

Seeing ares through **ILLi**ad Glasses: New Approaches to Course Reserves from an ILL Practitioner



Hilary H. Thompson
University of Maryland Libraries
Ares Virtual Conference
November 9, 2016

A Little History

Course Reserves @ UMD Libraries

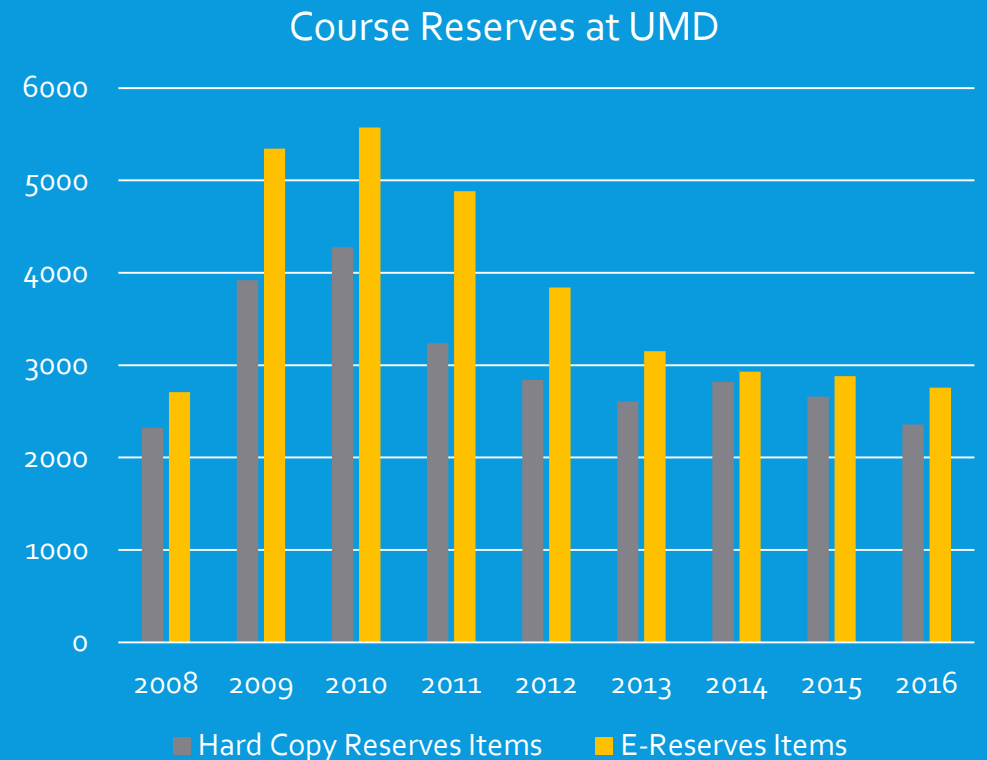
- Implemented Ares in 2008
- Hard copy reserves at 6 library service desks, plus kiosk reserves
- E-reserves and streaming media integrated with ELMS (Canvas)

Before the reorganization (2013-2015):

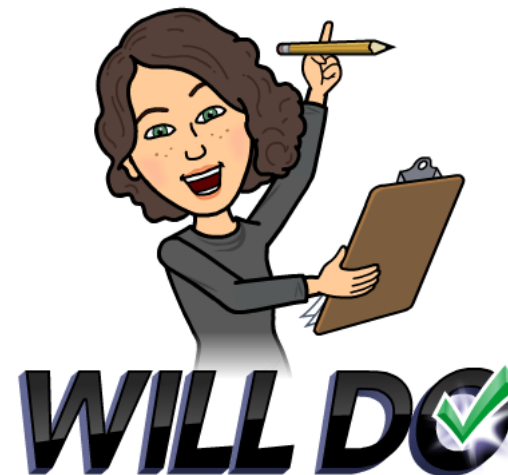
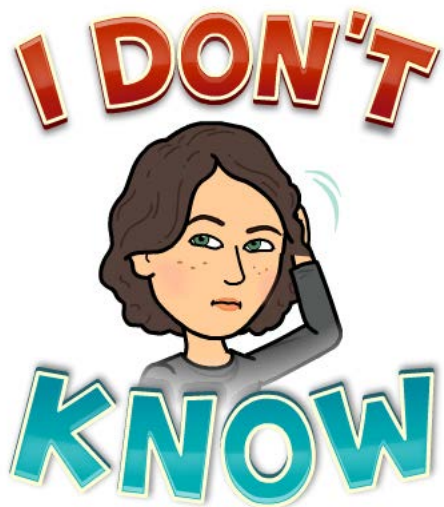
- Providing approx. 5,700 items for 450 courses
- Advertised turnaround time = 2 week minimum
- Supervised by the main library's Circulation & Reserves Coordinator

Access Services Department Reorganization

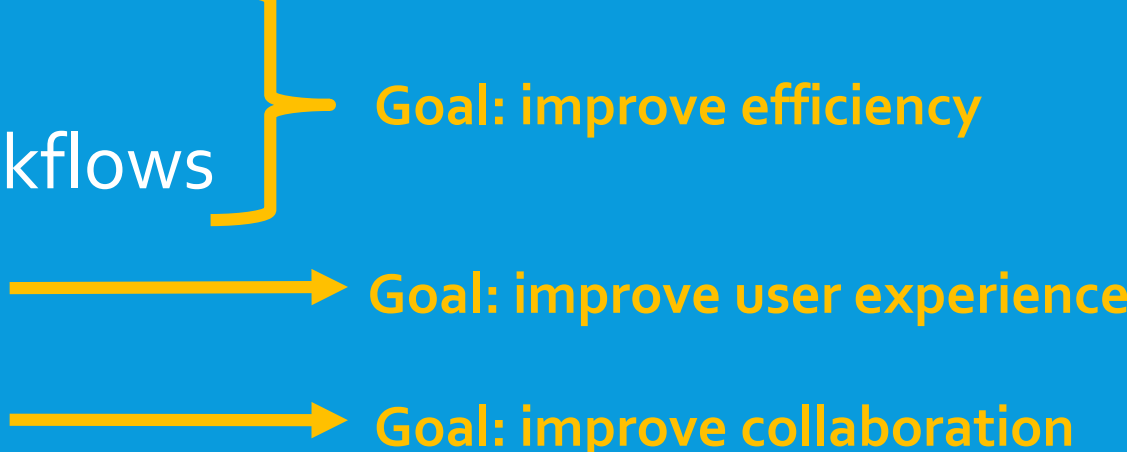
- Oversight of Reserves moved to the Head of Resource Sharing.
- Reasons why:
 1. Shared expertise re: copyright, fair use, and licenses
 2. Shared scanners
 3. Similarity between ILLiad and Ares



