

# Working Together to Get It For Them

ILL and Document Delivery at the UNT Libraries

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# UNIVERSITY OF NORTH TEXAS

- ❖ 37,000 + Students
- ❖ 4 libraries in Denton
- ❖ 2 Remote storage facilities in Denton
- ❖ UNT at Dallas
- ❖ UNT Dallas College of Law
- ❖ UNT New College at Frisco (no library facility)

# Stats: 2014/2015

## ❖ Borrowing:

- ❖ Processed 18,000+ requests
- ❖ 1,089 faculty ILL book deliveries

## ❖ Document Delivery:

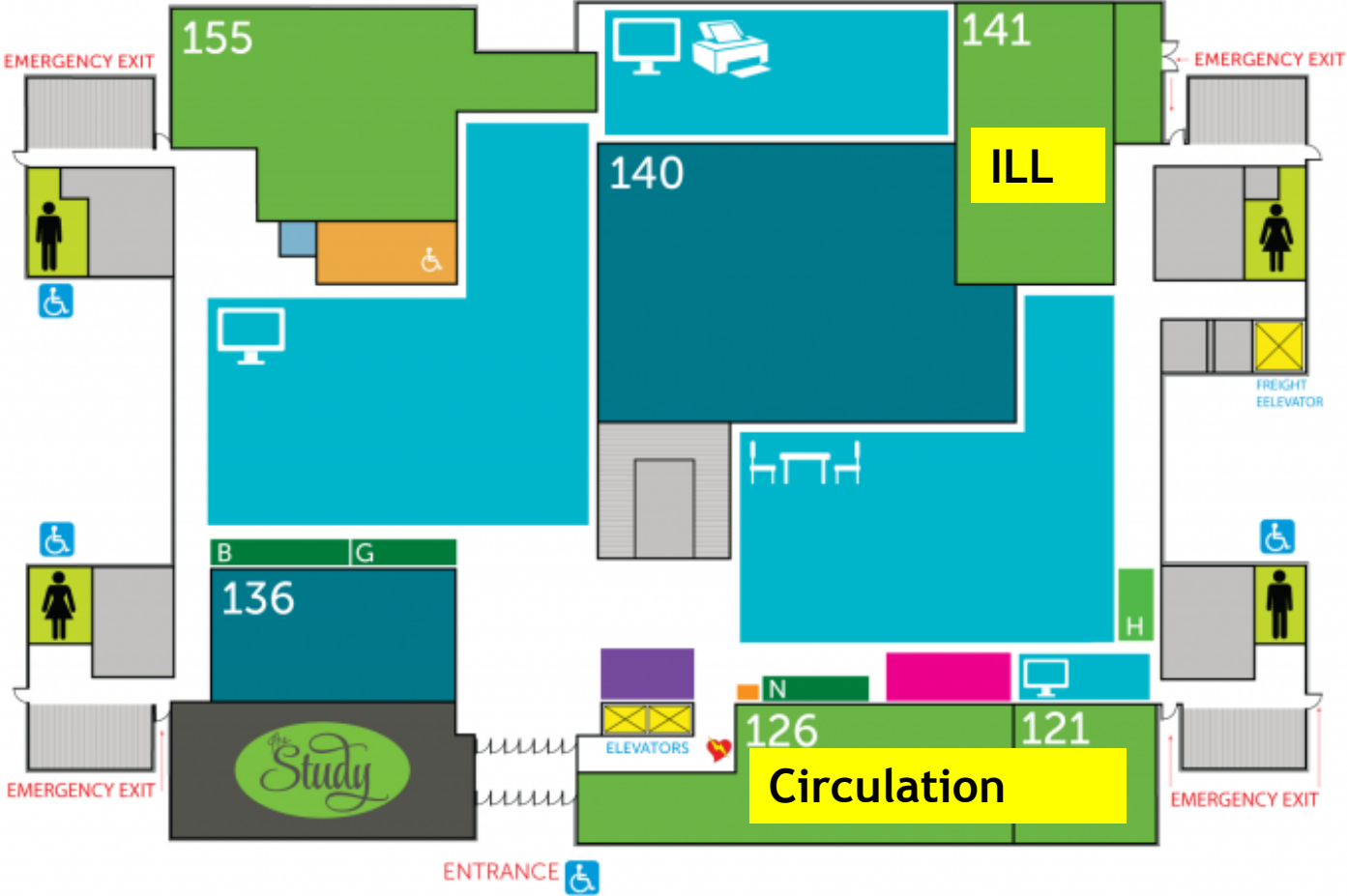
- ❖ Processed 3,600+ requests
- ❖ 1,438 faculty UNT book deliveries

