Attendance: Shrauger, Scott Ryan - USF, Rachel Tait, Peggy from FGCU, Chrissy from UF, Dan Schoonover – FSU, Troy Christenson – FAU, Elaine McCreary – FAMU, Paul – UNF, FSU – Music, Melanie Davis – UF, Wendy – FLVC, Archara Stone – FAMU – Law, Caroline Thompson - UWF

1. **Webinar: "What is Occam's Reader?"**

**From:** John Burger [<mailto:jburger@aserl.org>]   
**Sent:** Tuesday, February 11, 2014 4:24 PM  
**To:** Kristine Shrauger  
**Cc:** Joni Blake ([joni@gwla.org](mailto:joni@gwla.org)); [aserl-ill@aserl-lists.org](mailto:aserl-ill@aserl-lists.org)  
**Subject:** [aserl-ill] Webinar: "What is Occam's Reader?"

ASERL Friends:

You may have seen recent news announcements about the release of Occam’s Reader, a new software tool developed by Texas Tech, the University of Hawaii at Manoa, and the Greater Western Library Alliance to facilitate inter-library lending of ebooks.  Our colleagues at GWLA have arranged for a webinar on February 27 to describe & demonstrate this new tool.  Please join us for this webinar as desired, and share this invitation with other interested colleagues.

This session is free and open to any interested librarian; and it will be recorded for later playback.

**WEBINAR:  “What is Occam's Reader?”**

Occam’s Reader is a new software program that allows interlibrary loan of electronic books. Developed via a collaboration between Texas Tech University, the University of Hawaii at Manoa, and the Greater Western Library Alliance, Occam’s Reader works with ILLiad to allow Document Delivery staff to lend electronic books seamlessly between libraries. The software currently works with .PDF documents, but the development team plans to support other ebook formats and to develop a standalone, web-based version of the system (outside of ILLiad.)   Please join Ryan Litsey, Kenny Ketner, Naomi Chow, and Joni Blake to learn more about Occam’s Reader; additional information is also available at   [www.occamsreader.org](http://www.occamsreader.org) .

**WEBINAR:  “What is Occam's Reader?”**

**DATE / TIME:  Thursday, February 27, 2014,  3PM - 4PM ET**

REGISTER:  <https://www2.gotomeeting.com/register/228547522>

After registering you will receive a confirmation email containing information about joining the Webinar.

System Requirements

         PC-based attendees:  Required: Windows® 8, 7, Vista, XP or 2003 Server

         Mac®-based attendees:  Required: Mac OS® X 10.6 or newer

         Mobile attendees:  Required: iPhone®, iPad®, Android™ phone or Android tablet  (app download may be needed to view webinar)

John Burger, Executive Director

**Association of Southeastern Research Libraries**

Claire Dygert – FLVC – will be looking into the E-Resources into for licensing purposes for us.

1. TBLC Delivery. – any follow-up at this time?

“However, I was able to get a sample of a padded bag from A. Rifkin Co. that I think would work for the media items.  The bags cost about $12.00 each, and I am negotiating a discount.

I'm waiting to hear from Velocity Express about the way they would handle the new bags and if there would be an additional cost for tracking the bags.

I'll let you know something as soon as I hear from them.” **– Vickie Frost**

Troy – has a new driver.

Dan – periodically we still have difficulties with Delivery – 24 items still out over a week. Did people forget to actually mail the items? The late books are not from one particular institution but across the board.

Elaine – periodically has issues. Took 2 weeks to get a book from UWF to FAMU.

Peggy – did not have deliveries on Friday, but the issue has been resolved.

1. Media items – any further questions?

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Lend yes/no** | **Yes to 14 day Loan period** | **Yes to UBorrow button** |
| **Univ. of West Florida** | Yes | 14 | yes |
| **New College of Florida** | Yes | yes | yes |
| **FSU** | Yes with 2 exceptions | Yes | Yes to most items |
| **USF** | Yes with exceptions | Yes | Yes to most items |
| **UF** | Not at this time | No | No |
| **UNF** | Not at this time | No | No |
| **FAU** | Yes | Yes – but may not have long enough time period | yes |
| **UCF** | Yes with exceptions | Yes | Yes |
| **FAMU – College of law** | No | No | No |
| **UF – Health science** | Not at this time | No | NO |
| **FIU** | Yes with exceptions | Yes | yes |
| **FAMU** | Not at this time |  |  |
| **FGCU** | Yes | Yes | yes |

Troy – being the one unit approach and consistent policies across the board – hoping that people will change their minds. Being people who do not lend should not borrow.

