

Practical Tips for New ILL Librarians

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Shipping Tips

Packing tape is cheap. Paying to replace books that fall out of their packaging is not. Use it!

Fluffy mailing bags are evil, and make awful messes when torn. Use bubble bags instead – they are kinder to people and books alike. (Except for heavy or large books – use boxes for those.)

If you get a book from a library that requires a return in a box, save the box! Write the ILL number on the edge and then you can easily find it to safely return the item.

Match return label(s) with the book being returned. This is especially important if you are using multiple shipping services like a private courier, Fed Ex, USPS, etc.

When reusing shipping materials be sure to remove or completely deface barcodes and previous address to prevent automated shipping errors. Turn boxes inside out if you can.

Do not use staples. Don't even write the word staples. Staple-rage is real. Staples – the tool that must not be named or used. Ever.

Especially don't use staples or paperclips when sending AV materials. They can cause damage in transit.

Stapling labels to paperwork is okay, since it keeps everything together. Just don't staple bags closed!

Working With Patrons

Students don't really want a dissertation abstract. Just change it to a book and try to get it for them.

Don't promise anyone anything until you know the policies of your library.

Never assume the information your patron gives you is complete and correct.

Have a brief FAQ on your webpage that includes a definition of ILL and how it works. Too many patrons honestly have no idea. (Or better still, add a video. ☺)

Be willing and available to speak with the folks placing requests to relay information about the status of their request and if the item is available at all. When in doubt, call the patron. Follow up with an email if needed.

Be prepared to inform your patrons concerning your resources when they request an item that is readily available in your collection. Have a statement available explaining where the item is and how it can be accessed if you don't offer document delivery services.

Do not get rattled by rude or demanding patrons. This is not brain surgery and 99.9% of the time it does not begin to come close to an emergency situation.

Borrowing Tips

Check and recheck your searches in every available source before you cancel a request for your borrowers. It might take creative thinking and/or help to find it.

Google is your friend! Many items are online (theses, newsletters, conference abstracts, etc.). It is very handy for clarifying what the heck the patron wants.

Always look at citations with a critical eye. If you can't find something someone is requesting, it is probably because the citation is wrong.

Searching on the ISBN or ISSN is a bit quicker, but a title search will bring more results.

Look closely at and match ISSNs. Many journals have similar or identical titles with differing publishers and numbers. (i.e. Atlantic vs. Atlantic Monthly)

If you use automated requesting from databases (such as SFX) learn which ones have links to free content and which ones tend to have problems importing correctly.

CHECK what is sent to you. Make sure the title matches up with the request, make sure the score has all the accompanying pieces, the right number of CDs came in a set, etc. It's much better to catch mistakes BEFORE notifying the patron.

Make sure you are giving the item to the correct patron. Remember there may be many "Mary Smiths" in your library population and you need to be careful which one you give it to.

Be sure to familiarize yourself with your own available resources. Many of the borrowing requests sent your way will be readily available in your own collection. Students and faculty tend to order items without looking for them first.

Always read your lenders' paperwork. I make notes on my copies for things like special return instructions (NO JIFFY BAGS), renewals, etc. These details may also be on the ILL record's lending notes.

Follow any and all restrictions/rules for items lenders send you. (i.e. In Library Use Only, return in a box, no sticky labels on our books, etc.) They will appreciate it and perhaps do you a BIG favor in the future since you are a 'good borrower'.

Lending Tips

Realize how many lending ILL requests may have an incorrect citation. Especially in case of pre-1940's newspaper articles on microfilm or similarly titled journals, i.e. "Hospital Medicine".

Always check and note condition of outgoing materials, so if returns damaged you can document where it occurred.

Utilize the space on your ILL lending paperwork. Put your library's return address somewhere – anywhere! - on your paperwork or band when lending a book. This can be a godsend to borrowers without ILLiad.

Keep a list of which databases allow ILL handy. Being able to download and send articles to other libraries can save your tail when it's busy and you're all alone. You might also be able to avoid scanning from microfilm this way.

Working With Other Libraries

Assume good intentions on the part of your borrowing or lending partner and remember that everyone makes mistakes sometimes.

Remember that not all libraries use/can afford ILLiad or other library software systems. OCLC Worldshare is the most common denominator whether it is used directly or your software interfaces with it. Please format your addresses correctly in it!

PLEASE PLEASE PLEASE PLEASE format your address correctly in Worldcat!

Request current, new fiction from academic libraries. Public libraries often have long waiting lists or want to keep new titles on their shelves for their users.

Most people are doing the best they can. Assume the best of people until you get burned, then don't hold it against everyone. Most of the time it will eventually work out. If not, block that library, wash your hands and move on.

Miscellaneous Tips

Learn how to go non-supplier (or lowercase) on OCLC and what it means. (It means turning off your OCLC ILL supplier status for a pre-specified time or manually if you don't know when it will resume.)

Remember that the 'accession number' is the same thing as the OCLC number in Worldcat.

Join all the listservs that apply to you and your organization. Especially the ILL-L list (ill-l@webjunction.org) and the ILLiad list (workflowtoolkit-l@geneseo.edu). We love to chat and offer advice!

Learn how to determine which libraries charge, how much, and how to reduce your expenditures. The OCLC Policies Directory (<https://illpolicies.oclc.org>), LVIS (Libraries Very Interested in Sharing) and other resource sharing groups can help with this.

Shamelessly steal great ideas from other libraries to implement in your own. If they don't work for you, try tweaking things until you are happy with your work flow, record keeping, daily duties, etc.

Be in the moment. ILL work is really detailed, so it is easy to make errors. If that happens remember that it can be corrected!

There is SO. MUCH. JARGON. Enough acronyms to make alphabet soup. You'll need a translation guide.

If you have an ILL manual for your institution use it to record not only the processes, but also the jargon, acronyms and 'institutional memory'. Things like reciprocal agreements, why certain policies were written and legacy processes you no longer use but may need to be understood for tracking down old questions. Update and back it all up regularly.

There is no such thing as an ILL emergency. It can wait until your head is clearer in the morning.

Don't forget to try and make everyone happy, both internal/external, borrowing/lending. Treat others as you would be treated and think of others as you process requests.

Be prepared and don't be afraid of new technologies. Don't be afraid to fail. Adapt to the changes in search strategies and supply options quickly and without complaint!

Learn how to make the most of OCLC's automated options like Custom Holdings and Direct Request. A little time spent refining the configuration saves you a lot of time in the long run.

ILL tends not to get the respect/attention it deserves in the larger library community. Do it with pride anyway because YOU know the importance of your function.

Speak up and ask questions if you spot inefficiencies in your library's ILL workflow. Sometimes a fresh set of eyes is crucial to revamping obsolete and cumbersome procedures.

Never hesitate to ask questions, especially of vendors. Their support is there to help you. Also, use vendor help pages and webinars to learn more about the products you use.

Pay attention to any and all notes in a request. There is often important information in notes that should not be missed. (Such as a patron wanting volume 2 of a 6 volume set, a lender saying the item must be used In Library Only, a patron helpfully supplying the ISBN of the book they want, a borrower saying they need an article sent RUSH, etc.)

Only internal motivators will keep your giving top-notch service for decades. Know what they are for YOU and return to them on a regular basis. (This advice is from a presentation at the Midwest ILL Conference at Iowa's Loras College titled "Keep the Motivational ILL Fire Burning!")

If someone in your department has good reference skills, be proactive in writing to patrons and suggesting consultations or relevant material you ran across that may help with their research.