

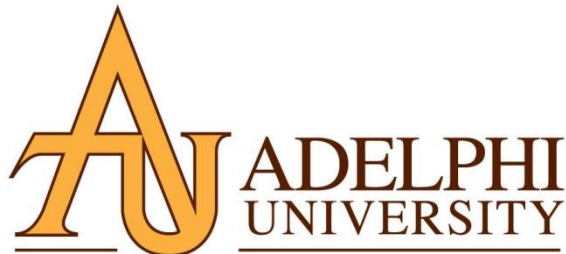


# Train the Trainer

Sreedevi Satyavolu

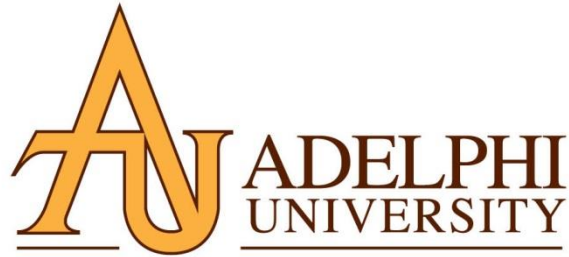
Bill Jones

Tim Bowersox



GENESE0

# Today we will cover:



## Training New ILL Staff

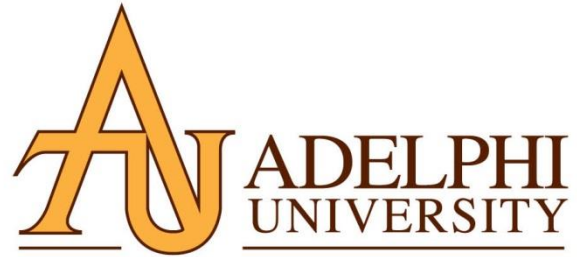


Online Learning  
Institute

## Virtual Classroom Training

# GENESEO

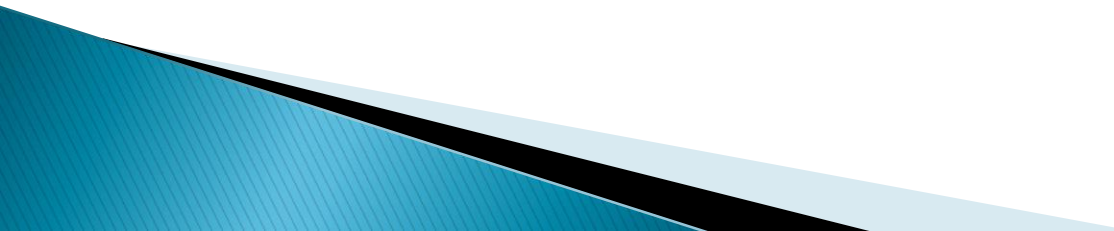
## Supporting Staff to Supervise Students



# ADELPHI UNIVERSITY

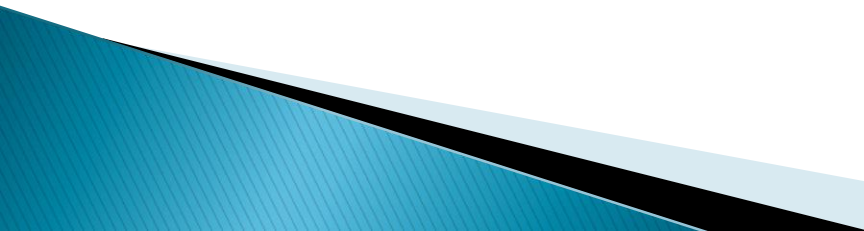
## Training New ILL Staff

# Department– Overview

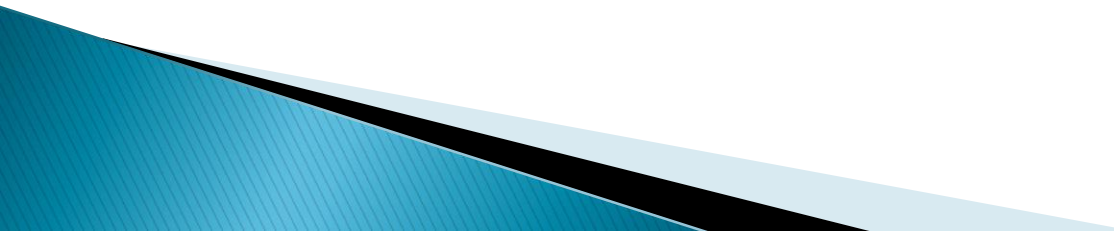
- ▶ Department Operations
  - ▶ Staffing
  - ▶ Annual ILL Activity
- 

