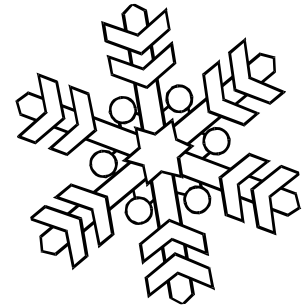


RESOURCE SHARING NEWS



**Happy Holidays
from the
MINITEX staff!**



Fall 2000

Volume 2 Number 2

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Document Delivery Update *Becky Ringwelski*

Much has happened since the last issue of Resource Sharing News this past spring. Contract negotiations are underway with Ex Libris for an Integrated Library System (ILS) for MnLINK. I was pleased to have been able to participate in the process as a member of the VET2 (Vendor Evaluation Team 2nd round).

The Ex Libris software has a good deal of potential for providing us with an interlibrary loan system that will meet the needs of the MnLINK ILS libraries. As we have worked with the vendors it has become increasingly clear that Minnesota's long history of resource sharing is not typical of their other customers. Also, many libraries in the state have used the PALS ILL system for a number of years. This gives us the advantage of being able to describe the functionality we're looking for in terms of our experience. It also raises the level of expectation for a replacement system.

On the Gateway interlibrary loan front, MINITEX sponsored presentations for two commercial ILL vendors (Pigasus Wings and Fretwell-Downing VDX) and the PALS ILL software on November 1, 2000. The presentations were conducted in order to provide attendees with an overview of the current development of ILL products on the market today as well as an opportunity to see the PALS ILL software.

Attendees at that meeting were asked to provide feedback on whether or not they felt the commercial vendors were far enough along in development to be an option for the Gateway ILL system at this time. They were also asked to comment on how the vendors that demonstrated would meet their immediate needs for ILL. The feedback was used by the MnLINK ILL Subcommittee to develop a recommendation to the MnLINK Steering Committee. The MnLINK Steering Committee has accepted the recommendation of the ILL Subcommittee to proceed with an RFP process. For information on the various MnLINK committees see the MnLINK website at: <http://www.mnlink.org/defaulta.htm>.

(continued on page 7)

Document Delivery staff begin new work processes

Carol Nelson

In December of 1999, nine MINITEX Document Delivery staff members began the process of redesign of our internal work processes. The goal was to provide faster, more flexible service to better meet the changing needs of our participating libraries and their patrons.

The planning group met 3 hours a week with consultant, Marilyn Pash, for about 6 months. Before the redesign, our Document Delivery work was divided between 3 areas that interacted, yet performed most functions independently. The planning group spent the initial meetings identifying where improvements, adjustments and changes were needed in workload, task variety, and the assignment of appropriate level work for all positions.

Throughout the process, the group learned a lot about the entire

Document Delivery workflow. Initially, most of the group members thought that it would be too difficult and inefficient to train more staff how do the “complicated work.” However, it turned out that each person thought the duties being performed in another area were “easier” than the tasks they were currently performing.

The facilitator provided information on studies which indicated that creating more ownership for requests would enhance quality and job satisfaction. That information convinced the group that a better process could be created that would both improve customer service and provide needed variety in tasks performed by our staff.

Before the redesign, staff who verified citations might never know if their work resulted in a filled request. The new design gave staff the opportunity to work with the same

group of requests from start to finish. Bob Fredrickson, a long-time staff member in Document Delivery says, “A knowledgeable staff is a bonus. More people know more tasks. That helps when someone is gone or when a position is unfilled.”

The redesign group met its goal of implementing the new process over the summer months. Staff who were expert in their jobs were asked to help train others to speed the learning process. For those trainers it meant responsibility for teaching as well as learning their own new jobs. Bob feels a more gradual process might have helped, “at times it was too much for the trainers”.

