Re-Working ILL Workflows in a Post-Big Deal Environment

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Re-Working ILL Workflows in a Post-Big Deal Environment Part 1

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LSU LIBRARIES
I  The Big Picture
II  Efficiencies
III The Expedited Option
IV ILLiad configuration
   (Zee Zee)
V  The Frontend
The Big Picture

• Our ILL Unit
• Project Timeline
• Choosing on Expedited Article Service
• ILL & Communication
# ILL Requests Filled FY 2019 (LUU)

<table>
<thead>
<tr>
<th>Category</th>
<th>Borrowing Articles</th>
<th>Borrowing Loans</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL Requests</td>
<td>15,027</td>
<td>7,351</td>
<td>22,378</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>Lending Articles</th>
<th>Lending Loans</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL Requests</td>
<td>8,525</td>
<td>3,110</td>
<td>11,635</td>
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<table>
<thead>
<tr>
<th>Category</th>
<th>Document Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL Requests</td>
<td>7,342</td>
</tr>
</tbody>
</table>

### ILL System
- ILLiad
- RapidILL
Timeline

Late 2018  Decision to end a “Big Deal” journal package (exp. Dec. 2019)
          ILL to implement an Expedited Article Delivery option for patrons

May 2019  Faculty Senate approves / Libraries’ Launches Informational Page
          First Successful Test of Expedited Article Delivery Service (backend)

May–Dec 2019  ILL improves efficiency & configures Expedited Article Delivery

January 2020  Expedited Article Delivery goes live (or does it??)
Goal

Implement an “expedited” article delivery option to supplement interlibrary loan. (Florida State model)

- Minimal disruption for ILL patrons
- Encourage use of standard ILL service

→ Integrate expedited option into our current patron interface. (EDS, ILLiad patron pages.)
Choosing an “Expedited” Article Option: Reprints Desk or OCLC’s Get It Now

X Get it Now Unmediated
   - Knowledge base integration only
     (Worldcat Discovery)

✓ Reprints Desk Unmediated (not Article Galaxy Scholar)
   ✓ ILLiad integration
   ✓ More configuration options - Atlas’ server add-on
   ✓ Fast - delivery in under 2 hours
Communication: Turnaround Time Report

RapidILL

No “outliers”
- Non-OCLC (email)
- Resends
- Extensives

Custom lookup (ILLiad):
“Creation Date”
- “Customer Notified via Email”* = Turnaround Time

*requires a “Tracking” → “Changed to” lookup for requests older than past 30 days
Communication
Standard ILL vs Expedited

- About 24 hours
- Under 2 hours
II Efficiencies

- Expectations
- Staffing
- IDS Logic
- Expand RapidILL membership
Efficiency I: Expectations

Increased Workload
  ++ Borrow articles
  - Lend fewer journal articles

Turnaround Time
  Faster turnaround time = lower use of Expedited Service
Efficiency II: Staffing

**From**

4.5 FTE

2 full-time staff members cross-trained

**To**

5.5 FTE

3 full-time staff members cross-trained

New staff member hired in October 2019
Efficiency III: IDS Logic

- ILLiad server add-on that automates ILLiad functions

- Annual fee + join IDS consortium (free reciprocal)

- Implemented
  - auto-populates call numbers into ILLiad request
  - auto-routes to stacks searching
  - auto-cancels unavailable lending requests

- Issues with Z39.50 availability – multiple copies on one item record

https://idsproject.og/logic
Efficiency IV: Expand RapidILL membership

Rapid “Pods” are groups of free-reciprocal libraries.
Joined Academic I (Intensive) Pod in Summer 20, more are planned.

