

Public Services Council Meeting of June 22, 2021

Meeting Announcement

PSC meetings, at least through December 2021, will continue on Zoom.

Resource Sharing Open Forum

All interested Library staff were invited to this Public Services Council forum to learn how Resource Sharing will work in the new shared environment of SILS (Alma/UC Library Search). Patrick Shannon, Shannon Monroe, and Kristen Van Vliet shared some of the workflow changes coming with InterLibrary Loan (borrowing and lending) and resource sharing in the Alma environment. This is an overview; deeper training will happen later.

General Context for InterLibrary Loans

We are reminded that this is a dynamic environment; we continue to test and to learn from other UCs and rethink our workflows. What is certain is that things will be different with how we lend and borrow with other UCs and beyond. The move to UC Library Search will impact the work we all do. Patrons may have previously viewed ILL as something apart with different navigation and policies. With the new system it will seem easy to use and easier to get items from other UC campuses for them. We will continue to borrow and lend outside the UCs. Most of those changes will be visible to the ILL staff and transparent to the users and other library departments.

Highlights of upcoming changes:

- Automated fulfillment network (AFN) - Alma will direct patron requests to the library that owns the item for them to page. ILL will coordinate pickup of those items and fill those requests (shipping to another campus or digitizing to send the article to the patron).
- Third location pickup - Berkeley patrons can request an item and designate to pick it up at another UC campus (such as UC Davis)
- Recalls - Staff may recall items. If a patron needs an item that is checked out, the system will look for a copy at other UCs via the AFN before trying ILL partners, if necessary.
- Loan periods - Previously ILL loan periods were not standardized. In the new system items borrowed from other UCs will be loaned for 90 days with renewals up to 360 days. Loan periods for ILL from non-UCs will vary by lender (as they do now).
- Patron inventory - Patrons will be able to view all UC checkouts by owning campus in their library account in UC Library Search

Not everything will be ready by go-live. Still being developed are how we will fulfill ILL requests from NRLF holdings, how we will handle Library Use Only materials for non-UC patrons, and how the UCB Law Library lending fits with our service flows since their items are not in Alma. Also some services are paused. Baker service is currently and will remain paused while we investigate how it might function in the future. RLCP (agreement with Stanford and UT Austin) may be evolving and incorporated into processes similar to other libraries. Google Books Scanning currently paused, and may have one final return shipment coming this fall.

Interlibrary Borrowing

Kristen Van Vliet reviewed the basics of requesting material through a single form - whether from another UC campus or a library outside the UCs. Users should be signed in to get the full scope of what is available to them. Once they find an individual record they will see options for requesting under "How to Get It." The system shows a request form that offers physical loans or digitization for articles. The form is prepopulated with some info. Users can choose where to pick it up. The system looks to borrow from the UCs first then other libraries as needed. The system confirms the request is received and notes that request in their library account. The user's library account shows all their items together. ILL items from non-UCs will be shown under the Berkeley items list.

Once requested in the system, the other campus will page and ship to Berkeley through the shared courier service and process for the library that the patron chose to pick it up. Once the item arrives at that library's circulation desk, staff will check it in marked as "item from another institution" and scan in the barcode. That puts it on the hold shelf and notifies the patron. When the patron comes you will check it out to them (choosing the owning library and scanning the barcode) and click "done." To check it in, you choose the owning library and scan in the barcode. The system gives a pop up window to confirm which campus, and staff put the item in campus mail to ILL to send back to the campus.

Digitization requests will look the same to the user but the fulfilling UC will send the scan to the user instead of the physical item to the pick up location noted.

Not all items will be owned by UC Libraries. Users can choose the Advanced Search tab to search WorldCat. (Users can also choose to use a blank interlibrary loan form but would have to complete all the fields themselves.) If the record does not show any UC owners, the user chooses the "Request through Interlibrary loan". Once another library fills that and we receive it, the system creates a temporary record and the steps are similar.