While there are still a few “kinks” to work out of the system, most of the processes are running smoothly now. Please check the enclosed Document Delivery contact list to see changes and a list of who to call for problems or questions.

| Two examples of how duties have changed for our staff | |
|---|---|
| Pre-Redesign | Post-Redesign |
| <p>Library Assistant III</p> <ul style="list-style-type: none"> • supervise Library Assistant II staff working with downloading, filing, typing, and negative replies • download incoming requests from PALS, OCLC, Web, Quill • type referral requests on the PALS and OCLC systems • download negative replies from all systems process all overdues, recalls, status checks | <ul style="list-style-type: none"> • supervise Library Assistant II staff processing PALS requests • download incoming PALS requests • verify incoming PALS requests • type and monitor referral requests on PALS system • handle all overdues and recalls for PALS requests |
| <p>Library Assistant I</p> <ul style="list-style-type: none"> • Search LUMINA • Type incoming requests into the Alexis database | <ul style="list-style-type: none"> • Retrieve photocopy, and check out library materials at a campus library • Search LUMINA, MULS, OCLC and other bibliographic tools to verify requests and identify holding locations • Process referral materials, fill out bookmarks, update online systems |

Process redesign timeline

December 1999 / January 2000

- Developed ground rules and a project charter
- Participated in a simulation designed to demonstrate the steps, problems, and pitfalls of an actual project redesign

February 2000

- Began meeting weekly for 3 hours
- Completed a walk-through of all areas with a detailed analysis of the existing workflow
- Identified tasks where there were slow-downs, staff shortages and a need for more communication about request processing

March 2000

- Collected and analyzed statistics on key workflow processes
- Rated existing positions in Document Delivery to compare the skills, customer contact, autonomy, variety, significance and comparison to benchmarks
- Brainstormed solutions to problems in work processes and job duties of existing positions within Document Delivery
- Looked at challenges to our process improvement

April 2000

- Decided to divide work into groups that performed all request functions on a particular automated ILL system (such as PALS, OCLC, Quill, or Web) instead of by tasks (such as verification, retrieval, record-keeping)
- Implemented any ideas that could improve processes and required little or no training
- Communicated to all Document Delivery staff the initial plan of the new design

May 2000

- Evaluated skills of current staff and determined how to best assign new responsibilities
- Continued to examine the new design for any possible oversights or problem areas
- Discussed new job responsibilities with staff who were not part of the Redesign Team
- Began training staff to perform their new tasks

June 19th, 2000

- Transition to new design begins for all Document Delivery Staff

Delivery sped by MEDD

Dave Paulson



Using a customized version of Prospero software, MINITEX began a pilot project with 7 libraries in September to deliver articles directly to patrons via the Internet. We are calling this new delivery method MEDD, which stands for MINITEX Electronic Document Delivery.

Prospero is a web-based document delivery system designed to complement the Ariel software system. It captures and converts Ariel files (TIFF images) to a web accessible document (PDF files) and uses the Internet to transmit them. Prospero also allows direct scanning of new documents instead of having to photocopy the item first.

MEDD works by posting a PDF file to a server at the MINITEX office. Prospero then sends an e-mail message to the patron containing a personal identification number (PIN) and instructions for retrieving the article. For the patron, the process is very similar to receiving an Internet greeting card.

Articles can be retrieved on any web browser up to 5 times, or for 14 days, whichever comes first. The patron decides whether or not to print the article. Our customized version of Prospero software also sends an e-mail message to the requesting library indicating that the request has been delivered directly to the patron. This means the libraries can update their records to reflect that the item has been received, even though that article never passes through their office.

At this point, we are still testing the capacity of our server and fine-tuning our internal procedures. To date, most of our deliveries have been successful and the test libraries

are giving us positive feedback. During the pilot project it is necessary for MINITEX to limit the number of participating libraries to twenty. As soon as we have determined the volume we are able to deliver via MEDD, we will be announcing the expansion of this service to other libraries in our region. If you have any questions about this service, please call Dave Paulson at the MINITEX office.



