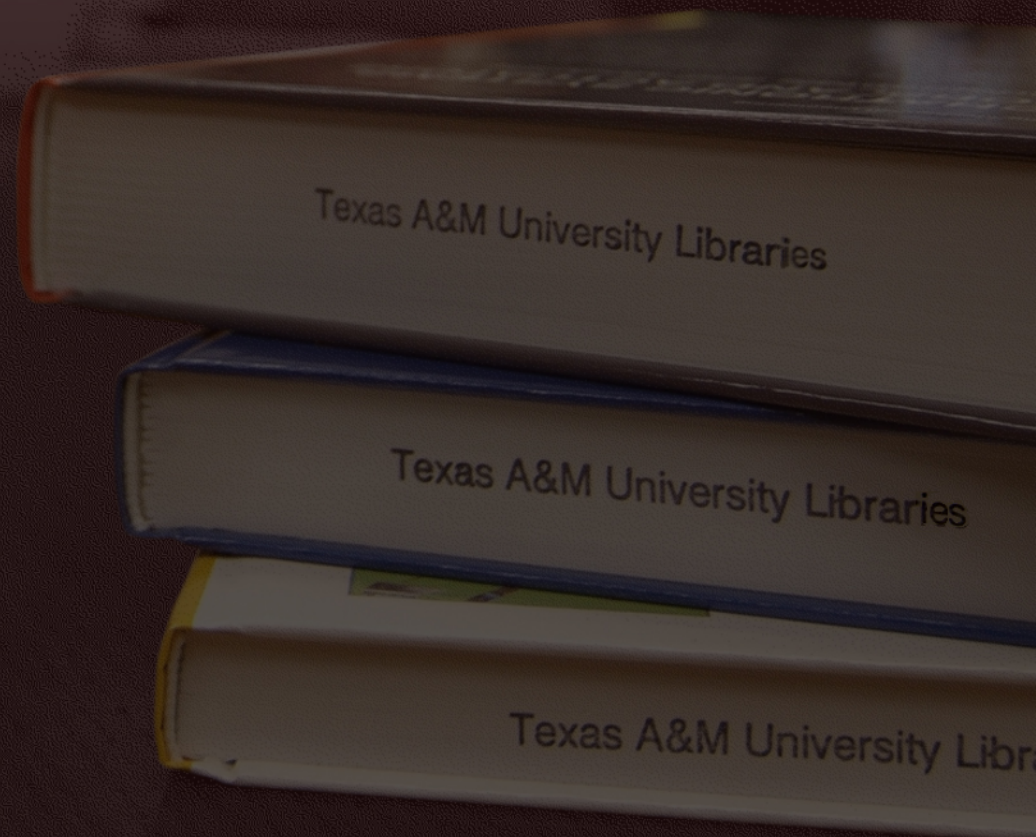


Document Delivery, Resource Sharing, A New Staff Hope: They Can Do It All

Zheng Ye (Lan) Yang
Texas A&M University



Texas A&M University

- **Founded in 1876**
- **1st public university in Texas**
- **Over 65,000 students**

