



SYRACUSE UNIVERSITY
LIBRARIES

ILLiad for Office Delivery

RONALD FIGUEROA
MANAGER, DELIVERY, INTERLIBRARY LOAN & COURSE RESERVE
SHARING BREAKTHROUGHS - 2017 OCLC RESOURCE SHARING CONFERENCE
MARCH 15TH 2017

ILLIAD FOR OFFICE DELIVERY

GOALS

- **Provide an overview of the office delivery service at the Syracuse University Libraries**
- **Demonstrate how to use ILLiad to receive and fulfill delivery requests**
- **Use of IDS Logic Rules**
- **Suggest best practices**
- **Share information**

ILLIAD FOR OFFICE DELIVERY

Syracuse University

- Chartered in 1870
- Total enrollment 21,970 (2016)
- ~15,000 Undergraduate
- ~6,600 Graduate and Law school
- ~1,700 Faculty
- ~3200 Staff

ILLIAD FOR OFFICE DELIVERY

Syracuse University Libraries

- Voyager
- IDS Member (Full)
- Bird Library (Main)
- Carnegie (Science)
- Architecture Reading Room
- Syracuse University Libraries Facility or SULF

PRE- ILLIAD PROCEDURE

Interlibrary Loan

- **System**
 - ILLiad
- **Self-hosted**
- **Services**
 - Lending
 - Borrowing
 - Full services to Undergraduate, Graduate, Faculty and Staff
 - Document Delivery
 - Full services to Undergraduate, Graduate, Faculty and Staff
 - We retrieve Items from stacks and place them on hold
 - Scan articles

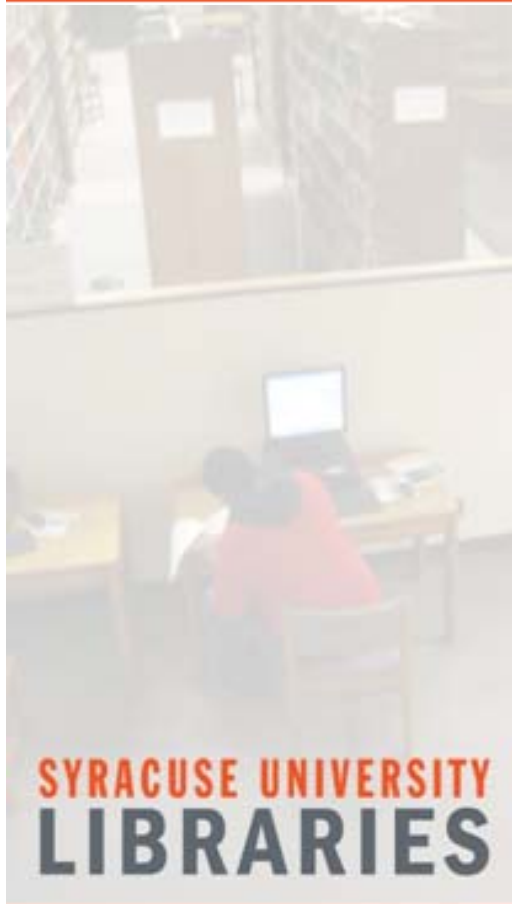
ILLIAD FOR OFFICE DELIVERY

Delivery Team Tasks:

- **Branch Mail**: Distribute library materials (holds, returns) among 3 branch libraries.
- **Retrieve and Return Special Collections and Archives materials from 2 storage facilities. About 5000 items/year**
- **Campus/Office Delivery**: Deliver and pickup library and ILL items to faculty and graduate students – Mailbox at departmental offices only. About 9700 items/year.
- **Delivery Turnaround Time**: Next business day.

ILLIAD FOR OFFICE DELIVERY

The main focus of this presentation is the use of ILLiad as the main system to receive and fulfill campus delivery requests.



History of the Office Delivery Service at the Syracuse University Libraries

HISTORY OF THE SERVICE AT SUL

- **2003**
 - Service established
 - Faculty Only
 - Supervisor + student assistants from stacks
 - Service to faculty through call slip in Voyager
- **2007**
 - Supervisor , 1 FT and student assistants from stacks
 - Van - provided accessibility to retrieve items from off-campus storage facilities
- **2009 – 2010**
 - Supervisor, 3 FT and delivery student assistants
 - Service expanded to include ILL items, holds and AV-materials
 - 24-Hour turnaround

HISTORY OF THE SERVICE AT SUL

- **2011**
 - **Branch Mail added: Architecture, Science, SULF**
 - **Other SU Libraries: Law and MLK**
 - **Delivery of ILL materials to other institutions: ESF and Upstate**
 - **Supervisor, 3 FT and 5 – 7 student assistants**
- **2016**
 - **ILLiad implemented as Delivery system to submit and fulfill requests**
 - **4 FT**
- **2017**
 - **March 2017 service extended to Graduate students**



Pre-ILLiad Procedure

PRE - ILLIAD PROCEDURE

Locally Held Items

- **Patrons searched the OPAC for a title and selected a specific record.**
- **Once the record was chosen, they requested delivery by clicking the Voyager call slip option.**
- **If this was the first time a patron submitted a request staff emailed patron asking if he/she would like to receive all items through delivery from now on.**
- **If patron said yes, name was added to an excel list.**
- **A note added to Voyager with department information.**
- **Patron list updated every semester.**

PRE - ILLIAD PROCEDURE

SYRACUSE UNIVERSITY LIBRARIES
Classic Catalog

Summon | Syracuse University Libraries | Syracuse University College of Law Library | M.L. K

Search | My Searches | My List | My Account | Log in | Interlibrary Loan | Jo

New Search

[Return to Search Results](#) 1 of 402

Mechanics of machines /

Title: Mechanics of machines / William L. Cleghorn and Nikolai Dechev.
Author: [Cleghorn, W. L. \(William L.\), author.](#)
Published: Oxford ; New York : Oxford University Press, [2015]
ISBN: 9780195384086
0195384083

Description: Second Edition.
Format: Book
Physical Desc: xvii, 619 pages : illustrations (some color) ; 29 cm
Contents: [Show Contents »](#)
Subjects: [Mechanical engineering.](#)