## ❖ Online Holds: 22,800+

# 2011: ACCESS SERVICES



# 1<sup>st</sup> Floor Willis Library



# Library Services Desk



# Combined Service Desk



# Our Full-Time Staff

- ❖ Interlibrary Loan - Borrowing
  - ❖ ILL Librarian
  - ❖ Borrowing Supervisor
- ❖ Circulation Support Services (Doc Del)
  - ❖ Circulation Support Services Supervisor
  - ❖ Document Delivery Manager
  - ❖ Online Holds Manager



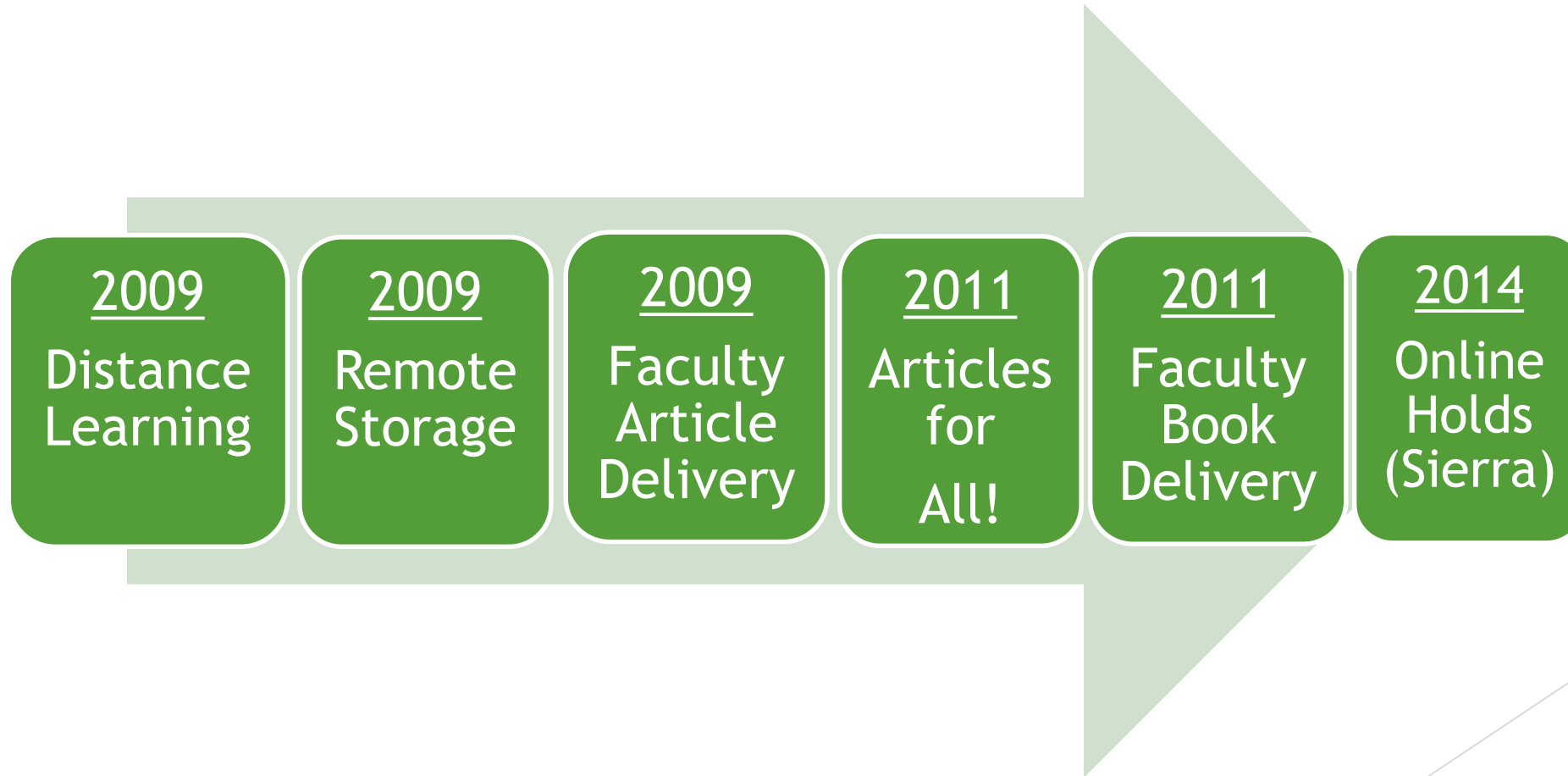
# Branch Libraries

- ❖ Library Specialists:
  - ❖ Eagle Commons Library
  - ❖ Discovery Park Library
  - ❖ Remote Storage (Library Annex)
- ❖ Staff assist with Borrowing, Document Delivery, and Lending

# Advantages

- ❖ Reorganization: Staff dedicated to Document Delivery services
- ❖ History of collaboration
- ❖ Experience
- ❖ Strong customer-service attitude
- ❖ Location

# ILLiad Collaboration: ILL and Document Delivery



# Remote Storage Requests (2009)

- ❖ ILL staff route requests to Document Delivery
- ❖ Awaiting Document Delivery processing
  - ❖ Custom Email sent to Remote Storage staff
  - ❖ Email routing sends request to “Awaiting Document Delivery Stacks Searching”
- ❖ Remote Storage staff scan articles via ILLiad

# Distance Learning Services (2009)

- ❖ Unique set of ILLiad web pages based on status “Dist Learning”
- ❖ Delivery locations: Home or other campus location
- ❖ Notification emails for new locations

# Routing Rule Match String

- ❖ `u.Status = 'Dist Learning' and t.DocumentType = 'Reserves'`
- ❖ Sends requests for Reserve items to “Awaiting Document Delivery Processing”

# Faculty Article Delivery (2009)

- ❖ Unique set of web pages based on status “Faculty”
- ❖ Copy Request Form
  - ❖ Cited Date field: At UNT/Not UNT
  - ❖ “At UNT” items automatically routed to “Awaiting Document Delivery Processing”

# Routing Rule Match String

❖ u.Status = 'Faculty' and t.CitedDate = 'At  
UNT'



# Article Delivery for Everyone (2011)

## ❖ Why?

- ❖ Providing research support to our customers
- ❖ Moving more items to Remote Storage
- ❖ ILL staff route requests to Awaiting Document Delivery processing