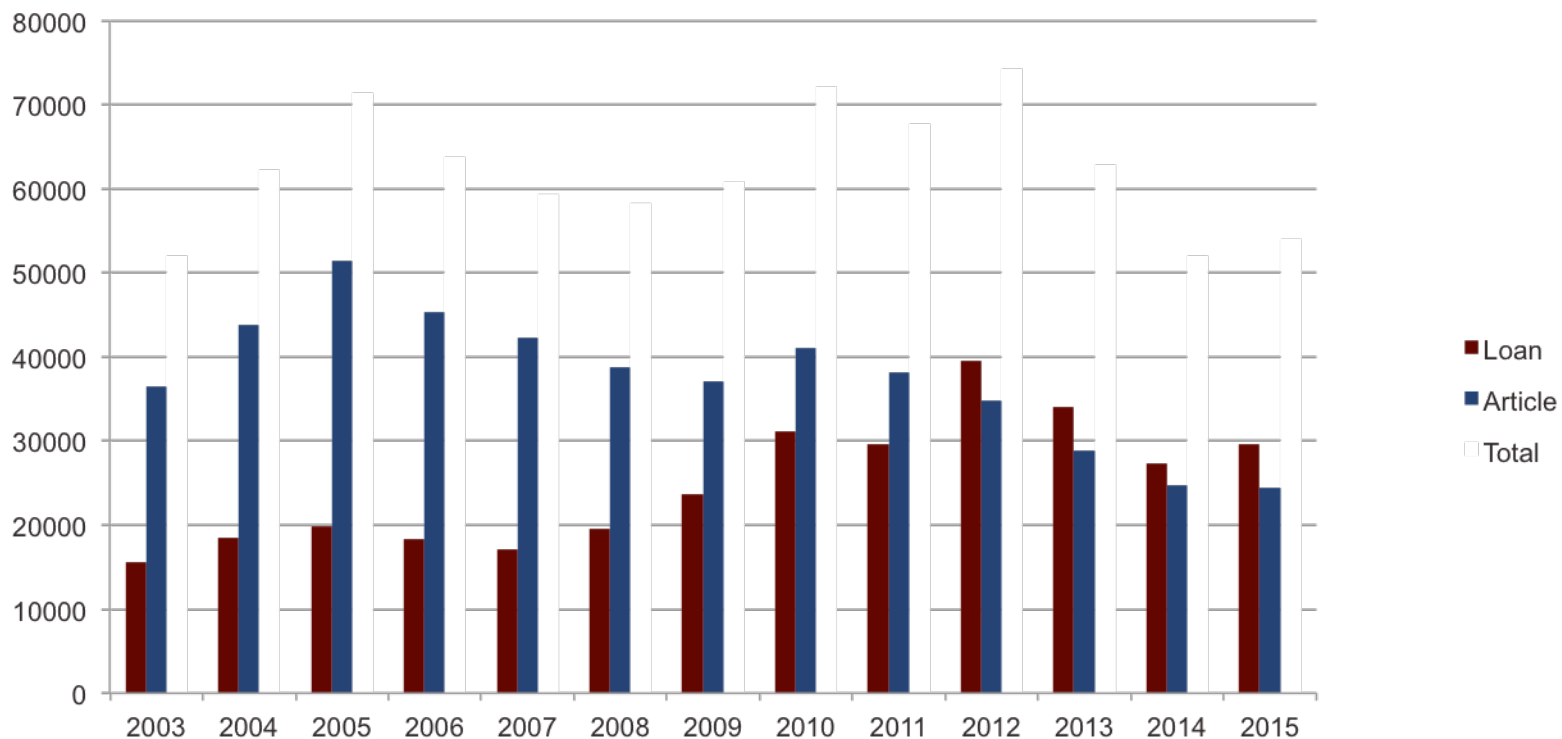
Texas A&M University Libraries

- **Five libraries**
- **Two remote storage facilities**
- **Over 5.1 million print volumes**
- **82 faculty librarians, 165 staff members**