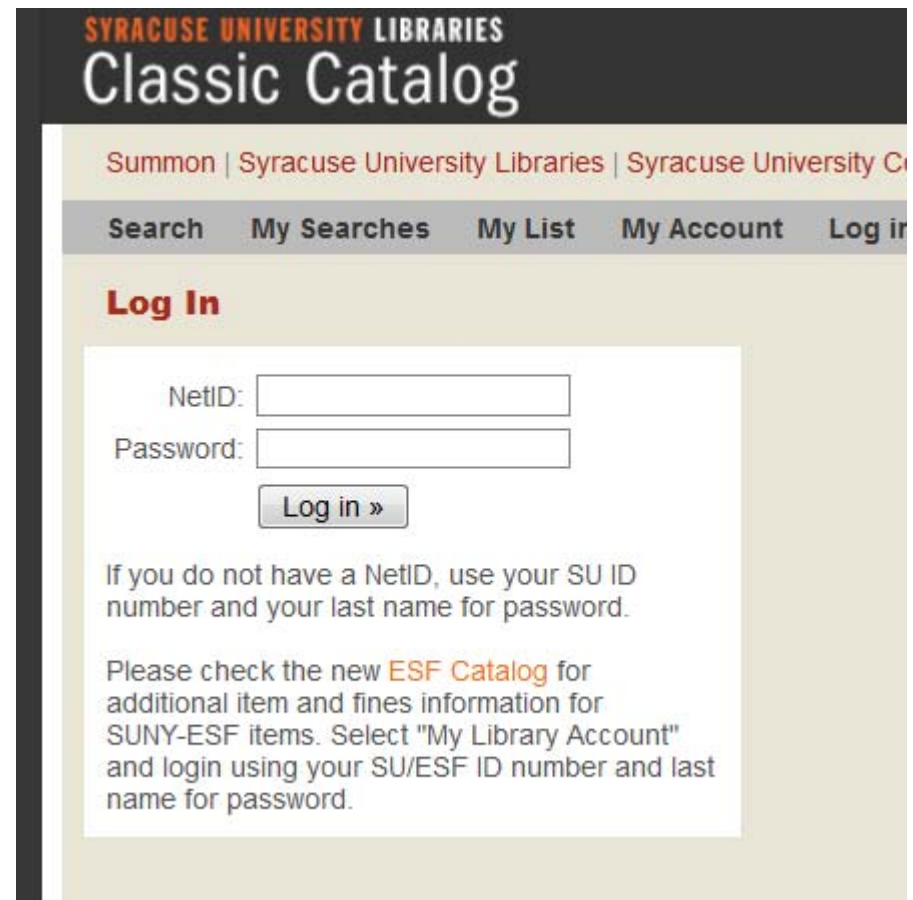
Holdings Information

Location:	Carnegie
Call Number:	TJ1170 .C58 2015
Status:	Available Request Delivery (Faculty Only) Missing Item - Request through ILL

Persistent link: <http://summit.syr.edu/vwebv/holdingsinfo?bibid=4201355>

PRE - ILLIAD PROCEDURE

Once patrons clicked the 'Request Delivery' option a login page loaded.



The screenshot shows the 'Classic Catalog' login interface. At the top, the header reads 'SYRACUSE UNIVERSITY LIBRARIES Classic Catalog'. Below this is a navigation bar with links: 'Summon | Syracuse University Libraries | Syracuse University C'. A secondary navigation bar contains 'Search', 'My Searches', 'My List', 'My Account', and 'Log in'. The main content area is titled 'Log In' and features a login form with two input fields: 'NetID:' and 'Password:'. A 'Log in »' button is positioned below the password field. Below the form, a message states: 'If you do not have a NetID, use your SU ID number and your last name for password.' Further down, another message reads: 'Please check the new **ESF Catalog** for additional item and fines information for SUNY-ESF items. Select "My Library Account" and login using your SU/ESF ID number and last name for password.'

PRE- ILLIAD PROCEDURE

- A second page loaded :
 - Provided instructions to add department into the comments field
 - Asked patron to select specific copy (barcode)
- Staff searched for item that matched title and barcode
- This page was required for every single request
- In many occasions patrons did not enter their department and it be added by hand to the slip.

The screenshot shows the 'Patron Requests' page of the Syracuse University Libraries Classic Catalog. The page has a dark header with the library name and a navigation bar with links like 'Search', 'My Searches', 'My List', 'My Account', 'Log out', 'Interlibrary Loan', 'Journal Locator', and 'Help'. Below the navigation bar, there's a section for 'Patron Requests' with a search bar and a 'Go' button. The main content area is titled 'Delivery' and contains a form for requesting materials. The form includes a 'Title' field with the text 'Mechanics of machines /', an 'Instructions' box with detailed text about the request process, a 'This Copy' dropdown menu showing 'c.0 32911045542040 cam', a 'Comment' text area, and a '*SUID Number or Barcode' field. At the bottom of the form are 'Submit' and 'Cancel' buttons.

SYRACUSE UNIVERSITY LIBRARIES
Classic Catalog

Summon | Syracuse University Libraries | Syracuse University College of Law Library | M.L. King Library | SUNY-ESF Library

Search My Searches My List My Account Log out Interlibrary Loan Journal Locator Help

Patron Requests

New Search [Search History](#)

Delivery

Title:

Instructions: Enter your SU ID number below and include your department's office address in the Comment field. Library staff will deliver requested materials to your department's office address. By submitting this form, you authorize the library to charge requested materials out in your name. For more information about the Library to Go campus delivery service, see [Library to Go Campus Delivery Service](#).

This Copy:

Comment:

*SUID Number or Barcode

PRE - ILLIAD PROCEDURE

- Request printed automatically
- Department written on each call slip by staff.

Callslip Request	6/17/2015 11:46:15 AM
Date Requested:	6/17/2015 11:43 AM
Call Number:	TP155.7 .S25 2005
Author:	Sanders, R. E. (Roy E.)
Title:	Chemical process safety : learning from case histories / Roy E. Sanders.
Location:	cam
Item Enumeration:	
Item Chronology:	
Item Year:	
Item Copy No:	
Item Barcode:	 32911829975249
Patron Name:	[REDACTED]
Patron SUID:	[REDACTED]
Patron Barcode:	 7589172458
Requestor Comment:	Please deliver to BMCE office in Link 329
Reassignment History:	None
Request number:	 24938

3mc Engineering

PRE - ILLIAD PROCEDURE

- Once Item was located staff checked out item in Voyager.
- Another slip was printed to be attached to the item and sent to faculty

Recipient _____

Location _____

Department _____

Due Date _____

SYRACUSE UNIVERSITY
LIBRARIES
DELIVERY SERVICES



Questions - Comments - Requests

delivery@syr.edu

PRE- ILLIAD PROCEDURE

Not on Shelf Procedure

- **Delivery staff sent email to patrons to suggest ILL.**
- **In most cases patron had to initiate request in ILLiad.**
- **Just a few request added manually in ILLiad. Delivery will contact ILL to do this.**