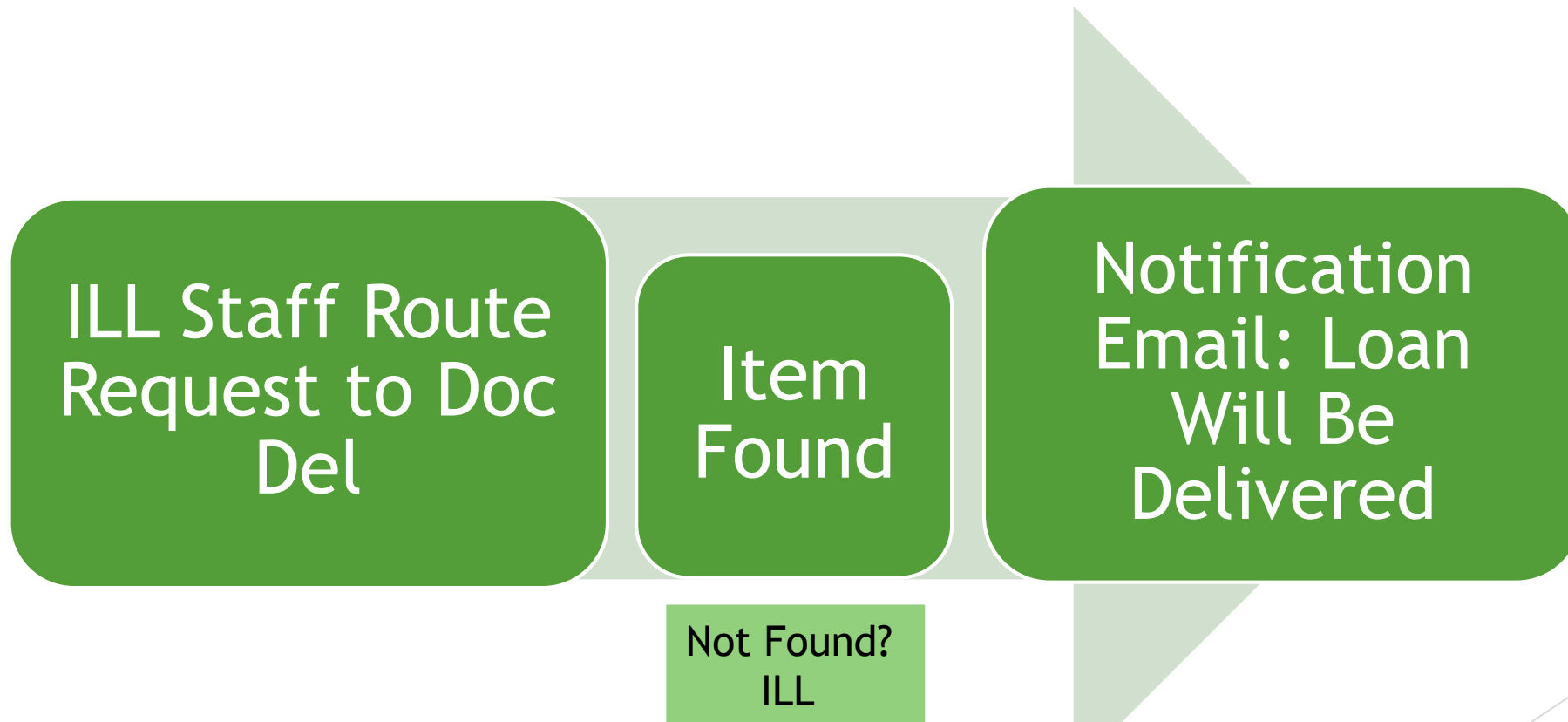
# Doc Del Item Not Found?

- ❖ Doc Del Routes to Borrowing
- ❖ Custom queues:
  - ❖ Lynne's Requests
  - ❖ Pam's Requests

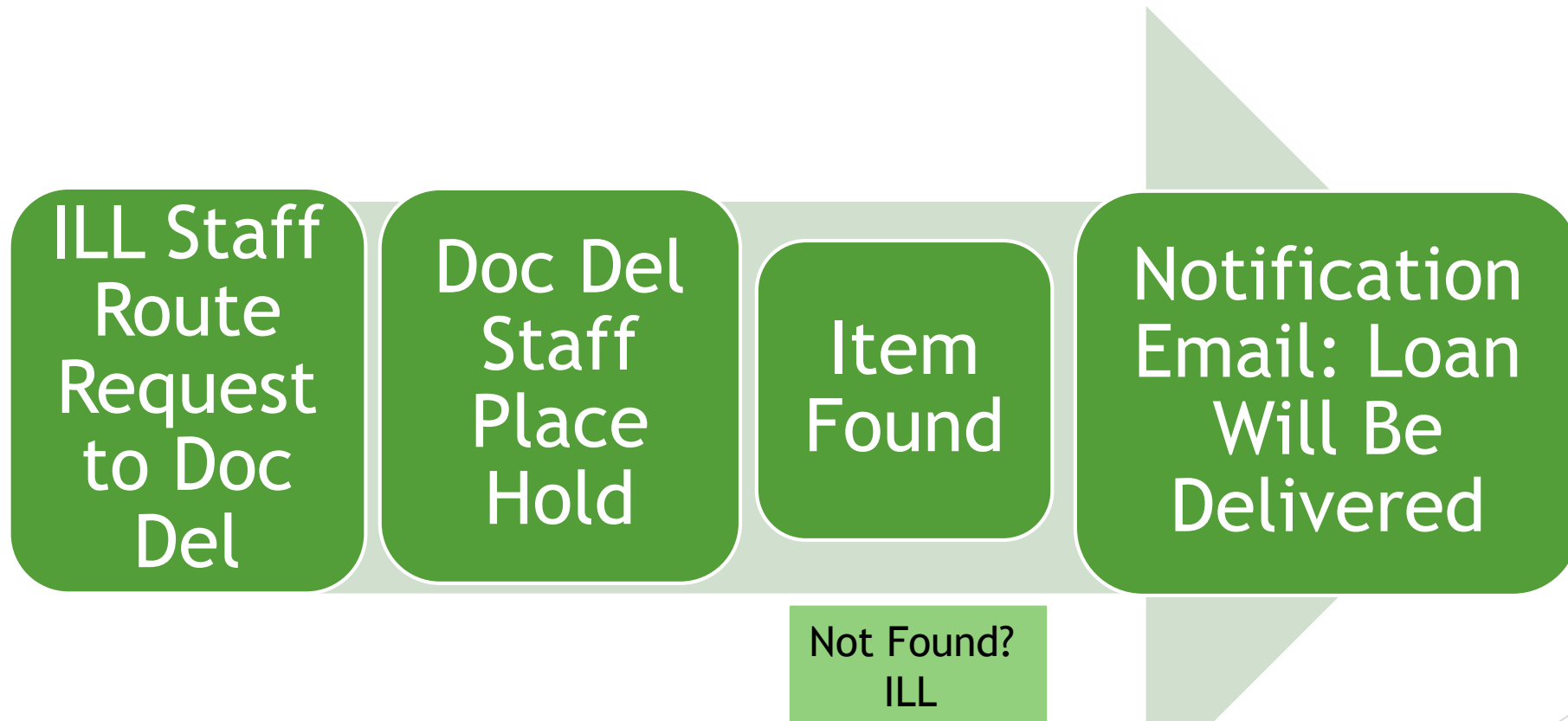
# Custom Emails for Branch Libraries + Email Routing

