



Promoting Library Excellence Through Efficiency



ares
automating reserves

ARES® RESERVES MANAGEMENT SOFTWARE CASE STUDY

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University of Chicago E-Reserves Challenge

The University of Chicago Library was using a reserves system that was included as part of their integrated library system (ILS), which was developed in the mid-1990s. The reserves system was geared toward processing print but not electronic resources. Over the years, staff had developed various workflows to overcome limitations of the system.

The University of Chicago Library supports 500 classes per quarter with 750 instructors, creating a substantial volume of reserves processing. According to David Larsen, Head of Access Services and Assessment, electronic resources account for about half of all the items placed on reserve. As the library looked for a new ILS, they knew they also needed a better solution to manage reserves. A primary requirement was that the system be efficient in handling reserves for electronic as well as print resources.

Ares Provides Blackboard Integration Plus Electronic Resources Capability

The library was drawn to Ares because of its facility in managing e-resources and its integration with the Blackboard course management system, which would give students convenient access to course reserves through an interface and login they were already using. Staff considered an open source solution but decided against it. They would need to invest a


Ares Saves Cost of One FTE

According to David, just six months after the Ares launch about half the reserve requests are being created by faculty within Ares rather than being submitted via email or paper reserve request forms. This saves staff time since faculty now do some of the work that library staff had to do previously, such as linking to external resources and uploading files. Since faculty can track the progress of their reserves, they don't need to have library staff spend time checking statuses for them.

In fact, the increased efficiencies of Ares with the Blackboard integration have allowed the library to reduce the number of full time course reserve processors at the largest campus library from six people to five, following the departure of a staff member. "In these tight budget times it was incredibly helpful to save the cost of an FTE and have that money to avoid cuts in other areas," said David. "We were able to absorb the work without creating a burden on other staff because of what Ares brings to us."

significant amount of time and programming expense to adapt an open source system to their environment, especially since the open source solutions didn't already come with Blackboard integration. "Open source isn't free," David said. "We preferred to work with a company we trusted to do the development rather than having to do that work ourselves."

Library staff had developed a good relationship with Atlas while working together on ILLiad



enhancements. They were confident Atlas would deliver what they promised with the Blackboard integration and reserves processing.

One critical aspect of development was the ability to clone records from previous classes into existing classes. Processing staff did not wish to redo work done for prior courses and faculty wanted easy ways to pull records for past course readings into current courses.

“Before we had Ares, faculty couldn’t see what they had on reserve in prior years or track their items through processing,” said David. “With Ares, faculty can access their course reserves through Blackboard so there’s just one login required. They can see all of their course reserves from the last five years. We decided to do this retrospective loading when we went live with Ares so faculty didn’t have to start all over again and neither did the library.” David said the retrospective loading was well worth the effort because it made it easy for faculty to adapt to Ares.

Benefits for Faculty, Students and Staff

According to David, the Ares implementation had an interesting side benefit—long-time reserve staff members found they enjoyed rethinking processes and workflows as they worked to implement Ares to promote greater efficiency. David and Jackie Larson, Head of Reserve Processing, agreed that it didn’t take long for even those who had twenty years of entrenched workflow to see the benefits of the new system. Staff also found that they were less reliant on paper to track

and process reserve materials. While they used to require an entire filing cabinet to keep track of requests each quarter, now everything is being tracked online.

- **Blackboard integration.** For an organization using Blackboard, one login and interface simplifies access to course reserve information for both faculty and students.
 - Library staff don’t have to do any setup for a class because information flows seamlessly from Blackboard into Ares.
 - Blackboard manages the lists of faculty and students associated with classes while still allowing staff to use Ares to track use of course materials.
 - There’s no need to restrict course materials to students who are registered for the class because Blackboard already does this.
 - Faculty and students can subscribe to classes so they can receive an email whenever something becomes available on reserve.
 - Ease of use encourages faculty to go in and check the accuracy and status of their reserves regularly.
- **Flexible routing rules.** Ares allows staff to create rules that automatically route records in ways that make sense for them. For example, records that are missing desired data can be automatically routed to a queue for staff attention. The amount of work is reduced with automatic processes.

- **Use of the barcode field.** Library staff consistently add barcodes to Ares print reserve records, which they use to establish links to the ILS.
 - Library staff created processes that automatically refresh item location and circulation status information in Ares every night. This allows staff to quickly see an item's location and status within Ares, without having to search for items in the ILS. It also allows them to establish routing rules that automatically move records to the processing queues that make the most sense for an item's current status (e.g., to a queue for items needing to be recalled or a queue for items to pull from book stacks). These routing rules are applied whenever a faculty member clones a reserve request from a prior course, so much of the initial processing for these reserve readings is handled without staff mediation.
 - Library systems staff wrote processes that automatically update the ILS when an item is added or removed from reserve in Ares. This allows items to display with the correct locations in the library catalog and to circulate for the correct loan periods.
- **Field for "needed by."** Ares allows library staff to easily see what week an item is needed so they can prioritize their work and track priority items.
- **Total file management.** When a course comes off of reserve the files come off automatically. Before Ares, moving files around took a lot of staff time.

- **Copyright tracking and payment.** Ares makes it easier to track when copyright permission is needed and obtain it if necessary.

- **Hosted application.** David said that having Atlas host their Ares implementation ensures timely upgrades and support if there are any problems. It also eliminates the need to compete with other library priorities to find the resources to manage the service. "Atlas worked closely with us during the implementation and continues to be responsive if we have problems. Library systems people have so much competing for their attention so being a hosted site works really well for us."

About the University of Chicago Library

The University of Chicago is located in the community of Hyde Park on Chicago's South Side, just 15 minutes from the city center. The University serves close to 5,000 undergraduate students and more than 9,800 graduate, professional, and other students. More than 2,100 faculty and other academic personnel are employed by the University. Eighty-one Nobel Prize winners have been affiliated with the University, seven of whom are current faculty.

The University of Chicago Library houses over 7.7 million print volumes in six campus library sites. The Library is currently constructing a new library on campus, scheduled to open in 2011, that will house an additional 3.5 million volumes.



About Atlas and Ares

Atlas Systems is a software development company founded in July 1995 with the mission of developing library automation to “promote library excellence through efficiency.” Atlas is best known for the ILLiad Interlibrary Loan Management Software, in use in over 900 libraries and now distributed exclusively by OCLC.

The Ares system automates library reserve services, provides around-the-clock access to reserves collections, includes integrated copyright management services, and saves time for faculty members and library staff.

For more information, visit our website www.atlas-sys.com, email us at ares@atlas-sys.com, or call Rich Stryker at 757-467-7872 ext. 210.



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This case study was developed based on an interview conducted with David Larsen and Jackie Larson by Judith A. Michaelson, MLS, principal of JAM Marketing, LLC. JAM Marketing is a marketing consulting firm focused on helping organizations design and implement short-term marketing strategies that yield long-term results.