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In Our Comfort Zone: 2 Years Post Tipasa from ILLiad

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In Our Comfort Zone: Two Years Post Tipasa From ILLiad

Derek Malone
University of North Alabama

Background

University of North Alabama

- 7,600+ students
- Late ILLiad adopter - 2012-2013?



Background

Around 8,000 annual requests

$\frac{1}{2}$ lending, $\frac{1}{4}$ borrowing, $\frac{1}{4}$ document delivery

1 staff member, 1 student employee, 1 supervisor

Delivery & scanning both in department.

Instruction and many other things are a responsibility.

Requests increased substantially last year.

Transition

- Began March 2017
- Fully Completed with ILLiad turned off July 2017



Transition

- Differing attitudes before the transition;
- Staff member didn't want to transition;
- Supervisor was greatly supportive of the transition;
- Others were OK either way.



Transition

We're all very happy now that we made the move.

There have been minor issues, but overall it's been a great move.



Transition

- One major piece to our transition was a transition in staff;
- It had been discussed before and was internally declined;
- Declining seems to have stemmed from lack of awareness and fear of the unknown.



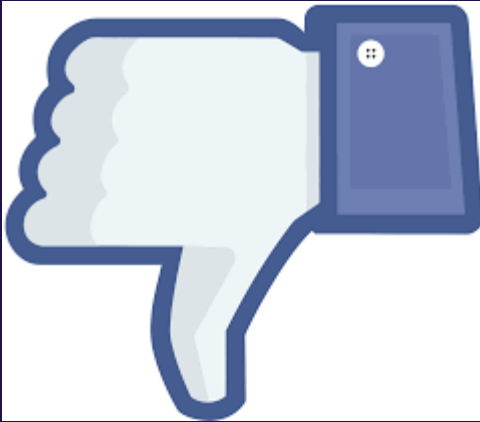
Transition set up

We:

- Do not utilize direct borrowing;
- Just started using trusted senders;
- Customized forms in ILLiad;
- Customized communication in ILLiad;
- Otherwise, used ILLiad typically.

Reflection (last year)

- What we miss
- What we wish for
- What we love



A lot of the desires we had, others did too, and it was changed.

We're very pleased with the extent that our voice has been heard and listened to.



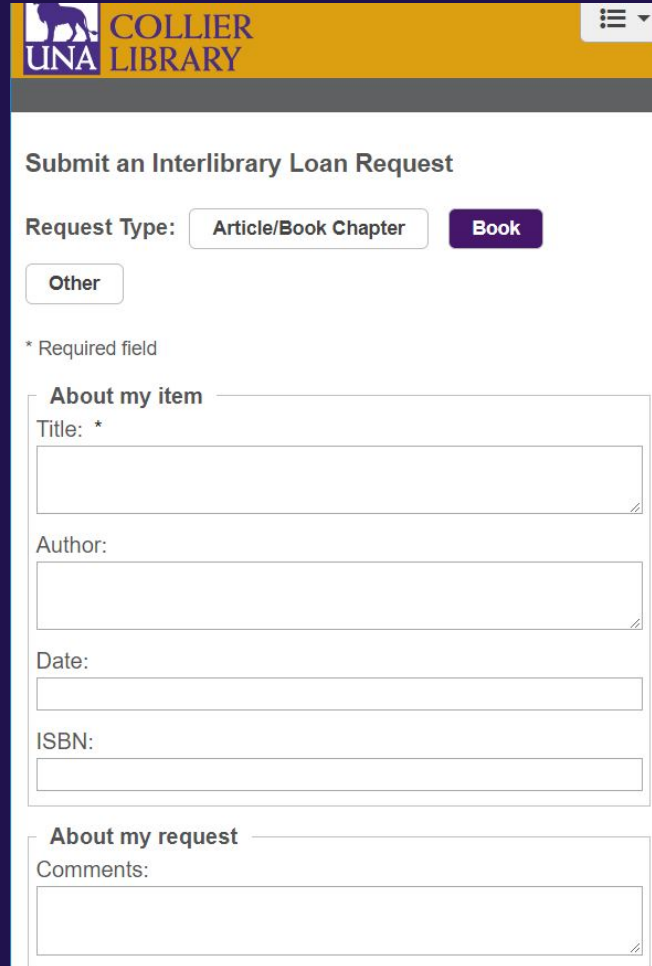
We're starting not to miss any longer...



Forms

Love:

- user -friendly;
- responsive;
- clean;
- simplistic;
- continued our minimization efforts.