- ❖ Scan article for Document Delivery
- ❖ Pull book for Document Delivery
- ❖ Requests Routed to “Awaiting Document Delivery Stacks Searching”
- ❖ Doc Del staff use pull slips to monitor requests

# Faculty Book Delivery (2011)



# Faculty Book Delivery: ILLiad + Online Holds



# UNT Faculty Book Delivery

- ❖ Campus mail
  - ❖ Conferred with Campus Mail services before implementing
- ❖ Reusable mailers: Faculty can return mailers to us via Campus Mail
- ❖ Delivery Time: About 24 hours
- ❖ No problems with lost items

# UNT Faculty Book Delivery



**UNT** UNIVERSITY  
OF NORTH TEXAS\*

**UNT Libraries - Access Services Document Delivery**

**DEPARTMENT :** \_\_\_\_\_

**NAME:** \_\_\_\_\_

*UNT Libraries - Document Delivery*

[circ@unt.edu](mailto:circ@unt.edu) (940)565-2413

Please return mailer by inter-campus mail to Libraries-Access Services  
for reuse.

## Online Holds - Sierra (2014)

- ❖ 25 holds at a time
- ❖ Self-Service Hold shelf (Willis Library): 24/7
- ❖ 8 additional pickup locations
- ❖ Items remain on hold shelf for 5 days
- ❖ 2,100+ /month; about 7% not picked up
- ❖ Item not available? ILL



# Self-Service Hold Shelf

**HOLDS PICK UP**

For Willis Library 1st Floor Pickup Shelf Delivery

## Step 1: Locate Your Item

Items are arranged alphabetically by last name

ABC

First 3 letters of your last name

0101

Last 4 digits of your UNT ID Number

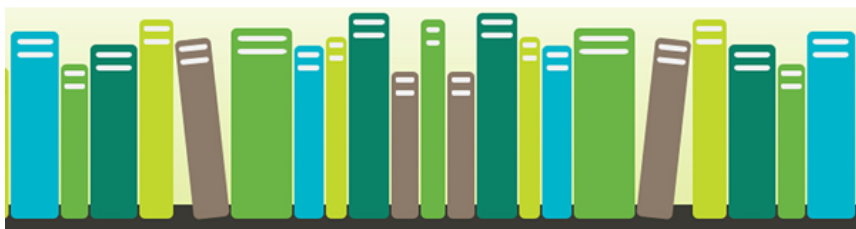
1/1/14

Date Hold item will be removed from shelf

## Step 2: Checkout the Item

Items may be checked out at the Library Services Desk, the Self-checkout machine, or at the 24 Center Desk if the Library Services desk is closed.

