

- **OCLC symbol: ISU**
- **12,448 FTE enrollment in Spring 2013**
- **2.25 FTE ILL staff**
- **5-8 student assistants (60- 100 hrs / wk)**
- **Part of Technical Services, previously of Circulation**

Indiana State University

- **10,000 avg borrowing requests**
- **12,500 avg lending requests**
- **Offer distance education ILL & Doc Del**
- **Responsible for outgoing shipping**
- **Technical Services responsibilities such as cataloging and processing**
- **Projects such as scanning print theses**
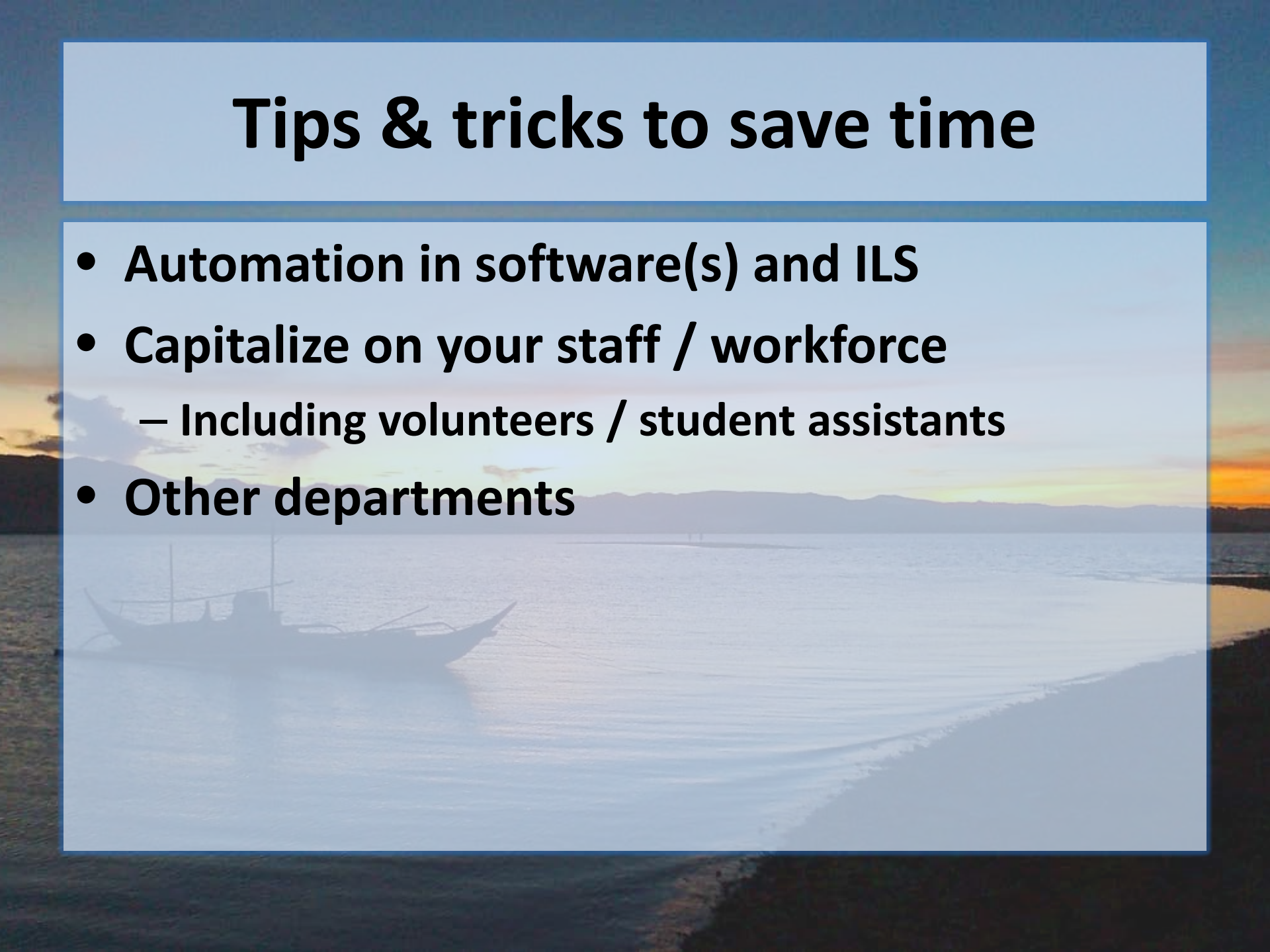- **Use ILLiad**