PRE- ILLIAD PROCEDURE

Other Ways to Receive Requests

- **Email**
- **Phone Call**
- **Subject Librarians**
- **Acquisitions**

PRE- ILLIAD PROCEDURE

Statistics

- **At the end of the month staff will put together all requests from all different methods to gather statistics.**
- **Kept paper copies of each request for 3 months.**

PRE- ILLIAD PROCEDURE

Interlibrary Loan

- **Patrons also submitted requests for locally held items through ILLiad.**
- **Requests handled through Document Delivery in ILLiad.**
- **Items requested through ILL materials submitted by Campus Delivery participants.**










PRE- ILLIAD PROCEDURE

ILL Materials

- **'User Record Form' updated in ILLiad - added information from the delivery excel list to identify patrons using this service.**
- **Used 2 fields:**
 - **u.SCity: Identifies patron as a Campus Delivery user.**
 - **u.SCountry: Includes department a and office address.**
- **We could not use the u.City and u.Country fields because, old accounts had residential information.**

PRE- ILLIAD PROCEDURE

User Form

 Change Password	 Print User	 Logon to Web	 Borrowing	 Document Delivery	 Cleared	 Not Cleared	 Blocked	 Disavowed
User			Add Request		Cleared Status			

User Information	Requests	Accounts	Notifications
------------------	----------	----------	---------------


Details			
User Name	<div></div>	Status	Faculty
Last Name	<div></div>	Department	History
First Name	<div></div>	Organization	
ID		Site	
Number		Authorized Users	
Email Address	<div></div>	Phone	
		Fax	
Expiration Date		Location	BIRD Library
		User Info 1	

Local/Mailing Address		Other/Notification Address		Delivery Method
Address		Address		Notification Method
				Delivery Method
City		City	Campus Delivery	Loan Delivery
State		State		Electronic Delivery
Zip		Zip		
Country		Country	144 Eggers	

Note	Date
------	------

PRE- ILLIAD PROCEDURE

Borrowing Loan slip
template customized to
reflect these fields.

PLEASE RETURN WITH BOOK Campus Delivery Information Studies, 343 Hinds
<div></div>
TN: 915945  Due Date: 8/15/2016
Title: 33 strategies of war Proxy:
FOR OFFICE USE ONLY
ELD - VKM
Syracuse University Libraries 222 Waverly Avenue Syracuse, NY 13244-2010 Hub: SYR
<hr/> Siena College Loudonville, NY HUB-ALB

PRE- ILLIAD PROCEDURE

- **Created routing rule to move requests from the 'In Transit to Pick-up Location' status to a new queue named 'Campus Delivery'.**
- **Email routing added to update status to 'Checked Out to Customer' after a customized email was sent to patrons to let them know the item was going to be delivered to their office.**
- **This helped delivery staff to keep records and a better control of ILL items to be delivered.**

PRE- ILLIAD PROCEDURE

Routing Rule

RuleNo	30
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	In Transit to Pickup Location
MatchString	u.SCity='Campus Delivery' and t.RequestType='Loan'
NewProcessType	Borrowing
NewTransactionStatus	Campus Delivery
RuleDescription	Routes Campus Delivery Books to Campus Delivery Queue where a custom email is sent

PRE-ILLIAD PROCEDURE

Email Routing

Edit Row	
ProcessType	Borrowing
Name	Campus Delivery Notification
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	ILL Item Received; Will Be Delivered
DefaultFromAddress	ill@syr.edu
DefaultFromName	Syracuse University Interlibrary Loan
DefaultStatus	Checked Out to Customer
LoanTemplate	Campus Delivery
ArticleTemplate	Campus Delivery
AutoCancel	NO



ILLiad as a Delivery Request System

ILLIAD AS A DELIVERY REQUEST SYSTEM

Points Evaluated

- Patrons had to select a specific barcode for every single transaction.
- Call slip format.
- Call slip information.
- Extra work for staff writing information in multiple slips once item was ready to go out.
- ILL request added manually or re-initiated by patron.
- No specific method to receive requests.
- Lack of system to collect statistics.
- ILL unit was providing similar service – Document Delivery.



Planning & Implementation

PLANNING & IMPLEMENTATION

Elements, Factors and Variables Considered

- Webpage
- Request workflow
- Information on call slip
- Branch Libraries workflow
- Match user information in ILLiad
- Communication with patrons
- Department Contacts
- Main Email Account for patrons to contact Delivery staff
- Training Staff
- Blocked Users
- Fear Factor

PLANNING & IMPLEMENTATION

Webpage

- **Issue:**
 - Patrons were used to a specific format of web pages. What is the best way to handle transition?
- **Solution:**
 - JavaScript to change appearance of the holdings display, picking up elements from the page and creating a URL from them to point to ILLiad. URL becomes a link on the brief or detailed display after Java has modified.
 - Customized Information
 - Instructions added to webpage.

PLANNING & IMPLEMENTATION

SYRACUSE UNIVERSITY LIBRARIES
Interlibrary Loan

ILLiad

Enter your NetID information below.
Then press the Logon to ILLiad button to continue.

Campus Delivery & Interlibrary Loan

ILLiad Logon

* NetID

* Password

Logon to ILLiad

First Time Users

ILLiad FAQ

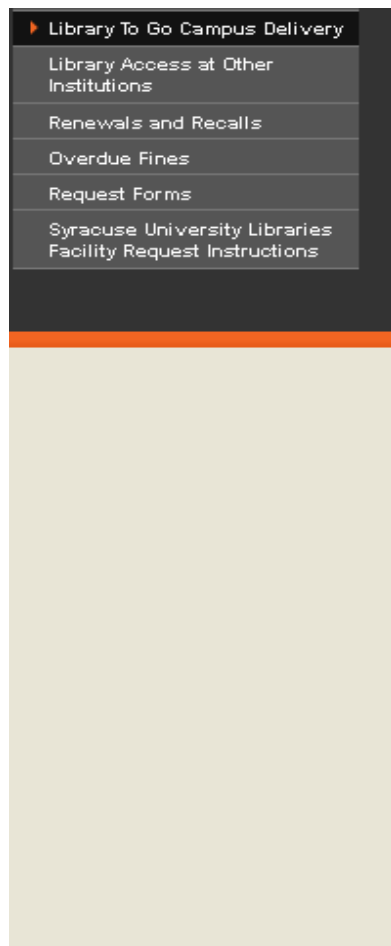
SUNY ESF Users (SUNY ESF faculty, students, and staff must use Moon Library for ILL services)

Syracuse University Library

SUMMIT

Copyright © 1998-2006 Atlas Systems, Inc. All Rights Reserved.