If you are not able to locate your hold item, or if you no longer need your hold, please visit the Library Services Desk for assistance



# Sierra: Online Holds



## Perceptual and motor skills

 Journal


**Publication Info:** Missoula, Mont. etc. Perceptual and motor skills etc.

**Continues:** [Perceptual and motor skills research exchange](#)

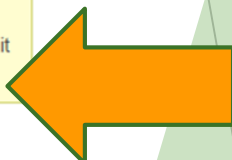
**Library Has:** v.5(1955)-v.113(2011)  
MISSING ISSUES: v.110 no.1(2010:Feb);

 **Request this item for pickup.** 

Location	Call Number	Status
<a href="#">Remote Storage (click to request)</a>	Periodical QP V. 5 1955	AVAILABLE
<a href="#">Remote Storage (click to request)</a>	Periodical QP V. 6 1956	

 [View all copies ...](#)

### Need an Article, Etc.?

Do you need a specific journal article or book chapter? Or is the item you want already checked out, and you need it soon? Or, are you a distance learning student needing an item shipped to you? Request it through ILLiad, instead! 

### UNT Students, Staff, and Faculty

EUID:

Password:

Forgot your EUID or password?  
[Update it here.](#)

### Visitors

Name:  
 *E.g.,  
Smith, John*

UNT ID:  
 *E.g.,  
10009899*

4-digit PIN:

Need a UNT ID or need help logging in?  
[Contact the Circulation department.](#)

# ILLiad Request Fields

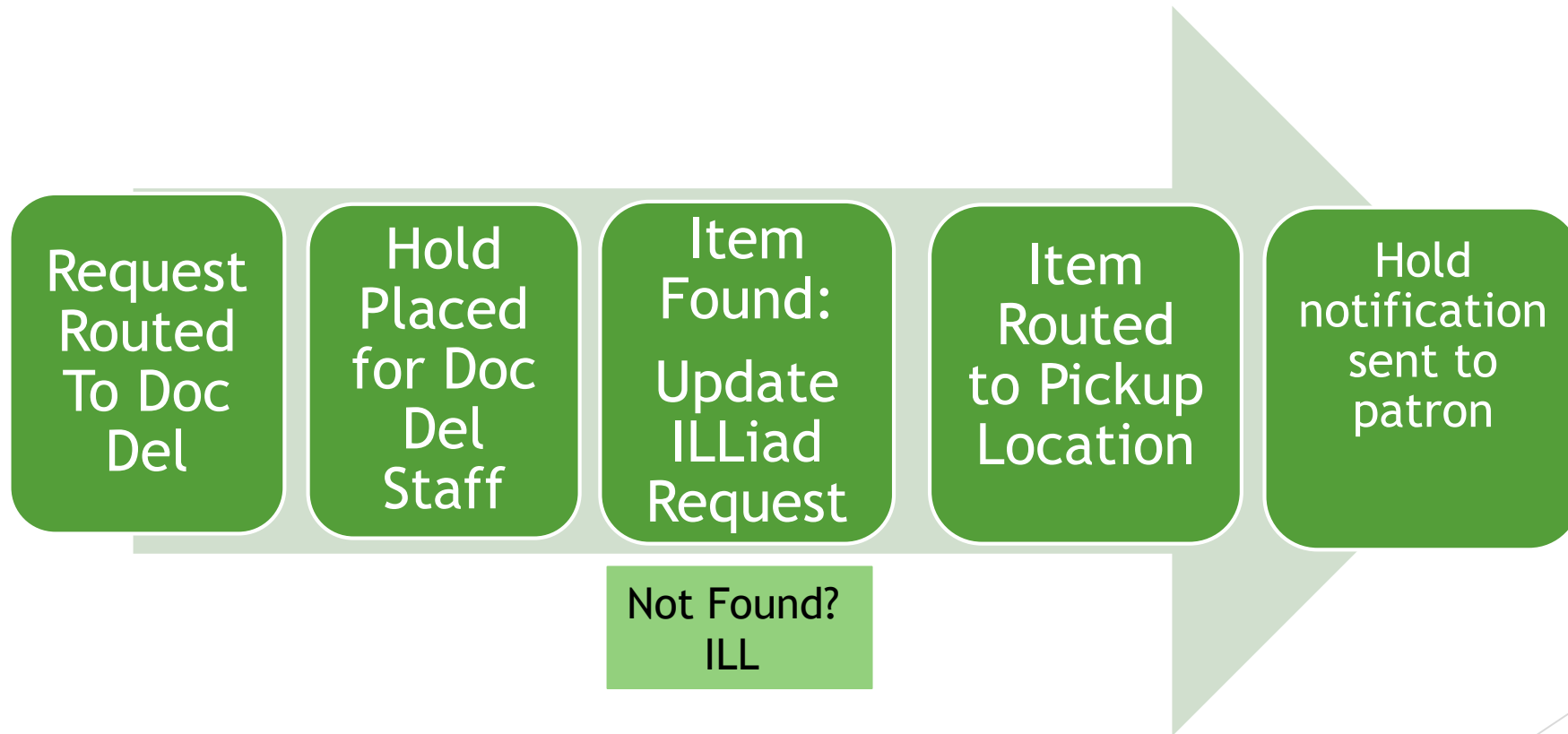
Citation Information	
Cited In	<input type="text" value="Catalog Request"/>
Title	<input type="text"/>
Date	<input type="text"/>
Volume/Pages	<input type="text"/> <input type="text"/>