Agenda

- **Tips and tricks to save time**

- **Tips and tricks to save money**

- **Analyzing your workflow**
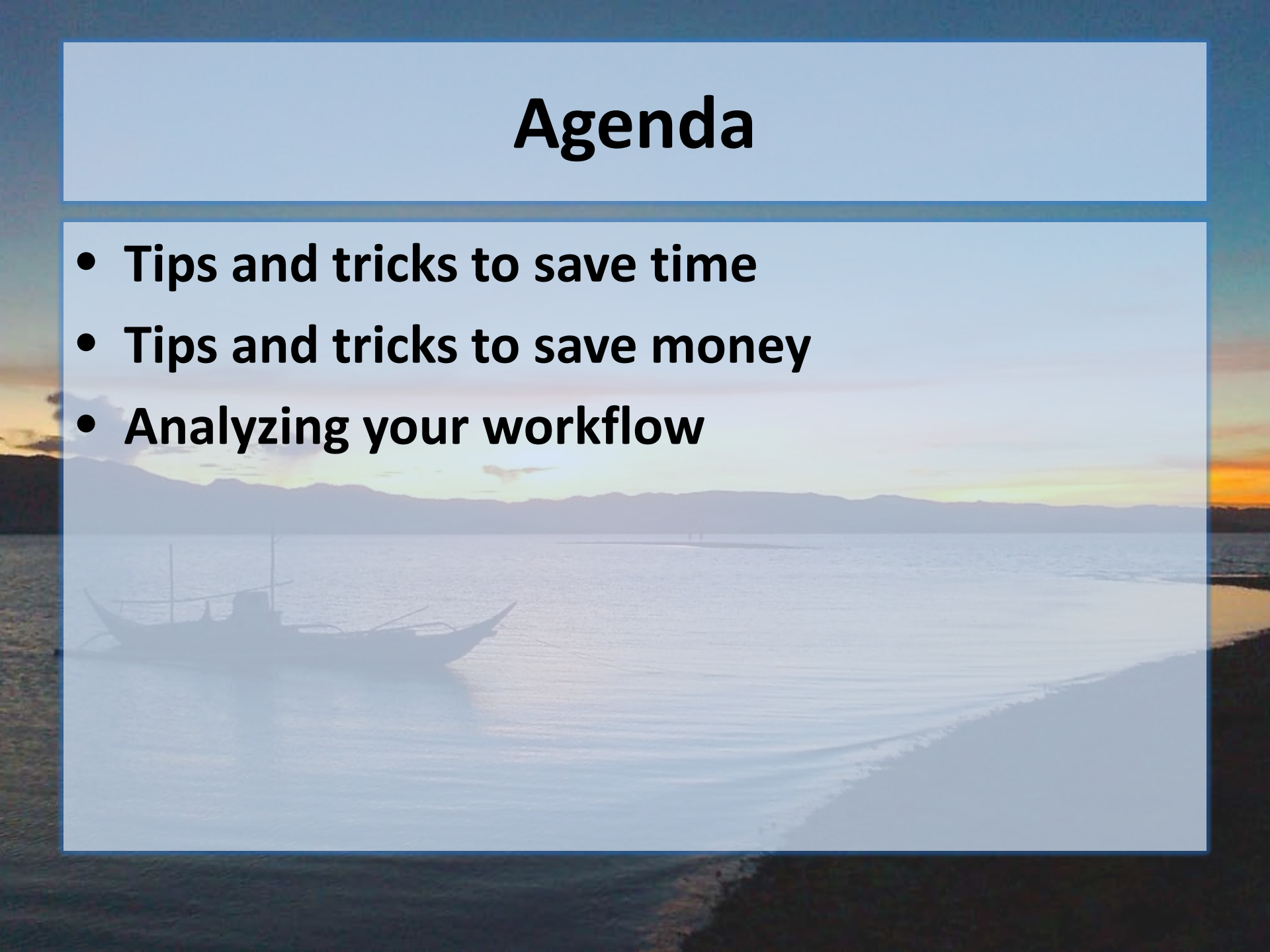
Tips & tricks to save time

- **Automation in software(s) and ILS**
- **Capitalize on your staff / workforce**
  - **Including volunteers / student assistants**
- **Other departments**

Tips & tricks to save time

- **Talk with ILL colleagues**
- **Arrange a visit with other ILL departments**
- **Listservs such as**
  - **ILL-L**
  - **OCLC-L**
  - **Software's listserv**
    - **ILLiad**
    - **Clio**

Tips & tricks to save time

To renew or not to renew

- **Renew:**
  - Shorter dues dates
  - Extra time when needed

- **Not to renew:**
  - If your due date is sufficient, no need renew
  - Save borrowing library time

Tips & tricks to save time

- **Organize**
  - **What you need, where you need it**
  - **A space for everything**
- **Forms**
  - **Problems   Example**
  - **Not on shelf and bad citations   Example**
- **Send electronic articles (if contract allows)**
- **Bill your own patrons for the lost item**

Tips & tricks to save money

- **Sometimes buying is cheaper**
  - **Books**
  - **Media**
  - **Audiobooks**
  - **Articles / documents**
- **Amazon, publishers & vendors**
- **Get It Now and other document suppliers**

Tips & tricks to save money

- **Use recycled paper (printed on one side)**

- **Cut paper use**

- **Price check regularly**
  - **Supplies**
  - **Upgrades**
  - **Subscriptions**

- **Check your invoices and IFM**

- **Contact patrons about cost and importance**

Tips & tricks to save money

- **Obtain it for free**
  - **Request items**
  - **Supplies / software**
- **Open Access**

Tips & tricks to save money

- **Belong to free groups**
  - **LVIS**
  - **Solinet (SIXX, SL#N)**
  - **Regional groups**
- **OCLC custom holdings**
  - **Free then speed**
  - **Group libraries that charge**
  - **Copy your free groups like LVIS from OCLC**

Example custom holding path (articles)

- **Indiana Odyssey**

- **LVIS, SIXX, & contracts w/ Odyssey**

- **Free and electronic**

- **Indiana Libraries, SIXX, contracts, LVIS**

- **Elec articles under $10 / then paper**

- **Elec articles from $10 - $14 / then paper**

- **Elec articles from $15 - $19 / then paper**

Tips & tricks to save money

- **Reciprocal contract / agreement**
- **Signed agreement between two libraries to loan material at no cost**
- **Send to everyone**
  - **Any libraries that charge**
  - **To libraries that have a collection you may need**
- **Usage studies are not a good prediction of future use!**

Tips & tricks to save money

- **Example: ISU ILL Contract**

Interested in having an agreement? Email me!