For ARIEL users -- dealing with missing pages

If you receive an item transmitted via Ariel that has a missing page, please be sure to supply MINITEX with the Document ID found on the cover page, as well as your 3 letter MINITEX code and the Interlibrary Loan request number (if different from the document ID number). This helps us speed the process of getting that missing page to you because it's easier for us to track down where that request was filled. If you have any questions about this process, please call Priscilla Pope at the MINITEX office.

New service options let you choose how MINITEX handles your requests!

MINITEX is introducing new options that allow you to customize how your requests are handled in our office. NO CHANGES are required in your request processing *if your library does not wish to use any of the new services*. See the description below for more information on the new services we are offering:

NEW OPTIONS

CAMPUS ONLY

MINITEX staff will search only University of Minnesota campus libraries and Minneapolis Public Library. You need only to provide the campus locations and a “need by” date of at least 2 days. To use this option, type “Campus Only” before the OCLC number or other verification in the “verified” (for OCLC or PALS) field of your request or the “locations” field (for the webform).

DIRECTED REFERRAL

Choose “Directed Referrals”, and MINITEX staff will check the University of Minnesota, Twin Cities Campus Libraries, Minneapolis Public Library, and **only** those other locations you *list* on your request. Remember that we can still only refer to locations that are able to fill your request within the “need by” date. This option gives you the ability to decide exactly how many referrals MINITEX should make for any given request.

The locations we access for “directed referrals” will be prioritized in the order we believe to be the most efficient. For example, we will not refer to Wisconsin libraries (a more time consuming and expensive option than using libraries in our region) before a Minnesota, North Dakota or South Dakota library.

To use this option, type “Directed Referral” before the OCLC number, or other verification source, in the “verified” for OCLC or PALS) field or the “locations” (for the webform) field of your request.

INCREASED CHOICE FOR OUT-OF-REGION REFERRALS

FOR SERIALS ONLY: Out of region referrals (IFM) service option – increased choice!

IFM referrals for serial requests will continue to be automatic. However, you may now choose to ask us not to refer to these out of region libraries. Simply type: “no IFM” before the OCLC number, or other verification source, in the “locations” (for the webform) or the “verified” (for OCLC or PALS) field of your request.

Note that MINITEX chooses “Out of Region” locations based on several factors such as cost, the lender’s ability to transmit via Ariel and turnaround time. For that reason, it is never necessary for your library to list “out of region” locations on your requests, MINITEX will assign them.

NLOC (NEED LOCATIONS) SERVICE IS STILL AVAILABLE!

We are not changing the procedures for our “NLOC” Service. MINITEX will continue to check for bibliographic sources that list holding locations when your library cannot verify a request. We then report the holdings back to your library to be used to request the material outside of the MINITEX region. To initiate a “Need Locations” request, type “NLOC” in the “location” field in OCLC, PALS, or the MINITEX ILL webform.

How do I use the service levels?

Simply indicate in either the “verified” field on PALS or OCLC, or in the “locations” box on the MINITEX Interlibrary Loan webform which service level you want to use for that request. You may choose a different service level for each request. For instance, let’s say your patron needed something within a week and you want to determine which libraries receive the request. See below for examples of how to indicate how you want your request to be handled in our office:

| Using PALS and OCLC | Using the MINITEX Interlibrary Loan webform |
|--|---|
| What to type in the “verified” field: | What to type in the “locations” field: |
| √☐☐ <i>Directed referral</i> OCLC 12345 MNU, MNP, MPI, MAC | |
| √☐☐ <i>Campus Only</i> LUMINA Wilson BF 698.35 E54 B57 1996 | |
| √ <i>No IFM</i> MULS 1569879: MNUP, MPI\$ | |

What doesn’t change?