Date	Note
11/24/2015 3:26 PM	Catalog record: <a href="http://iii.library.unt.edu/record=b1000171~S12">http://iii.library.unt.edu/record=b1000171~S12</a>

# Catalog Request: Routing Rule

- ❖ `t.RequestType = 'Article'` and `t.CitedIn LIKE '%Catalog Request%'`
- ❖ Routes article requests originating from online catalog directly to Document Delivery module.

# UNT Book Requested Via ILLiad Instead of Online Hold



# Spring 2015: Doc Del Overhaul

- ❖ Doc Del queues all moved to Doc Del module
- ❖ Doc Del emails all moved to Doc Del module and updated
- ❖ New Doc Del custom emails created
- ❖ Routing rules reviewed and modified
- ❖ Reasons for Cancellation

# New Doc Del Custom Emails:

- ❖ New custom emails created for Doc Del:  
Cover common scenarios encountered by Doc Del staff
- ❖ Request Change Notification
  - ❖ “...exceeds copyright restrictions for electronic delivery. It has been changed to a Loan by the Document Delivery staff and will be delivered to your preferred delivery location.”

# New Doc Del Custom Emails

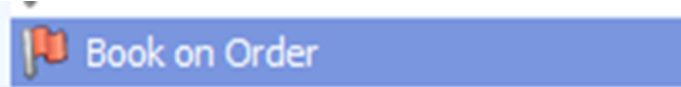
- ❖ Requested Item Unavailable
  - ❖ “...is currently unavailable. The Document Delivery staff has routed this request to ILL Borrowing to determine if an alternate copy may be obtained.”



# Doc Del Reasons for Cancellation

- ❖ Available - E-Resource
- ❖ Available - Library Use Only
- ❖ Available - Reserve Item
- ❖ Duplicate Request
- ❖ We are unable to complete the request by your deadline
- ❖ Other

# E-books for Distance Learners

- ❖ Purchasing E-books
  - ❖ Document Delivery staff route request to “Pam’s Requests” with a note
  - ❖ Ordered via Gobi
  - ❖ Custom Flag  Book on Order
  - ❖ Patron notified when item available

# Expanded Delivery Locations

- ❖ Eagle Commons Library (ECL)
  - ❖ Graduate Student Library Advisory Board (GSLAB) suggested the delivery location
  - ❖ ECL Library Specialist processes incoming/outgoing items

# Expanded Delivery Locations

- ❖ UNT Dallas College of Law Library
  - ❖ No courier service between campuses
  - ❖ Doc Del mails both UNT books and ILL books to Law Library
  - ❖ Tracking numbers recorded in ILLiad