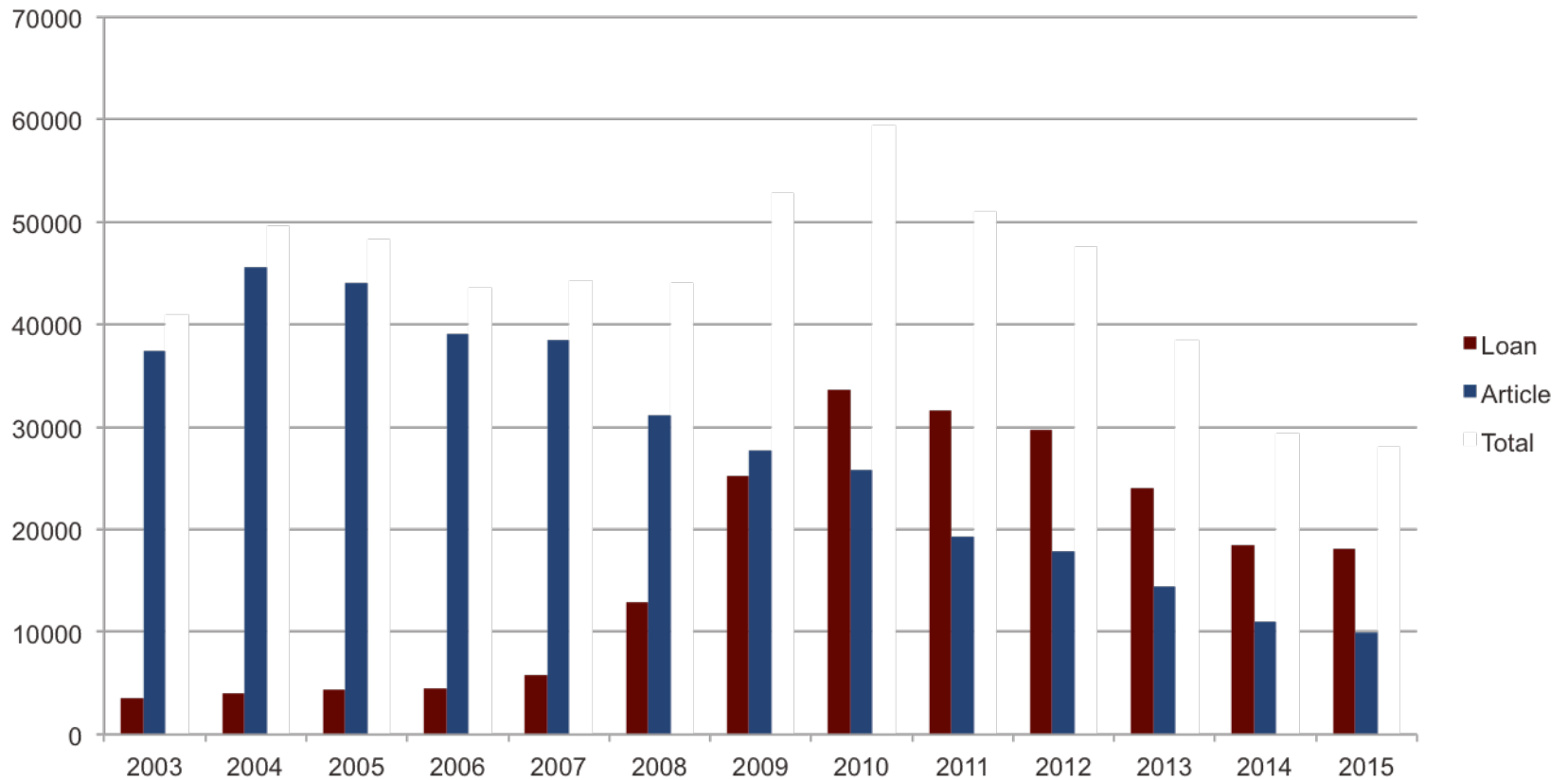
Document Delivery Department

- Three functions
- Free ILL/DD to *ALL* campus users since June 2002
- Loan delivery to faculty/staff's office mail box
- Nine staff members, and eleven student workers