Making Changes



Areas Targeted for Improvement

1. Processing incoming requests
 2. Printing, retrieval, & scanning workflows
 3. Interacting with instructors
 4. Communicating with Acquisitions
- Goal: improve efficiency
- Goal: improve user experience
- Goal: improve collaboration
- 

1. Processing Incoming Requests

Changes to expedite processing:

1. **Customize layout**
2. Z39.50 Configuration & Use
3. Find on Shelves + Routing Rules
4. Autohotkey for posting weblinks

The screenshot displays a library management software interface with a toolbar at the top containing icons for 'Find on Shelves', 'In Transit', 'Make Available Electronically', 'Make Available at Desk', 'Email', 'Cancel', 'Scan Item', 'Upload', 'Add Flag', 'Remove Flag', 'Route', 'View Course', 'Clone', 'Import Details', and 'Delete'. Below the toolbar are tabs for 'Details', 'History', 'Z39.50', 'Copyright', and 'GOBI'. The main form is titled 'General Information' and contains the following fields:

Item ID	65092	<input checked="" type="checkbox"/> Visible to Students	<input type="checkbox"/> Instructor Provided
Processing Location	McKeldin Library	Current Status Date	8/26/2016 5:00 AM
Pickup Location	McKeldin Library	Reason for Cancellation	
Call Number*	Z675.U5 E95 2010	Item Type	Monograph
Shelf Location*	UMCP McKeldin Library Stacks Available	Item Format	Book
Barcode*		Location	
Document Type	Hard Copy Reserve Item	<input type="checkbox"/> Web Proxy	File Size
ISxN*	9780838985519	Usage Count	0
OCLC Number		Semester Name	Summer 2016
DOI		Course Displayed Instructor(s)	Thompson, Hilary
Cited In (E-book Supplier)		Course Name	Libraries Test Course
Citation			
Title (Book/Journal/Media)*	The expert library : staffing, sustaining, and advancing the academic library in the	Additional Title (Article/Chapter)	
Author*	Scott Walter, Karen Williams	Editor	
Publisher		Publication Place	
Edition		Volume	
Description		Issue	
		Publication Date*	2010

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The screenshot displays the AlephProd library system interface. At the top, there are navigation tabs for 'Home', 'Miscellaneous', and 'Discovery'. Below these are icons for 'AlephProd', 'Copy Info', and 'Options'. The main search area shows a title 'The expert library staffing sustain...', author 'Scott Walter Karen Williams', and keyword 't:expert t:library t:staffing t:susta...'. Search criteria include System Number, Standard Number (9780838985519), and Call Number (Z675.U5 E95 2010). The interface includes tabs for 'Details', 'History', 'Z39.50', 'Copyright', and 'GOBI'. The 'Searching' tab is active, showing a table with one result: Record Number 003893503, Title 'The expert library : staffing, sustaining, and advancing the academic library in the 21st c...', Author 'Chicago : Association of College and Research Librar', and Imprint 'Chicago : Association of College and Research Librar'. At the bottom, there are sections for 'Ares Citation' and 'Holdings'. The Ares Citation section shows the full title, author, and year (2010). The Holdings section shows two entries: 'UMCP McKeldin Library Stacks' and 'Towson University Stacks', both with Call Number 'Z675.U5 E95 2010 General coll.' and Availability 'Available'.

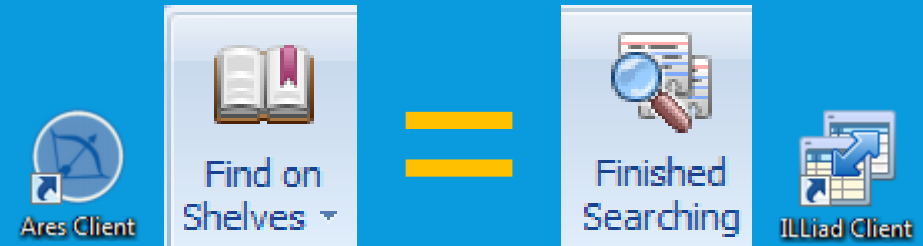
Record Number	Title	Author	Imprint
003893503	The expert library : staffing, sustaining, and advancing the academic library in the 21st c...	Chicago : Association of College and Research Librar	Chicago : Association of College and Research Librar

Location	Call Number	Availability
UMCP McKeldin Library Stacks	Z675.U5 E95 2010 General coll.	Available
Towson University Stacks	Z675.U5 E95 2010 General coll.	Available

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Routing				
R...	Active	Status	Match	New Status
4	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='PDF' AND i.ShelfLocation LIKE '%Not Available%'	Awaiting Doc Provider Request
5	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='PDF' AND (i.CallNumber LIKE '%missing%' OR i.CallNumber LIKE '%lost%' OR i.CallNumber ...	Awaiting Doc Provider Request
6	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='PDF' AND i.ProcessingLocation NOT LIKE '%SG%' AND i.ShelfLocation LIKE '%Shady%'	Awaiting Doc Provider Request
7	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND (i.CallNumber LIKE '%missing%' OR i.CallNumber LIKE '%lost%')	Awaiting Purchase
8	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ShelfLocation LIKE '%Not Available%'	Awaiting Recall Processing
9	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='MCK' AND i.ShelfLocation NOT LIKE '%McKeldin%'	Awaiting Recall Processing
10	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='ARCH' AND i.ShelfLocation NOT LIKE '%Architecture%'	Awaiting Recall Processing
11	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='ART' AND i.ShelfLocation NOT LIKE '%Art%'	Awaiting Recall Processing
12	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='CHEM' AND i.ShelfLocation NOT LIKE '%Chemistry%'	Awaiting Recall Processing
13	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='EPSL' AND i.ShelfLocation NOT LIKE '%EPSL%'	Awaiting Recall Processing
14	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='HBK' AND i.ShelfLocation NOT LIKE '%HBK%'	Awaiting Recall Processing
15	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='PAL' AND i.ShelfLocation NOT LIKE '%Performing%'	Awaiting Recall Processing
16	<input checked="" type="checkbox"/>	Awaiting Stacks Searching	i.DocumentType='HardCopy' AND i.ProcessingLocation='SG' AND i.ShelfLocation NOT LIKE '%Shady%'	Awaiting Recall Processing

1. Processing Incoming Requests

Changes to expedite processing:

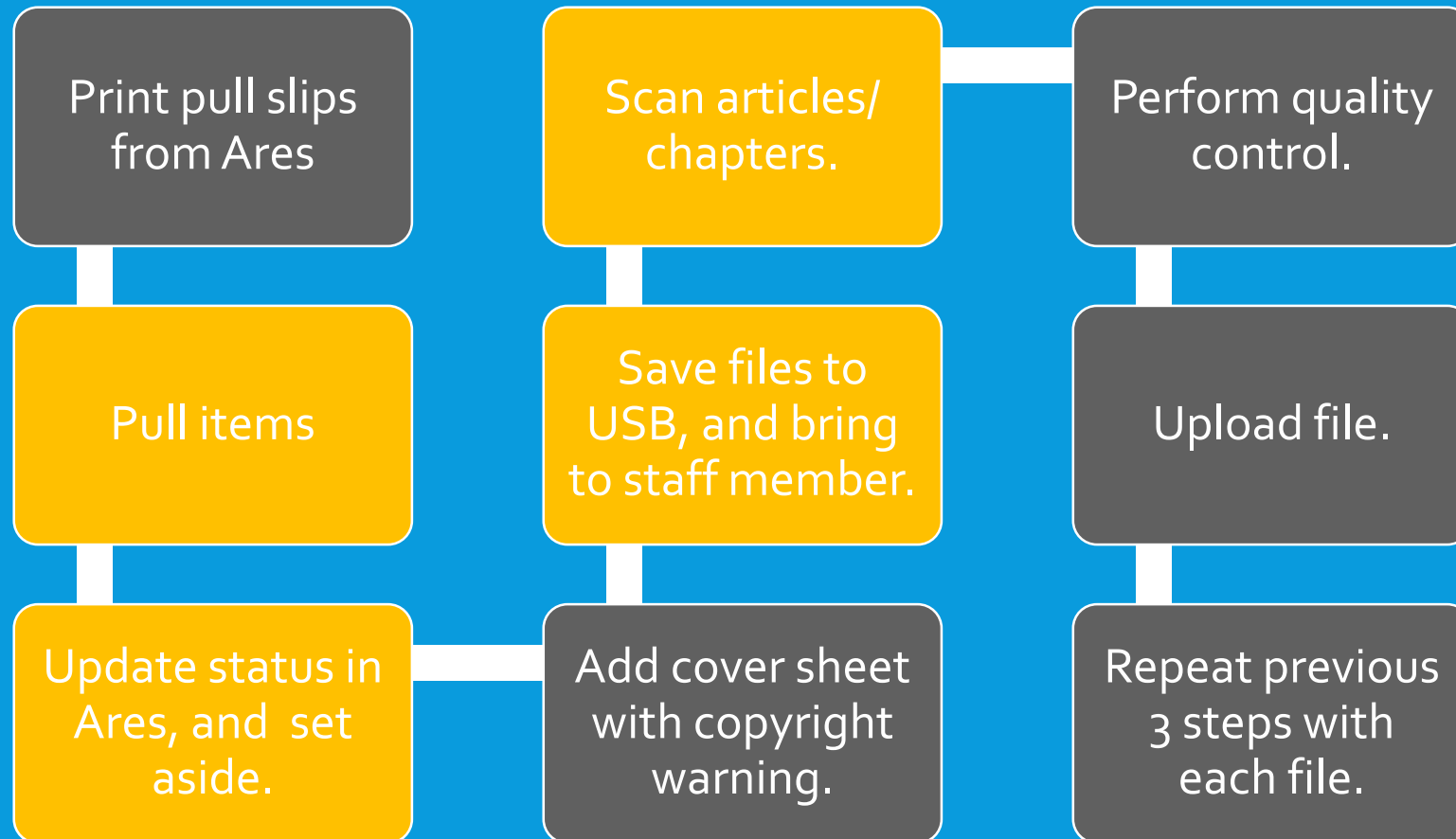
1. Customize layout
2. Z39.50 Configuration & Use
3. Find on Shelves + Routing Rules
4. **Autohotkey for posting weblinks**

The screenshot shows a web-based interface for managing library items. The title bar indicates the item ID is 67033. The interface includes a navigation menu with 'Home' and 'Miscellaneous' options. A toolbar contains various action buttons such as 'Find on Shelves', 'In Transit', 'Make Available Electronically', 'Make Available at Desk', 'Email', 'Cancel', 'Scan Item', 'Upload', 'Add Flag', 'Remove Flag', 'Route', 'View Course', 'Clone', 'Import Details', and 'Delete'. Below the toolbar, there are tabs for 'Details', 'History', 'Z39.50', 'Copyright', and 'GOBI'. The main content area is divided into sections: 'General Information' and 'Citation'. The 'General Information' section contains fields for Item ID (67033), Processing Location (McKeldin Library), Pickup Location (McKeldin Library), Call Number*, Shelf Location*, Barcode*, Document Type (Hard Copy Reserve Item), ISxN* (9781610690362), OCLC Number, DOI, and Cited In (E-book Supplier). It also includes checkboxes for 'Visible to Students' and 'Instructor Provided', and a 'Current Status Date' field (10/18/2016 3:30 PM). The 'Citation' section includes fields for Title (Book/Journal/Media)* (Librarian's Guide to Online Searching), Author* (Bell, Suzanne S.), Publisher, Edition, Description, and Publication Date*.

General Information	
Item ID	67033
Processing Location	McKeldin Library
Pickup Location	McKeldin Library
Call Number*	
Shelf Location*	
Barcode*	
Document Type	Hard Copy Reserve Item
ISxN*	9781610690362
OCLC Number	
DOI	
Cited In (E-book Supplier)	

Citation	
Title (Book/Journal/Media)*	Librarian's Guide to Online Searching
Author*	Bell, Suzanne S.
Publisher	
Edition	
Description	

2. Printing, Retrieval, & Scanning Workflows



2. Printing, Retrieval, & Scanning Workflows

New Integrated Workflow

For Interlibrary Loan, Document Delivery, & Reserves

1

Print Slips

- * By RSR Staff
- * In ILLiad & Ares
- * Expedited with Auto Hot Key

2

Pull Items

- * By CMR Staff
- * By Floor & Shelving Location

3

Scan & Save

- * By RSR Students
- * Specs on slips
- * QC while scanning
- * Save to (S:) Share