# Getting Started

Prior to Training : Tech Stuff

- ▶ ILLiad settings
  - ▶ Staff permissions
  - ▶ Operating systems & Settings
  - ▶ Printer and Scanner
- 

# Training Checklist

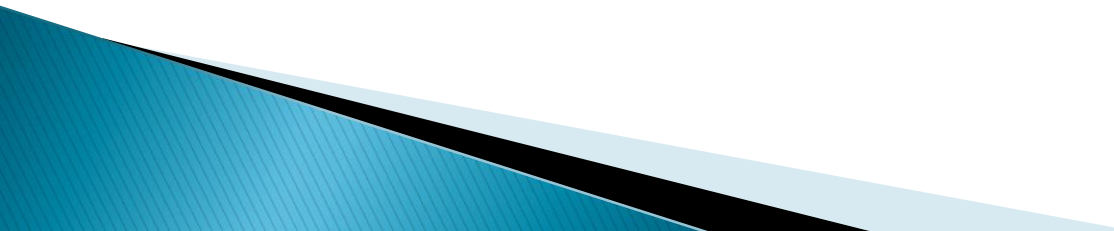
- ▶ ILL Department overview
  - ▶ Department Responsibilities
  - ▶ Interlibrary Loan Policies
  - ▶ Procedures (Lending/ Borrowing/Doc Delivery)
  - ▶ Terminology
  - ▶ Task list
  - ▶ Customer Service
  - ▶ Communication
  - ▶ Do's and Don't s
  - ▶ Troubleshooting
- 

# Daily Tasks

## Daily Tasks

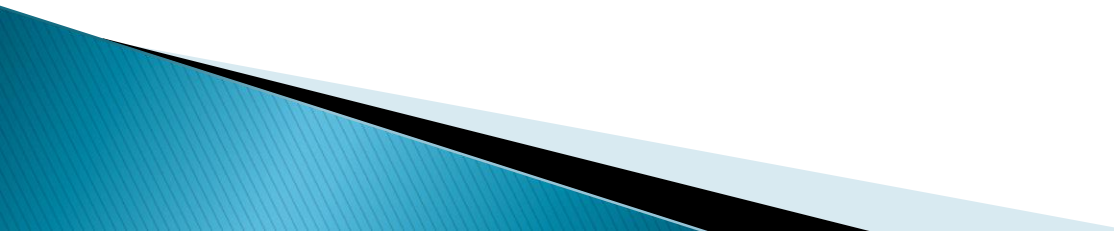
1. Check ILL email box. Address any customer concerns.
2. Log into ILLiad.
3. Switch into the Borrowing Module.
4. Clear New Users
5. Process the Awaiting Copyright Clearance folder.
6. Process Awaiting Odyssey Processing folder.
7. Check-in any articles received via email. Change articles' statuses from Awaiting Post receipt processing to Request Finished.
8. Process Awaiting Request Processing folder.
9. Process Awaiting Unfilled Processing folder.
10. Print new requests.
11. File into active binder.
12. Process any renewal requests. If a renewal request was approved (Awaiting Renewal Request Processing), note the new due date on the appropriate sheet in the active binder.
13. Check in new items received in the mail. Forward any received articles via email to the appropriate patrons and check in as well.
14. Change hard-copy articles' statuses from Awaiting Post Receipt Processing to Awaiting Customer Contact. Change emailed articles' statuses from Awaiting Post Receipt Processing to Request Finished.
15. Print receives (books only) on green paper.
16. Loose paperwork gets clipped to the appropriate sheet in the active binder. The lending institution, received date, and due date is noted on the sheet.
17. Slips are cut apart and highlight the due date and fine notice.
18. Tape slip to the front cover of the book with removable tape.
19. Contact customers and bring items up to Access Services.
20. Collect any books that were returned.
21. Levy overdue fines, if applicable.
22. Print Returns (can be done on a weekly basis as well).
23. Check LAND list. If there is a book going back to a school that participates in LAND, write the hub and today's date on the address label. Cut out the label and put the book in a LAND bag. Slide the label into the clear plastic pocket.
24. For non-LAND books, write out the invoices and mail as usual.

