

In Our Comfort Zone: Two Years Post Tipasa From ILLiad

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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.



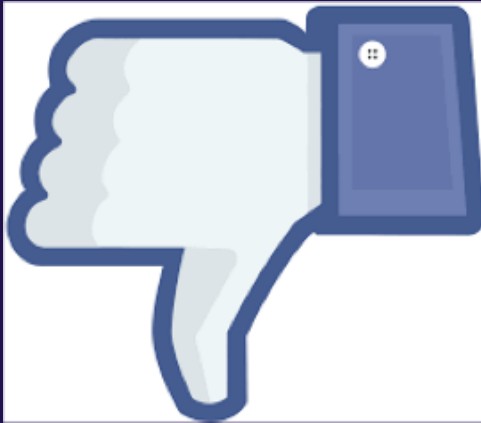
Transition set up

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.



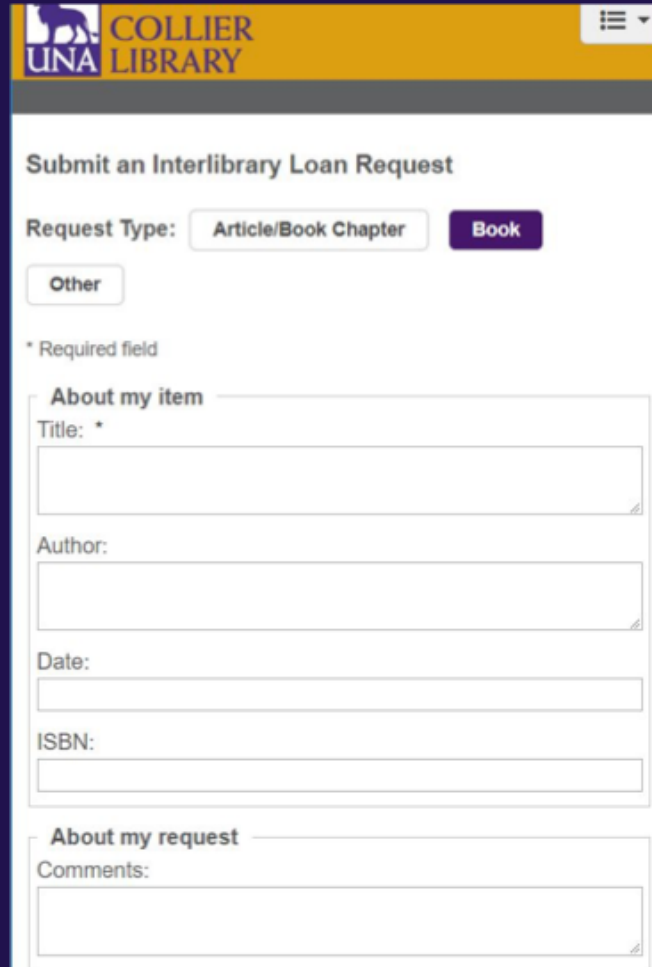
We're starting not to miss any longer...



Forms

Love:

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



The screenshot shows the Collier Library website header with the UNA logo and a menu icon. Below the header is the title "Submit an Interlibrary Loan Request". The "Request Type:" section has three buttons: "Article/Book Chapter", "Book" (highlighted in purple), and "Other". A note indicates that the "Book" option is a required field. The form is divided into two sections: "About my item" and "About my request". The "About my item" section contains four text input fields for "Title: *", "Author:", "Date:", and "ISBN:". The "About my request" section contains a single large text input field for "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 for Collier Library. The header includes the UNA Collier Library logo and navigation links for 'Library Links' and 'Derek'. 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 'About my item' section contains a grid of 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 a 'Comments:' field.

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

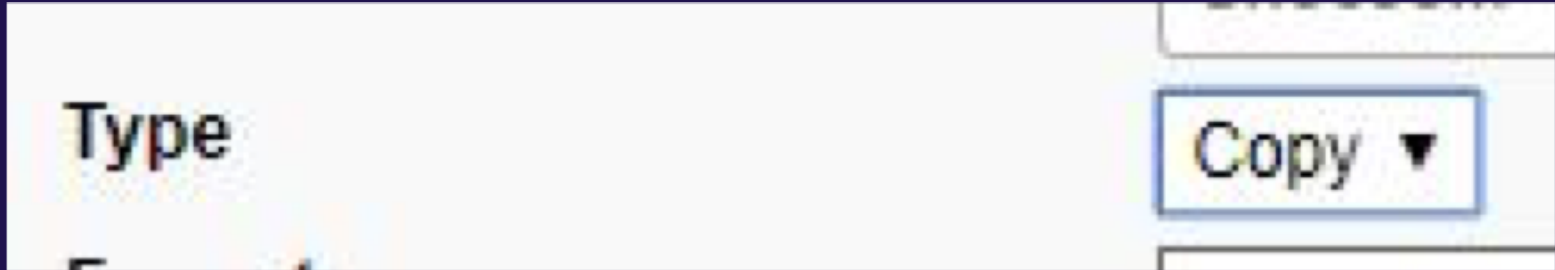
NOTES

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 displays the OCLC Policies Directory interface. The top left features the OCLC logo and the text "Policies Directory". The top right shows a welcome message: "Welcome Derek JANDI Sun, Oct 7 1996".

