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Share resources through the largest interlibrary loan network

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Abstract

Purpose – The paper aims to show how using a resource-sharing service can help you provide more resources to your users.

Design/methodology/approach – This paper discusses interlibrary loan challenges and opportunities, specifically with reference to WorldShare Interlibrary Loan.

Findings – This paper describes the service that connects libraries to the largest cooperative resource-sharing network with more than 10,000 borrowing and lending libraries worldwide, the possibilities for the future, facts and figures and how libraries around the world have used the solution successfully.

Originality/value – This paper looks at how WorldShare Interlibrary Loan can help libraries overcome the challenges that they face regarding resource sharing.

Keywords Interlibrary loan, Resource sharing, Lending, WorldCat, Electronic articles, WorldShare

Paper type General review

Introduction

Libraries can sometimes find it difficult to provide all the resources that their users need without relying on a resource-sharing service. Additionally, some interlibrary loan services can help libraries manage resource-sharing tasks through integration and automation. WorldShare® Interlibrary Loan (ILL), with its foundation in WorldCat®, automates tasks and connects libraries to the largest cooperative resource-sharing network of more than 10,000 borrowing and lending libraries worldwide. Together, these libraries have created a shared, global library collection for the benefit of all library users. This article will describe the current WorldShare ILL service; illustrate its use in four very different organisations, the Bavarian State Library, SUB Göttingen, the University of Winchester, UK and the Commonwealth Scientific and Industrial Research Organisation (CSIRO) in Australia; and finally look at some recent and future developments.

The WorldShare ILL service

WorldShare ILL allows library staff members to automate many regular processes to save time and ensure timely delivery of items in all formats to the people who need them. Launched in 2013, WorldShare ILL replaced OCLC's earlier

interlibrary loan solution, WorldCat Resource Sharing. The foundation of WorldShare ILL is the cooperatively enhanced library metadata in WorldCat, including more than 360 million resources, 2.3 billion library holdings and 14,151 electronic content collections as of April 2016. According to Ann Derolini, Manager of Information Services at Vancouver Aquarium, "The interoperability of these systems [WorldCat and WorldShare ILL] makes it easier to get materials in researchers' hands quickly". This deep integration with WorldCat allows for both print and electronic resources to be found in other libraries and via open-access providers.

WorldShare ILL centralises workflows that many libraries currently manage manually using multiple systems and applications. By automating certain tasks and communicating directly through the WorldShare ILL interface, library staff members reduce the time they spend phoning and emailing other libraries one by one to fulfil requests. It simplifies the borrowing request process by allowing borrowing library staff to view other libraries' holdings, fees and policies before they place a request. Using this information, library staff create an ILL request with a list of potential lenders. When one library cannot fulfil the request for any reason, it is automatically routed to the next library identified in the lending list, so staff members no longer have to spend time sending the same request out again and again. Diana Parker, Interlibrary Loan Coordinator at Stow – Munroe Falls Public Library, stated, "Being able to define strings of 15 lenders lets us really focus on requesting from local libraries when possible. That means faster fulfilment".

When a library purchases a new periodical or collection subscription or renews an existing one, library staff can enter

the licence information into WorldShare License Manager and have it populate their ILL policies in WorldShare ILL. This information feeds the library's automatic fulfilment and deflection rules, which allow some requests to be handled without staff involvement. When a library's licence permits electronic sharing of an article, the staff can choose to immediately and automatically fulfil those requests. When a licence prohibits sharing, the library's deflection policy automatically reroutes the borrowing request to the next library identified in the lender list. As more libraries add their local data and turn on article sharing, lending libraries will receive an increasing number of loan requests that contain direct links to electronic articles in their collections that they are licenced to loan.

Article Exchange, a key feature in WorldShare ILL, provides a secure online location where library staff can upload a requested document (of up to 60 MB) and allow access only to the person who requested it, regardless of their geographical location. By sharing articles through this secure portal, libraries eliminate the security concerns about emailing documents. And, because Article Exchange is cloud-based, there is no requirement for software downloads or special arrangements for access through a local firewall. Documents made available via Article Exchange are only accessible for five downloads or 30 days, which helps libraries adhere to copyright restrictions. (To remain in compliance with strict European copyright rules, some libraries share documents electronically through MyBib eL®, which is discussed further below.)