4

Deliver or Upload

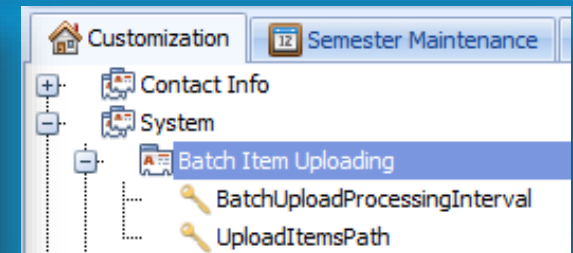
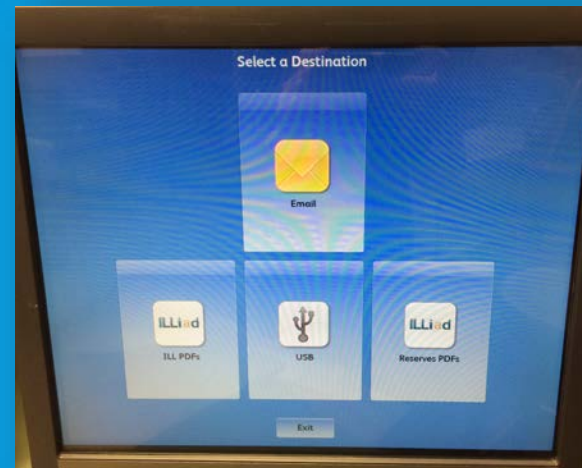
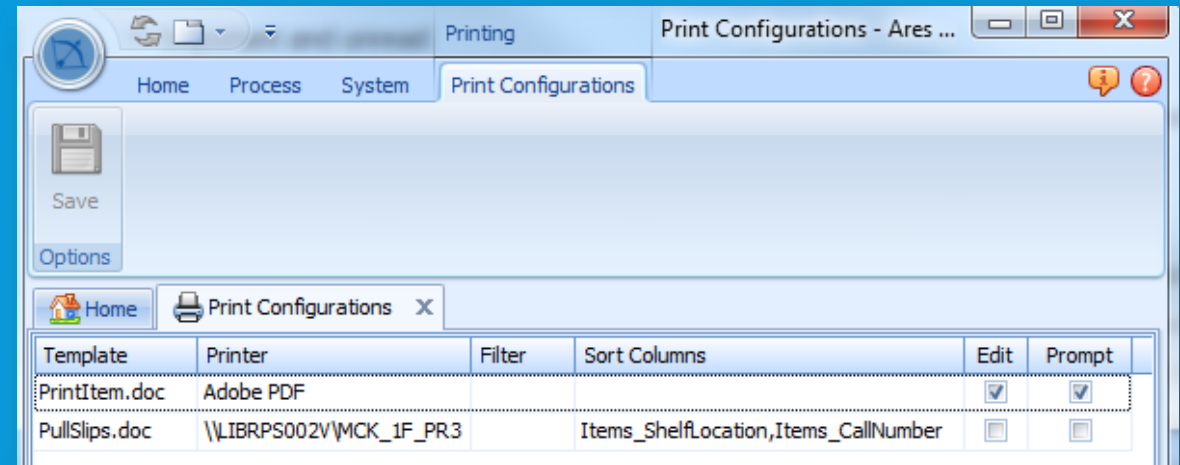
- * Deliver with ILLiad's EDU (auto-mode)
- * Batch Item Upload by RSR staff in Ares

REPEATED 3 TIMES DAILY

2. Printing, Retrieval, & Scanning Workflows

Changes to expedite include:

1. Print Configuration
2. ` + p AutoHotKey
3. Print template edits
4. Change paper color daily
5. Scanner configuration
6. Routing rule to move PDF item records to Awaiting Scanning
7. Batch Upload configuration



2. Printing, Retrieval, & Scanning Workflows

University of Maryland Ares

Ares Item ID: **65760**

Title: **The expert library : staffing, sustaining, and advancing the academic library in the 21st century**

Article Title: **Listen up, librarians: it's all about the message**

Author: **Eric Bartheld**

Class: **libr()**
Libraries Test Course

Semester: **Fall 2016**

Instructor: **Thompson, Hilary**

Department:

UMCP McKeldin Library Stacks Available
Z675.U5 E95 2010

ATLAS SYSTEMS, INC.

Ares Item ID: **0**

Title:

Article Title:

Author:

Class: **0**

Semester:

Instructor:

Department:

ATLAS SYSTEMS, INC.

Default

University of Maryland Reserves

Ares Item ID: 65760
Needed By: 9/15/2016

Title: **The expert library : staffing, sustaining, and advancing the academic library in the 21st century**

Author: **Scott Walter, Karen Williams**

Article Title:

Volume:

Issue:

Year: **2010**

Pages :

Class: **Libraries Test Course**

Semester: **Fall 2016**

Instructor: **Thompson, Hilary**

Call #: **Z675.U5 E95 2010**

Location: **UMCP McKeldin Library Stacks Available**

To be placed on: Hard Copy Reserves

Custom if Hard Copy

University of Maryland Reserves

Ares Item ID: 65760
Needed By: 9/15/2016

Title: **The expert library : staffing, sustaining, and advancing the academic library in the 21st century**

Author: **Eric Bartheld**

Article Title: **Listen up, librarians: it's all about the message**

Volume:

Issue:

Year: **2010**

Pages : **292-313**

Class: **Libraries Test Course**

Semester: **Fall 2016**

Instructor: **Thompson, Hilary**

Call #: **Z675.U5 E95 2010**

Location: **UMCP McKeldin Library Stacks Available**

To be placed on: E-Reserves

Scanning Instructions:

1. Select PDF as format.
2. Scan top half of pull slip.
3. Scan title page and copyright page.
4. Scan requested pages, checking for clarity & completeness. Edit as needed.

After Scanning:

5. Cut/tear pull slip along the dotted line.
6. Bring top half of slip and book to Post-Scanning shelf.
7. Save file to \\libshare.umd.edu\RSS\$
8. Leave bottom half of slip in Electronic Delivery tray.

NOTICE: The materials provided in this E-reserve may be protected by copyright law. (Title 17 US Code) You may print a copy of course e- reserve materials for your personal study, reading, research, or education. Reproducing, distributing, modifying and/or making derivative works based on the materials posted to this e-reserve for any other purposes may be an infringement of the owner's copyright and subject you to civil and criminal liability as well as potential action by the University.