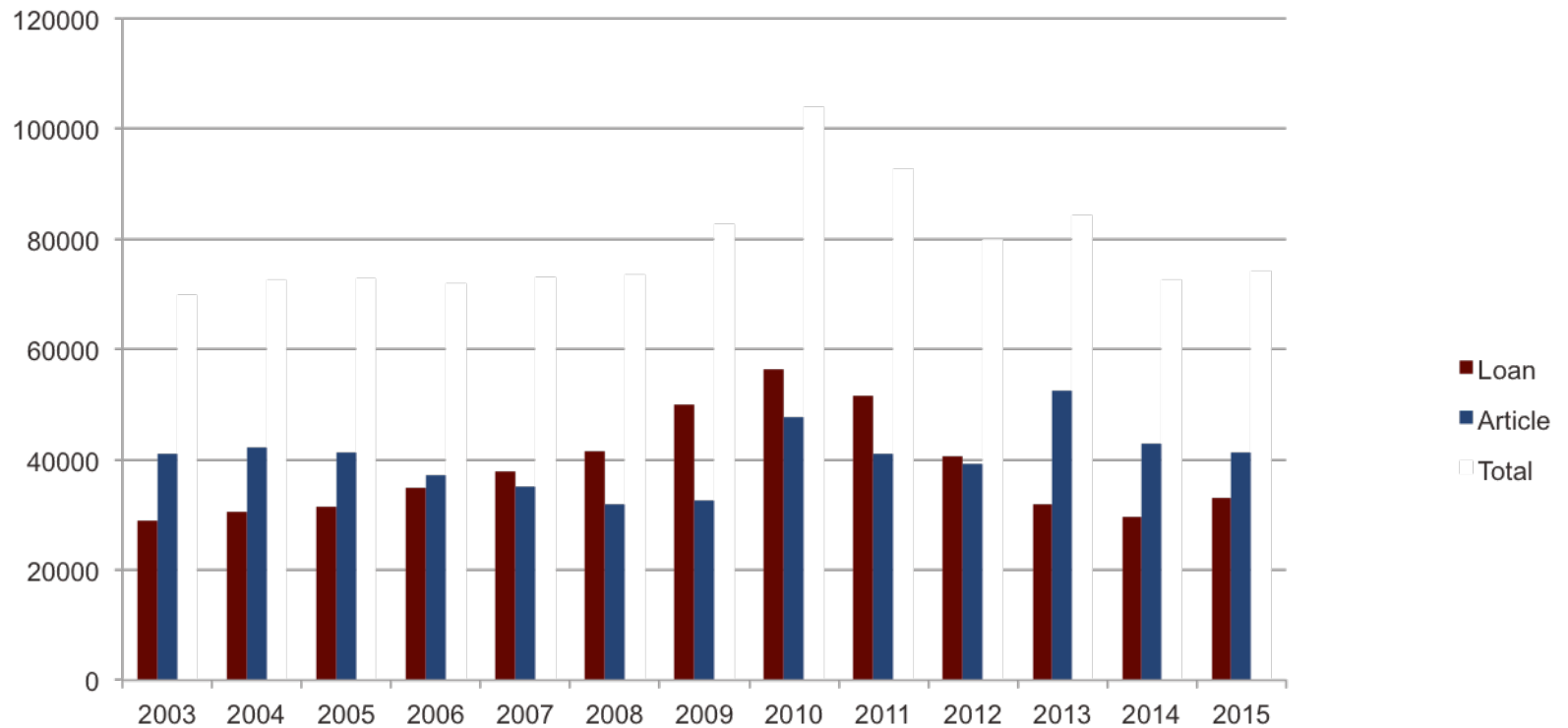
Borrowing Requests Trend



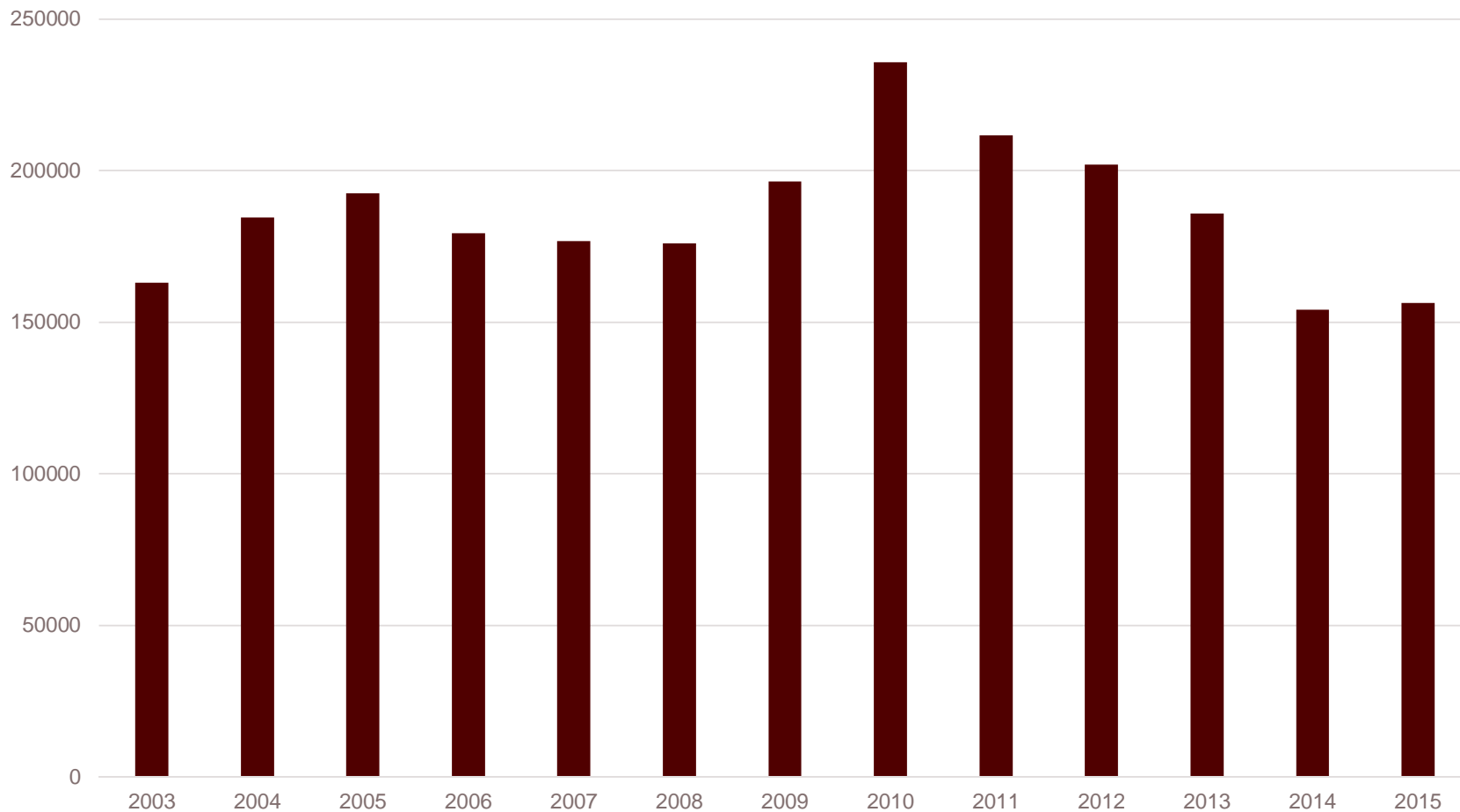
Book Retrieval and Scanning Requests Trend



Lending Requests Trend



Yearly Total Requests Received



Requests Received in FY 2016

- **Total requests: 156,000**
- **Lending requests: 74,278**
- **Borrowing requests: 54,032**
- **Book retrieval and scanning requests: 28,064**
- **Average daily requests: 800-900**

New Opportunity, New Model

- **Two staff members resigned last summer**
- **Revised their job descriptions**
- **Trained two new hires in all three functions**
- **Each job assignment can be backed up by three or four staff members**

Benefits of Cross-Training

- **Consistent productivity**
- **Combat employee boredom**
- **Empathy for other employees**
- **Increased productivity and satisfaction**

Why We Love Our Job

- **Most valued library service**
- **Thrill of the detective work**
- **Sharing not competing**
- **In touch with users' real needs**

Training Approach

- **Show job responsibilities list**
- **Give copies of US ILL Code**
- **Submit a Get it for me request as a user**
- **Read the Get it for me FAQ page**
- **Start with the borrowing process**

MARC Fields Descriptions

- 010: Library of Congress Catalog Number (LCCN: 12-345678)
- 020: International Standard Book Number (ISBN: 0123456789)
- 022: International Standard Serial Number (ISSN: 1234-5678)
- 030: CODEN (ABCDEF) - assigned by Chemical Abstracts Service
- 037: Source of acquisition - NTIS and ERIC documents microfiche
- 050: Library of Congress call number
- 082: Dewey Decimal call number
- 086: US Documents classification/call number
- 100: Personal name/author
- 110: Corporate name
- 111: Meeting/Conference name
- 210: Abbreviated title
- 245: Title
- 260: Publication place, company, & date.
- 300: Physical description - book.
- 362: Dates of publication/sequential designation - serials
- 440: Series title
- 502: Dissertation/thesis note
- 772: Parent record entry - for supplements and single issues
- 776: Additional physical form entry merged with alternate title
- 780: Preceding bibliographic record - serials
- 785: Succeeding bibliographic record - serials