# Expanded Delivery Locations

- ❖ UNT New College at Frisco
  - ❖ No library facility at this time
  - ❖ UNT books mailed to home address
  - ❖ No ILL books, but may be able to purchase an e-book

# Frisco: Routing Rule

- ❖ `t.RequestType = 'Loan'` and `u.NVTGC = 'Frisco'`
- ❖ Routes all Frisco loan requests to Doc Del

# Troubleshooting

- ❖ Webcirc Checkouts
- ❖ Eagle Commons Library delivery
- ❖ Doc Del Processing at branch locations

# WebCirc Troubleshooting


## ILLiad Web Circulation

**Main**

Home  
Change Password  
Logoff pjohnsto

**Quick Tasks**

Enter transaction number




Requests Users In Transit Items Returned

Drag a column header here to group by that column

Transaction

## ILLiad Web Circulation

Transaction 636050 was successfully checked out.



Copyright

**Main**

Home  
Change Password  
Logoff pjohnsto

**Quick Tasks**

Enter transaction number

Requests Users In Transit Items Returned

Drag a column header here to group by that column

Transaction <input type="text"/>	Title	Author
<input type="text"/>	<input type="text"/>	<input type="text"/>

No data to display





# Webcirc Troubleshooting

- ❖ Custom Email: Over Due/Not Checked Out
- ❖ “Due to a technical problem, this item may not have been checked out to you. Please review any Interlibrary Loan items you currently have and return overdue items. If you still need an overdue item for your research, you may submit a new request.”

# Eagle Commons ILL Delivery Issue

Coming?



Going?

# Processing Document Delivery Article and Loan Requests – Discovery Park – ECL - Annex

Please retrieve the following item for Document Delivery:

TN: 599112

JOURNAL/BOOK TITLE: History of American political thought; Edited by Bryan-Paul Frost and Jeffrey Sikkenga  
 JOURNAL VOLUME:  
 JOURNAL ISSUE: Chapter 35  
 JOURNAL MONTH:  
 JOURNAL YEAR: 2003  
 PAGES: 598-

ARTICLE/CHAPTER AUTHOR: Brand, Donald  
 ARTICLE/CHAPTER TITLE: Franklin Delano Roosevelt and the Second Bill of Rights

CALL #: JA84 .U5 H57 2003  
 LOCATION: Eagle Commons Library AVAILABLE

PATRON NAME: Stayton, Jennifer  
 STATUS: Staff

DELIVERY LOCATION: ILL  
 ADDRESS: 403 Bryan Street Apt 107  
 Denton, Tx 76201

If you have any questions, contact Jennifer Stayton in the Access Services Department

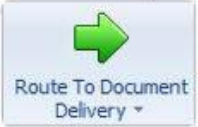
Print out the loan or article request and look up the borrowing request by the Transaction Number in ILLiad

Locate the requested item on the shelf:

Add Note

Recent notes
This item was not on the shelf.

If the item is not found, or if there are any other issues that prevent request processing, place a note in the ILLiad request and route the request to the Awaiting DD Resolution queue.



Scan and save the requested article or book chapter.

Select "Update Stacks Search" in the DD module. Search by the Transaction Number.



Select "Mark Found Scan Now" and go to the request scanning pop up window.



Verify that each page is legible and that the scan is complete. Cropping, rotating, and editing features are only available for requests saved as TIF files. Select "Send via Odyssey" once verified.



Look at the delivery location provided on the printed request slip.  
 Your Location      Other Location

In Sierra, place a hold in the patron's name, include the Transaction Number in the hold note. Process hold and place on shelf.

In ILLiad, select "Update Stacks Search" in the DD module. Search by the Transaction Number.

Place an Item-Level Hold

Patron: \_\_\_\_\_  
 Pickup Location: \_\_\_\_\_  
 Not Wanted Before: - -20  
 Not Wanted After: 04-26-2015  
 Hold Note: 599112

OK Cancel

Select "Mark Found"



Place the printed slip in the book and put it in the courier box for the desired pick-up location. Home & ILL requests should be sent to Willis. They will be marked found upon receipt at their destination.

If you are unsure where to send the item, you can place a hold in Sierra for Circ Dist. Learning and send the item to Willis for processing. Please be sure to include the Transaction Number in the hold note.