✕

Ares Item ID: 65760

To Upload:

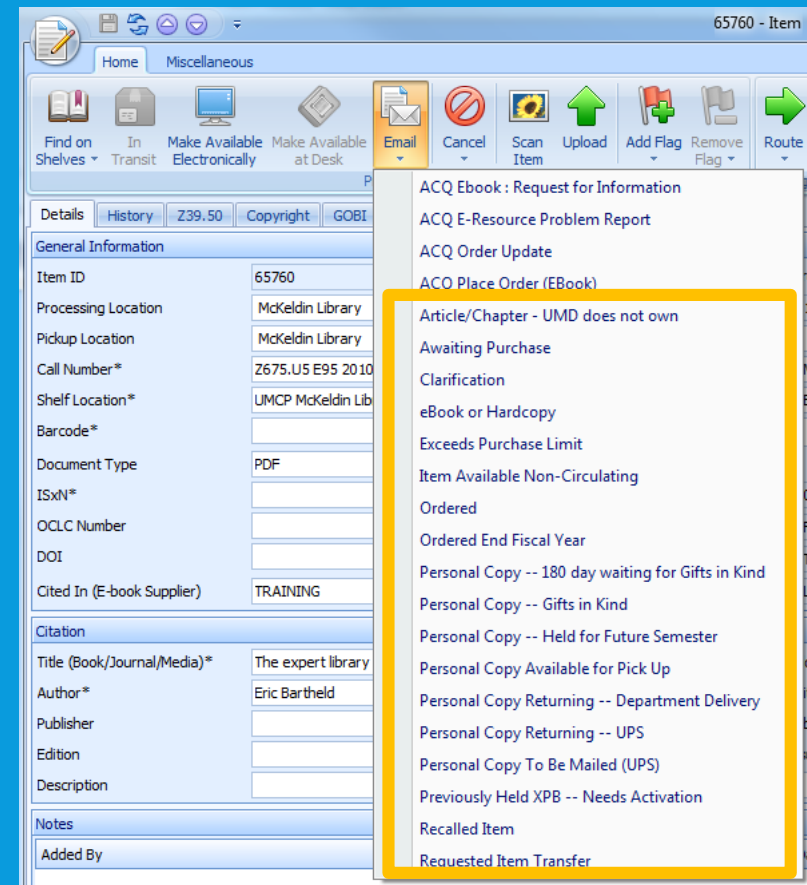
9. Move Reserves file(s) into RSS (S:) network drive
10. Check file(s) for completeness/quality of scan.
11. If needed, edit in Acrobat Pro (crop/rotate), then save changes.
12. Select Process tab in Ares client.
13. Click Batch Upload Item.
14. Click Upload.

Custom if PDF

3. Interacting with Instructors

Changes include:








1. **Adding Send Emails**
2. Custom queues and display statuses
3. Edits to Ares webpages, especially Item Request Forms



3. Interacting with Instructors

Changes include:

1. Adding Send Emails
2. **Custom queues and display statuses**
3. Edits to Ares webpages, especially Item Request Forms

Reserve Items						
	ID	Title	Author	Inactive	Status	Tags
Show Details Edit	67037	 Interdisciplinarity and academic libraries	Daniel C. Mack, Craig Gibson	12/31/2016	Item Available at Reserve Desk	
Show Details View Item Edit	65764	 American Libraries Designing Library Space for Children and Teens	Feinberg, S. & Keller, J.P.	12/31/2016	Item Available on Electronic Reserves	
Show Details View Item Edit	65767	 The Changing Academic Library: Operations, Culture, Environments Chapter 7: The Collection(s)	John M. Budd	12/31/2016	Item Available on Electronic Reserves	
Show Details Edit	65760	 The expert library : staffing, sustaining, and advancing the academic library in the 21st century		12/31/2016	Item Recalled from Library Patron	
Show Details Edit	67034	 More library mashups : exploring new ways to deliver library data	Nicole C. Engard	12/31/2016	Item Requested from Another UMCP Library	
Show Details Edit	67035	 The Living Library : an intellectual ecosystem	Patricia Ann. Steele, David. Cronrath, Sandra Parsons. Vicchio, Nancy Fried. Foster	12/31/2016	Missing from Reserves Shelf	
Show Details Edit	67036	 Twenty-first century access services : on the frontline of academic librarianship		12/31/2016	Ordered and Awaiting Arrival	

3. Interacting with Instructors

Changes include:

1. Adding Send Emails
2. Custom queues and display statuses
3. Edits to Ares webpages, especially Item Request Forms

Reserve Item: Book, etc. * Indicates required field

Pickup Location for Physical Items

Loan Period for Physical Items

* Title
Please do not abbreviate unless your citation is abbreviated

* Authors/Editors
(Last Name, First Name)

Date of Publication

Edition

ISBN
Providing an ISBN will speed processing of your request.

Call Number


* Date Needed By
(Format: MM/DDYY)

How will this item be supplied?

Notes
Put any information here that may help us find the item, as well as any other pertinent information.

Reserve Restrictions

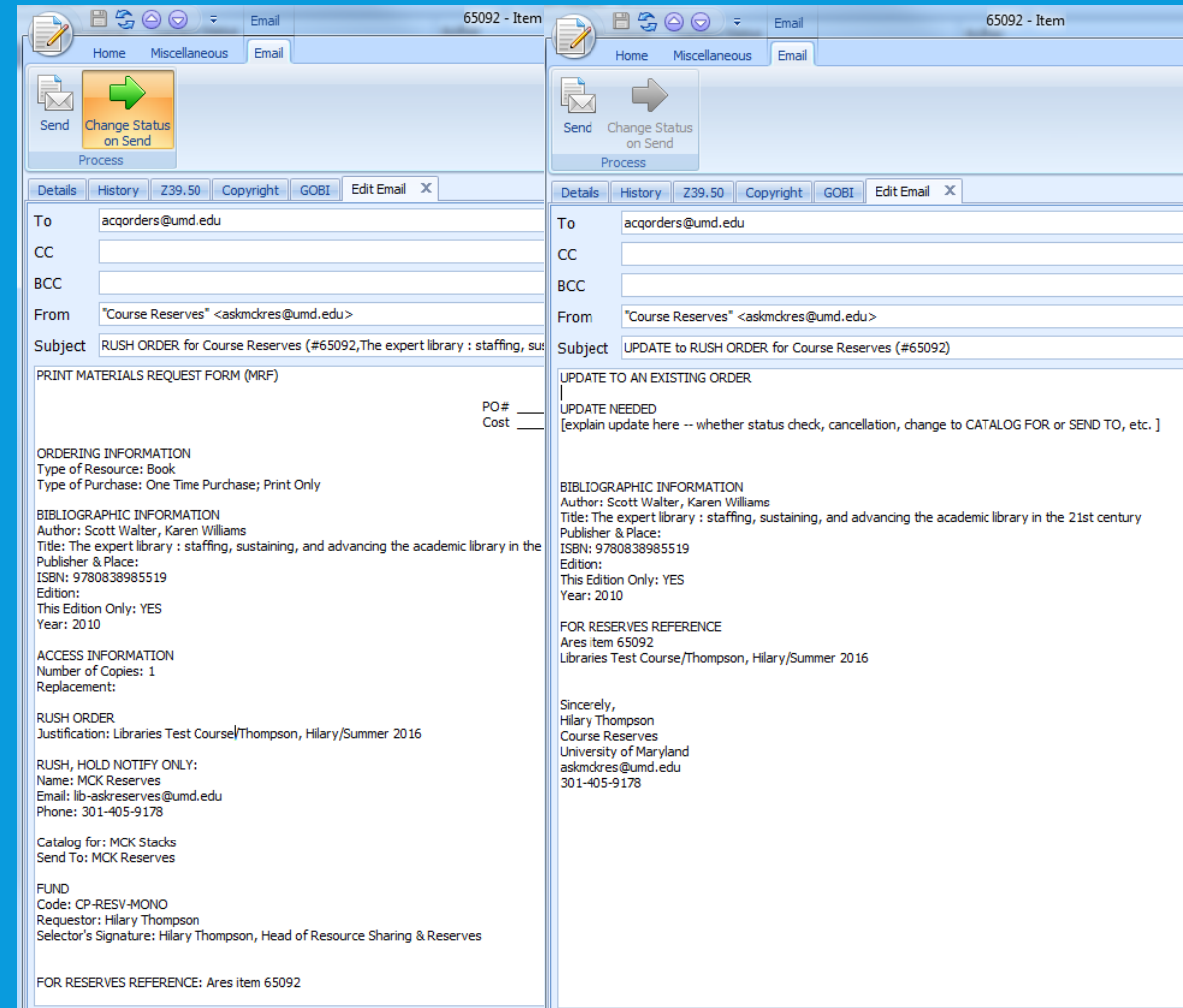
Course Number	Name	Start Date	Stop Date
libr	Libraries Test Course	<input type="text" value="8/1/2016"/>	<input type="text" value="12/31/2016"/>