UNA COLLIER LIBRARY

Submit an Interlibrary Loan Request

Request Type:

* Required field

About my item

Title: *

Author:

Date:

ISBN:

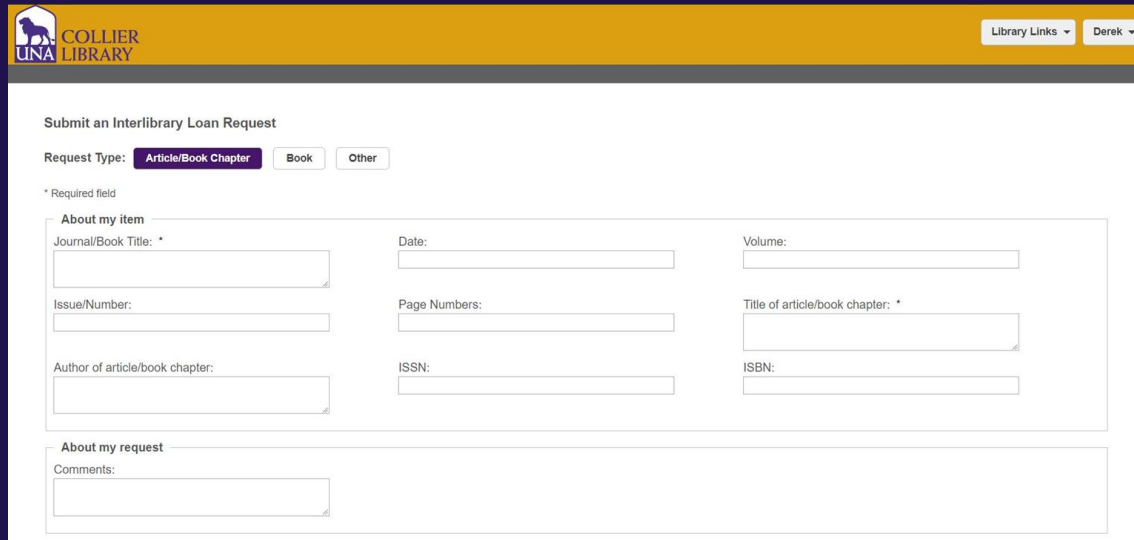
About my request

Comments:

Forms

Fully customizing sign-up and request forms

- We would like to be able to add a custom field to the request.



The screenshot shows the 'Submit an Interlibrary Loan Request' form on the Collier Library website. The header is yellow with the UNA Collier Library logo on the left and 'Library Links' and 'Derek' dropdown menus on the right. The form title is 'Submit an Interlibrary Loan Request'. Below the title, there are three buttons for 'Request Type': 'Article/Book Chapter' (selected), 'Book', and 'Other'. A note indicates that fields marked with an asterisk are required. The form is divided into two sections: 'About my item' and 'About my request'. The 'About my item' section contains nine input fields: 'Journal/Book Title: *', 'Date:', 'Volume:', 'Issue/Number:', 'Page Numbers:', 'Title of article/book chapter: *', 'Author of article/book chapter:', 'ISSN:', and 'ISBN:'. The 'About my request' section contains one input field: 'Comments:'. The form is set against a white background with a light gray border.

Labels!

Customizable labels

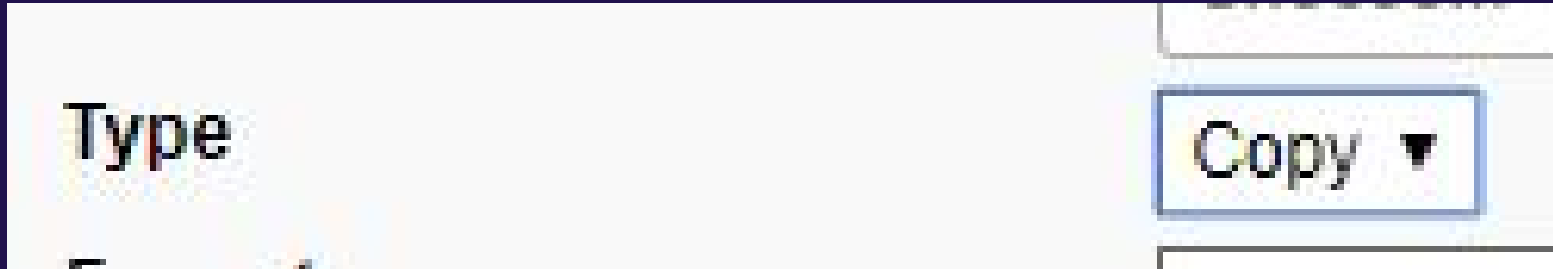
- We really like new capabilities in Tipasa regarding labels!
- This is a good example of a need being met.