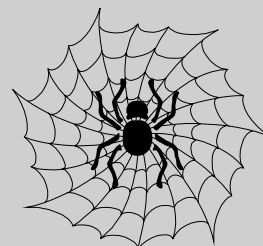
You will still need to verify the request, identify MINITEX locations, and provide a “need by date”. There is more information on OCLC and LUMINA verification on pages 16 – 18 in your [MINITEX Document Delivery Manual](#). If you choose to use MnLINK to verify requests, make sure you specify MnLINK as your verification source, and list the entire library name. (If you know the 3-letter OCLC code, you may use that if you prefer, *but please do not create alternate abbreviations*). For more information on MnLINK verification, check out the Fall/Winter 1999 issue of [Resource Sharing News](#), page 6, or on the website at: <http://www.minitex.umn.edu/publi-mail/resource/winter00/deardell.asp>

Referral Priority List

We will still only refer to libraries that we can access within our deadline date and we will continue to use our [Referral Priority List](#) to decide the order in which we will refer.

Our priority list is determined by a number of factors, including our experience with turn-around times, method of delivery, and how we are able to transmit referral requests to a specific location. A current list of MINITEX referral priorities can be found on our webpage at: http://www.minitex.umn.edu/prog-serv/doc_del/index.asp

If you have any questions about this new service, please call Agnes Lee, Dave Paulson, or Carol Nelson in the MINITEX office at 1-800-462-5348.



Document Delivery website grows

Agnes Lee

Did you know that you can already send all kinds of messages to MINITEX using our website?

To send a negative reply, status check, overdue, report a library closing, and miscellaneous other messages:

http://www.minitex.umn.edu/prog-serv/doc_del/message.asp

To order supplies:

http://www.minitex.umn.edu/prog-serv/doc_del/order.asp

To see current referral priority lists for AV items, monographs and serials:

http://www.minitex.umn.edu/prog-serv/doc_del/av.asp
http://www.minitex.umn.edu/prog-serv/doc_del/monograph.asp
http://www.minitex.umn.edu/prog-serv/doc_del/serials.asp

During the winter months, we will be working to improve the Document Delivery portion of the MINITEX website so check back often to see what has changed. Be sure to let us know what you think!



Dear Del Illa,

Do I have access to all the major national libraries, like the Library of Congress (LC) or the National Agricultural Library through MINITEX? Recently I sent a request to MINITEX with a note saying I wanted my request to be sent to the Library of Congress and it wasn't filled there. Why? What is a "library of last resort" and does that have anything to do with the fact that my request wasn't filled?

-M.T. Page

Dear M.T.,
MINITEX will refer to the Library of Congress when your library has exhausted all other United States libraries. That's one of the requirements of using a "library of last resort". According to Christopher Wright, from the Library of Congress, the policy of LC is that they won't circulate a book that is still in print if they are the only holding institution because it would be unfair to the author. It's not the Library of Congress' intent to take away possible sales of that item from the author.

In addition, LC does not fill requests for AV materials, reference materials, periodicals, genealogical materials, items that were published in the last two years, or other selected materials.



New digs - better delivery service? You bet!

Fred Finch, Delivery

Since MINITEX moved into the new Elmer L. Andersen Library, I would bet that most of you are becoming irritated or at least bored with hearing about all of the wonderful things that the new building has done for MINITEX, the University of Minnesota and the state of Minnesota. However, I intend to add to that great big pile of wonderful things.

Now that the MINITEX Delivery Unit has a dedicated loading dock with a keycard access, we can have courier items picked up and delivered when it is convenient for the courier, not just during the hours when MINITEX is staffed. MINITEX has some basic requirements for delivery; one of them is that our couriers need to

arrive before 8:00 am. However, a courier could make a morning delivery as early as 5:00 am, if that fit into their schedule.

We are always working to make sure that the items that your patrons need get delivered in a timely fashion. Another advantage of having the secure loading dock is that outgoing materials are being picked up later in the afternoon than before. The MINITEX Delivery Unit is now able to prepare materials for packing and shipping several hours later in the day. This means that more materials are getting in the Delivery System faster.

If you have any questions regarding MINITEX delivery, call me at: 612-624-3374 or 1-800-462-5348.