Library staff receive an alert through WorldShare ILL's Article Exchange when a document is available, so staff no longer need to email lending libraries directly. Without the need to wait on email responses, libraries can fulfil requests within hours, rather than days. As Karl Stutzman, Assistant Director of Digital Library Services at Anabaptist Mennonite Biblical Seminary, said:

> "Article Exchange within WorldShare Interlibrary Loan is not just a great thing for our staff, it's also a great thing for our users, because it means that electronic delivery book chapters and articles happens often within 24 hours".

A customisable version of Article Exchange supports larger files and allows libraries to reinforce their branding.

WorldShare ILL libraries can also simplify their ILL payments and charges by routing all fees through their regular OCLC invoice. Interlibrary Loan Fee Management (IFM) allows libraries to easily reconcile all ILL fees on a monthly basis, which frees staff from calculating fees and following up on unpaid invoices. Libraries who participate in IFM report an average saving of more than £31 GBP (€40 EUR or US$45) per request from eliminating invoices and cheque-writing tasks for individual transactions (Internal Customer Research, 2010).

The statistical reports included with WorldShare ILL help libraries closely analyse their borrowing and lending patterns. They use this information to refine staffing, workflows and policies and to illustrate the value of ILL to stakeholders and funders. WorldShare ILL offers a range of reports, including fee management, reasons for not fulfilling requests and monthly activity.

Success stories

More than 10,000 libraries worldwide use WorldShare ILL to lend and borrow resources. The institutions below are just a few that make up the largest international interlibrary loan network in the world. More stories can be found on the OCLC website.

Bavarian State Library – making knowledge visible and available internationally

With 10 million tapes, around 63,000 periodicals in electronic and printed format and around 130,000 manuscripts, the Bavarian State Library is one of the most important knowledge centres in the world. Because of European copyright restrictions, especially in Germany, the library found international interlibrary lending to be an expensive and time-consuming process. Library staff simplified and improved their borrowing and lending processes by managing them through WorldShare ILL.

"WorldShare ILL brings together the collection inventories of a lot of libraries, thereby making them visible to many, including the unique stocks of the Bavarian State Library", said Berthold Gillitzer, Assistant Head of User Services Department and Head of Document Delivery and Interlibrary Lending Unit at the Bavarian State Library.

WorldShare ILL's integration with ImageWare's MyBib eDoc® and MyBib eL allows the Bavarian State Library to share its unique collection electronically without violating the European copyright act. MyBib eDoc facilitates the digitisation and storage of copyright-compliant documents on the Bavarian State Library's server. Users at borrowing libraries can only access these documents through the MyBib eL viewer, which is on specific registered computers in the borrowing library. This viewer does not allow a user to download the document, and screenshots will become blurred and unreadable. The user can only view the document and print it once, in compliance with copyright rules.

The direct link between WorldShare ILL's order management system and MyBib eDoc allows this process to be incorporated into local workflows. With integration of the MyBib eL system, the Bavarian State Library can provide document copies that comply with German copyright laws electronically as an alternative to fax and mail, even internationally. Both requesting and processing requests for the library's resources have become much easier and more convenient since the implementation of these tools. The Bavarian State Library has become one of the most frequent WorldShare ILL suppliers of library materials outside the USA.

"WorldShare ILL is a central tool, if not the central tool, for libraries with a substantial amount of international interlibrary lending", stated Berthold.

SUB Göttingen – overcoming copyright and cost barriers to sharing

SUB Göttingen is a high-volume interlibrary loan institution that has participated in OCLC's global interlibrary loan network since 2000. Previously, the institution used many manual processes for document requests and ILL invoices, which took a lot of staff time and resulted in slower than desired turnaround times. Like the Bavarian State Library,

SUB Göttingen is limited by European copyright restrictions. Because the European copyright act does not allow libraries to physically deliver electronic copies to patrons, requested items had to be sent by mail or fax, which led to high costs and slow delivery.

Adoption of WorldShare ILL, connected with ImageWare's internal document delivery tool, MyBib eDoc, has allowed SUB Göttingen to reduce both staff time and turnaround times on document requests:

> "Since early 2014, the SUB Göttingen has processed all interlibrary loans within the structure of WorldShare Interlibrary Loan, including document delivery through MyBib eDoc. It is largely automated, convenient and transparent", said Dr Kerstin Helmkamp, Head of Readers' Services at SUB Göttingen.