ILLiad Borrowing Request Queues

Main - ILLiad Client

Home Borrowing Document Delivery Lending System

Number TN
User Information ALL
Citation Information ALL

Search Requests

Username
Name
ID

Search Users

Symbol
Name
Address

Search Addresses

Main
Borrowing Document Delivery Lending


Requests (17 items)

- Awaiting Request Processing 12
- Borrow From Others 3
- Request in Processing 2
- Bobbie (9 items)
 - Awaiting RAPID Local Request Processing 7
 - Awaiting Doc Del Request Searching 2
- Carolina (8 items)
 - Claimed Returned by Patron 7
 - Awaiting Recalled Processing 1
- Jill (7 items)
 - Jill 7
- Marisol (10 items)
 - Awaiting Unfilled Processing 5
 - Status Investigation 5
- Nick (7 items)
 - TAES Distance Requests 1
 - Cancelled by Customer 6
- Tracy (88 items)
 - Awaiting SFX Requests Processing 12
 - Awaiting Copyright Clearance 1
 - Awaiting Return Label Printing 75
- Branch Library (9 items)
 - Transit to PSEL 6
 - Transit to MSL 3
- Contact (13 items)
 - Awaiting Contact Reply 11
 - Awaiting CRL Reply 2
- Qatar Request (2 items)
 - In Transit from Customer 2

Training Approach

- **Tour the library stacks**
- **Visit other library departments**
- **Lending Process**
 - Consortia agreements
 - License agreement
 - OPAC search tips

ILL Restriction for Lending Shown in SFX

 **TEXAS A&M**
UNIVERSITY

UNIVERSITY
LIBRARIES

e-Journals

Chat / Questions

University Libraries → e-Journals

Source: Paediatrics and child health [1751-7222]

Online copy available from

- ▶ [Elsevier ScienceDirect Journals](#)
Available from 2007 volume: 17 issue:1
Note: No Interlibrary Loan outside of the United States.
- ▶ [Elsevier ClinicalKey Journals](#)
Available from 2007 volume: 17 issue:1

Journal at a glance

Peer-Reviewed
Academic / Scholarly
Published Monthly
[...more details](#)

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Home

Borrowing

Document Delivery

Lending

System

Number

TN

User Information

ALL

Citation Information

ALL

Search Requests

Username

Name

ID

Search Users

Symbol

Name

Address

Search Addresses

Main

Borrowing

Document Delivery

Lending

GWLA (23 items)	
Awaiting GWLA Request Processing	23
SEC Libraries (3 items)	
Awaiting SEC Libraries Request Processin	3
Rapid (41 items)	
Awaiting RAPID Electronic Processing	39
Awaiting RAPID Stacks Searching	2
Requests (163 items)	
Awaiting Lending Request Processing	73
In Stacks Searching	47
Awaiting Stacks Searching	43
Tashika (2 items)	
Tashika	2
Nick (1 items)	
Awaiting Renewal Request Processing	1
Sara (1 items)	
Sara	1
Carolina (15 items)	
Carolina	15
Branch Library (3 items)	
Awaiting for Receipt from WCL	1
WCL Filled	2
Lost Books (59 items)	
Lost Books	59
Flagged Requests (19 items)	
OCLC Special Message: Complete?	9
OCLC Special Message: Lender Lost	1
OCLC Special Message: Not Received	8
Damaged books	1
Finished (1110668 items)	
Cancelled by ILL Staff	538893
Request Conditionalized	21324
Item Shipped	3745
Request Finished	546706

Training Approach


Document Delivery Process


- Create hold record in Voyager Circulation module
- Update stacks search for loans
- Scan/update documents for electronic delivery