4. Communicating with Acquisitions

Changes include:

1. **Route to Acquisitions configuration**
2. E-book vetting and purchasing
3. E-resource troubleshooting



4. Communicating with Acquisitions

Changes include:

1. Route to Acquisitions configuration
2. E-book vetting and purchasing
3. E-resource troubleshooting

The screenshot displays the GOBI system interface. The top navigation bar includes 'Home', 'Miscellaneous', and 'GOBI'. Below this is a search bar with 'ISBN' and 'Any Words' dropdowns, and a search button. The main content area is titled 'Library History' and shows a table of transactions for the book 'LIBRARIAN'S GUIDE TO ONLINE SEARCHING' by Bell, Suzanne S. The table has columns for Action, Date, Qty, Descriptor, and Subaccount. A highlighted row shows an 'Order' on 7/16/2013 for 1 US EBOOKS. Below the table, there are fields for 'YBP Order Key', 'Department Code', 'Location', 'Vendor ID Code', 'Library Note', and 'Aleph System Number'. A 'Purchase option: Multiple User Option (MUPO)' is highlighted in yellow. The right side of the screenshot shows an email form with fields for 'To', 'CC', 'BCC', 'From', and 'Subject'. The subject is 'RUSH ORDER for Course Reserves (#67068, Librarian's Guide to Online Searching)'. The email body contains ordering information, bibliographic information, and access information.

Action	Date	Qty	Descriptor	Subaccount
Slip	5/14/2014		US E-AUTOSLIP -12	1840-22
Slip	8/28/2013		US E-AUTOSLIP -12	1840-22
Slip	8/28/2013		US E-AUTOSLIP -12	1840-22
Shipped	7/18/2013	1	US EBOOKS	1840-20
Order	7/16/2013	1	US EBOOKS	1840-20

Library History

Title: LIBRARIAN'S GUIDE TO ONLINE SEARCHING.
Author: BELL, SUZANNE S
Pub Year: 2012

Non-returnable/non-cancelable alert overridden.
YBP Order Key: 99954424691
Note to YBP:
Department Code: CPNET
Location: EBWWW
Vendor ID Code: CP-YBP
Library Note: KP/CPNET EBWWW/MULTIPLE USER
Aleph System Number:

Purchase option: Multiple User Option (MUPO)
Selected 7/15/2013 1

Go to Item (6 Books/24 Slips)

Email Form:

To: acqorders@umd.edu
CC:
BCC:
From: "McKeldin Reserves" <askmdres@umd.edu>
Subject: RUSH ORDER for Course Reserves (#67068, Librarian's Guide to Online Searching)

EBOOK REQUEST FORM (ERF)
PO# _____
Cost _____

ORDERING INFORMATION
Type of Resource: BookChapter
Type of Purchase: One Time Purchase; Ebook Only

BIBLIOGRAPHIC INFORMATION
Author: Bell, S. S.
Title: Librarian's Guide to Online Searching
Publisher & Place:
ISBN: 9781610690362 |
Edition:
This Edition Only: YES
Year: 2012

ACCESS INFORMATION
Supplier:
Purchase Option: unlimited simultaneous users
Note: purchasing this e-book from another supplier would also be acceptable, provided that the purchase option allows unlimited users.

RUSH ORDER
Justification: libr/Thompson, Hilary/Fall 2016

RUSH, HOLD NOTIFY ONLY:
Name: McKeldin Reserves
Department: User Services & Resource Sharing
Email: askmdres@umd.edu
Phone: 301-405-9178