# Training Materials

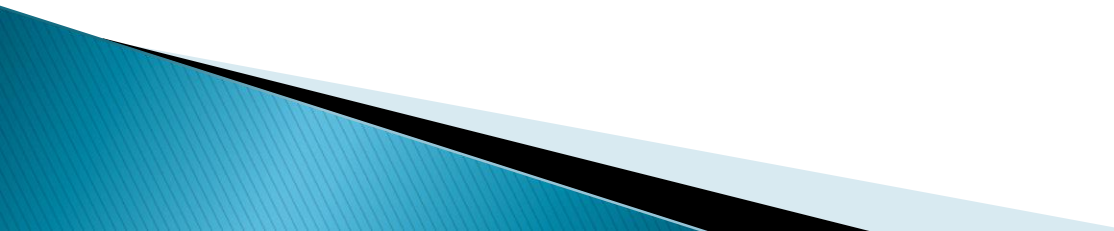
- ▶ Have the training material ready for the new staff.
  - ▶ Break down the Steps with Screen Shots & If possible prepare AV training material.
  - ▶ Think of Loose leaf (easy to make changes)
  - ▶ Cheat Sheets
  - ▶ Keep track of your training
- 



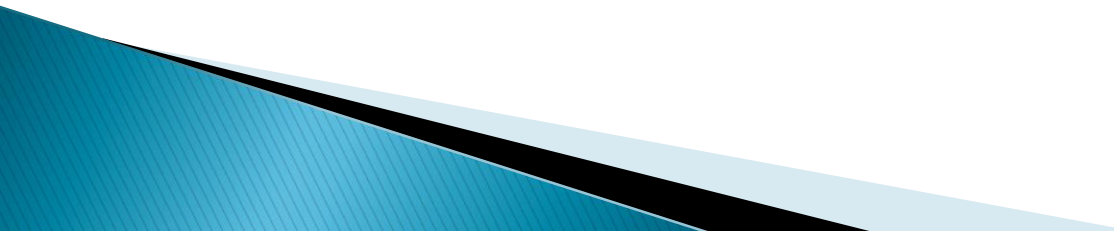
# Cheat Sheets

- ▶ Tips and Shortcuts
  - ▶ ILL –License Notes
  - ▶ Scanner Instructions
  - ▶ Microfilm Digital Reader Instructions
  - ▶ Shipping Instructions
- 

# Show and Tell

- ▶ Introduce the interface
  - ▶ Queues
  - ▶ Workflow chart
  - ▶ Break down into different Modules
  - ▶ Use it as a patron and staff
  - ▶ Job shadowing co-worker
- 

# ILL Competencies

- ▶ Basic research skills
  - ▶ Conduct basic reference interview with a patron
  - ▶ Understand the components of the request
  - ▶ Library Resources (Print and Electronic)
  - ▶ Able to understand and interpret library's
  - ▶ Interlibrary Loan policy to patrons
  - ▶ Customer service (Internal and External)
  - ▶ Technical Skills
- 

# Questions

Sreedevi Satyavolu  
Manager- ILL/Doc Delivery/ Periodicals  
&  
Adjunct Reference Librarian  
Adelphi University  
New York  
Email : [ssatyavolu@adelphi.edu](mailto:ssatyavolu@adelphi.edu)

**Thoughts?  
Suggestions?**





Online Learning  
Institute



## Online Learning Institute

### **Pilot Course:**

#### **Resource Sharing 101**

*The IDS Project Online Learning Institute's Course, Resource Sharing 101, provides students with a basic foundation in resource sharing best practices while building a community of support and connections for future troubleshooting and collaboration.*

### **Future Courses:**

#### **Mentors in Training**

*Future courses will include training opportunities for mentors within the IDS Project as well as our extended community.*

#### **Workflow Evaluation**

*Future courses will include opportunities to dive into various aspects of resource sharing workflows and tools including building Addons, ILLiad customizations, Copyright & ILL, marketing your service, etc.*





Online Learning  
**Institute**

## **Pilot Course Completed!**

- 8 Week Course:
  - January 13<sup>th</sup> – March 7<sup>th</sup>
- Online components:
  - Resources
  - Assignments
  - Discussions
- Weekly Web Conference
  - Opportunity to hear from Guest Speakers recognized as experts and innovators in the field.