Tips & tricks to save money

- **Batch mail**

- **Reuse mailing materials**
  - **Boxes**
  - **Bubble mailers** (*Not jiffy bags)*
  - **Shipping paper & bubble wrap**
- **Ask others for their shipping materials**
  - **Obtain from other departments**
  - **Personal shipping like Amazon**

Tips & tricks to save money

- **Out of copyright ➡ consider scanning**
  - **Most US Government Documents**
  - **Pre 1923 publications**
  - **Items without a copyright notice before 1978**
  - **If your institution owns the copyright and you have permission to use it**
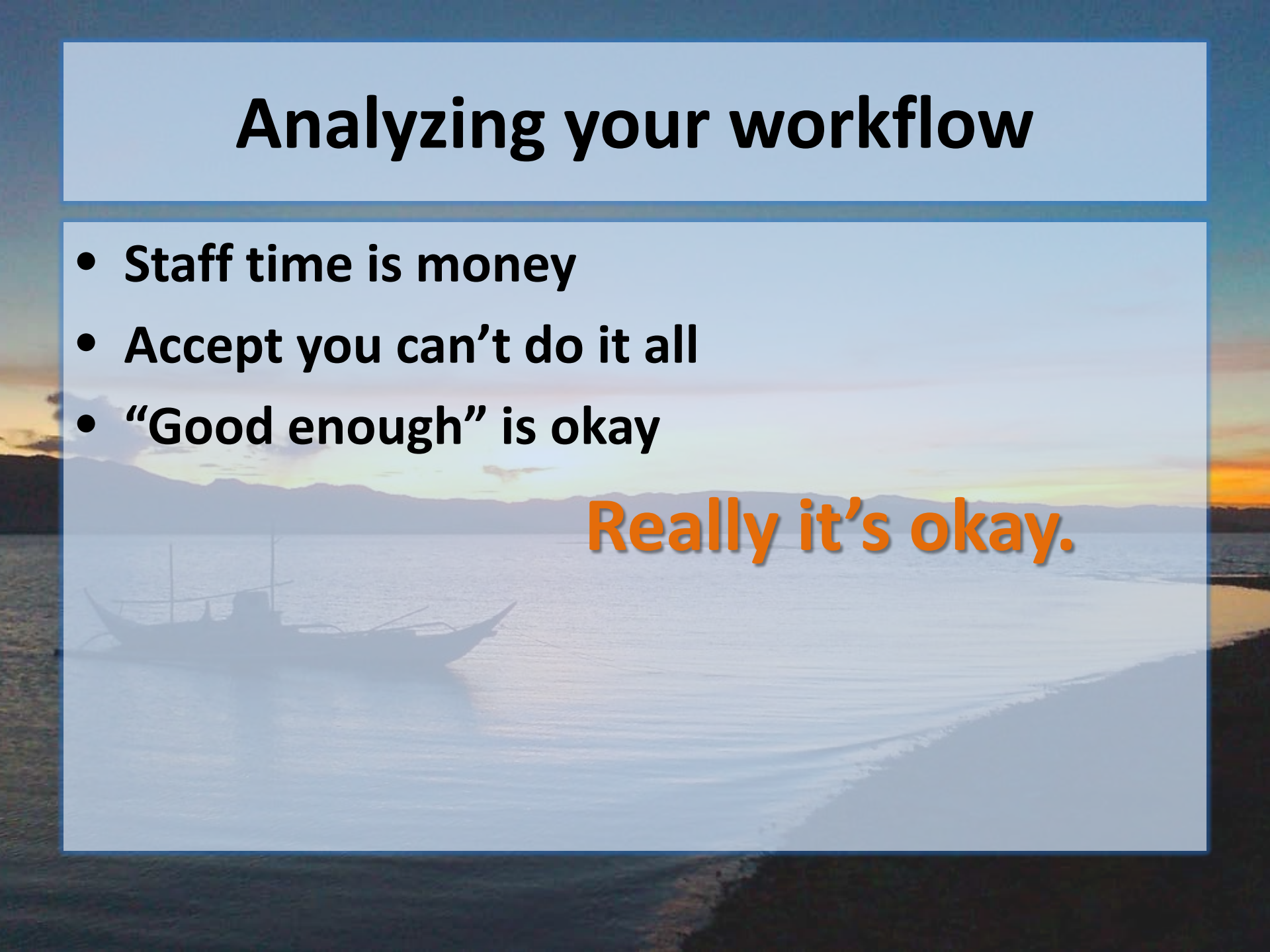
Analyzing your workflow

- **Sometimes a change makes it necessary to analyze your workflow**
  - **2003: 6 FTE staff**
  - **2004: ILLiad**
  - **2008: 2.5 staff**
  - **2012: 1.5 staff**
  - **2014: 2.25 staff**
- **Change should always be on your mind**

