

Best Practices for Recording Barcodes-Advice from our Members

Rosenberg Library (Kaitlyn Keever)

I use Navigator (NRE) to process the library's ILLs. There is a public note and private note section in each item's request record, and I record the bag barcode in the public note section. This way it is visible to both myself and the lending or borrowing library should the need arise.

I know other ILL interfaces like Worldshare ILL lack a note section, but for libraries using NRE, this is the easiest and most accurate way to keep up with barcodes.

Nicholson Memorial Library – Sue Ellen Jackson

We print out the paperwork for our interlibrary loan materials. When it comes time to ship these items back to their home, we record the bag barcode on the bottom of the paperwork. We check each item to see when it is checked in by its home library. Once it has made it back home, we shred the paperwork. We do the same thing with our materials that we send out. Once it makes it back to us, we shred that paperwork, even though the borrowing library has used a different bag to send it back to us.

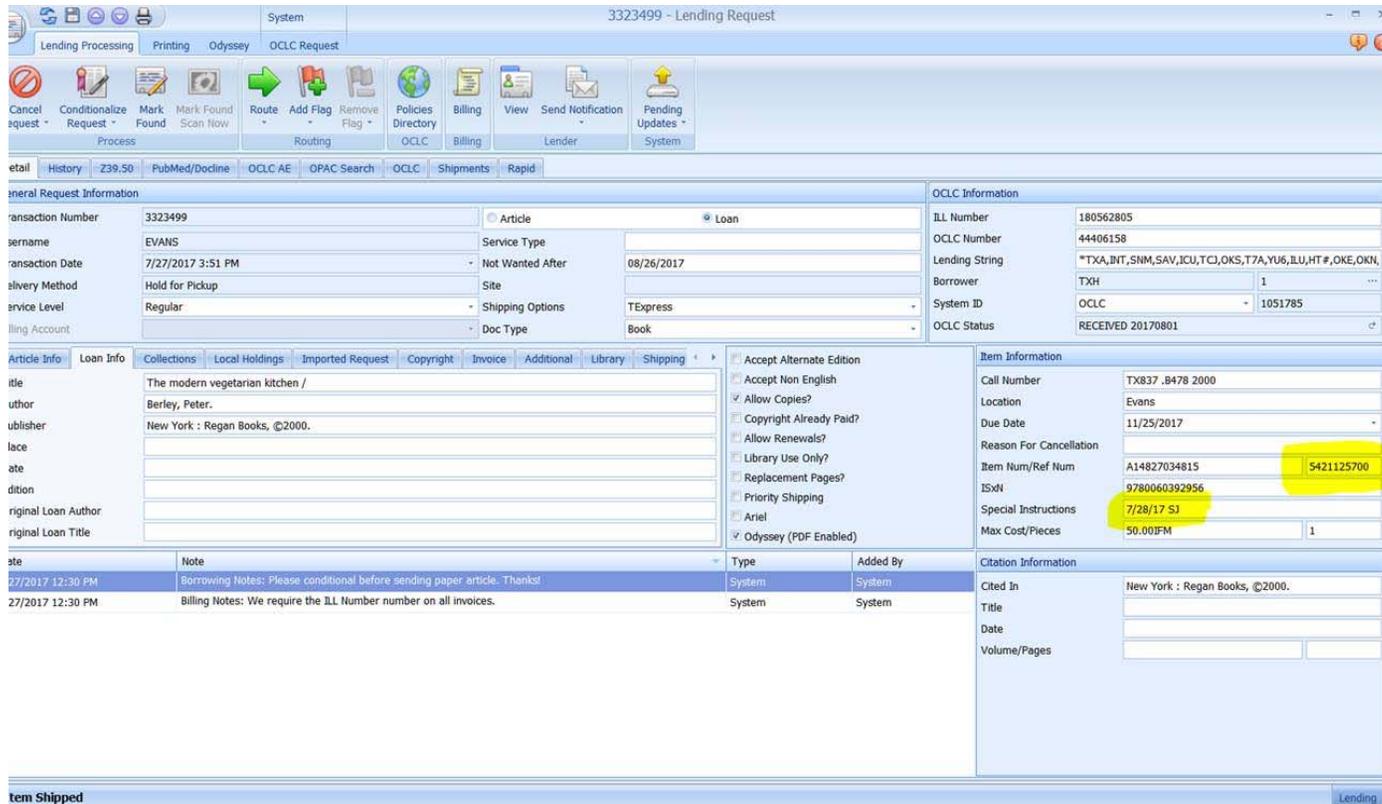
TCU – Jill Kendle

ICU records the barcodes in the Notes section of ILLiad for each item sent. We did not come up with this—I believe IXA did & you passed it on previously. It has been a great way to make sure a barcode is associated with each loan we send out via courier.