The main content area is titled "University of North Alabama (UNA) Collier Library". Below the title are navigation tabs: "Profile", "Collections", "Policies (4)", "Schedule", and "Contacts". A timestamp indicates the profile was "Last updated Tuesday, January 22, 2019 2:27:10 PM EST".

The "Summary" section provides the following details:

- Name (Symbol):** University of North Alabama (UNA)
- Also Called:** Collier Library
- Location:** Florence, AL 36632-0001 US
- Shipping Address:** Hunter Traylor, U.S.P.S. - 522 - Collier Library, University of North Alabama, 51 Hammon Place - Box 5028, UPS - I.L. - Collier Library, University of North Alabama, 625 Crocker Way - Box 5028, Florence, AL 36632-0001 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))

The left sidebar contains search filters for "Institution Information" (Search by Institution Symbol, Countries, States/Provinces, City, Institution Types, OCLC Supplier, Days To Respond - Copies, Days To Respond - Loans, Rush Supported, International Lender, Group Affiliation) and "Policy Information" (Fee, Currency, Format, Request Method, Delivery Method, Billing Method).

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?

Yes

- Print Shipping Labels
- Print Book Straps/Stickers

No - No reason given



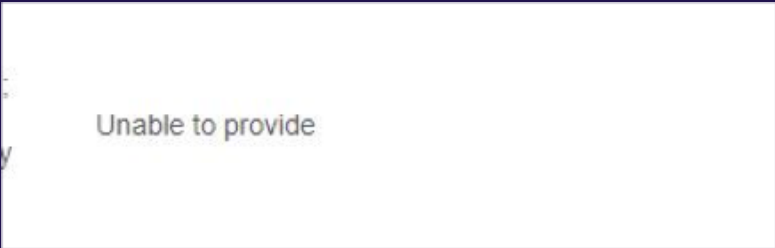
Conditional - Additional info needed



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 a library request. The form is titled 'Borrowing Library (ANO)' and is divided into several sections:

- Electronic Delivery:** Includes a 'Preferred' dropdown menu set to 'Article Exchange', and two 'Alternate' dropdown menus.
- Shipping:** Includes a 'Ship To' dropdown menu set to 'LL - Collier Library (ANO)'.
- Address:** Includes fields for 'Address' (University of North Alabama), 'City' (Florence), 'State/Province' (Alabama), 'Country' (United States), and 'Postal Code' (35632-0001).
- Ship Via:** Includes a dropdown menu.
- Fax/Phone:** Includes fields for 'Fax/Phone' (256-785-4308) and 'Ex' (777-555-1910).
- Email:** Includes a field for 'Email' (R@una.edu).
- Group Affiliations:** Includes a field for 'Group Affiliations'.
- Borrowing Notes:** Includes a text area with the text 'Articles/Items via Article Exchange or email only --- NAALLVIG/SOLINE/SOS/SIXXLYRA'.
- Billing:** Includes a 'Billing' dropdown menu set to 'Copy from shipping', and fields for 'Bill To' (LL - Collier Library (ANO)) and 'Address' (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



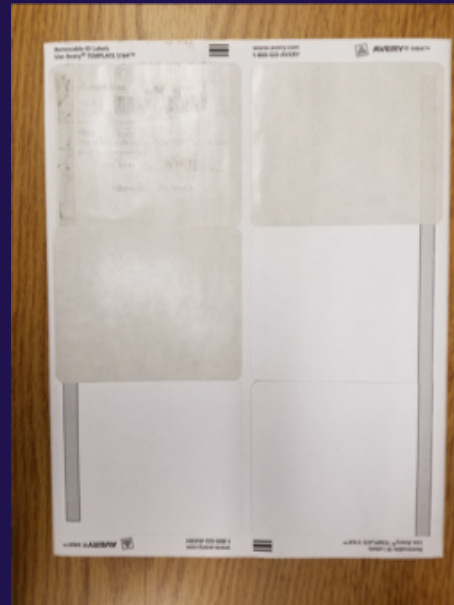
What we love more and more every single day

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 Loans', 'Analytics', and 'Admin'. A left-hand navigation menu includes 'Tipasa™ Home', '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 features a search bar for requests with a 'Request ID' dropdown and a 'Go' button. Below the search bar, there are radio buttons for 'Active Requests' and 'Closed Requests'. A 'Frequently Used Tags' section shows a message: 'There are no tags for this institution. Please create a tag upon receiving a request.' The 'Quick Links' section is divided into three columns: 'Borrowing' (Produced (21), In Transit (10), Lending (6), Received (Renewed/Activated (18), Renewal/Cancel (2), Cancelled (1), Recalled (1)), Returned), 'Lending' (Can You Subscribe? (1), Consideration - Loans (1), Supplied (Not Requested (1)), Returned (Returned in Transit (7), Returned/Cancelled (4))), and 'Document Delivery' (New (1), Item - Copies (1)). Below the quick links is a 'Message Board' with a message from the Administrator dated 2017-10-02, welcoming staff and providing instructions on how to update library catalog links and bookmark the 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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