Analyzing your workflow

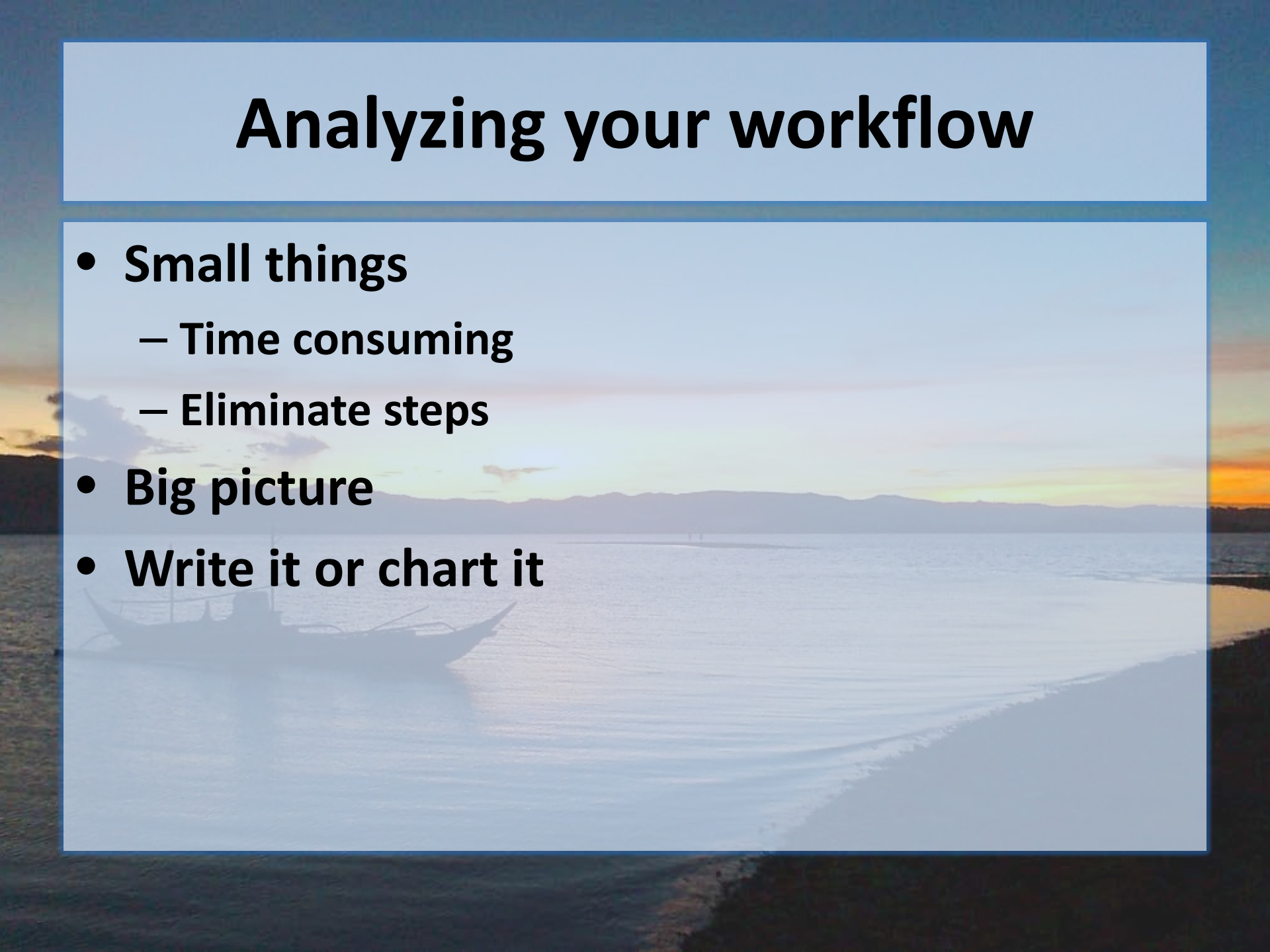- **Staff time is money**

- **Accept you can't do it all**

- **"Good enough" is okay**

Really it's okay.

Analyzing your workflow

- **Small things**
  - **Time consuming**
  - **Eliminate steps**
- **Big picture**
- **Write it or chart it**

Analyzing your workflow
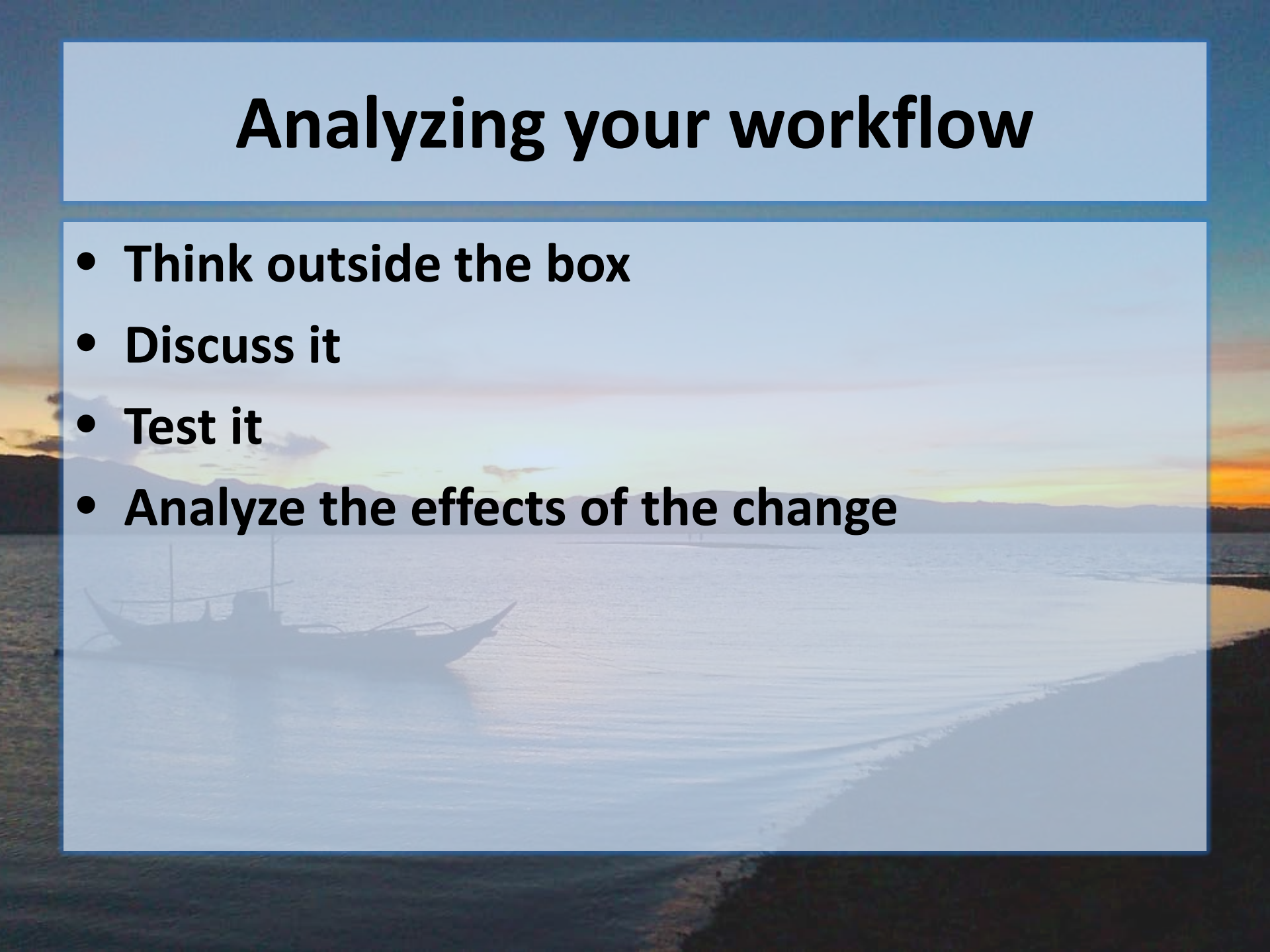
- **Break down every step**
- **Ask**
  - **Why**
  - **What is the goal**
  - **How long does it take**