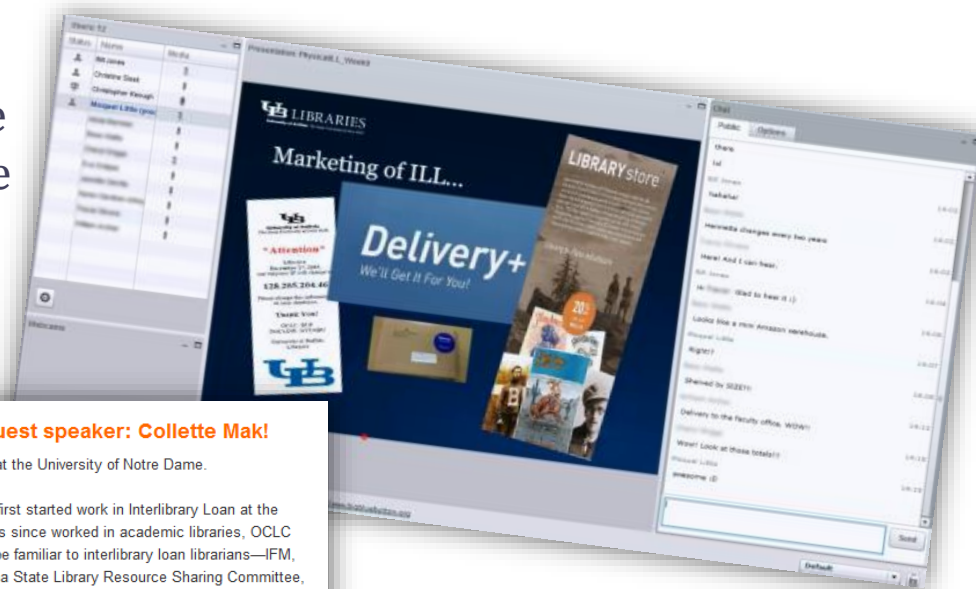




## Online Learning Institute

### Guest Speakers:

**Beth Posner** | CUNY Graduate Center  
**Megan Gaffney** | University of Delaware  
**Collette Mak** | University of Notre Dame  
**Tom Bruno** | Yale University  
**Chris Keough** | University of Buffalo  
**Lars Leon** | University of Kansas



#### Please join us this Thursday for our third guest speaker: Collette Mak!

Collette Mak is the Outreach and Scholarly Communications Librarian at the University of Notre Dame.



Collette has been passionate about resource sharing from the day she first started work in Interlibrary Loan at the University of Michigan. While at Michigan she earned her MLS and has since worked in academic libraries, OCLC and library consortia. While at OCLC she worked on projects that will be familiar to interlibrary loan librarians—IFM, Custom Holdings and, the FirstSearch/ILL Link. She chairs the Indiana State Library Resource Sharing Committee, regularly presents on issues related to resource sharing and the use of data, trains on Excel, and can be seen on Youtube as part of the RUSA STARS Interlibrary Loan topics. Most recently she presented at the North West Interlibrary Loan conferences on market-based baseline data and at ALA on the “Does your Data Deliver” panel and, is the 2012 Virginia Boucher Distinguished Interlibrary Loan Librarian in recognition of her contributions to the field.

Collette volunteered for 12 years as a docent at the Columbus Zoo in Ohio—made famous by Jack Hanna. While I was there I did birth watches on giraffes, counted wolf puppies, spent the night with manatees and once helped clean the bear yard so I can answer with some authority on the age-old question about where bears....

Please post one -two questions for Collette Mak to address.





Online Learning  
**Institute**

# Online Mentor Institute

**The IDS Project Online Mentor Institute will provide new Mentors with:**

- A basic foundation in the IDS Project history and philosophy;
- the tools to successfully mentor;
- access to Atlas videos; and
- practical, experiential, and hands-on learning with Mentors.



canvas



ensemble  
video

- Resource 101
- Home
- Announcements
- Modules
- Grades
- People
- Conferences
- Collaborations
- Assignments
- Discussions
- Files
- Pages
- Syllabus
- Outcomes
- Quizzes
- Settings

🏠 > [Resource 101](#)
[Change Home Page Layout](#) | [See Course Stream](#)

## Resource Sharing 101

Last edited by Bill Jones about 1 month ago [Page history](#)



Welcome to the IDS Project Online Learning Institute's Resource Sharing 101 course.  
 We are excited to work with you!

Please take a few moments to view our Introductory Video and the "Resource Sharing 101 Expectations" document.



Video player interface showing three participants in a virtual meeting. The top participant is Marquell Little, the bottom-left is Christine Skub, and the bottom-right is Bill Jones. A large play button is overlaid on the video. The video progress bar at the bottom shows 00:00 / 02:02.

