

# Sharing Breakthroughs

2017 OCLC RESOURCE SHARING  
CONFERENCE

## Expediting Document Delivery from Remote Storage

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# Expediting Document Delivery from Remote Storage

Kent State University Libraries houses roughly one-third of our collection at a third-party commercial off-site storage facility. Presenters will review a workflow developed to fulfill Document Delivery requests for items at this facility that reduces both time to fulfillment and cost. Prior to this workflow, items were retrieved at the facility then sent to campus for processing. This practice created significant lag in delivery and increased overall costs. Leveraging ILLiad and Odyssey and taking advantage of available services at the facility, we addressed these issues by partnering with the vendor for scanning and delivery. Obstacles overcome will also be discussed.

# Background

# Institution & Library Profile

- Kent State University
- University Libraries
  - Holdings
  - ARL
  - Locations
- History of off-site storage
- ILS set-up
  - Requesting from remote/off-site storage



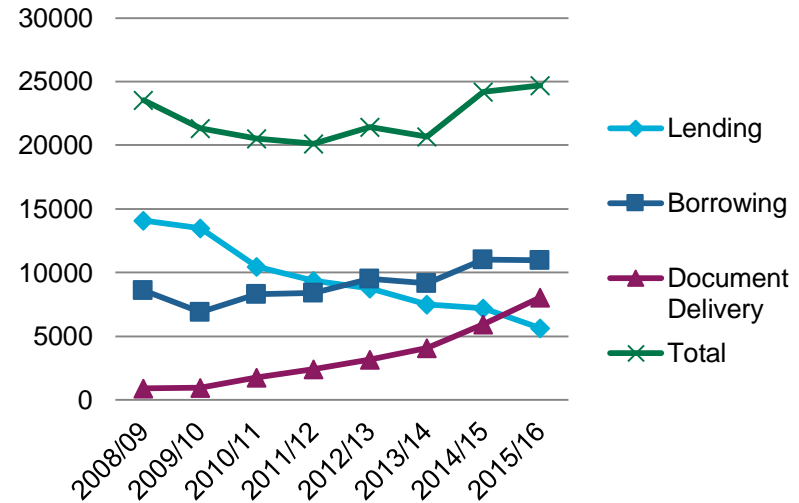
# ILL Department Profile

- Fill requests for patrons, including Community Borrowers, at all KSU campuses and materials held at all locations.
- Fill approximately 20-24k Borrowing/Document Delivery/Lending requests/year
- Lending is about 70% non-returnables (articles)
- We use ILLiad

# ILL Department Profile (continued)

- **Lending** decline—total filled and fill rate
- **Document Delivery** increase – free Article e-delivery
- Late 2014 rerouted incoming **Borrowing** article requests to DocDel queue

## Total Filled Requests



# Original Workflow



# Document Delivery when Off-site

- ILL staff reviewed request
- Searched OPAC
- Requested material from off-site storage
- Received material locally
- Fulfilled request
- Returned material to off-site storage



# New Workflow

# Document Delivery from Off-site

- ILL staff review request
- Search OPAC in staff mode
- Locate barcode and enter into custom field
- Assign to custom queue

Document Delivery Processing 458387 - Doc Del Request

Document Delivery Processing Printing

Cancel Request Finished Searching Mark Found Scan Now Route Route to Borrowing Add Flag Remove Flag Clone to Current User Clone to Another User Policies Directory Billing View Send Notification

Next Step Routing Cloning Billing User

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number 458387 Article Loan

Username earicha1 Service Type

Transaction Date 12/9/2015 1:15 PM Not Wanted After 11/18/2016

Delivery Method Mail to Address Site Kent Campus

Service Level Regular Shipping Options

Billing Account Doc Type Article

System Information Information

ILL Number

OCLC Number

Lending String

Borrower

System ID

OCLC Status

Article Info Loan Info Collections Local Holdings Imported R

Journal Title Routing this for ASV

Volume/Issue

Month/Year/Pages 2014 7-eoa

Article Author Jane Doe

Article Title

Original Journal Title

Item Author/Publisher

Item Place/Edition

Accept Alternate Edition

Accept Non English

Allow Copies?

Copyright Already Paid?

Allow Renewals?

Library Use Only?

Replacement Pages?