Analyzing your workflow

- **Think outside the box**

- **Discuss it**

- **Test it**

- **Analyze the effects of the change**

Example of step analysis

Check out items to a library in our ILS

1. **Look up library in ILS**

2. **Edit the address if needed**

3. **Check item out to library**

4. **Change the due date to reflect ILLiad date**

*2.08 days turnaround for loans (lending)

Example of step analysis

Check out items to library in our ILS

1. **Look up library in ILS**
   - **Why? Find library**
2. **Edit the address if needed**
   - **Why? If it goes billed**
3. **Check item out to library**
   - **Why? Know it isn't on the shelf & who has it**
4. **Change the due date to reflect ILLiad date**
   - **Why? Date is the same for billing**

Example of step analysis

1. **Look up library in ILS**

    Could check out to a generic account

2. **Edit the address if needed**

    Edit when item is billed

3. **Check item out to library**

    ILLiad knows who has it.

4. **Change the due date to reflect ILLiad date**

    Due date can be longer but not shorter

Example of step analysis

- **Made a generic ILL account (ISU-Lending)**
- **Due date for 4 months**

  (2 months more than ILLiad's)

- **Saved lending billing time!**

Example of step analysis

New steps:

1. Look up ISU-Lending

2. Check out items

- Down to 1.31 days turnaround

*37% less time

ISU's handouts

- **Reciprocal contract**
- **Problem forms**
- **Not on shelf & bad citation forms**
- **ILL handout**
- **Distance ILL handouts**
- **Libraries in our area handout**

Questions &
share your resource sharing tips

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Great Lakes Resource Sharing Conference (Toledo, OH.) June 6, 2014

Indiana State University
Cunningham Memorial Library
Terre Haute IN 47809

Dear Interlibrary Loan:

The Indiana State University Library (**OCLC: ISU**) would like to establish a written reciprocal agreement with your institution. Under the agreement we would loan or copy ISU materials to you without charge if you agree to do the same. This does not apply to fees or replacement costs for overdue or lost items.

Indiana State University Library accepts requests via OCLC, on the web at http://illiad.indstate.edu/lending/lendinglogon.html, via email or by ALA form. We offer electronic delivery of copied material via Odyssey or email. Rush delivery service is available during non-peak periods for no additional charge.

If you consent to a reciprocal agreement, please fill out the section below and return this contract to us via mail, email, or fax. The agreement will remain in effect until either party cancels it by notifying the other in writing. Please keep a signed copy for your records.

Reciprocal Agreement

Institution Name	**Institution Name**
Indiana State University	

OCLC Symbol:

ISU

OCLC Symbol:

Mailing Address:

Indiana State University
Library - Interlibrary Loan
510 N 6 1/2 St
Terre Haute IN 47809

Mailing Address:

Telephone: 812-237-2566

Telephone:

Fax (not for articles): 812-237-2567

Fax:

Email: ISU-libill@mail.indstate.edu

Email:

Odyssey: 139.102.65.93

Odyssey:

Authorized Name:

Holli Moseman
Authorized Signature:

Authorized Name (Please type or print):

Authorized Signature:

Date: _____

Date: _____

SCANNING Problem Form

Date: _____

Initials: _____

TN: or ILL:

_____

- ☐ Needs scanned on Boba Fett
- ☐ Wouldn't send or server is down;
  Had to save to:

  _____

  On workstation:

  _____

- ☐ Started this and ran out of time
  Had to save to:

  _____

  On workstation:

  _____

- ☐ Error occurred said this (below)

- ☐ **HUH? Other Problem :**

_____

_____

_____

BORROWING Problem Form

Date: _____

Initials: _____

TN: or ILL:

_____

- ☐ Item not found in ILLiad
- ☐ Title or author or date or edition
  doesn't match request
- ☐ Duplicate item (already received)
- ☐ Due date not coming up
- ☐ Can't determine lender
- ☐ Note said Holli needs to see this
- ☐ Loan came in as an Article
- ☐ Article came in as Loan
- ☐ Article is poor quality
- ☐ Article is missing pages
  PGS: _____
- ☐ Item was not meant for us
  (not ISU-owned or for an ISU patron)
- ☐ **HUH? Other Problem :**

_____

_____

_____

_____

LENDING Problem Form

Date: _____

Initials: _____

TN: or ILL:

_____

- ☐ Item not found in ILLiad
- ☐ Returned item is missing piece(s)