PLANNING & IMPLEMENTATION



Submit a Request

1. Search the online [Classic Catalog](#) and locate the desired item.
2. If the item has a status of **Available**, click the **Request Delivery** link.

A screenshot of a 'Holdings Information' form. It contains the following fields: 'Location:' with the value 'Bird-5th Floor', 'Call Number:' with the value 'PS3511.A86 A8655 1990', 'Number of Items:' with the value '1', and 'Status:' with the value 'Available'. Below the status field, there are two links: 'Request Delivery (Faculty Only)' and 'Missing Item Request Form'.

3. Log in using your SU NetID and password.

A screenshot of a 'Campus Delivery & Interlibrary Loan' form. It features an 'ILLiad Logon' section with two input fields: 'NetID' and 'Password'. Below these fields is an orange button labeled 'Logon to ILLiad'.

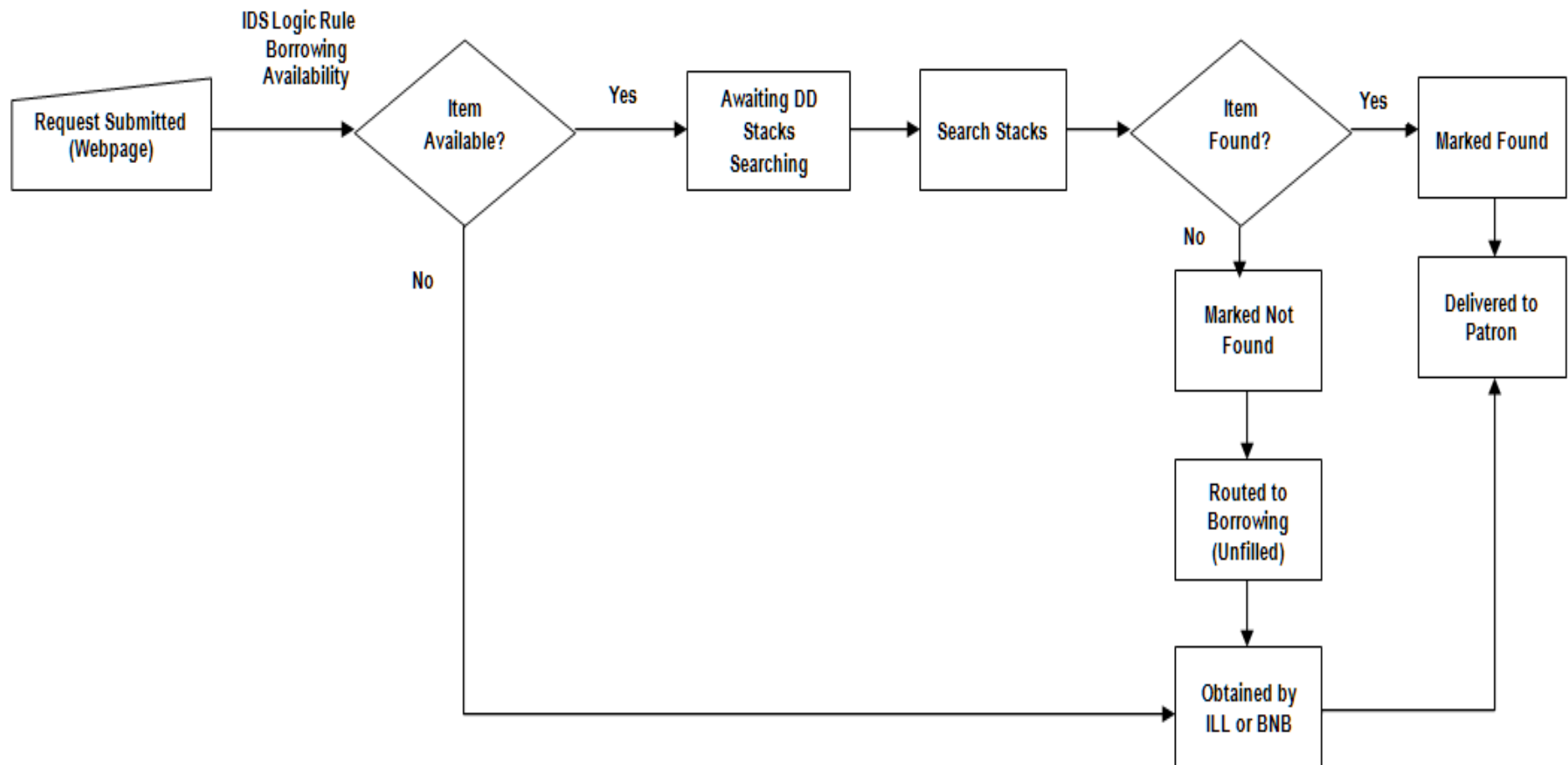
4. All information is automatically imported. Add notes or additional information, if needed. Click **Submit Request**.

PLANNING & IMPLEMENTATION

Request Flow

- **Issue:**
 - Since this type of requests are for items held locally and land in borrowing, What is the best way to save staff time when checking the OPAC?.
- **Solution:**
 - **Open URL**
 - When patrons submit requests through the webpage and request delivery, all information is imported into the request form including the ISBN and/or OCLC numbers. This step is important for the Logic Rule.
 - **IDS Logic Rule**
 - Borrowing Availability checks if item is available in the OPAC and routes request to the Doc. Del Module

ILLiad for Delivery Basic Workflow



PLANNING & IMPLEMENTATION

Call Slip

ILL LOCAL HOLD
Campus Delivery
Geography, 144 Eggers

Due Date: 06/02/2017

TN: 917030



Location:
Bird-2nd Floor

Call #:
DK295 .I58 2013

Title:
International dimensions of authoritarian
persistence :

Proxy: Julian Georg



PLEASE RETURN WITH BOOK
Campus Delivery
Information Studies, 343 Hinds

TN: 915945



Due Date: 8/15/2016

Title: 33 strategies of war
Proxy:

FOR OFFICE USE ONLY

ELD - VKM

Syracuse University Libraries
222 Waverly Avenue
Syracuse, NY 13244-2010
Hub: SYR