Texas A&M University – Sara Jordan

We used to keep an excel file of each bag we sent: to where, the number of the bag, and the transaction numbers in each bag. Then, we would save each excel file into a month folder of that year. The file's name was the date the bags were packed to be shipped. If there was a question about a shipment, we would have to search through the files to find the bag number or the transaction number.

Now, we save the bag number for each transaction on our interlibrary loan software, ILLiad. There is a reference number field in the transaction that we scan the bag number to and then we put the date it was shipped with initials of the one the packing bags in a special instructions field. This way, if another library calls about a missing book/request, we can pull it up by the transaction number. Then, we have the bag number and date shipped on hand to inform the inquirer. Of course, there's always a chance for human error, but this new method has consolidated and streamlined our process for getting the information needed.



Texas A&M University-San Antonio – Sarah Timm

In response to the recent call for best practices on recording courier barcodes, we simply scan the barcode as a note in the item record in ILLiad. See below for an example. We do this for both borrowing and lending requests.

The screenshot displays the ILLiad 'Lending Request' window for transaction 14180. The interface is divided into several sections:

- General Request Information:** Transaction Number: 14180, Username: Lending, Transaction Date: 8/7/2017 1:23 PM, Service Level: Regular, Delivery Method: Mail, Not Wanted After: 09/06/2017.
- OCLC Information:** ILL Number: 180933433, OCLC Number: 606759613, Lending String: **TAMSA,FX8,DB\$,MCT,YU6,AKC,QS2,CGPIL,FSM,TC),TX7,MC2,1, Borrower: TXU 1, System ID: OCLC 147427, OCLC Status: SHIPPED 20170807.
- Article Info:** Title: The Life guide to digital photography : everything you need to shoot like the pros / Author: McNally, Joe, 1952- / Publisher: New York, N.Y. : Life Books, ©2010.
- Item Information:** Call Number, Location, Due Date: 9/6/2017, Item Num/Ref Num, ISBN: 9781603201278, Max Cost/Pieces: 0.00 / 1.
- Notes:** A note is added on 8/7/2017 12:49 PM: "Billing Notes: LVIS, Texshare, Reciprocal, @/AM-BCR, Aminet, AMIGOS".
- Shipping Information:** A note on 8/7/2017 1:23 PM (added by staff/stmm) states: "5421009034".

At the bottom of the window, the 'Item Shipped' status is visible, and the Windows taskbar shows the time as 10:44 AM on 8/8/2017.

Krum Public Library – Donna Pierce

This is what we have been doing. We just scan the bag and then whatever we put into the bag. It is easy to set up and to use.

Example of Transit List (template included)

- *Note scanners used - an OLD CCD Barcode reader and possibly even older Follet scanner, plus two new Honeywell scanners.*

Date to be shipped	Sent to Library	Bag number	Items in bag				
06/03/14	Aubrey	5421016359	33805000704477				
06/03/14	Saginaw	5421002523	30564005217646	36249000183930	30564005206387		
06/03/14	Lake Cities	5421045933	30137000404437	30137002903387	30137006012984	30137000650242	30137000111964
06/03/14	Decatur	5421036966	36249000180896				
06/03/14	Sanger	5421035642	30382001104856				
06/03/14	Alvarado	5421064571	30481020004745				
06/03/14	Ponder	5421020787	30579000004070				
06/03/14	Bridgeport	5421034237	30385000020376	30385000020373	30385000020377		
06/03/14	Westworth	5421019550	30114000138740				
06/03/14	Roanoke	5421050447	30251000041765				
06/06/14	DAL 354 (ILL)	5421063581	36249000180365				
06/06/14	DAL 350 (ILL)	5421045684	36249000182565				
06/06/14	Ponder	5421058449	30579000001001				
06/06/14	Sanger	5421002897	36249000182452				
06/06/14	Decatur	5421018669	36249000183057				
06/06/14	Roanoke	5421036184	36249000177301				
06/06/14	Lake Cities	5421026665	30137006000368	30137000507979	30137000650051		

University of Arkansas for Medical Sciences - Cindy Caton

We enter the courier barcode in the ILLiad record of the book we are returning.