  _____

- ☐ Item has damage

  _____

- ☐ Item has a Cat or Circ Review
- ☐ Item says give to Staff Member
- ☐ Item is in 'Awaiting Lost Bill Payment'
  in ILLiad
- ☐ OCLC Status is not 'Returned'
- ☐ Item came up as non-circulating in
  Sierra
- ☐ Item needs cataloged (Needs barcode)
- ☐ Item had weird pop-up in Sierra
- ☐ Item was not meant for us
  (not ISU-owned or for an ISU patron)
- ☐ **HUH? Other Problem :**

_____

_____

_____

NOT ON SHELF	NOT ON SHELF	NOT ON SHELF
Initials_____ Date_____ *Check Stacks, Periodicals, Browsing, Oversized & Circ. Whole series missing? Part of series shelved wrong?	Initials_____ Date_____ *Check Stacks, Periodicals, Browsing, Oversized & Circ. Whole series missing? Part of series shelved wrong?	Initials_____ Date_____ *Check Stacks, Periodicals, Browsing, Oversized & Circ. Whole series missing? Part of series shelved wrong?
BAD CITE	BAD CITE	BAD CITE
Initials_____ Date_____ Pull the item or volume & year on the pull slip	Initials_____ Date_____ Pull the item or volume & year on the pull slip	Initials_____ Date_____ Pull the item or volume & year on the pull slip

INTERLIBRARY LOAN & ILLIAD

What Is Interlibrary Loan (ILL)?

When you can't find the resources you need on campus, ILL can bring the resources to you!

ILL borrows materials from other libraries that are not available here at ISU or electronically.
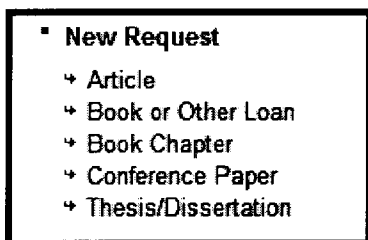
What Are The Restrictions?
- You must be affiliated with ISU.
- You cannot request current ISU textbooks.
- You should allow 10-14 business days to receive items.

How To Get Started With ILLiad:
Go to the ISU Library home page http://library.indstate.edu/. Under "for Students" click "**Interlibrary Loan**."

If you have not used ILL before, click on "**Create an ILLiad Account**" and fill in your personal information. You need to create a special user ID and password to logon. This is not connected to your MyISU.

The ILLiad main menu on the left side of the page features request forms and links to view your requests. There is an alert section on the right side of the page for special messages from ILL.

> ■ **New Request**
> ↳ Article
> ↳ Book or Other Loan
> ↳ Book Chapter
> ↳ Conference Paper
> ↳ Thesis/Dissertation

Choose the form, fill it out and submit it.

If you access a citation for a loan or article through a database such as EbscoHost or WorldCat, then click on the ILL link in the database to have the form filled out for you automatically!

What Can I Request?
- Books
- Articles and book chapters
- Scores
- Dissertations and theses
- Conference papers and government documents
- DVDs and CDs
- And other items you need for research

How Do I Get My Items?
- Articles are delivered in PDF format through a link via email and are also stored in your ILLiad account under "Electronically Received Articles" for 14 days.
- Loans are available for pick up at the Circulation Desk with your ISU ID card. You will be notified via email upon their arrival.

ILL Will Send Email Notifications:
- When your articles are ready to view.
- When loan items are at the Circulation Desk.
- If your request was cancelled.
- If ILL has a question about your request.

How To Renew ILL Items:
- On the left side of the main menu, click 'Renew Items' or 'Checked Out Items'.
- Next, click on the Transaction Number of the item you wish to renew.
- Then click on the RED 'Renew Request' text. If you do not see the "renew" at the top of the page, you cannot renew the item. If you have questions, contact ILL.
- Your new temporary due date will appear in the upper left corner.
- You will receive an email from ILL once the owning library assigns the permanent due date.

Contact Information:
Interlibrary Loan
Phone: 812-237-2566
Email: ISU-libill@mail.indstate.edu
ILL Hours 8:00 a.m.– 4:30 p.m. M-F

Interlibrary Loan & Distance Learners

What Is Interlibrary Loan?

Interlibrary Loan (ILL) is a library service available to all ISU students.

We will deliver circulating materials (except for browsing media) owned by the ISU Library. Due dates conform to ISU circulation policies. We can also obtain materials not found at the ISU Library where the due dates are determined by the owning library.

Using a web program called ILLiad you can submit, view, and check the status of a request, and renew your ILL items from any computer.

Articles are made available to you digitally for viewing, saving or printing the PDF.

What Are The Restrictions?

✓ You must be affiliated with ISU.
✓ You cannot request current ISU textbooks.
✓ You should allow 10-20 business days to receive items.
✓ **You are responsible for any return postage and insurance for books and other loans.**
✓ Before requesting articles, check the Electronic Resources list for full text availability. A pop-up may ask you for your ID and password; enter your ISU Portal ID and password.

How To Get Started With ILLiad:

Go to the ISU Library home page http://library.indstate.edu/ Under "for Students" click "**Interlibrary Loan.**"

If you have not used ILL before, click on "**Create an ILLiad Account**" and fill in your personal information. You need to create a special user ID and password to logon.

The ILLiad main menu on the left side of the page features forms and links to view your requests. There is an alert section on the right side of the page for special messages from ILL.

- **New Request**
  - ↪ Article
  - ↪ Book or Other Loan
  - ↪ Book Chapter
  - ↪ Conference Paper
  - ↪ Thesis/Dissertation

Fill out the form and submit it.

If you access a citation for a loan or article through a database such as EbscoHost or WorldCat, then click on the ILL link in the database to have the form filled out for you automatically!