Siena College
Loudonville, NY
HUB-ALB

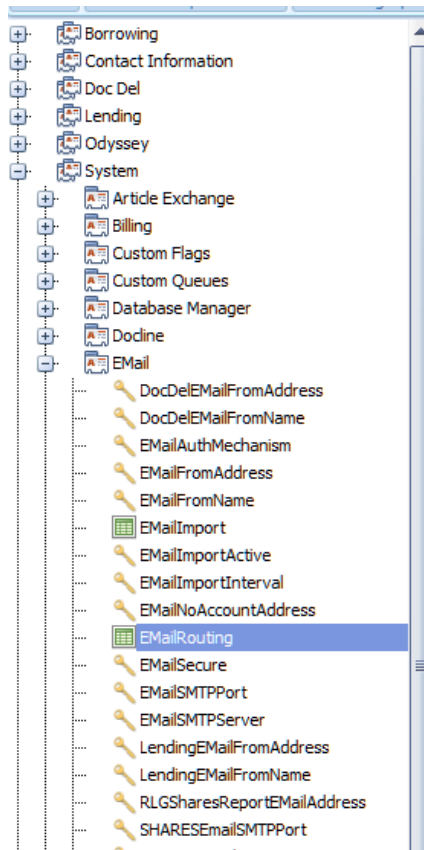
PLANNING & IMPLEMENTATION

Branch Libraries

- **Issue:**
 - **Architecture Library:** staff doesn't have ILLiad. We use email routing for ILL. How can we make a difference between Delivery and ILL?
- **Solution 1 – Email Routing:**
 - **Architecture Library:** Used the same email templates for regular Doc Del from email routing rule, but added the following fields to the subject line of the email. This way Architecture Library staff would be able to identify if the request is for Delivery or not.
 - SCity field from User Table ('Campus Delivery' from patron User form)
 - RequestType from Transaction Table (Delivery only delivers loans)

PLANNING & IMPLEMENTATION

Email Routing Rule



Edit Row	
ProcessType	Doc Del
Name	Architecture Reading Rm
DefaultToAddress	arrstaff@syr.edu
DefaultToName	Request for ARR material from Faculty/Grad
DefaultCCAddress	
DefaultSubject	<#User.SCity>-ILL ARR <#RequestType> Request #<#TransactionNumber> Local Patron
DefaultFromAddress	ill@syr.edu
DefaultFromName	Interlibrary Loan
DefaultStatus	Awaiting DD Stacks Searching
LoanTemplate	ARR-book
ArticleTemplate	ARR-article
NVTGC	BIRD

PLANNING & IMPLEMENTATION

Solution 2 - IDS Logic

LogicRule_11

Field	Value
Enabled	1
RuleName	ArchitectureCampusDeliveryEmailer
PreventReruns	1
NVTGCList	[BIRD]
ProcessTypeList	[Doc Del]
RequestTypeList	[Loan]
TransactionStatusList	[Awaiting DD Stacks Searching]
Query	(u.Status = 'Faculty' AND t.Location LIKE '%Architecture%')
RouteTo	
EmailTemplate	ARR-book
EmailSubject	Campus Delivery

PLANNING & IMPLEMENTATION

LogicRule_12

Field	Value
Enabled	1
RuleName	ArchitectureNonFacultyRouterToUnfilled
PreventReruns	1
NVTGCList	[BIRD]
ProcessTypeList	[Doc Del]
RequestTypeList	[Loan]
TransactionStatusList	[Awaiting DD Stacks Searching]
Query	(u.Status <> 'Faculty' AND t.Location LIKE '%Architecture%')
RouteToBorrowing	Awaiting Unfilled Processing

PLANNING & IMPLEMENTATION

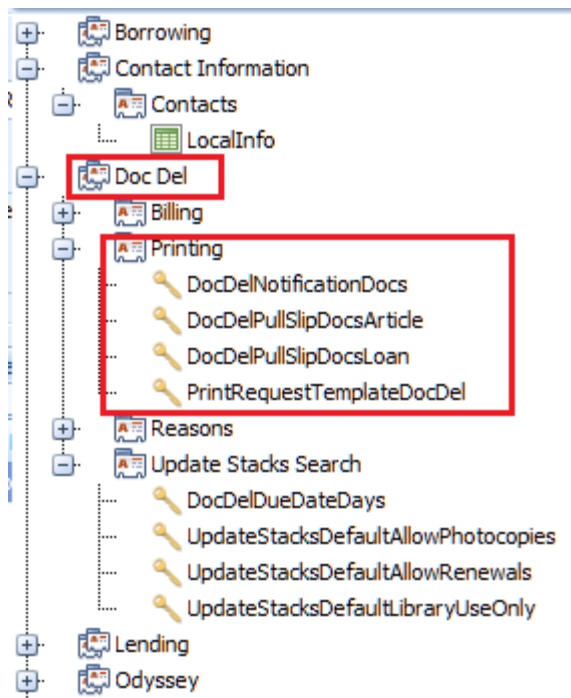
- **Issue:**

- Science Library: staff uses ILLiad but combines lending and regular document delivery requests in one process. There was no way to identify if a request was for Delivery or not.

- **Solution:**

- Science Library staff uses the 'Print RequestTemplate' as pullslips. Adopted the same template for both documents:
- DocDelPullSlipsDocsLoan
- PrintRequestTemplateDocDel

PLANNING & IMPLEMENTATION



ILL LOCAL HOLD
{ MERGEFIELD Users_SCity }
{ MERGEFIELD Users_SCountry }
{ MERGEFIELD Users_UserInfo1 }

{ MERGEFIELD Users_LastName }, { MERGEFIELD Users_FirstName }

{ IF { MERGEFIELD Users_SCity } = "Campus Delivery" "Due Date: **06/02/2018**" "" }

TN: { MERGEFIELD Transactions_TransactionNumber }

{ MERGEFIELD Transactions_TransactionNumber }

{ IF { MERGEFIELD Transactions_Pieces } > "1" "Pieces: { MERGEFIELD Transactions_Pieces }" "" }

Location:
{ MERGEFIELD Transactions_Location }

Call #:
{ MERGEFIELD Transactions_CallNumber }

Title:
{ MERGEFIELD Transactions_LoanTitle }

Proxy: { MERGEFIELD Users_AuthorizedUsers }

{ MERGEFIELD Transactions_TransactionNumber }

ILL LOCAL HOLD
Campus Delivery
Geography, 144 Eggers

Due Date: 06/02/2017

TN: 917030

Location:
 Bird-2nd Floor

Call #:
 DK295 .I58 2013

Title:
 International dimensions of authoritarian persistence :

Proxy: Julian Georg

PLANNING & IMPLEMENTATION

Other Factors to keep in Mind

- Matched User Record in ILLiad: Before ILLiad was implemented as a delivery system, we matched every department from the delivery excel list into ILLiad and updated the SCity field of the User Form for each patron participating in Campus Delivery.
- Department Contacts: Started a list of office contacts from each department.
- New Queue Added to Doc Del:
 - Helps identify Campus Delivery requests as they are ready to go out to send out notifications.
 - Easier for sending emails.