Waco-McLennan County Library – Kayla Jackson

We keep track of bag barcodes within the item records. We add the bag number to the “Public Note” section in the record to items that we are sending out and sending back. We were keeping them in a notebook, but we send out around 600 items a month, and it was not feasible for us. At my previous library, we printed out and kept the Navigator page and wrote the bag number on the top of the page.

Gatesville Public Library – Faye Nichols

At our library, we use an Excel spreadsheet. We scan in the TAE barcode in one column, the request # in another column, and the date we ship it in another. Very easy to look up by date or request # if we need to check something. We keep the spreadsheet on the desktop of our computer we use for ILL and back it up to our Onedrive.

Haslet Public Library – Vanessa Crabtree

I created two google forms (one incoming/Check In, one outgoing/check out) to collect barcodes of bags and bar codes of items - we just scan barcodes into the web form.

We also wanted to collect the information on how many ITEMS were being shipped, not just bags, so we also ask "How many items in bag" to run a report(pivot table) that will total those for us.

The image shows a screenshot of a Google Form titled "Courier Check In" displayed in a web browser. The browser's address bar shows the URL: https://docs.google.com/forms/d/e/1FAIpQL5eVBX00pH45ndFrRi6WTzbdvbr37n3TP-0_52WA1z9WLyw/viewform?c=0&w=1. The browser's bookmark bar includes items like "Haslet Library Catalog", "SRC", "Haslet Library Links", "Priorities!", "Work Email", "Library", "Better World Books", "Goodreads", "ILL", "Tech Teaching", "Marketing and FB", "Prof Dev", "Weather", and "Bookmarks".

The form itself has a white background with a red header bar. The title "Courier Check In" is centered at the top. Below the title, there are three required questions, each marked with a red asterisk:

- COURIER "Blue Bag" Barcode ***: A text input field with the placeholder "Your answer".
- NEW: ALL ITEM Barcodes in Bag ***: A text input field with the placeholder "Your answer".
- How many items in Bag? ***: A radio button selection grid with numbers 1 through 10. The radio buttons are currently unselected.

Below the radio buttons is a text input field for **Any Notes (if damage, Lender & Borrow # if NRE ILL, etc)** with the placeholder "Your answer". At the bottom of the form is a blue "SUBMIT" button. A small disclaimer at the bottom of the form reads: "Never submit passwords through Google Forms." The Google Forms logo is visible at the very bottom of the page.

Haslet Public Library –Continued

The image shows a browser window displaying a Google Form titled "Courier Check Out". The form is set against a green background. The form fields are as follows:

- * Required**
- All Item Barcodes in Bag: ***
Your answer
- How many items in Bag? ***
A row of 10 radio buttons labeled 1 through 10.
- COURIER "Blue Bag" Barcode ***
Your answer
- TAE Number Delivered To: ***
Your answer
- Notes**
Your answer
- SUBMIT** button
- Footer: Never submit passwords through Google Forms.

I paste a code into the last column on my spreadsheets to calculate which month the information is related to. I can search (Ctrl + F) for a particular barcode (book OR blue bag) to find information on the date it was delivered or sent out from the library. I use the "Notes" field for anything extra: usually it's ILL NRE numbers (again, I just scan them in to the google form.)

Haslet Public Library –Continued

1	Timestamp	All Item Barcodes in Bag	COURIER "Blue Bag" Barcode	TAE Number Delivered To	Notes	How many items in Bag?	Month
2	7/6/2017 9:55:59	36052200014289 36052200002664 36052200002540	5421116802	8802		3	=month(A2)
3	7/6/2017 9:59:12	35932003070508 36052000009009 35932003140160 35932003454348 35932003319160 35932004081421	5421026511	114		6	7
4	7/6/2017 9:59:50	30579000004642	5421050625	8809		1	7
5	7/6/2017 10:01:10	30385000067397	5421027625	8803		1	7
6	7/6/2017 10:03:16	36052400003363 30251000022131 36052000000400 36052000006243 36052000005912 30251000044216	5421011722	8810		6	7
7	7/6/2017 10:05:55	30564005506657 36052000005596 30564005221822 30564005577423	5421010389	8811		4	7
8	7/6/2017 10:06:31	36052200021144 36052200020823	5421128384	8812		2	7
9	7/6/2017 10:07:18	30114000190160 3011400005602	5421000497	10		2	7
10	7/6/2017 10:10:42	36052200021292 36052200015708 30007000469857 36052900000901	5421125783	8805		4	7
11	7/6/2017 10:12:15	36249000182634 36249000184218	5421005777	8807		2	7
12		36052000014817 30137000404741					