MyBib eL – an ImageWare platform that supports adherence to German copyright law by enabling borrowing libraries to print a single copy of requested documents – completes the Interlibrary Loan service at SUB Göttingen.

Library staff no longer create invoices or write cheques for individual ILL fees. Instead, they have their fees included on their monthly OCLC invoice through IFM. This "[. . .] has replaced time-consuming, manual processes for managing individual ILL invoices with a single, monthly billing statement", noted Dr Helmkamp.

Introduction of these new elements has improved the service for users and reduced required staff time allowing them to focus efforts elsewhere.

University of Winchester – satisfying document requests quickly and easily

> "In 2013, we decided to look at running a paperless interlibrary loan system as we wanted something that was more efficient, cost effective and that provided a better user experience. WorldShare ILL helped us achieve this", said Dawn Downes, Senior Library Assistant at the University of Winchester Library.

The library staff wanted an easier way to keep track of their ILL requests. "Our goals were not only to satisfy users' needs, but to do it quickly and easily", explained Dawn. "Instead of many emails going back and forth about obtaining international material, we wanted to see straightaway who had what we needed and how much it would cost."

WorldShare ILL allowed them to search and request items all within one system. This gave them better visibility into the status of their requests. All the information they need is available at a glance, and they no longer have to keep statistics on paper. "Additionally, using WorldShare ILL, a system that other libraries in our consortium use, means we now lend more materials than ever before", Dawn added.

Commonwealth Scientific and Industrial Research Organisation – supporting scientists worldwide with easy access to resources

Australia's premiere science agency, CSIRO, maintains massive collections of resources a scientist might need to advance research. They receive requests through their Document Delivery Services, managing 1,500 requests per month on average, from libraries and suppliers worldwide.

"Adopting WorldShare Interlibrary Loan has allowed us to streamline both requesting and supplying into a single workflow", said Thomas Girke, Manager of Information Resources at CSIRO. Not only do their requests now follow a standard format, but also "the ISO capabilities of WorldShare ILL allowed us to easily integrate requesting and supplying into our existing Document Delivery Management system".

There is also less staff time spent on dealing with accounts and billing due to their use of IFM. "We no longer need to raise invoices or make multiple payments each month", Thomas explained. "It's hard to imagine how we could function without WorldShare ILL now."

The future

OCLC regularly communicates with WorldShare ILL users through the OCLC Community Center, listservs, service requests and in-person and virtual meetings. Through these conversations, the WorldShare ILL product team collects and prioritises member feedback, which directly informs the roadmap for future enhancements. After each enhancement release, the OCLC team produces release notes that are available on the product support webpage.

During the most recent enhancement in November 2015, WorldShare ILL saw several workflow improvements and bug fixes. With a single click, ILL staff may now clone requests that are marked as "Not Received" yet, which eliminates the time required to manually re-create the request. Staff may also set due dates to more than 99 days out in the constant data that automatically populate each request. This release also provided enhanced interoperability with the WorldCat Discovery end-user discovery solution. In December 2015, WorldShare ILL IFM charges shifted from being triggered on "Received" status to "Shipped" status to be more in line with standard online credit and debit practices.

Based on member feedback, the IFM workflows will likely be further improved in summer 2016, especially in relation to managing refunds and payments for lost materials. Future enhancements may include additional support for IFM payments in non-US currencies and improvements to user preferences.

Facts and figures

- *More than 10,000*: Number of libraries that share resources through the OCLC resource-sharing network.
- *63*: Number of countries in which libraries participate in the OCLC resource-sharing network.
- *More than 360 million*: Number of resources catalogued in WorldCat.
- *More than 2.3 billion*: Number of library holdings represented in WorldCat.
- *14,151*: Number of electronic content collections available in WorldCat.
- *Every 5 seconds*: How often libraries fulfil ILL requests through WorldShare ILL.

More information

If you would like to find out more about WorldShare ILL, please visit: http://connect.oclc.org/worldshareill

Or learn more about interlibrary loan trends to watch in 2016 in a post for the OCLC blog, Next.

Additional resources

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