You will receive email notifications when
- your articles are ready to view
- loan items are at the Circulation Desk
- if your request was cancelled
- if ILL has a question about your request

How To See Your Articles:

You can access your articles two ways:
- Click the direct link to your article provided in the notification email
- Log on to your ILLiad account and click on "Electronically Received Articles" from the left side of the main menu

How To Renew ILL Items:

- On the left side of the main menu, click 'Renew Items' or 'Checked Out Items'
- Next click on the Transaction Number of the item you wish to renew
- Then click on the RED 'Renew Request' text. If you do not see the "renew" at the top of the page you cannot renew the item. If you have questions, contact ILL.
- Your new temporary due date will appear in the upper left corner.
- You will receive an email from ILL once the owning library assigns the permanent due date.

Contact Information:
Phone: 812-237-2566
Email: ISU-libill@mail.indstate.edu
Interlibrary Loan Hours
8:00 a.m.– 4:30 p.m. M-F

Dear Distance Learning Student:

Please use the shipping label provided to mail material back to us. We recommend you insure this material for $100 when shipping. If the package is lost in the mail, you will be billed for the item.

If your loan is eligible for renewal, you may use your ILLiad account to request one renewal for non-ISU items and up to 3 renewals for ISU owned items. This should be done several days before the due date.

To Log on to ILLiad:
- Go to the ISU Library home page http://library.indstate.edu/
- Under "for Students" click "**Interlibrary Loan**"
- Log on with your ILLiad username and password.

To Renew ILL Items:
- On the left side of the main menu, click 'Renew Items' or 'Checked Out Items'
- Next click on the Transaction Number of the item you wish to renew
- Then click on the RED 'Renew Request' text. If you do not see the "renew" at the top of the page you cannot renew the item. If you have questions, contact ILL.
- Your new temporary due date will appear in the upper left corner.
- You will receive an email from ILL once the owning library assigns the permanent due date.

For more information about Distance Learning Services see:
http://library.indstate.edu/services/distance/
&
http://www.indstate.edu/distance/index.html

If you have questions, please contact us at:
E-mail   isu-libill@mail.indstate.edu
Phone   812-237-2566
Office Hours: Monday- Friday 8:00AM-4:30PM

From:

TO:

Indiana State University
Cunningham Memorial Library- ILL
510 N 6 ½ Street
Terre Haute, IN 47809
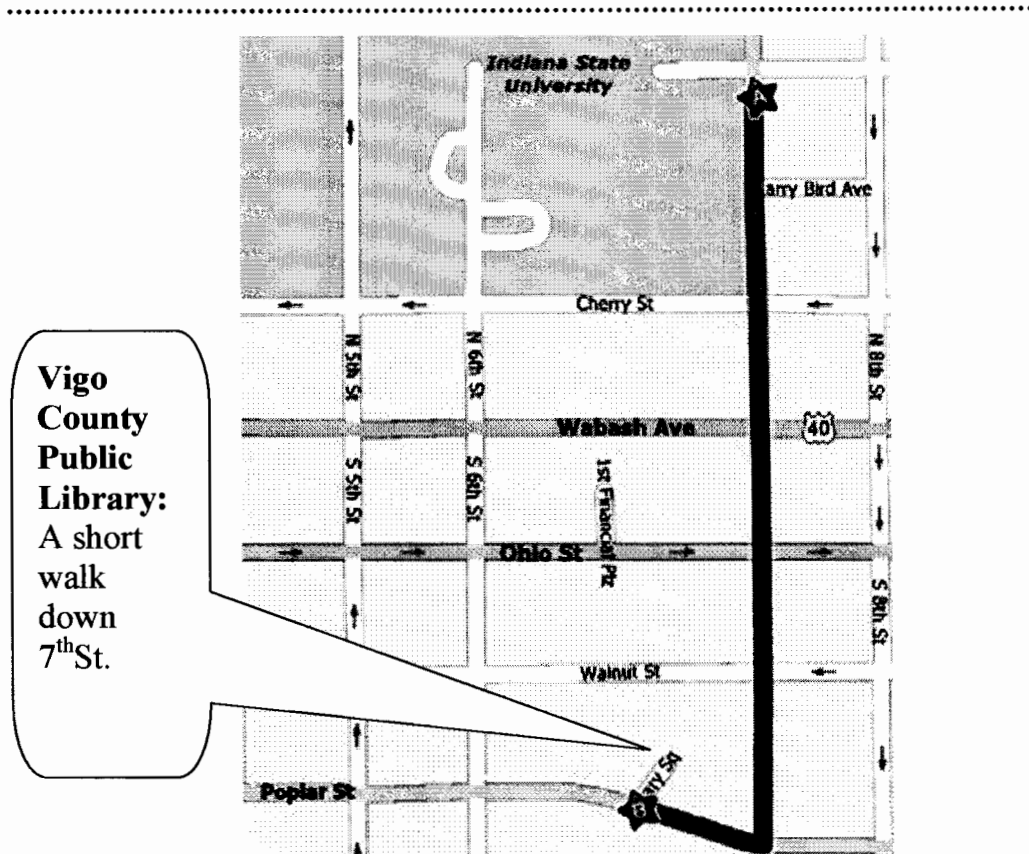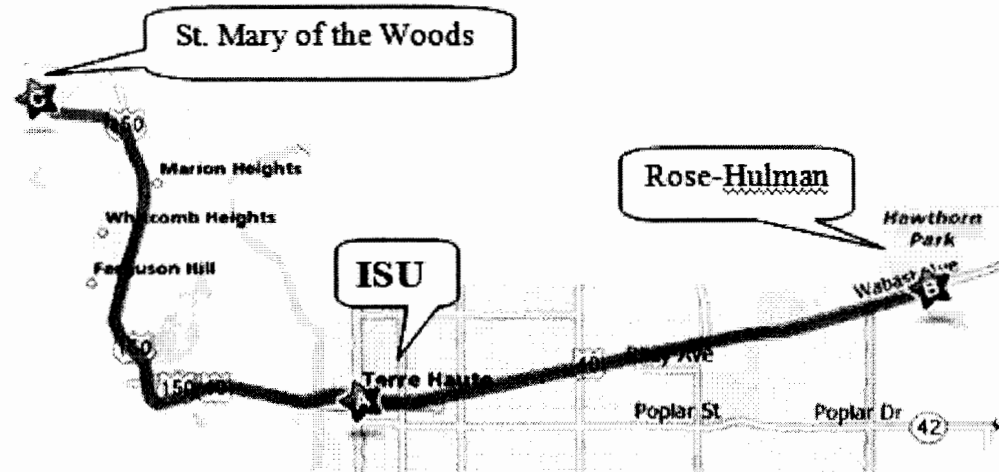
Library Materials