**Pros**

+ Faster turnaround time vs. OCLC
  
  Each library must reply within 24 hours + Unmediated on LUU’s end

+ No additional cost to join more RAPID pods

**Cons**

- More pod memberships may increase Lending workload
III  The Expedited Option: Unmediated Reprints Desk
Unmediated Reprints Desk

• Added an “Expedited” option on ILLiad article request form (Yes/No)
  o Request is filled within 2 hours, day or night
  o LSU Libraries is charged a fee
  o Request is delivered to patron through ILLiad (Odyssey)

• Configure to limit access to expedited service
  o By User Status (Faculty, Graduate Student, etc.)
  o By Journal title (allow specific ISSNs)
  o Configured using a SQL “Match String” in an ILLiad routing rule (Zee Zee)
Unmediated Reprints Desk: The Addon

- Server-level addon for ILLiad configured in Customization Manager. Free to use.

- Monitors incoming requests. Sends requests at Transaction Status “Awaiting RD Unmediated Processing” automatically sent to Reprints Desk & filled in < 2 hours.

- Reprints Desk delivers to ILLiad via Odyssey. Patron receives standard ILLiad email notification. Retrieve it from their ILLiad account. NO third party vendor email.*

https://atlas-sys.atlassian.net/wiki/spaces/ILLiadAddons/ages/3149408/ILLiad+Reprints+Desk+Unmediated+Server+Addon
Who is eligible?

✓ Faculty

✓ Graduate Students
        (including LSU Online)

Which titles are eligible?

✓ Titles we no longer subscribe to after “big deal” cancellation (ISSN match)

✗ Everything else
Article Request Workflow/Decision Tree

Now to Zee Zee...
V The Frontend

• Improved ILLiad patron pages

• Tutorial for Expedited Service
### Article Request

**Journal Title**

**Volume**

**Issue Number**

**Month**

**Year**

**Inclusive Pages**

**Publisher**

**ISSN/ISBN** (International Standard Serial/Book Number)

**OCLC Accession Number**

If given will speed request processing

**Find in WorldCat**
Revised ILLiad Request Form

ISSN/ISBN (International Standard Serial/Book Number)
Find in WorldCat
If given will speed request processing

OCLC Accession Number
Find in WorldCat
If given will speed request processing

Article Author

* Journal Title

* Article Title

* Volume

Issue Number

* Need by Date
format: (MM/DD/YYYY)
Revised ILLiad patron page:

Main Menu
Expedited Article Tutorial

lib.lsu.edu

lib.lsu.edu/elsevier-changes

Upcoming Changes to Elsevier Subscriptions
Elsevier changes

On Tuesday, April 23, 2019 the LSU Faculty Senate voted to approve Resolution 19-05, recommending the cancellation of the LSU Libraries’ subscription to its bundle of Elsevier journals and adoption of a subscription model that will involve subscribing to titles in an à la carte manner, narrowing Elsevier journal subscriptions to journals that are the most appropriate for LSU’s needs. The changes will take place in January 2020. Access to the canceled content will be available in the following ways:

Interlibrary Loan
Interlibrary Loan will be able to provide access to the canceled journal articles in about 24 hours.

Expedited article delivery
The Libraries will offer a new expedited delivery service to faculty and graduate students. Expedited articles will arrive in about 2 hours and all journal articles from the canceled “big deal” subscription will qualify. The Libraries will be charged a per article fee and asks that the service be used only when necessary.

Open access
Open access versions of articles are often available and discoverable through Google Scholar or through open access browser plugins and extensions like Open Access Button and Unpaywall.

Direct from the author
Most publishers allow authors to share their own work. Authors can be contacted directly and may be found through research-oriented social networking sites such as Academia.edu, Mendeley, and HumanitiesCommons.

Contact your subject librarian
Subject librarians are available to help connect you with what you need.
Expedited Article Service Instructions

Please Note: The Expedited Article Service is available to faculty and graduate students, and for certain journals only.

There are three ways to make an Expedited Article request: ScienceDirect, Discovery, or manual entry on the ILL request form.

Expedited Delivery through ScienceDirect

To begin, navigate to the ScienceDirect database using the "Databases" tab on the Libraries' homepage: www.lib.lsu.edu
Live

• “Quiet Phase” Jan. 2\textsuperscript{nd}, 2020

• Live March 2\textsuperscript{nd}, 2020
Questions, Comments

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