TestInstitution (TEST)		DUE DATE 04/02/2019
	REQUEST ID 87654321	PIECES
		BORROWER TEST
		LENDER LEND
	PATRON Jane Test	
	PHONE 555-xxx-xxxx	
	EMAIL patronemail@test.edu	
	PICKUP LOCATION Patron pickup location	
	AUTHOR John Doe	
	TITLE Test title	
NOTES		
	Renew online Do not remove this label	

What we would like from Tipasa

Changing our accidental copies to loans

- This was easy in ILLiad, maybe one of the last things we miss;
- It's easy in Tipasa too IF the LENDER has taken care of it, if not it's trouble;
- If it isn't taken care of by the lender and the borrower misses it, it closes!



What we would like from Tipasa

Policy Directory

- It would be nice to be able to click the policy directory in the request to view information on the borrower

The screenshot shows the OCLC Policies Directory interface. On the left is a search sidebar with filters for Institution Information (Symbol, Countries, States/Provinces, City, Types, OCLC Supplier, Response times, Rush Supported, Lender, Affiliation) and Policy Information (Fee, Currency, Format, Request Method, Delivery Method, Billing Method). The main content area displays the profile for the University of North Alabama (ANO) Collier Library, including tabs for Profile, Collections, Policies (4), Schedule, and Contacts. A summary section provides details such as Name (Symbol), Also Called, Location, Shipping Address, Institution Type, OCLC Supplier status, and Loan/Renew periods. A 'Non-Circulating' section lists various materials like reference books and microforms.

OCCLC™ Policies Directory

Welcome
Derek (ANO)
Sign Out / Help

Search

University of North Alabama (ANO)
Collier Library

Profile Collections Policies (4) Schedule Contacts

Last updated Tuesday, January 22, 2019 2:27:10 PM EST

Summary

Name (Symbol): University of North Alabama (ANO)

Also Called: Collier Library

Location: Florence, AL 35632-0001 US

Shipping Address: Hunter Tinsley
U.S.P.S. - ILL - Collier Library, University of North Alabama, 1 Harrison Plaza - Box 5028
UPS - ILL - Collier Library, University of North Alabama, 625 Cramer Way - Box 5028
Florence, AL 35632-00001 US

Institution Type: Academic Library

OCLC Supplier: Yes [Edit](#)

Days To Respond: Copies: 4 days [Edit](#)
Loans: 4 days [Edit](#)

Non-Circulating: Reference books, Periodicals, Microforms, Audiovisual materials, Electronic books and serials, Musical scores, Software and Computer disks, New books still in processing, Items located in branch libraries (Kibby, Learning Resources Center, Music Library), Items located in the Archives. [Edit](#)

Periods: Loan Period: 4 Week(s)
Renew Period: 2 Week(s)

What we would like from Tipasa

Confirmation of high-consequence clicks

- Accidental clicking of Yes/No or “Reason for No” in Lending.

Can you supply?

Print Shipping Labels
 Print Book Straps/Stickers

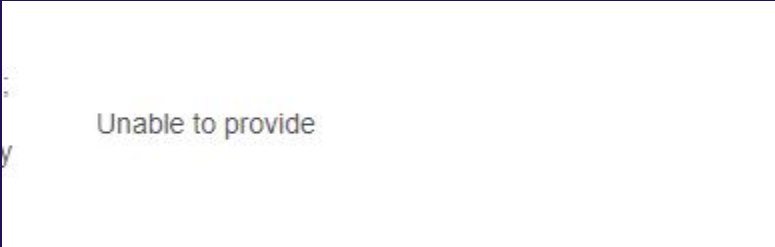
▼

▼

Personally, largest growing pain

Unfilled requests expire!

- This is my biggest issue with the transition;
- The resubmission isn't really a resubmit, rather it's a new request;
- The patron sees "unable to fill;"
- The new request allows the same lenders to be chosen;
- The old request has to be cancelled;
- It's an overall unfriendly process for an academic library.



Unable to provide

What we wish for

Request field box

- Change the order;
- Change what's in the boxes;
- Not include everything.