INSURE

Libraries in our Area:

- ➤ Rose-Hulman Institute
- ➤ St. Mary-of-the-Woods
- ➤ Vigo County Public Library

Your Sycamore ID card allows you to check out materials from other area libraries. Returning materials is a snap! Fill out a courtesy return form at the ISU Library checkout desk when returning the material.

Brought to you by,

ISU Interlibrary Loan

Phone: 812-237-2566

Email: libill@indstate.edu

St. Mary of the Woods

Rose-Hulman

ISU

Marion Heights
Whitcomb Heights
Ferguson Hill
Terre Haute
Hawthorn Park
Poplar St   Poplar Dr

Vigo County Public Library: A short walk down 7th St.

Indiana State University
Mary Bird Ave
Cherry St
N 5th St
N 6th St
N 8th St
Wabash Ave
S 5th St
S 6th St
1st Financial Plz
S 8th St
Ohio St
Walnut St
Poplar St

ROSE-HULMAN
INSTITUTE OF TECHNOLOGY

http://www.rose-hulman.edu

John A. Logan Library
5500 Wabash Ave
Terre Haute IN 47803
812-877-8200

Rose-Hulman shares the library catalog with ISU and St. Mary-of-the-Woods College. Holdings are mostly science and technology with core collections in social sciences and humanities. **You may check out materials with your ISU ID card**. Book due dates are 30 days for undergraduates, 90 days for graduate students, and 365 days for faculty and staff. You may return borrowed items directly to Rose-Hulman or, if more convenient, ISU Interlibrary Loan can return them for you. Ask for a courtesy return slip at the ISU checkout desk as you return these materials. ILL will keep it on file to show what you have returned.

Logan Library research databases may be used while in the Logan Library if you request a temporary guest username and password. Printing is free but users should restrict printing to topics of an educational nature and keep the volume of pages printed to a reasonable amount.

R-H Campus is about 5 miles from ISU. Drive east from the ISU campus on Wabash Ave/US40. The main entrance to Rose-Hulman is on the left (north) about ½ mile after the stoplight at State Highway 46. For parking locations see:
  http://www.rose-hulman.edu/tour/printable/

SAINT MARY-OF-THE-WOODS
C O L L E G E

http://www.smwc.edu/

Mary and Andrew Rooney Library
Saint Mary-of-the-Woods IN 47876
812-535-5223, library@smwc.edu

Saint Mary-of-the-Woods shares the library catalog with ISU and Rose-Hulman Institute of Technology. **You may check out materials with your ISU ID card.** The loan period for undergraduates is 21 days, for graduate students 89 days, and for faculty 150 days. Books may be renewed in person or through the online catalog. Whatever circulates to SMWC students also circulates to currently affiliated ISU faculty, staff, and students with valid ISU ID cards.

Any database may be used by those visiting the library. Printing is free, but there is a charge for photocopies. Hours may vary when campus classes are not in session.

You may return borrowed items directly to SMWC, or if more convenient, ISU Interlibrary Loan can return them for you. Ask for a courtesy return slip at the ISU checkout desk as you return these materials. ILL will keep it on file to show what you have returned.

SMWC is about 5 miles from ISU. Drive west on Wabash Ave (US 40); cross the bridge over the Wabash River into West Terre Haute. Turn right (north) on US 150 and go approx. 2.5 miles. Watch for the St. Mary-of-the-Woods sign on the left side of the road road; turn left; drive .7 mile and enter campus at the second gate. Library is on the left, midway in campus.

Campus map:
http://www.smwc.edu/about/campus_map.php

Vigo County Public Library
Discover the Possibilities!

http://www.vigo.lib.in.us/

Vigo County Public Library
One Library Square, Terre Haute IN 47807
812-232-1113, questions@vigo.lib.in.us

Vigo County Public Library is just a short walk away from the ISU campus! **You may check out materials after you register for a VCPL library card.** There are various ways for residents and non-residents to qualify for a library card. Students need to show a current ISU ID to qualify for a VCPL card. Once you have the card, you may check out material which include books (21 days), new DVDs (7 days), CDs, older DVDs, games, and videotapes (14 days), and bestseller express books and audio tapes (7 days).

You may return borrowed items directly to the VCPL main library or if more convenient, ISU Interlibrary Loan can return them for you. Ask for a courtesy return slip at the ISU checkout desk as you return these materials. ILL will keep it on file to show what you have returned.

Other VCPL features are an online book club (receive via e-mail 2-3 chapters from a book), downloadable audiobooks, and a variety of databases. Special collections include Vigo County records, W.P.A. Indexes, Census Materials, Terre Haute newspapers on microfilm, and other genealogical material. The main library faces Poplar Street between 6th and 7th streets, approx. ½ mile south of campus.
See the VCPL home page for hours:
http://www.vigo.lib.in.us/