In Alma records for non-UC ILL loans show the owning unit as the "Resource Sharing Library".

Interlibrary Lending

Shannon Monroe shared an update of the lending side. Some of the details for workflows are still to be worked out with the various campus libraries and the fulfillment group. In general campus libraries will print Paging or Transit slips for items requested, or export an excel spreadsheet to export for paging loan requests. The destination line indicates whether it is for digitization or for the physical item. The owning library will page items and scan the barcode to put in transit to its destination. ILL students will do the digitization and send the item to patrons through Alma. There are standard notices to users that show the file link and password or the attached PDF they will use to access it.

Once the item is paged and scanned, it may not attach to the right request. Staff at the owning library need to connect the two (the item and the request) via an “attach the request” function in the record. Owing units must print individual Paging Slips for digitization requests in order to show the citation information for verification and for ILL SLEs to scan the requested article/chapter. If ILL SLEs scan print materials on-site vs bringing the items back to the ILL office, best practice is for units to wait to clear the “to be checked in shelf” for two days for the digitization process to be complete.

The system shows which library has last touched it and “Workflow step” shows when it is in transit between campuses. Once ILL receives the item from other campuses, it will check in and put it in transit back to the owning library.

Lending for domestic and international borrowers for non-UC loans will largely remain the same. The one main difference will be the use of Work Orders in Alma for requesting NRLF materials. ILL will use a departmental patron ID to check out those items by coming to a library service desk for scanning of the material or requesting the item through the system to be paged and sent to ILL through mail services for NRLF materials.

Questions and Answers

Q: Terminology when talking to patrons: AFN or ILL or Resource Sharing?

A: Branding and communications will be forthcoming. Discovery group suggested the terminology “request through interlibrary loan.”

Q: Will we use receipt printers?

A: Receipt printers will no longer be used by our campus libraries once we shift to Alma. Patrons will be able to print information, and staff will be able to print paging slips and hold slips as things are put in transit. Printing will occur through quick print to copy machines or other sources, not through a network receipt printer.

Q: Where do users add comments in an ILL request?

A: Comments currently will be put in the volume/comments field. We have suggested ExLibris create a new field for comments but that would be a future development.

Q: Is there a suggested best practice for items on hold from other libraries?

A: We are still working on workflows with the hold shelves; suggested practices still to come.

Q: It appears that UCLA Law Library is in UC Library Search, right?

A: Most of the UC campus' subject specialty libraries are in Alma, including UCLA and UCD law libraries. UCB Law Library is one of the exceptions.

Q: What kind of ILL reports will we have?

A: Statistics and reports for ILL not fully known yet. Currently working on operations and workflows. This will be explored further a little bit later.

Q: If Berkeley has an item but it is checked out, does the patron need to do something special to request the copy elsewhere?

A: If a Berkeley item is checked out, the system will automatically look at UC libraries and other ILL partners if needed; the user does not need to make a new request in another way.

Q: How would borrowing microfilm from CRL work?

A: If a user wants to borrow microfilm, they could do an advanced search and choose the WorldCat search parameter in UC Library Search. The system will search first at other UCs then go to our preferred list of lenders. For microfilm, CRL is in the top of that list. If a patron needs a particular institution's copy then they can add that as a note in the comment field.

Q: Why do we need to choose "from another institution's library" before scanning the barcode?

A: Must choose the institution it is from before scanning the barcode to be sure we get the right item. Otherwise campuses might use the same barcode for different items and there will be mistakes with which titles we are logging in the system.

Q: How do patrons request articles not found via UC Library Search in the CDI?

A: They can use the new ILL blank form if they cannot find the reference to the article they want through UC Library Search. ILL staff will mediate locating the item if needed.

Final note: Adapting to Alma/UC Library Search is a work in progress, we are still testing and fixing things. Overall we believe patrons will find this an easier and more streamlined process for accessing an array of items.