1. Marketing – unification
   1. What is every one doing?
   2. What are some ideas that people have for unifying ILL / UBorrow across the campuses

* Paul – UNF
  + Monitors in the building – routinely at the beginning of the semester – show slides
  + Go over it in classrooms
  + Social media
  + Posters at the Info Desk – first week of every semester
  + Bookmarkers / pencils
* Elaine – FAMU
  + Social media
  + Monitors –
  + Classrooms
* Dan
  + Posters
  + Bookmarkers
  + Instructions / outreach
  + videos
* Rachel

ILL/UBorrow tutorials right now, so we're in limbo there. We have done posters and bookmarks, info lit classes, outreach and reference training. We are discussing getting the ad on our TV monitors here, as well.

* Melanie

|  |
| --- |
| * Like Paul, we have displays and posters about UBorrow around the libraries; we've also trained reference staff to promote it one-on-one |

|  |  |
| --- | --- |
| I'm also hoping to do more outreach during library classes this year.... | 2:16 PM |

* LeEtta
  + Revamping tutorials for ILL/UBorrow – for instruction
* Caroline – at UWF
  + Similar to LeEtta

1. UBorrow button – goes to ILLiad if unfilled… LeEtta

Hello,

We’ve discussed a possible ‘get it now’ aspect to the UBorrow catalog before, that is that requests that cannot be filled in UBorrow at the time should route to ILLiad for those libraries that are interested.  This will stop patrons from hitting a brick wall when the only SUL holding in the UBorrow catalog is checked out or an e-book.  Has this happened already?

This is what I’m seeing:  we have all requests for items at our other USF libraries send directly from the UBorrow catalog to ILLiad.  However, while I was pulling stats I noticed 1.) a jump in referrals and 2.) that some of the requests send from the UBorrow catalog to ILLiad were not titles owned by USFs at all.  Is anyone else noticing this activity?

I love the idea, by the way, and am fully supportive.  I just wanted to make sure the catalog wasn’t actually malfunctioning.

Regards,

LeEtta

Misunderstanding / learning experience–

* One of items had a UBorrow button on an EBook – the request went to ILLiad. Something at another library that wouldn’t loan – but had an UBorrow button on it – went to ILLiad.
* We shouldn’t be calling a UBorrow catalog – Its confusing that the UBorrow at the top of the catalog is not right.
* When the requests go to ILLiad automatically, does the patron information follow and is the patron information complete? Yes, the information is correct.
* Wendy has mentioned it to FLVC Gainesville office – we need to discuss it with the entire FLVC group and Members Council – we need to make a distinction between the Union and UBorrow.
* haven't experienced this automatic movement to ILLiad when requesting. If an item isn't available via UBorrow, I'm given the OPTION to place the request via ILL, and the information does transfer over when I say yes and log in to ILL. Is this what you mean?

1. FLVC Overview

* UBorrow service – its just not ILL. It’s the whole service – it checks fines.
* New CRM – help desk – yesterday at 4:00 they turned off the RT system
  + It will generally work the same way – send an email to [help@FLVC.org](mailto:help@FLVC.org)
  + Send all questions to the email account – whether it is cataloging, circulation, UBorrow
  + New Mango just was released: [www.discover.flvc.org](http://www.discover.flvc.org). Please review over the next 2 weeks – test the system.
  + February 18 – shared ILL systems will start between State Colleges and University system. SUS libraries will start to see requests from State Colleges.
  + EBooks – separate library – should hopefully take care of the UBorrow button on EBooks.

1. FLARE – ILL / Reserves

* Wendy gave us a demonstration of how to process / send requests to UFL for an item that is in FLARE for Reserves.
* What happens if the FLARE barcode gets discharged:
  + You’ll have to send a request to [help@flvc.org](mailto:help@flvc.org)
* FLARE is operational. They are last on the lending string. UBorrow requests are going to there currently.

|  |
| --- |
| * Melanie: Yes, we had to start doing this this term - we have a bunch of stuff already stored there. That’s where things go weird when we needed the stuff back for course reserves! |

Yes, you will probably need to create a temporary record for local circulation – if your using Aleph for Reserves -

1. Lost Books / Invoices

* 90% of the workflow is on the Borrowing side as part of the current Circ overdue/lost workflow.
* <https://fclaweb.fcla.edu/content/what-workflow-lost-ub-material>
* Currently UBorrow loans that are billed to lost, are not marked as lost in Aleph ILL. Staff must manually do this. We may need to implement an automated process to accomplish this in the future.
* Borrowing library staff can run the Loan Report job to find Lost UBorrow loans
* Lending Library can run the library lending Overdue handling job to identify shipped UBorrow material that is grossly overdue.
* Lending – reports and message to Requestors
  + Can run a report of overdues – give it a file now and expected return date