**Course Setup Checklist**

- New Announcement
- View Course Analytics

**To Do**

- [Grade Friday: Week 4 Quiz](#) ✕  
1 needs grading
- [Grade Friday: Week 5 Quiz](#) ✕  
4 need grading
- [Take Friday: Week 2 Quiz](#) ✕  
due: Jan 24 at 11:55pm
- [Take Friday: Week 3 Quiz](#) ✕  
due: Jan 31 at 11:59pm
- [Take Friday: Week 4 Quiz](#) ✕  
due: Feb 7 at 11:59pm
- [Take Friday: Week 5 Quiz](#) ✕  
due: Feb 17 at 1:59am
- [Take Friday: Week 6 Quiz](#) ✕  
due: Feb 24 at 1:59am

**Common Pages**

- [Front Page](#)
- [Web Conference with Christopher Ke...](#)
- [Thursday - Guest Speaker - Beth Po...](#)
- [Monday: Week 8 Presentation, Read...](#)
- [Web Conference with Tom Bruno](#)

**Recent Changes**

- [Web Conference with Christopher Keough](#)
- [Web Conference with Tom Bruno](#)
- [Monday: Week 6 Presentation, Reading...](#)
- [more...](#)

**All Pages**

[show all...](#)

---

**Recent Feedback**

- [Friday: Week 5 Quiz](#)  
12 out of 10 - "Hi Travis, I wasn't in on last week's..."

Resource 101

 Home > [Resource 101](#) > [Modules](#)
[Home](#)
[Announcements](#)
[Modules](#)
[Grades](#)
[People](#)
[Conferences](#)
[Collaborations](#)
[Assignments](#)
[Discussions](#)
[Files](#)
[Pages](#)
[Syllabus](#)
[Outcomes](#)
[Quizzes](#)
[Settings](#)

## Course Modules

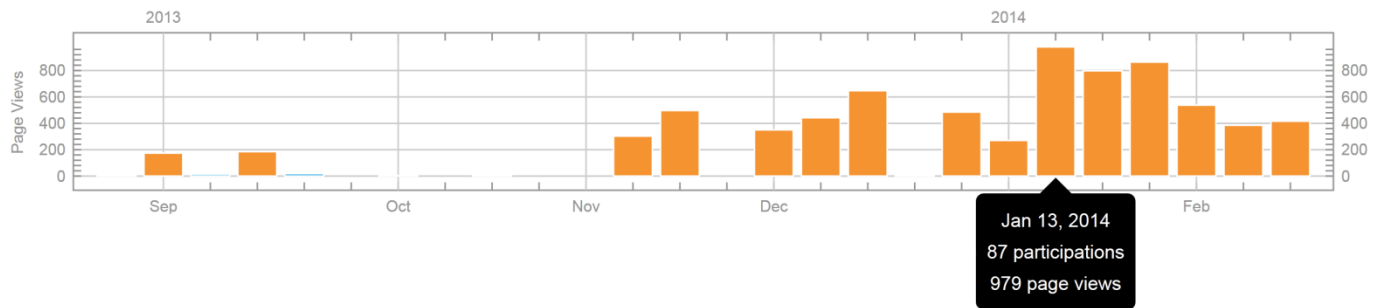
[View Progress](#)
[Create a Module](#)

<ul style="list-style-type: none"> <li>Introduction to Resoure Sharing 101               <ul style="list-style-type: none"> <li>Welcome!</li> <li>Questions for Class Discussion</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Week 1: Intro to Interlibrary Loan               <ul style="list-style-type: none"> <li>Monday: Week 1 Welcome</li> <li>Monday: Week 1 Presentation, Readings and Assignments</li> <li>Tuesday - Wednesday: Introduction Discussion</li> <li>Thursday - Meet your Instructors</li> <li>Friday: Week 1 Quiz</li> </ul> </li> </ul>	Jan 6 at 12am 10 pts
<ul style="list-style-type: none"> <li>Week 2: Intro to Borrowing               <ul style="list-style-type: none"> <li>Monday: Week 2 Welcome</li> <li>Monday: Week 2 Presentation, Readings, and Assignments</li> <li>Tuesday - Wednesday: Borrowing Discussion</li> <li>Thursday - Guest Speaker - Beth Posner</li> <li>Friday: Week 2 Quiz</li> <li>Web Conference with Beth Posner</li> </ul> </li> </ul>	Jan 17 at 12am 10 pts
<ul style="list-style-type: none"> <li>Week 3: Borrowing/Copyright               <ul style="list-style-type: none"> <li>Monday: Week 3 Welcome</li> <li>Monday: Week 3 Presentation, Readings, and Assignments</li> <li>Tuesday - Wednesday: Borrowing/Copyright Policies Discussion</li> <li>Thursday - Guest Speaker - Megan Gaffney</li> <li>Friday: Week 3 Quiz</li> <li>Web Conference with Megan Gaffney</li> </ul> </li> </ul>	Jan 24 at 12am 10 pts
<ul style="list-style-type: none"> <li>Week 4: Copyright               <ul style="list-style-type: none"> <li>Monday: Week 4 Welcome</li> <li>Monday: Week 4 Presentation, Readings, and Assignments</li> <li>Tuesday - Wednesday: Copyright for Borrowing and Lending Discussion</li> <li>Thursday - Guest Speaker - Collette Mak</li> <li>Friday: Week 4 Quiz</li> <li>Web Conference with Collette Mak</li> </ul> </li> </ul>	Jan 31 at 12am 10 pts