Document Delivery Request Queues

Main - ILLiad Client


Home Borrowing Document Delivery Lending System


Number TN  Search ☐


User Information ALL  Search ☐


Citation Information ALL  Search ☐


Search Requests Search Users Search Addresses


Username  Search ☐

Name  Search ☐

ID  Search ☐

Symbol  Search ☐

Name  Search ☐

Address  Search ☐

Search Requests Search Users Search Addresses

Main

Borrowing Document Delivery Lending

Requests (16 items)

In DD Stacks Searching	2
Cancelled by Customer	2
Awaiting DD Stacks Searching	12
Branch Libraries (3 items)	
Awaiting for Receipt from PSEL	3
In Transit (15 items)	
Evans book to PSEL	9
PSEL books to EVANS	1
PSEL books to WCL	1
WCL books to EVANS	4
Qatar Requests (59 items)	
Arrived in Qatar	40
Evans books to Qatar	6
TAMUQ Purchase Awaiting Arrival	8
TAMUQ Purchase Request	5
Finished (596625 items)	
Delivered to Web	702
Cancelled by ILL Staff	30062
Request Finished	565861

On Their Own

- Screen shots and notes
- Instant message
- Tips from colleagues

Review Time

- Continue training
- Layout next semester training plan
- Identify tasks where their involvement is not needed

Feedback From New Hires

“Work is very varied, get to do many different things instead of focusing on only one thing all day”

“Learn many of the department processes through incremental instruction”

Feedback from New Hires

“Have a comprehensive plan laid out at the beginning with a written schedule for review dates and key training goals for the different areas of the department”

Feedback From Other Staff Members

“Cross-training is a blessing”

“This model breaks away from the traditional big resource sharing/document delivery department’s practice – where the natural tendency is to have specific staff attend to their specific responsibilities”

Training Schedules for New Hire

- **Week 1:** Train on lending process, OPAC/Database search and floor search
- **Week 2:** Practice lending processing and train on opening incoming mail and distributing mail, preparing for lending outgoing packages (FedEx, Texpress, International Mail)
- **Week 3:** Train on printing lending pull slips, updating lending stacks search for loan and scanning for electronic delivery (Odyssey, Article Exchange)
- **Week 4:** Practice lending processing
- **Week 5:** Train on processing borrowing requests in Borrow from Others and Awaiting Request Processing queues
- **Week 6-7:** Practice both lending and borrowing processing
- **Week 8:** Train on placing hold record in Voyager circulation for book retrieval in DocDel, updating DocDel loan/article stacks search for delivery

Training Schedules for New Hire

- **Week 9-12: Practice Lending, Borrowing and DocDel processing**
- **Week 13: Comprehensive review with the supervisor**
- **Week 14: Train on the following borrowing tasks:**
 - Awaiting Copyright Clearance
 - Awaiting Renewal Request Processing
 - Awaiting Denied Renewal Processing
 - Awaiting Odyssey Delivery
 - Users to Clear
 - Awaiting SFX Requests Processing
 - Using OCLC blank work form to submit request
- **Week 15-17: Practice all of the above**
- **Week 18-19: Train on processing incoming books for borrowing**
- **Week 20: Comprehensive review with the supervisor**
- **Week 21: Train on borrowing unfilled/conditional processing**

Training Schedules for New Hire

- **Week 22: Train on following lending tasks:**
 - Conditional request processing
 - Unshipped
 - Renewal request
 - OCLC Special Message: Complete, Not Received
- **Week 23-24: Practice all of the above**
- **Week 25: Comprehensive review with the supervisor**
- **Week 26-27: Train on following Document Delivery tasks:**
 - Monitor In Transit queues for books to/from branch libraries
 - Prepare items for faculty office and branch library delivery
 - Ship books to distance education student's home via FedEx
 - Check in returned books from faculty/distance students in borrowing
- **Week 28-31: Practice all of the above processing**
- **Week 32: Comprehensive review with the supervisor**

Current Staffing and Training

- Only three staff members are confined to their specific assignments
- Training is an on-going effort for ALL staff members

Thank You

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This paper will appear in the upcoming issue of the *Journal of Interlibrary Loan, Document Delivery & Electronic Reserve* entitled: “Cross-train your new hire with a plan and schedule”