PLANNING & IMPLEMENTATION

This routing rule routes requests from 'In Transit to Pickup Location' to 'DocDel Campus Delivery queue'.

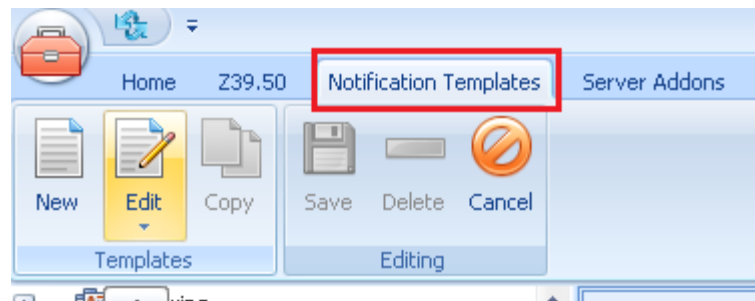
Edit Row	
RuleNo	61
RuleActive	Yes
ProcessType	Doc Del
TransactionStatus	In Transit to Pickup Location
MatchString	u.SCity='Campus Delivery' and t.RequestType='Loan'
NewProcessType	Doc Del
NewTransactionStatus	DocDel Campus Delivery
RuleDescription	A separate queue to notify campus delivery users that their docdel items will be delivered

PLANNING & IMPLEMENTATION

Communication with Faculty

- **Mass emails were sent to faculty.**
 - Message explained the reason of the change
 - Assured them their service was being improved
 - Provided date of change
- **New email template to notify patrons when items have been delivered.**
- **Created a “Weather Delay” email to notify patrons when items cannot be delivered due to weather conditions**

PLANNING & IMPLEMENTATION



PLANNING & IMPLEMENTATION

Edit Row

ProcessType	Doc Del
Name	Item Delivered
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Item Delivered from Bird Library
DefaultFromAddress	delivery@syr.edu
DefaultFromName	Syracuse University Interlibrary Loan
DefaultStatus	Request Finished
LoanTemplate	Item Delivered
ArticleTemplate	
NVTGC	BIRD

Template Details

Name: Item Delivered
Description: Notifies Campus Delivery Patrons

E-mail

From Name:

To Name:

CC Address:

Subject:

Dear <#User.FirstName> <#User.LastName>

An item that you requested from Bird Library:

Loan Title: <#Transaction.LoanTitle>

Loan Author: <#Transaction.LoanAuthor>

TN: <#Transaction.TransactionNumber>

Has been delivered to your department office. Please contact us at delivery@syr.edu for any question or comment.

Delivery Service staff will also retrieve materials to be returned to the library.

Simply complete this Pick up request form the link below indicating the departmental office where the materials are located

https://library.syr.edu/services/getting_help/circulation/forms/form-pickup.php

Thank you for using Library Delivery Services

Syracuse University Libraries

315.443.2452

delivery@syr.edu

PLANNING & IMPLEMENTATION

Edit Row

ProcessType	Doc Del
Name	Weather Delay Delivery
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	
DefaultFromAddress	delivery@syr.edu
DefaultFromName	Syracuse University Interlibrary Loan
DefaultStatus	Weather Delay
LoanTemplate	Weather Delay Delivery
ArticleTemplate	
NVTGC	BIRD

Template Details

Name: Weather Delay Delivery

Description: Email Sent to Patron

E-mail

SMS

From Name:

To Name:

CC Address:

Subject: Weather Delay from Bird Library

Dear <#User.FirstName> <#User.LastName>,

Due to current weather conditions the delivery of the item cited below is being delayed.

Loan Title: <#Transaction.LoanTitle>

Loan Author: <#Transaction.LoanAuthor>

TN: <#Transaction.TransactionNumber>

We apologize for this situation and will deliver the item to your departmental office as soon as weather permits.

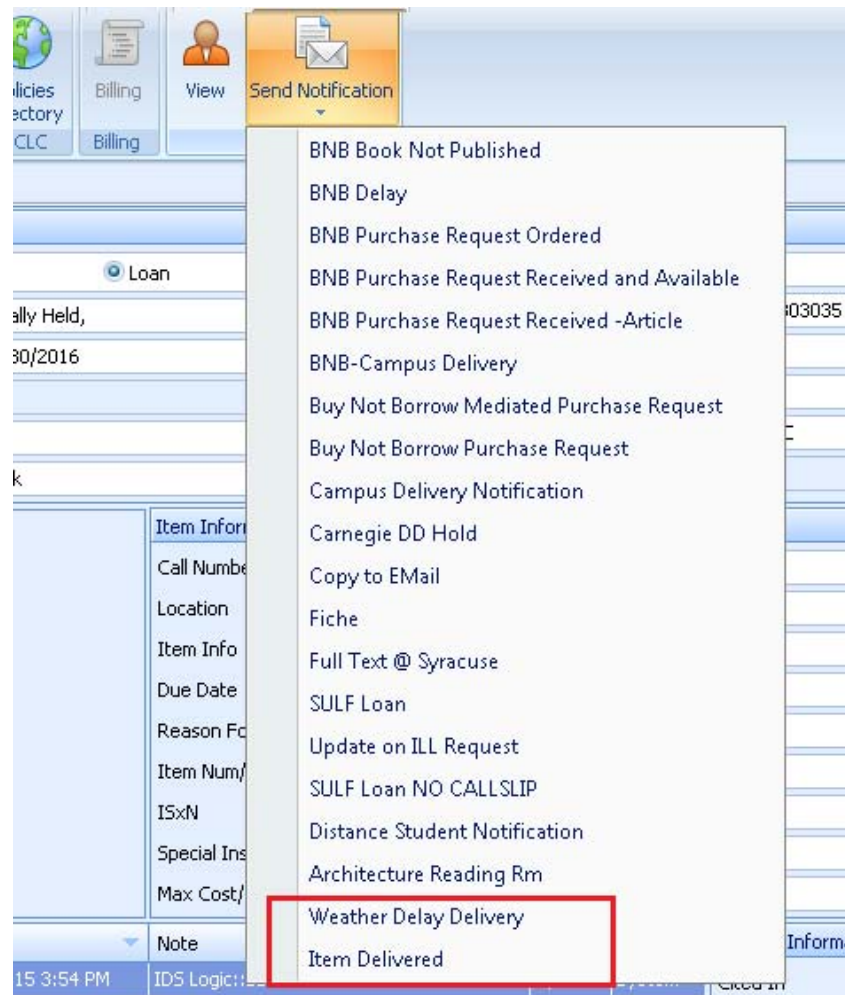
Regards,

Syracuse University Libraries

315.443.2452

delivery@syr.edu

PLANNING & IMPLEMENTATION



PLANNING & IMPLEMENTATION

- **Main Email Account:** It is important to keep in mind that you can add a different email address to the email routing rules. Our main address in ILLiad is ill@syr.edu. However, for specific delivery emails from the EmailRouting we added the delivery address to the Document Delivery module:

ProcessType	Doc Del
Name	Item Delivered
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	Item Delivered from Bird Library
DefaultFromAddress	delivery@syr.edu
DefaultFromName	Syracuse University Interlibrary Loan
DefaultStatus	Request Finished
LoanTemplate	Item Delivered
ArticleTemplate	
NVTGC	BIRD

PLANNING & IMPLEMENTATION

Training

- **Patron Record Form**
 - Staff could recognize fields: Department, Status, SCity, SCountry and Patron Record Notes
- **Request Form**
 - Staff could recognize fields: Title, Author, Location, Call #, Notifications and Request Form Notes
- **Doc Del Module**
 - Staff could recognize ribbon buttons and queues

PLANNING & IMPLEMENTATION

Blocked Users

- **Issue:**
 - We did not want to prevent our faculty from submitting requests for items held locally if they were blocked in ILLiad.
- **Solution 1:**
 - Created Custom Search to target requests from faculty that have received a 2nd overdue notice. This query was ran every other day.

And ⊕

-[Transactions.TransactionStatus] Equals Checked Out to Customer ⊗
-[Users.Status] Equals Faculty ⊗
-[Transactions.LastOverdueNoticeSent] Equals 2 ⊗
-[Users.Status] Equals Faculty ⊗

PLANNING & IMPLEMENTATION

Blocked Users

- **Solution 2:**
 - **IDS Logic Rule:** This rule looks for transactions with the criteria below and moves transaction to a new queue called 'Overdue Faculty'
 - » **Criteria:**
 - **u.Status:** Faculty
 - **Process Type:** Borrowing
 - **t.Status:** Checked Out to Customer
 - **u.City:** Campus Delivery
 - **Overdue:** 18720 (13 Days)
 - **Second IDS Logic Rule** sends an automatic email to every transaction arriving to this new queue.
 - **Easier way to deal with overdue transactions from faculty.**

PLANNING & IMPLEMENTATION

Not on Shelf

- Created new queue in Doc Del: Doc Del Unfilled
- IDS Logic Rule: Automatically takes transactions from new queue and sends them to Awaiting Direct Request Sending.
- Routing Email Rule: Notifies patron that the item was not found on shelf and will be submitted through ILL.

PLANNING & IMPLEMENTATION

- **Fear Factor**
 - **Change:** “If ain’t broke, don’t fix it” The old system had been in place for 10 years and technically worked.
 - **Territory:** Units are used to their own environment.
 - **Technology:** Learning new systems always bring some anxiety and concerns.
 - **Unknown:** Fear of the unknown.



Results

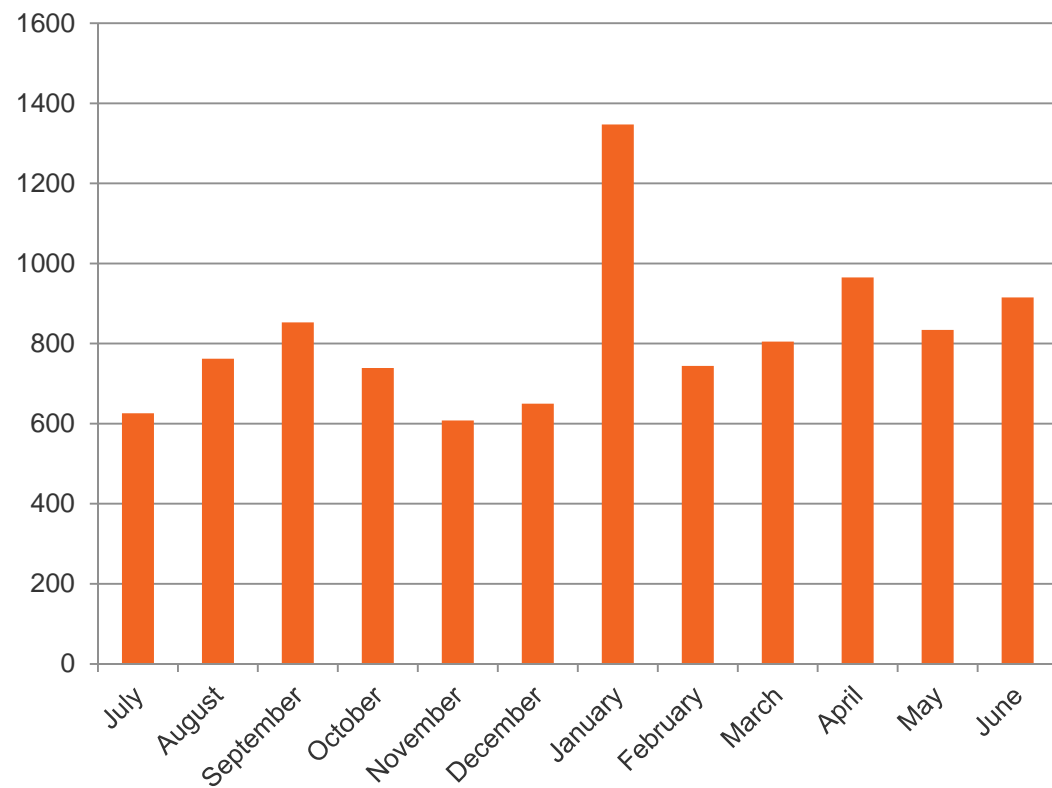
RESULTS

- ILLiad was implemented as the Delivery request system in February 2016.
- Faculty have followed along without major issues.
- We have currently about 600 faculty members registered for campus delivery in ILLiad.
- About 200 new since we switched to ILLiad.
- About 65 departments/offices.