Student	Page Views	Participations	Assignments	Current Score
[User Icon]				97.5%
[User Icon]				102%
[User Icon]				90%
[User Icon]				78.8%
[User Icon]				--
[User Icon]				--
[User Icon]				100%
[User Icon]				88%
[User Icon]				98%
[User Icon]	1,993 page views			110%
[User Icon]				--
[User Icon]				84%

## Activity

Each bar represents the number of *page views* on that day. An orange bar indicates that some user *took an action* within the course on that day.



**Thoughts? Suggestions?**

# GENESE0

SUNY Geneseo's experience

**SUPPORTING STAFF TO SUPERVISE  
STUDENTS**



# Why is this important?

- People are not as easy to manage as software
- Supervisory skills build over time
  - Soft skills are key: communication, attitude, problem solving (to name a few)
  - Experience is the best teacher
- “Training” in this sense is ongoing
  - Create a supportive environment
  - Clearly define roles & responsibilities
  - Communicate clearly & often
  - Learn from good & bad experiences

# Milne Library's IDS Office

- 2 fulltime staff
  - AM Supervisor: Donna Ayers
  - PM Supervisor: Bill Baker
- Open 72 hours/week over 6 days
- Total request volume: 30,482 in 2013-14
  - Borrowing
  - Lending
  - Document Delivery (loans & articles)

# Milne Library's IDS Office

- Limited to hiring only work study students
  - FWSP awards limit them to roughly 6 hours/week
  - Requires hiring a lot of students to fill our staffing needs
  - More student turnover from year to year
  - Not enough time to become experts in doing everything
- Implications for supervisors
  - Scheduling: supervise more students over shorter shifts
  - Training: teach what needs done at the moment
  - Time management: balancing supervision with other duties

# Preparing staff to supervise

- Start with student hiring
  - Get staff involved from the very beginning
    - Establishes accountability over student employees
  - Review, select, and interview applicants
    - Let them review the applicants
    - Work with staff to structure the interview process
  - Discuss and select new hires
    - Talk about student strengths and weaknesses

# Preparing staff to supervise

- Develop a schedule together
  - Balance new students with experienced students
    - Eases the training workload
    - Experienced students can mentor new students
  - Schedule students to meet needs
    - Schedule more students during key points of the day
    - Allows supervisors to be more prepared
  - Share the schedule & communicate updates
    - Don't let supervisors get caught by surprise
    - Online scheduling software is very helpful...
    - But make sure you train staff how to use it effectively!