Then the stats auto populate in two pivot tables in my google sheet:

Haslet Public Library –Continued

The screenshot shows a Google Sheets spreadsheet with the following data:

	A	B	C	D	E	F	G
1	Outgoing Packages/Items				Incoming Packages/Items		
2							
3	7	60	141		7	66	172
4	8	12	30		8	7	22
5	Grand Total		72		Grand Total		73
6							
7							
8							
9							
10							
11							
12							
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32							
33							
34							
35							

The 'Report Editor' sidebar on the right shows the following configuration for the selected range 'Outgoing Packages' (A1:G73):

- Rows: Add field
- Group by: Month
- Order: Ascending
- Sort by: Month
- Show totals:
- Columns: Add field
- Values: Add field as: Columns
- Display: COURIER "Blue Ba...
- Summarize by: COUNT
- Display: How many items in ...
- Summarize by: SUM
- Filter: Add field

Northeast Texas Community College – Heather Shaw

I have been doing this for some time now (2+ years) when I do ILL's, and please see below for what I do, and attached for screenshots. We also have OCLC's Worldshare Management System for about 3-4+ years (at least the ILL portion, and some of the Discovery service, while our ILS is SirsiDynix Symphony), after our First Search ILL system had been sunset.

- I put our book barcode # in the Local ID space, as well as the book's call number (anything can be entered there, and stays in the ILL record, and shows up on any paperwork too). (See highlighted portion of the image Screen Capture for Best Practices Email)
- In the Lending notes area I put this (see below or attached called Lending Notes for Screen Capture for Best Practices Email):

▼ Lending Information

Use ILL Fee Management (IFM)

Lending Charges USD ▼

Insurance Amount USD

Lending Notes

Lending Restrictions

Return Via

Return To

Address

City

State/Province ▼

Country ▼

Postal Code

Northeast Texas Community College –Continued

- *I hit the “_” enough to make it look like everything below it is a separate thing from the above once the paperwork is printed out. I then grab a bag and scan the barcode, so that way when I hit the “yes” button that I will send out the item, it will be on the paperwork and in my ILL system (and, in theory, at least, both libraries should be able to see those numbers, if a report needs to be made for a lost/missing item).*
 - *What is said in the lending notes for library mail is similar (See below for example), but I have tracking numbers for them, and request they use the tracking number that I provide for them (which is free to use) that I stick inside the front cover of the book, along with a return label and a copy of the paperwork, so that way I have a way to let the post office know what to search for, and the other library knows what number to report if the item gets lost in the mail, which has happened to me more than once, but was prior to me using those tracking numbers.*

Lending Notes

When shipping the item back to us via library mail, please use the enclosed USPS tracking# 9114901496450239622760 (it's free to use). Thank you.

Tracking # 9114901496450239622791
to QUE.

- *Then I hit the “yes” button, and click on the ILL number that comes up, to go back to print 2 copies of the paperwork, one for my files, and one to go with the book. (See attached pdf named ILL# 180986863 for what gets highlighted, and what markings I would handwrite on the paper, or use a stamp for condition, and where all of it would go).*
- *I do all the above before hitting the “yes” button because sometimes (and I don’t know why), after hitting “yes,” and trying to go back and add it in afterwards, it doesn’t always stay there.*
- *I have the TAE label maker bookmarked on every work computer I use, and have been using the label maker since it shortly came out, even though I had enough old labels to last me well over 10-20 years.*
 - *I print them to where they come out in portrait orientation, instead of landscape, which reduces the size of the labels, and the bottom half gets used for the back part of the book strap. This size of label fits very well in the window of the zipper bags, and does not need further trimming.*
 - *I keep the extra labels, and plan to put them in a 3-ring notebook for business cards to hopefully, one day, reduce the amount needed to print in the future, and to keep them in order by site #.*
- *I then check out the item through our ILS, desensitize it (important, because the libraries that forget, including mine, makes our gate go off when the courier goes through), put on the book strap, using tape only on the paper itself, never to any portion of the book, and wrap the item in padding and place it in the zippered bag (I have gotten damaged books back in the past because of the item being mishandled*

due to the courier, and one day, I saw our courier accidently drop one, but I had padded it well. Library mail pieces I always use enough padding, and the returning library usually reciprocates in kind.)