The screenshot shows a web form for library requests. It is titled 'Lending Libraries' and has a sub-section 'Borrowing Library (ANO)'. The form is divided into several sections:

- Electronic Delivery:** Includes a 'Preferred' dropdown menu set to 'Article Exchange' and two empty text input fields. Below are two 'Alternate' dropdown menus, each followed by an empty text input field.
- Shipping:** A 'Ship To' dropdown menu is set to 'ILL - Collier Library (ANO)'. Below are fields for 'Address' (University of North Alabama, 1 Harrison Plaza - UNA Box 5028), 'City' (Florence), 'State/Province' (Alabama), 'Country' (United States), and 'Postal Code' (35632-0001).
- Ship Via:** An empty text input field.
- Fax/Phone:** Two text input fields containing '256-765-4308' and 'Ex: 777-555-1010'.
- Email:** A text input field containing 'ill@una.edu'.
- Group Affiliations:** An empty text input field.
- Borrowing Notes:** A text area containing the text 'Articles/scans via Article Exchange or email only --- NAALLVIS/SOLINE/SO6/SIXXLYRA'.
- Billing:** A 'Bill To' dropdown menu set to 'Copy from shipping'. Below are fields for 'Address' (ILL - Collier Library (ANO)) and 'University of North Alabama'.

What we love more and more every single day

The user interface

- The responsive design is extraordinary;
- It allows us to ask for the simplistic things we need;
- We're easy able to customize fields that we ask for;
- We tailor the experience to the patrons (ex. Distance Education).

What we love more and more every single day

Communication



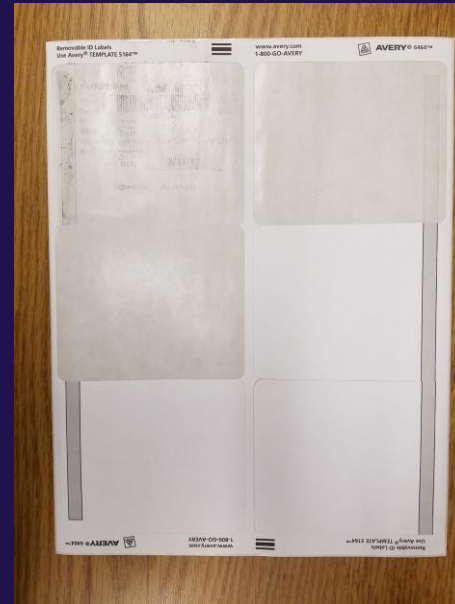
What we love more and more every single day

We're ILL

What we love more and more every single day

Label printing options

- We're able to mandate at which label the print begins, which is extremely helpful if you've used so many labels



What we love more and more every single day

Web-based staff access

- We can process from wherever, whenever with ease

The screenshot displays the WorldShare Tipasa™ Home interface. At the top, the WorldShare logo is on the left, and 'Need Help?' and 'Derek Malone' are on the right. Below the logo, there are tabs for 'Interlibrary Loan', 'Analytics', and 'Admin'. A left-hand navigation menu includes links for 'Discover Items', 'Find Patrons', 'Borrowing Requests', 'Document Delivery', 'Lending Requests', 'Purchasing Requests', and 'Print Queue (1)'. The main content area is titled 'Tipasa™ Home' and includes a 'Search for requests' section with a 'Request ID' dropdown, a search input field, and a 'Go' button. Below this is a 'Frequently Used Tags' section with a message: 'There are no tags for this institution. Please create a tag upon reviewing a request.' The 'Quick Links' section is divided into three columns: 'Borrowing' (Produced (21), In Transit (10), Unfilled (4), Received (Renewal Approved (16), Renewal Denied (2), Overdue (3), Recalled (1)), Returned), 'Lending' (Can You Supply? (1), Considering - Loans (1), Supplied (Not Received (1)), Returned (Returned/In Transit (7), Returned/Complete? (2))), and 'Document Delivery' (New (1), New - Copies (1), Other: OCLC Policies Directory, OCLC Service Configuration, OCLC Usage Statistics, OCLC Article Exchange, Resource Sharing News, WS III Training Resources, OCLC Community Center). At the bottom, there is a 'Message Board' section with a message from an administrator dated 2017-10-02, containing a welcome message and two bullet points: 'Ask OCLC staff to update links to your library's catalog by completing the catalog link information form with the needed information, and we will do the rest.' and 'To simplify your return, please bookmark this page.'

What we love more and more every single day

Sending articles/Article Exchange

- Article exchange works seamlessly for us;
- Sending and receiving is easy and time-efficient.

Moving forward

The Tipasa move freed up time to work on other things. Our staff numbers are low in comparison to peers. We have to maximize efficiency where we can.

Tipasa's web-based interface has allowed us to explore other web-based services with less fear.

We're never done tinkering with communication.

Questions? Thoughts?

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