# Example: WhenToWork

HOME SCHEDULES EMPLOYEES TRADES TIME-OFF MESSAGING REPORTS ON NOW SETTINGS HELP SIGN OUT

Jul 21, 2014 10:45am

## SUNY Geneseo Published Schedule

Calendar View All Categories Milne - IDS Office

Add Shifts Search Save Template Print UnPublish Export

◀ Week of Feb 3, 2014 ▶

Change Layout

Monday Feb-3	Tuesday Feb-4	Wednesday Feb-5	Thursday Feb-6	Friday Feb-7	Saturday Feb-8	Sunday Feb-9
<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>	<b>Milne - IDS Office</b>
9am - 11am Mary Cicero	9am - 11am Michael Adams	9am - 11am Mary Cicero	9am - 11am Michael Adams	9am - 11am Emily Ramirez		5pm - 7pm (Unassigned)
9:30am - 11:30am Emily Ramirez	9:30am - 11:30am (Unassigned)	9:30am - 11:30am (Unassigned)	9:30am - 11:30am (Unassigned)	9:30am - 11:30am (Unassigned)		7pm - 9pm Franklin Hernandez
11am - 1pm Lesley Dalton	11am - 1pm Siobhan Pfaff	11am - 1pm (Unassigned)	11am - 1pm Siobhan Pfaff	11am - 1pm Saarah Shakeel		
11:30am - 1:30pm Saarah Shakeel	11:30am - 1:30pm (Unassigned)	11:30am - 1:30pm Lesley Dalton Out sick -- TSB	11:30am - 1:30pm (Unassigned)	11:30am - 1:30pm (Unassigned)		
1pm - 3pm Michael Adams	1pm - 3pm Danielle Ward (deleted)	1pm - 3pm Saarah Shakeel	1pm - 3pm Danielle Ward (deleted)	1pm - 3pm Danielle Ward (deleted)		
1:30pm - 3:30pm Abigail Stein (deleted)	1:30pm - 3:30pm (Unassigned)	1:30pm - 3:30pm Abigail Stein (deleted)	1:30pm - 3:30pm (Unassigned)	1:30pm - 3:30pm Mary-Margaret Gallup		
5pm - 7pm Siobhan Pfaff	5pm - 7pm William Ju	5pm - 7pm Mary-Margaret Gallup	5pm - 7pm William Ju	5pm - 7pm William Ju		
5:30pm - 7:30pm (Unassigned)	5:30pm - 7:30pm (Unassigned)	5:30pm - 7:30pm Mary-Margaret Gallup	5:30pm - 7:30pm Abigail Stein (deleted)	5:30pm - 7:30pm Abigail Stein (deleted)		
7pm - 9pm Mary-Margaret Gallup	7pm - 9pm Emily Ramirez	5:30pm - 7:30pm William Ju	7pm - 9pm Franklin Hernandez	7pm - 9pm Franklin Hernandez		
7:30pm - 9:30pm (Unassigned)	7:30pm - 9:30pm (Unassigned)	7pm - 9pm (Unassigned)	7:30pm - 9:30pm (Unassigned)	7:30pm - 9:30pm (Unassigned)		
		7:30pm - 9:30pm Franklin Hernandez				

Schedule Notes:  [Schedule History](#)

Note to Employees: Note to Managers:

# Preparing staff to supervise

- Review & develop training materials
  - Student training checklists are vital
    - Outline orientation & training
    - Keeps track of progress with each student
    - Can be shared: helpful when students work with different supervisors
  - Develop them together
    - Your staff will know what they need their students to learn
    - Cheat sheets, tutorials, & videos can support training
  - Review with staff before each semester
    - Has anything changed that students need to know?
    - This can also serve as a refresher for staff

# Example: Checklists

Training Checklist - IDS Office

Name: \_\_\_\_\_

## Day 1: Orientation

<input checked="" type="checkbox"/>	Task	Date Completed	Trained By
	Know attendance expectations & timesheets		
	Using WhenToWork		
	Using <u>LibIDSoffice-L</u>		
	Tour Milne Library		
	Tour Fraser Storage & Reading Room		
	Understand LC call numbers: use tutorial at <a href="http://www.library.kent.edu/page/13760">http://www.library.kent.edu/page/13760</a>		
	Log into IDS Office computers		

## Process: Retrieving materials from the shelf

<input checked="" type="checkbox"/>	Task	Date Completed	Trained By
	Update lending stack search results		
	Check items out to IDS Aleph account		
	Sorting outgoing lending loans		
	Update del. del. stack search results		