If you have any questions, please feel free to contact me: Heather Shaw, Reference Librarian, 903-434-8152 | Fax 903-434-4422

Screen shots included from Northeast Community College

The screenshot displays the WorldShare Interlibrary Loan interface. At the top, it shows the user's name 'Heather Shaw' and a 'Need Help?' link. The main header indicates the request ID '180986863: Henry Ford' and provides navigation for 'Previous Request' and 'Next Request'. Below this, there are options to 'Can you supply?' (Yes/No) and checkboxes for 'Print Shipping Labels' and 'Print Book Straps/Stickers'. A 'Group Affiliations' field lists 'TAEX, AMGS, MAGO, TAKE, TAEM'. A 'Request Details' section provides a summary of the request, including status, type, source, and dates. A 'Borrowing Information' section details the shipping address and method. The bottom section shows the item's metadata, including title, author, ISBN, publisher, and format, along with search links for the library's catalog, Google Scholar, Google Books, and Google.

WorldShare[®] Need Help? Heather Shaw
User support info

Interlibrary Loan Admin

Interlibrary Loan Home
Discover Items
Borrowing Requests
Lending Requests
Can You Supply? (1)
Henry Ford
New - Loans (1)
Supplied (13)
Shipped/In Transit (5)
Received/In Use (8)
Returned (1)
Returned/In Transit (1)
Purchasing Requests
Print Queue (29)

180986863: Henry Ford NTX Reg ID: 57871
Previous Request Next Request

Can you supply? Yes Print Shipping Labels Print Book Straps/Stickers
Group Affiliations: TAEX, AMGS, MAGO, TAKE, TAEM
No - No reason given
Conditional - Additional info needed

Apply constant data: Actions: DEFAULT Mark as Considering Save Email Print Now

Request Details (Request ID 180986863)

Status	Submitted	Borrower	HT#
Type	Loan	Max Cost	USD 0.00
Source	NIRE	Need Before	09/07/2017
Lenders	*NTX	Requested on	08/08/2017
		Due Date	09/07/2017
		Shipped Date	08/08/2017

Title: Henry Ford
Author: David Long
ISBN: 9780750958554 07509
Publisher: The History Press | 2014
Format: Book
Preferred edition: Any edition
Verification: WorldCat Navigator

[Search my library's online catalog](#)
Local ID: **Item# 30000010178048 call # 1**
Open Access: No links found
[Search Google Scholar](#)
[Search Google Books](#)
[Search Google](#)

Borrowing Information (HT#)

Ship to
Attention: Harris County Public Library - ILL (Stratford Branch)
Address: 78-HOU
509 Stratford
City: Highlands
State/Province: Texas
Postal Code: 77562
Ship Via: Courier
Copyright Compliance: US_CCG
Bill to
Attention: Library Administration - ILL

Screen shots included from Northeast Community College-Continued

▼ Lending Information

Use ILL Fee Management (IFM)

Lending Charges USD ▼

Insurance Amount USD

Lending Notes
When shipping the item back to us via library courier, please use padding. Thank you.
Bag barcode # 5421046824 to HT#.

Lending Restrictions No AV materials, ebooks, textb

Return Via Library Rate/ TAE / MALA / MOBI

Return To 198-TYL via TAE, Northeast Texas Community College

Address Learning Resource Center
 2886 FM 1735, P.O. Box 1307

City Mount Pleasant

State/Province Texas ▼

Country United States ▼

Postal Code 75455

Screen shots included from Northeast Community College-Continued

STATUS In Transit	TYPE Loan	OCLC # 0	
SOURCE NRE	REQUEST DATE 08/08/2017	NEED BEFORE 09/07/2017	180986863
BORROWER HT#	RECEIVE DATE		DUE DATE 09/07/2017
LENDERS *NTX			

BIBLIOGRAPHIC INFORMATION

LOCAL ID item# 30000010178048 call # TL140 .F6 2014	ARTICLE AUTHOR	TAE
AUTHOR David Long	ARTICLE TITLE	78 - HOU
TITLE Henry Ford	FORMAT	
IMPRINT The History Press \ 2014	EDITION	
ISBN 9780750958554 07509	VOLUME	
	NUMBER	
	DATE	Condition
	PAGES	No Markings