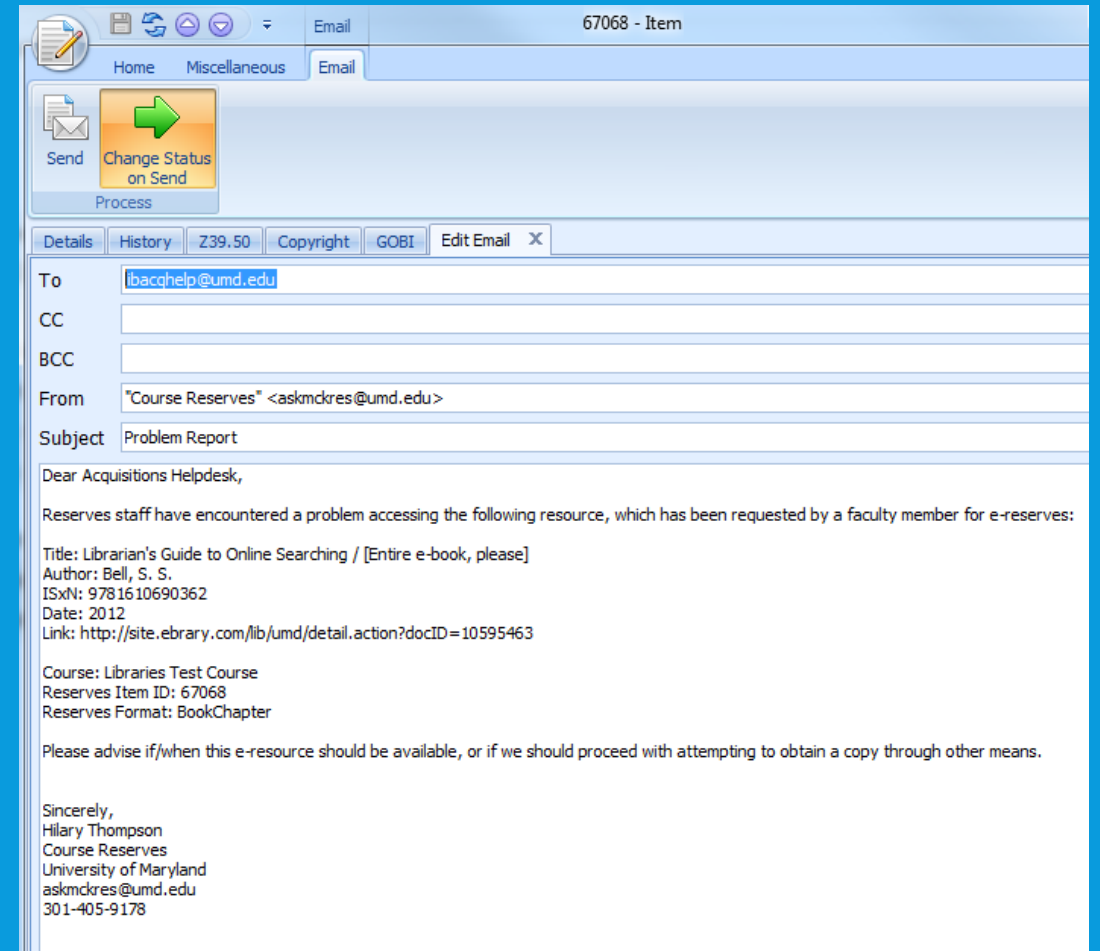
Catalog for: McKeldin Stacks
Send To: McKeldin Reserves

FUND
Code: CP-RES-EBOOK
Requestor: Hilary Thompson
Selector's Signature: Hilary Thompson, Head of Resource Sharing & Reserves

4. Communicating with Acquisitions

Changes include:

1. Route to Acquisitions configuration
2. E-book vetting and purchasing
3. **E-resource troubleshooting**



Assessment & Next Steps



Did these new approaches make a difference?
What else can we do to further improve our services?

Turnaround Time Improvement

Average Turnaround Time for Reserves



11.4 → 5.2 days

average turnaround time for hard copy reserves



4.5 → 1.8 days

average turnaround time for e-reserves



7.1 → 3.9 days

average turnaround time for e-reserves (without cloning)

Ordering Books from Acquisitions



16 → 4 days

average turnaround time from item submitted to ordered

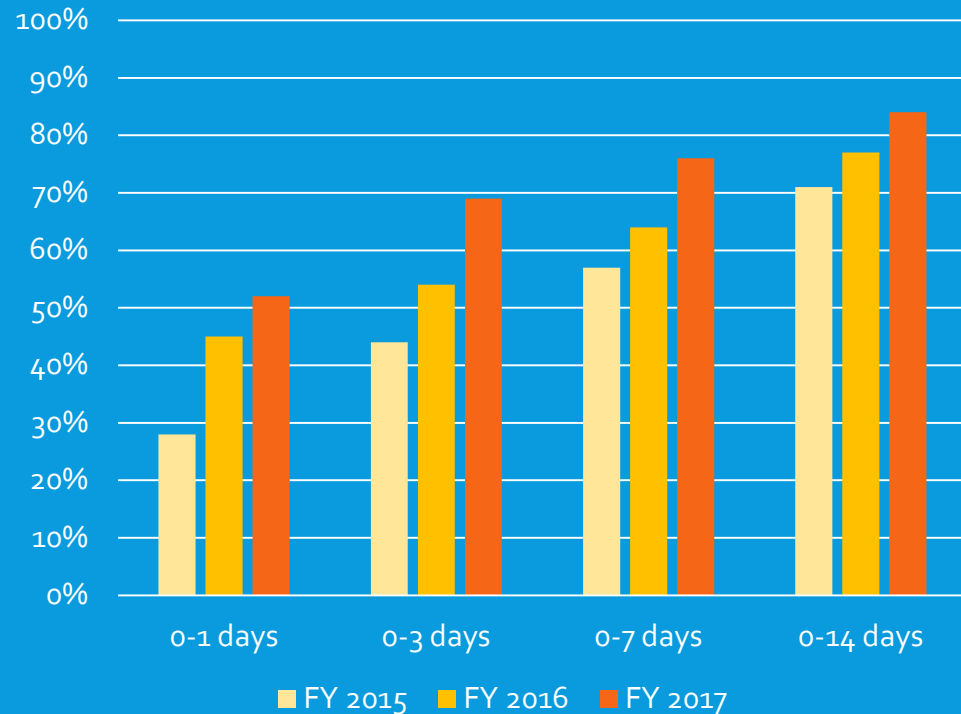


33 → 20 days

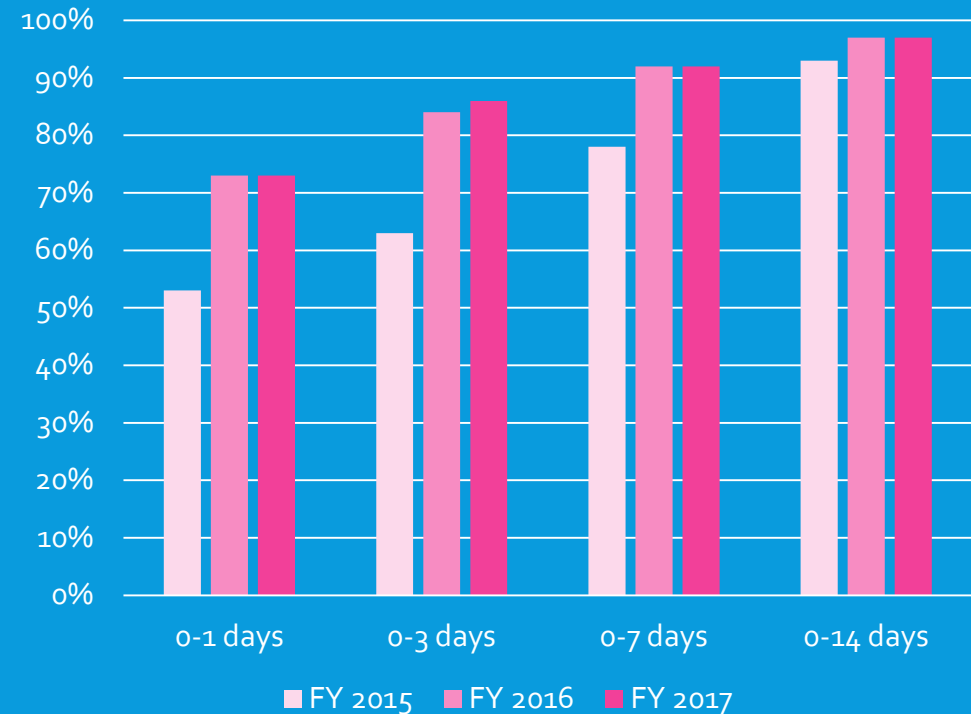
average turnaround time from item submitted to available