New locations added to MINITEX delivery

Beginning November 1st, MINITEX started a pilot project with the metro area MnSCU (Minnesota State Colleges and Universities) community and technical colleges. This project involves placing the Metro MnSCU libraries on the MINITEX Overnight Courier System. With new technologies on the horizon, staff at MINITEX participating institutions are beginning to look at all ways that services for their patrons can be improved.

We have added these locations to the MINITEX Overnight Delivery System:

- *St. Paul Technical College*
- *Anoka Hennepin Technical College*
- *Century Community and Technical College*
- *Minneapolis Community and Technical College*
- *Inver Hills Community College*
- *North Hennepin Community College*
- *Dakota County Technical College*
- *Hennepin Technical College in Eden Prairie*
(*Hennepin Technical College in Brooklyn Park receives materials from the Eden Prairie HTC campus.*)

Metro area MnSCU schools that were already on the MINITEX Overnight Delivery System are:

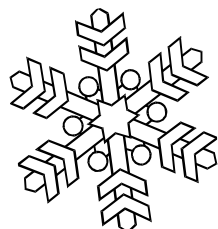
- *Normandale Community College*
- *Metro State University*
- *Anoka-Ramsey Community College*

(continued on page 7)

**New locations added to MINITEX
Delivery (cont. from page 6)**

We have created a new routing slip that will allow the libraries on this list to lend and borrow materials to and from each other. This pilot project will run until May 31st, 2000. At its completion, we will determine the future of this service by evaluating statistics on the amount of materials moving between each location. If we see that this service is cost effective, it will most likely become a permanent change to our delivery service.

If there are any questions about the new locations, Fred Finch and Zach Kelly will be happy to talk to you about it.



**Document Delivery Update
(cont. from page 1)**

The MINITEX Document Delivery staff has also been busy working on a redesign of internal work processes. The goal of that project was to bring added benefits to our participating libraries (see article on pages 2-3), and to enhance job satisfaction among our employees. In addition, we have begun an electronic delivery pilot project and are introducing a new service that will give your library options on how MINITEX processes your requests.

Both of those services are explained in this issue.

So, while so many new things are happening with the MnLINK ILL process, the redesign and technology in general; MINITEX continues to stay busy doing the work we've always done - filling interlibrary loan requests! We know the same holds true for the staff of our participating libraries. We hope you all take time to enjoy the coming holiday season!

IN CONSTANT DEMAND TITLES

Unlikely to be available at any location = 31

Cure for all Diseases-Clark
Daughter of Fortune-Isabelle Allende
Death of a Blue Movie Star-Jeff Deaver
Doctor's Book of Food Remedies : the newest...-Selene Yeager
Eating Well for Optimum Health-Andrew Weil
Four Agreements : A Practical Guide to Personal Finance-Miguel Ruiz
Gap Creek-Robert Morgan
Harry Potter and...(any volume)-J.K. Rowling
Hot Six - Janet Evanovich
House on Hope Street - Danielle Steel
Inferno-James Nachtwey
Invitation - Oriah Mountain Dreamer
Irish Hearts-Nora Roberts
Letters From a Skeptic-Gregory A. Boyd
Liver-cleansing Diet-Sandra Cabot
M: the Man Who Became Caravaggio-Peter Robb
Papal Sin : Structures of Deceit - Garry Wills
Red Lake of the Heart-Mary Logue
Rich Dad Poor Dad-Robert T. Kiyosaki
Search-Iris Johansen
SQ: Connecting with our Spiritual Intelligence - Danah Zohar
10 Things I Wish I'd Known...-Maria Shriver
Take Time for Your Life-Cheryl Richardson
The Brethren-John Grisham
The Sixteenth Round-Rubin Carter
The Talented Mr. Ripley-Patricia Highsmith
Ties That Bind-Janet Liebl
Things We Couldn't Say-Diet Eman
Tuesdays With Morrie-Mitch Albom
Turbo-protein diet : stop yo-yo dieting forever-Dieter Markert
White Oleander-Janet Fitch
Winter Solstice-Rosamunde Pilcher