# Example: Cheat Sheets

## ALEPH Circulation: Lending

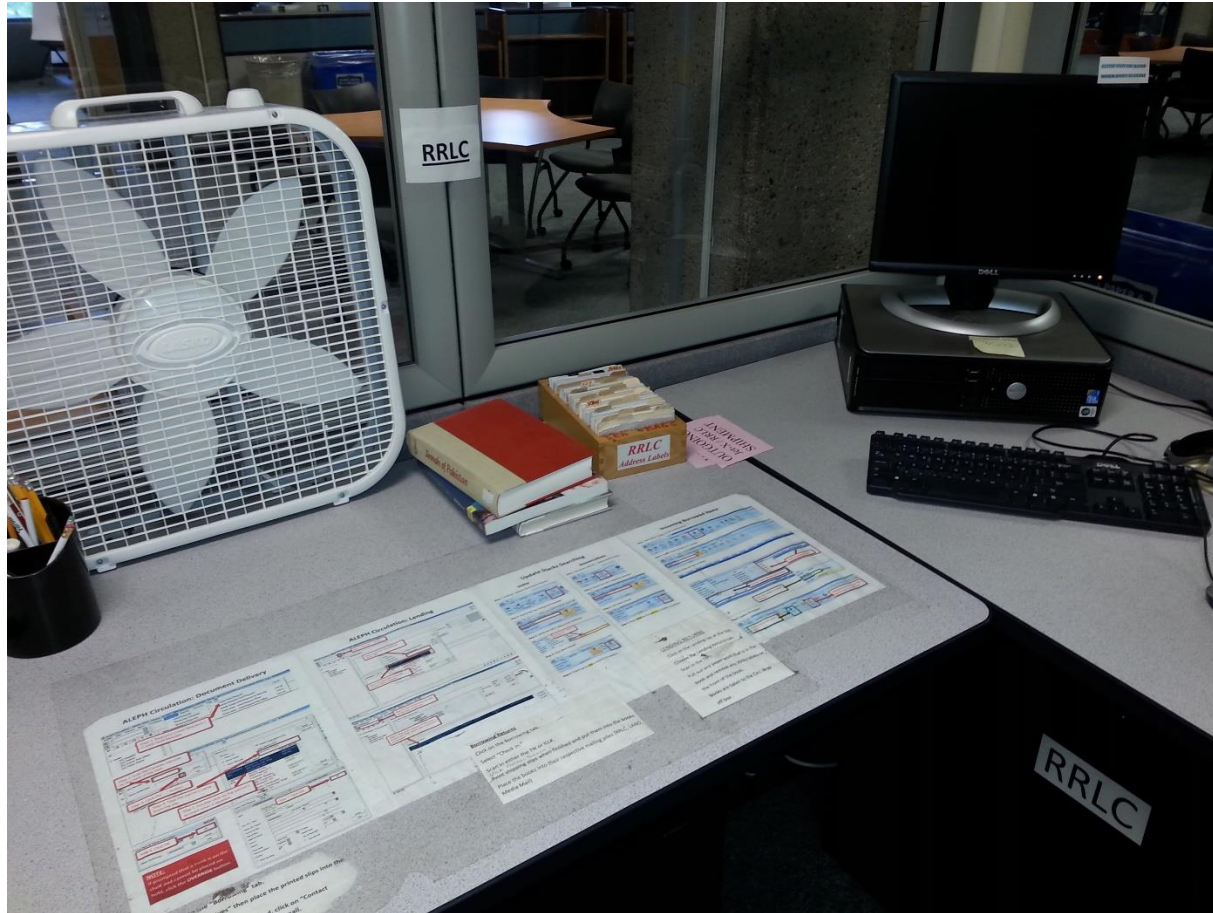
The screenshot shows the ALEPH Circulation software interface. The title bar reads "ALEPH Circulation - Version 20.01 Library: GEN50 - GEN (prod)Admin (GEN50) Server: gen.sunyconnect.suny.edu:6420 (20.01) User: BOWERSOX". The interface includes a menu bar, a toolbar, and a main workspace. Three red callout boxes with arrows point to specific elements:

- Step 1:** Click the "..." button in the top toolbar.
- Step 2:** Type "ids" in the "Enter Starting Point" field of the "Patron List" dialog box.
- Step 3:** Double-click on the "IDS" account in the "Patron List" dialog box.

The "Patron List" dialog box displays a table of patron information:

Patron ID	Patron Name	Patron Barcode
GEN000006	IDS	0026000005
807		1649
GEN000010	Iarvese, Dharina	5081281911
776	9 Hidden Pheasant Path Wading River, NY	323795
GEN000029	Igarashi, Taketo	5081281911
	658	427000
	MacVittie Circle	
	leo, NY	
	li, Christian	5081281911
705	Box 2493	496708
	10 MacVittie Circle	

# Example: Cheat Sheets



# Example: Cheat Sheets



# Establish roles & responsibilities

- Staff will be better supervisor if you clearly establish roles & responsibilities
  - Who manages scheduling? How will changes be shared?
  - Who is responsible for time & attendance records?
  - How will students be evaluated?
  - Who can fire underperforming students?
- Consider creating a student handbook
  - Students know the rules of the road up front
  - Makes it easier for supervisors to enforce expectations
  - Also serves as training resource for new supervisors

# Other considerations

- Consider office layout
  - How far are your supervisors from your students?
  - At Geneseo, staff can directly observe the student work area
    - Easier for students to ask for help
    - Easier for staff to supervise with less interruption
    - Can really help minimize mistakes
- Facilitate easy communication
  - Email lists
  - Bulletin boards & whiteboards

# Example: Geneseo's IDS Office



# Professional development

- Encourage staff to build their supervisory skills
  - Local workshops (check with your HR Office)
  - Union workshops
  - Regional, State, or National workshops & conferences
- Discuss supervision regularly
  - Meet regularly with staff to discuss what's going on
  - Solve supervision problems together
  - Learn from good and bad experiences

# Discussion prompts

- What is one obstacle facing student supervision at your library? How might you overcome it?
- Share one tool you use to train or support your staff.



# Group Discussion

# Thank you!

Sreedevi Satyavolu (ssatyavolu@adelphi.edu)

Bill Jones (thebilljones@idsproject.org)

Tim Bowersox (bowersox@geneseo.edu)