INTERLIBRARY LOAN INFORMATION

ALERT	AFFILIATION
VERIFIED WorldCat Navigator	COPYRIGHT US:CCG
MAX COST 0.00 USD	SHIPPED DATE 08/08/2017
LEND CHARGES	FAX NUMBER
LEND RESTRICTIONS No A/V materials, ebooks, textbooks, non-circulating materials, electronic articles, and books must be at	EMAIL
LENDER NOTES When shipping the item back to us via library courier, please use padding. Thank you.	ODYSSEY
Bag barcode # 5421046824 to HT#	ARIEL FTP
	ARIEL EMAIL
	BILL TO Library Administration - ILL 78-HOU Harris County Public Library 5749 S. Loop East Houston, TX 77033

SHIPPING INFORMATION

SHIP VIA Courier **RETURN VIA** Library Rate/ TAE / MALA / MOBIUS / KLE

Rose State College – Linda Dillner

After we experienced the loss of a book on loan to us, I developed an Excel workbook to track every transaction. I have attached my recently prepared workbook for the upcoming 2018 fiscal year.

How I use it:

I print it out blank for the upcoming year and we record manually throughout the month at the Circ Desk. At the end of the month I enter all the barcodes into the spreadsheet. (The TOTALS worksheet grabs the totals from each monthly worksheet so I don't have to go back through and do this manually.)

How I formatted it:

Rose State College is on a 2-day per week courier schedule and my spreadsheet reflects that.

What purpose it serves:

This spreadsheet makes me feel confident that we could easily supply TAE with the necessary information to track down a lost book.

Please feel free to share it if you think it would help someone else.

I'm sure by now there are great ways to track this information in the cloud and I will probably explore that option eventually, but for now, Excel works for me.

Rose State College-Attached spreadsheet:

Delivery Dates	# Bags Shp'd	SHIPPED TAE Bag #	SHIPPED ILL TX #	# Bags Rec'd	RECEIVED TAE Bag #	RECEIVED ILL TX #
9/5						
9/7						
9/12						
9/14						

9/19						
9/21						
9/26						
9/28						
	0			0		

Leon Valley Public Library – Sherry Watson

Well, I may not be among “best practices” for sharing purposes simply because my way might be too much for most, here are sample pages from what I do. It is all the info smack dab in one place, totally color-coded ‘cause I can get the info fast that way.

- Everything coming and going, from which source (NRE or Worldcat) and what kind of transport (Texpress/mail/etc.).
- I have one file of everything requested from all sources (our library, other libraries) and what happens to them, etc.--
- the courier info is under the TXP headings (inserted notes with the bag numbers and any other relevant info).

The other file is of everything going out and coming in, in such a way I can easily read for stats for various purposes(not just TAE). The bag numbers are in the boxes of the courier items in that file, and I cross-ref the two files

Screenshot of excel spreadsheet – Leon Valley PL

Request'd	Ret'd	When In?	When Sent?	Request ID	Mem#	Title	Author	Barcode	From/Notes	How	System	D
										\$		
*****Counting requests and loans by month: Count Months from When Sent/filled *****(not by when Requested)												
January 2017												
01/04/17	Yes	01/10/17		3764946	6198	Show World: A Novel	Wilton Barnhardt	3764946	Moore Memorial Public Library/Texas City,	TXP	TXGroup	
01/05/17	Yes	01/26/17		3770233	5846	Peril at End House	Agatha Christie	3770233	Longview Public Library/Longview, TX	TXP	TXGroup	
01/05/17	Yes	01/12/17		3770244	5846	Four Novels of the 1950s	Ross Macdonald; Tom Nolan	3770244	Richardson Public Library/Richardson, TX	TXP	TXGroup	
01/07/17	Yes	01/17/17		3773430	7762	Private Empire: ExxonMobil and American Power	Steve Coll	3773430	Plano Public Library/Plano, TX	TXP	TXGroup	
01/10/17	Yes	01/17/17		3781155	7999	Why Does He DO That?: Inside the Minds of Angry and	Lundy Bancroft	3781155	Wichita Falls Public Library/Wichita Falls, TX	TXP	TXGroup	
01/17/17	Yes	01/31/17		3796479	6198	Black Swan Green: A Novel	David Mitchell	3796479	La Marque Public Library/La Marque, TX	TXP	TXGroup	
01/24/17	Yes	01/31/17		3815355	1274	God Is Not One: The Eight Rival Religions That Run the	Stephen R. Prothero	3815355	Helen Hall Library/League City, TX	TXP	TXGroup	
01/28/17	Yes	02/07/17		3825106	8204	Beyond the Sunrise--LT	Mary Balogh	3825106	Wichita Falls Public Library/Wichita Falls, TX	TXP	TXGroup	