Guide to the map for There and Back Again: Getting the Library Storage Building Online

Email Road: Prior to 2015, all ILL and Document Delivery requests for the Library Storage Building (LSB), which is located off-campus, were sent via email at 9am and 10am every Monday morning. The one LSB staff member and 3-4 students would scan requests and save them to a network drive or send loans through campus mail. The ILL office would deliver these scans via Odyssey. There were a few drawbacks to this process. LSB employees are at the location from 8am to 11:30am Monday through Friday, so there was an entire hour where they could have worked on requests that the ILL office was not taking advantage of. Also, the scanning quality of the LSB was excellent, so the need for quality assurance wasn’t required. It seemed a waste of resources, as well as an increase in turnaround time, to prevent these employees from delivering requests straight to patrons and borrowing libraries through ILLiad. With the acquisition of a new WideTek scanner, we began the process of getting the LSB online with ILLiad in July 2015.

Vale of Scanners: We had some initial problems at the LSB getting BSCAN set-up for both lending and document delivery. Previously, we had emailed Lending Article and Loan slips to the LSB and the Print Request document for Document Delivery requests. After trying unsuccessfully to get the slips to print just for Storage without printing the rest of the slips, we decided to switch to using the Print Request document for all LSB requests, which they could print out themselves. After some further trial and error, we discovered that this change required BSCAN to re-program our pull slips (how the scanner reads the request information) in order for the scans to be sent to Odyssey Helper automatically.

Rivers Z39.50 and Article Exchange, Hills of Odyssey Helper: These add-ons and programs had to be installed on the LSB machines.

ILLiad Road: After ILLiad was installed at the LSB, we created queues in the Lending and Document Delivery modules to address the paths that requests can take to the LSB. All requests with the LSB location are initially moved to the Storage Request Processing queue. If the item is a loan or is too large or unwieldy for the LSB staff to scan, the request is moved to the Storage in Transit to Parks queues. Once we created the queues, we developed routing rules to limit the amount of information that LSB or ILL office staff had to remember.
**Routing Rule Range:** The bulk of our adventures involved routing rules. We created routing rules to direct loans and articles with the location of Parks Library Storage, Storage Building, and SGEN to the Storage Request Processing queue.

| Document Delivery Rule: SGEN entered in request Location field | Process Type = Borrowing  
Transaction Status = Awaiting DD Stacks Searching  
MatchString = (t.Location='sgen')  
New Process Type = Doc Del  
New Transaction Status = Storage Request Processing |
|---|---|
| Document Delivery Rule: Parks Library Storage or Storage Building entered in request Location field | Process Type = Borrowing  
Transaction Status = Awaiting DD Stacks Searching  
MatchString = (t.Location LIKE '%stor%')  
New Process Type = Doc Del  
New Transaction Status = Storage Request Processing |
| Lending Rule - Articles: SGEN entered in request Location field | Process Type = Lending  
Transaction Status = Awaiting Stacks Searching  
MatchString = t.RequestType='Article' AND t.Location IN ('SGEN')  
New Process Type = Lending  
New Transaction Status = Storage Request Processing |
| Lending Rule - Articles: Parks Library Storage or Storage Building entered in request Location field | Process Type = Lending  
Transaction Status = Awaiting Stacks Searching  
MatchString = (t.Location LIKE '%stor%')  
New Process Type = Lending  
New Transaction Status = Storage Request Processing |
| Lending Rule – Loans: Parks Library Storage, SGEN, or Storage Building entered in request Location field | Process Type = Lending  
Transaction Status = Awaiting Stacks Searching  
MatchString = t.RequestType='Loan' AND t.Location IN ('SGEN','Storage','Parks Library Storage')  
New Process Type = Lending  
New Transaction Status = Storage Request Processing |

However, as we started using the routing rules, the Lending article and loan requests proved problematic, thus trapping us in the **Bog of Non-Routing Articles.**
Bog of Non-Routing Articles: Certain article requests would not route to the Storage Request Processing queue and we couldn’t figure out why. We also ran into a snag with loans when we realized that, in order to print the stacks slips, we would have to re-route loans to Awaiting Stacks Searching, put an extra space between Storage or SGEN so that the routing rule wouldn’t go into effect. The loan issue was an easy fix. The loans went to In Stacks Searching for printing and THEN routed to Storage Request Processing.

But we still had some that occasionally stayed in the In Stacks Searching queue. Together with the random articles, it was happening just often enough to be annoying and we couldn’t figure out what was wrong. After much trial and error, we realized that there were far more varieties of the location text than we had initially anticipated, so we entered the majority of the variations into the MatchString (for some reason, the wildcard never worked correctly). We also edited the Rapid routing rule to exclude anything with a Storage variation in the Location, so those items would go to the Awaiting Request Processing queue first.

After fixing these issues, the new rules looked like this:

<table>
<thead>
<tr>
<th>Lending Rule – Loans: All variations of the Storage building name in the Location field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Type = Lending</td>
</tr>
<tr>
<td>Transaction Status = In Stacks Searching</td>
</tr>
<tr>
<td>MatchString = t.RequestType='Loan' AND t.Location IN ('SGEN','Storage','Parks Library Storage','Storage Building','Parks Library Storage Building','Parks Library Storage Building Available')</td>
</tr>
<tr>
<td>New Process Type = Lending</td>
</tr>
<tr>
<td>New Transaction Status = Storage Request Processing</td>
</tr>
</tbody>
</table>

<table>
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<th>Lending Rule - Articles: All variations of the Storage building name in the Location field</th>
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<tbody>
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<td>Process Type = Lending</td>
</tr>
<tr>
<td>Transaction Status = Awaiting Stacks Searching</td>
</tr>
<tr>
<td>MatchString = t.RequestType='Article' AND t.Location IN ('SGEN','Storage','Parks Library Storage','Storage Building','Parks Library Storage Building','Parks Library Storage Building Available')</td>
</tr>
<tr>
<td>New Process Type = Lending</td>
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<td>New Transaction Status = Storage Request Processing</td>
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</tbody>
</table>

Once we finished navigating the Routing Rule Range, we had some final tweaks to our Workflow Forest to work out, and then we finished our journey along Unity Road to finally have the Library Storage Building online in ILLiad, fulfilling requests to other libraries and our patrons.