Turnaround Time Improvement

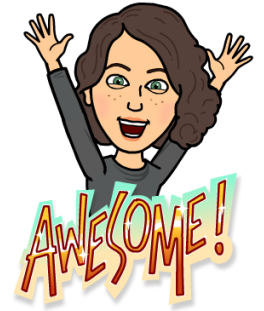
Turnaround Time for Hard Copy Reserves:
Percentage of Requests Filled



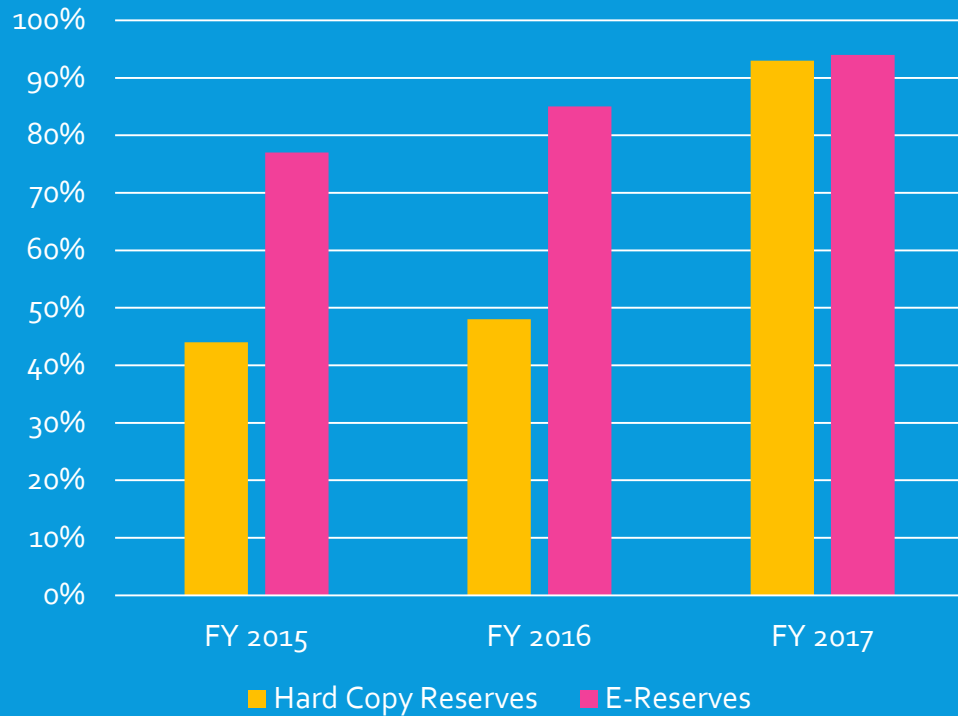
Turnaround Time for E-Reserves:
Percentage of Requests Filled



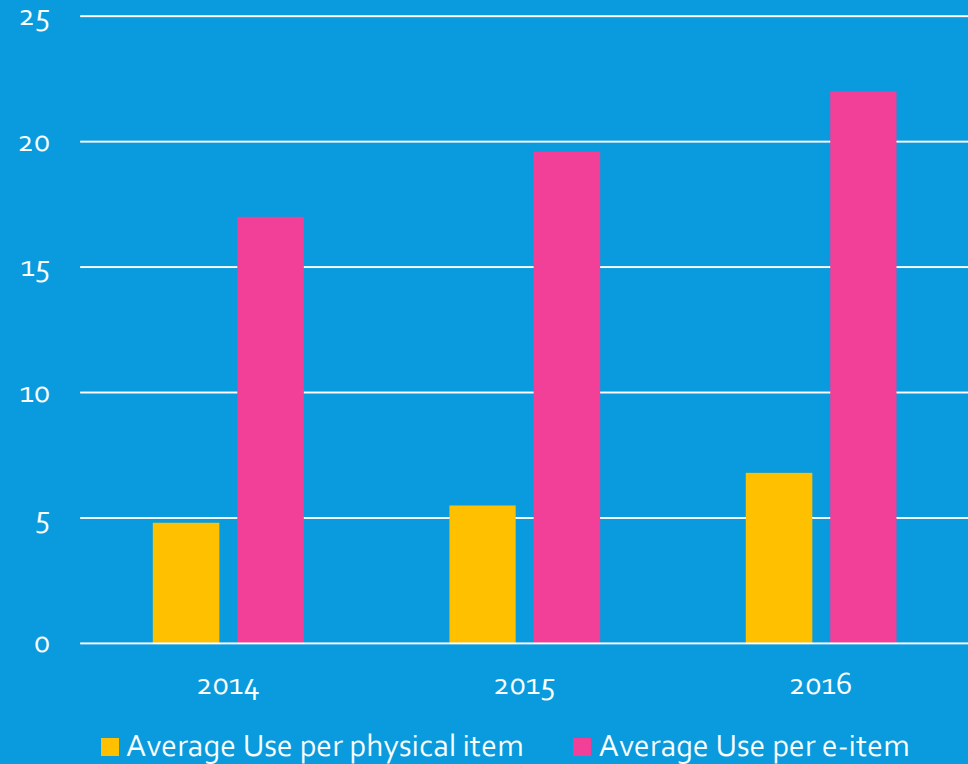
Other Metrics



Percentage of Items Available by the Instructors' Needed By Date



Average Usage Of Reserves Items



Next Steps

1. Examine tracking and notes on outliers
2. Survey instructors and students (again)
3. Implement Display Statuses broadly
4. Promotion of new and improved services

Questions?

Hilary H. Thompson

Email: hthomps1@umd.edu

Twitter: [@HHT8820](https://twitter.com/HHT8820)