Priority Shipping

Ariel

Searched

Item Information

Call Number

Location

Due Date

Reason For Cancellation

Item Num/Ref Num

ISxN

Special Instructions

Max Cost/Pieces

Barcode 31850019178392

Citation Information

Cited In

Title

Date

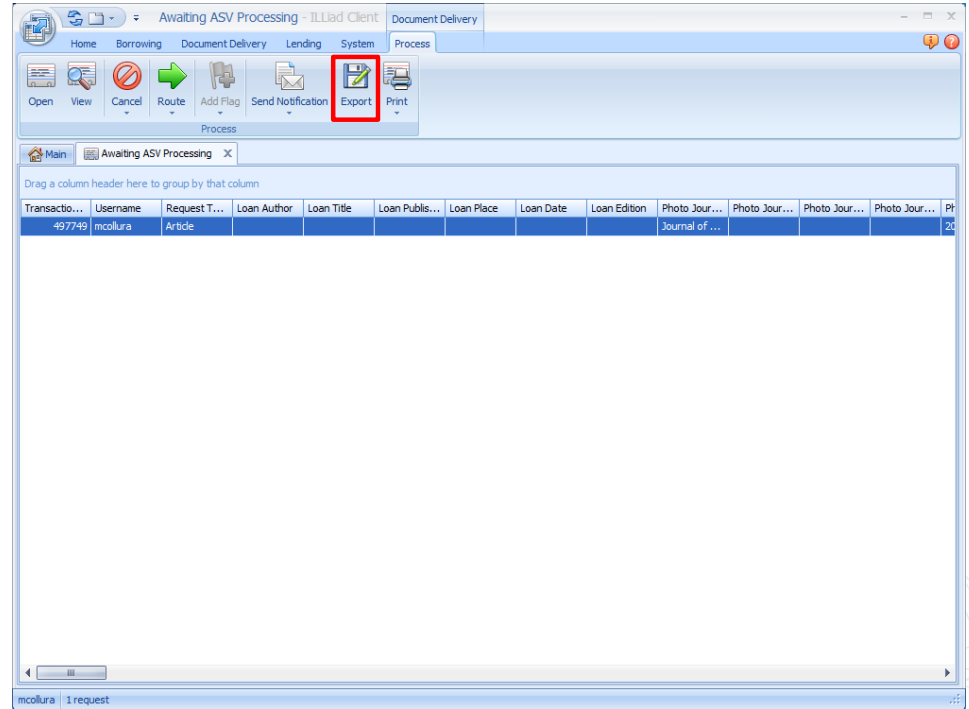
Volume/Pages

11/19/2015 1:19 PM Note Dummy request Type User Added By earicha1

Awaiting ASV Processing Doc Del

# Fulfillment from Off-Site

- AssureVault staff exports queue
- Ingest into Total Recall system
- Retrieve material



# Fulfillment from Off-Site (continued)

- Print cover page
- Scan request
- Fulfill
- Refile material

The screenshot displays the 'Document Delivery Processing' software interface. The window title is '458387 - Doc Del Request'. The interface is divided into several sections:

- Toolbar:** Contains icons for 'Print Request' (highlighted with a red box), 'Add to Print Queue', and 'Print and Empty Queue'. A 'Printing' button is also visible.
- General Request Information:** Transaction Number: 458387, Username: earicha1, Transaction Date: 12/9/2015 2:04 PM, Delivery Method: Mail to Address, Service Level: Regular, Billing Account: [blank].
- System Information Information:** ILL Number, OCLC Number, Lending String, Borrower, System ID, OCLC Status.
- Article Info:** Journal Title: Routing this for ASV, Volume/Issue, Month/Year/Pages: 2014 7-eoa, Article Author: Jane Doe, Article Title: Please Do Not Process, Original Journal Title, Item Author/Publisher, Item Place/Edition.
- Options:** Checkboxes for 'Accept Alternate Edition', 'Accept Non English', 'Allow Copies?', 'Copyright Already Paid?', 'Allow Renewals?', 'Library Use Only?', 'Replacement Pages?', 'Priority Shipping', and 'Ariel'.
- Item Information:** Call Number, Location, Due Date, Reason For Cancellation, Item Num/Ref Num, ISxN, Special Instructions, Max Cost/Pieces, Barcode: 31850019178392.
- Table:** A table with columns: Date, Note, Type, Added By, Citation Information. One entry is visible: 11/19/2015 1:19 PM, Dummy request, User, earicha1.
- Status:** 'Awaiting ASV Processing' is displayed at the bottom left.

# Obstacles

# Overcoming Pain Points

- ILLiad client
  - Installation & updates
  - Hosted access and firewalls
- Technical issues with Microsoft Word
- Staff perceptions



# Outcomes



# Before & After Comparison

## Old Workflow

- Time to fulfillment
  - 2 to 4 business days
- Cost of fulfillment
  - Retrieve & refile
  - Round trip shipping
  - Local staff time

## New Workflow

- Time to fulfillment
  - 1 to 2 business days
- Cost of fulfillment
  - Retrieve & refile
  - Scan per page

# Results

- Half the time to fulfill
- On average, 40% cost savings per request
- Process is working well
- Recently expanded to Lending



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thank you

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