ILLIAD FOR OFFICE DELIVERY

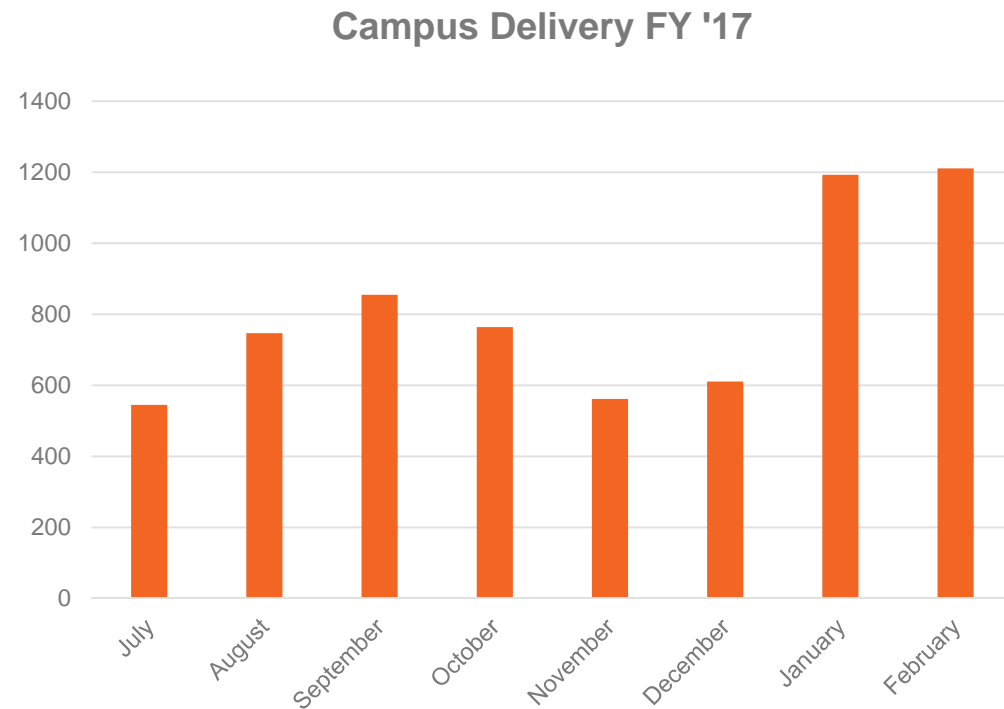
Month	Items Delivered
July	626
August	762
September	853
October	739
November	608
December	650
January	1347
February	744
March	805
April	965
May	834
June	915
Total	9848

Campus Delivery FY '16



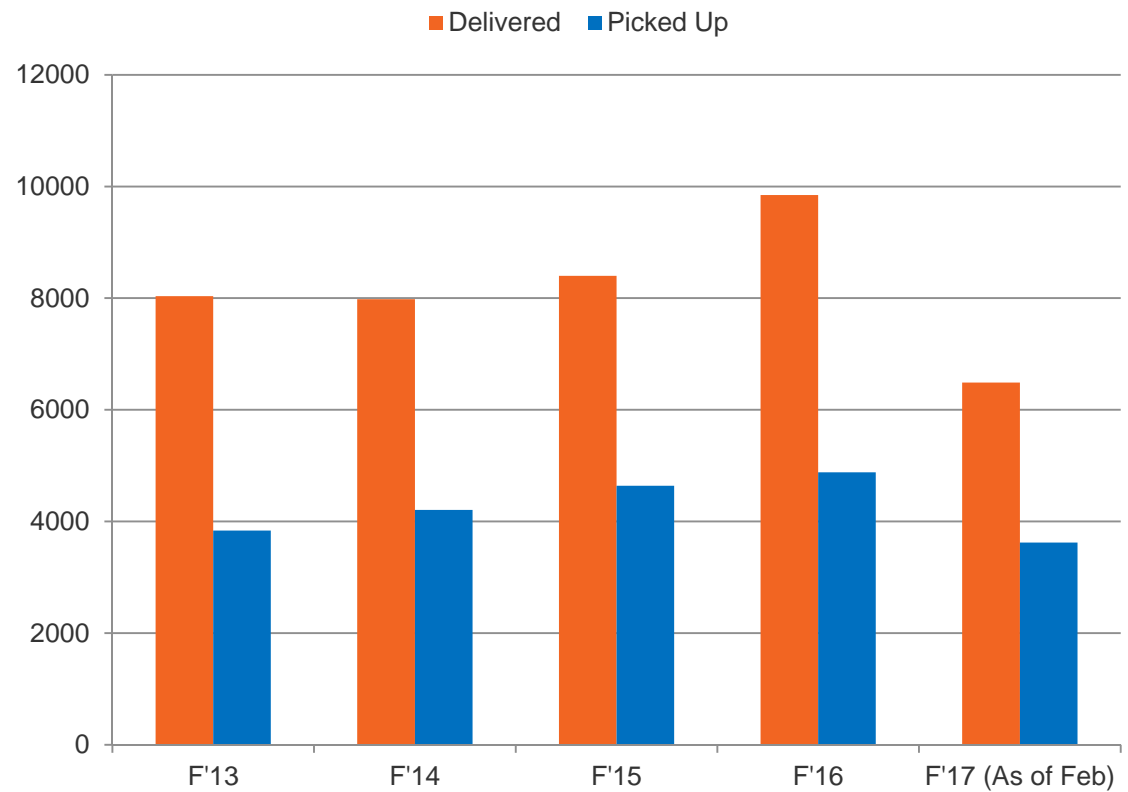
ILLIAD FOR OFFICE DELIVERY

Month	Items Delivered
July	545
August	747
September	855
October	764
November	562
December	611
January	1193
February	1211
Total	6488



ILLIAD FOR OFFICE DELIVERY

Year	Delivered	Picked Up
F'13	8037	3838
F'14	7982	4208
F'15	8399	4639
F'16	9848	4879
F'17 (As of Feb)	6488	3623





Challenges

CHALLENGES

Internal Challenges

- As previously indicated, the old system had been in place for 10 years, so it was difficult at first to get everybody involved to follow the new procedure and see the benefits.



Improvements

IMPROVEMENTS

Future Improvements

- Find a better way to track requests submitted to Acquisitions for patrons participating in this service
 - BNB
 - Subject librarians



Graduate Students

GRADUATE STUDENTS

- As of March 3rd 2017 - Service offered to graduate students who have a mailbox at their department.
- Pilot project focused on 5 departments (1st stage)
- Flyers sent to departmental office contacts to advertise service.
- 21 patrons registered the first week.
- Learning process.

ILLIAD FOR OFFICE DELIVERY

Questions?

ILLIAD FOR OFFICE DELIVERY

Ronald Figueroa
rfiguero@syr.edu