

Interlibrary Loan/Document Delivery System



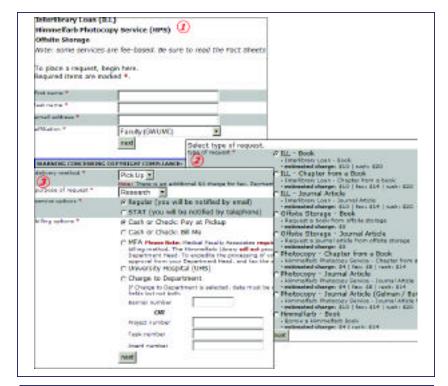
GOALS:

- To create a method of receiving all requests outside of DOCLINE, Loansome Doc and OCLC in a consistent electronic format
- To track requests made by GWUMC faculty (not using Loansome Doc), staff, students and non-affiliated patrons filled in-house
- To provide a consistent invoicing method exclusive of QuickDoc
- **PLATFORM AND FORMAT:**
 - ColdFusion
 - Microsoft Access
 - Requests are password-protected through the Online Control Panel

OUTCOMES:

- Online Request Form is the only method, other than DOCLINE, Loansome Doc and OCLC to request Document Delivery or an Interlibrary Loan
- Specialist can now track each request from receipt to payment through the Online Control Panel
- Other staff members can use Control Panel to inform patron of request status
- Invoicing Specialist can create monthly invoice for each patron.
- Document requests are no longer keyed into QuickDoc
- Information about placing loans/requests is now in one place

- To avoid double keying loan information
- To collect information about placing loans/requests in one place:
 - Fact Sheets
 - Cost for different users and types of requests
 - Material delivery options
 - Billing options





ONLINE REQUESTS: TOWARD EXPANDED AND EFFICIENT MANAGEMENT

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Setting



- Document Delivery and Course Reserve Requests were being received in multiple formats:
 - DOCLINE
- ALA Forms received by fax, mail, hand-delivered
- Loansome Doc
- Email
- OCLC
- Slips of paper left for ILL and Reserves Specialists
- Communication with patrons was difficult with so many formats
- Legibility was a serious problem
- Streamlining the flow of requests was essential to improve accuracy and efficiency

Challenges



- Interlibrary Loan/Document Delivery
 - How far should we take development?
 - Should this be a permanent solution?
 - System design?
 - □ What is minimally necessary?
 - □ Maintenance?

- Course Reserves
 - System design?
 - How much time should be invested?
 - Copyright Clearance Center interface?

Successes



- Interlibrary Loan/Document Delivery
 - Received over 1130 requests from January, 2002 to January 15, 2003
 - Faculty, staff, GWUMC students using the system
 - Non-affiliated patrons using the system
 - Specialist and patron receiving better information about:
 - □ Citations
 - □ Patron contact information
 - □ Delivery methods; more use of email delivery

- □ Fewer citations need verification
- ☐ Invoicing more efficient and timely leading to better cost recovery
- Course Reserves
 - Received 152 requests since September, 2002
 - Faculty is using system
 - Positive feedback from faculty:
 - □ More efficient service
 - □ Fewer delays in processing electronic reserves

Future Directions



- Rebuild the Interlibrary Loan/Document Delivery system
- Provide a consistent login for all users showing all services where requests have been made:
 - Interlibrary Loan/Document Delivery
 - Course Reserves

- Room Scheduling Requests
- Library Classes Registrations
- Move both Interlibrary Loan/Document Delivery and Course Reserve system to SQL Server
- Investigate moving to another Interlibrary Loan/Document Delivery system



Online Course Reserve Requests System



The Online Course Reserve Requests System receives heavy use two times a year as instructors prepare materials for the Fall and Spring semesters.

GOALS:

- To create an online system for course reserve requests
- To provide a single mechanism for placing all requests for print or electronic reserves
- To increase the accuracy of information received
- To integrate E-reserves into course management system
- To facilitate communication between the Reserves Specialist and requester
- To reduce keying information
- To create a link to Copyright Clearance Center interface
- To document procedures and workflow for tasks done infrequently.

PLATFORM AND FORMAT:

- ColdFusion
- Microsoft Access
- Requests are password-protected through the Online Control Panel

OUTCOMES:

- Sole method of placing requests since August 15, 2002
- Improved citation accuracy
- Questions and problems communicated more efficiently
- Reduced additional keying
- Interface with the Copyright Clearance Center is in the planning stages

More development is planned for the Course Reserves System to parallel the Interlibrary Loan/ Document Delivery System.

Reserves Requests Workflow:

- 1. instructor makes request
 - automatic email response to instructor and library
- instructor brings reserve materials and printed email to library
- library staff reviews requests and updates database
 - marks requests as reviewed
- if request does not need copyright approval, close out request in database
 - -- DONE --
- 5. if request does need copyright approval, mark requests in database
- 6. notify faculty members of copyright issues send email from within system to instructor
- 7. upon approval from faculty, send marked requests to Biomedical Communications for processing
 - generate pre-filled PDF Copyright Clearance Center form; automatically send email to Biomedical Communications with attached CCC form
- 8. once Biomedical Communications has the form, they will update database to mark request as pending approval from CCC
- 9. upon CCC approval:
 - Biomedical Communications will notify library
 - auto-generated email from within control panel
 - Biomedical Communications notifies and bills faculty of CCC approval
 - bill faculty for copyright cost
 - · generate PDF bill, email to faculty
- 10. upon receipt of payment, close out request
 - -- DONE --