



**One Resource Sharing Library
to Rule them All**

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<http://hdl.handle.net/2268/227174>



Agenda

- ▶ About us
- ▶ Prior to go live with Alma
- ▶ In Alma: step 1
 - 5 Resource Sharing Libraries
- ▶ In Alma: step 2
 - 1 Resource Sharing Library
- ▶ Future projects and developments

About us



University of Liège Library



5 main libraries

- composed of 16 branches
- spread on 4 campuses in 3 cities



30,000 users

- 24,000 students
- 3,000 professors and researchers
- 3,000 external users





Resource Sharing at the University of Liège

- ▶ 3,500 borrowing requests/year
 - Two main platforms used:
 - Impala (Belgian national ILL service) : 81 %
 - Subito (German national ILL service) : 16 %

- ▶ 1,500 lending requests/year
 - One platform used: Impala

Prior to go live with Alma



Prior to go live with Alma

- ▶ 8 libraries
 - ▶ 15 operators
- } manage ILL services



Prior to go live with Alma

- ▶ ILS = Aleph, no use of the ILL module
- ▶ Interlibrary Loan service was processed using an in-house solution (*MyDelivery*) developed with APIs
 - The form was accessible in Primo MyAccount
 - Creation, cancellation and tracking options





Prior to go live with Alma

► MyDelivery form:

The screenshot shows the 'MyDelivery' section of the Alma interface. At the top, there are navigation tabs for 'MyDesk', 'Panier', 'Requêtes', 'MyDelivery', and 'MyORBi'. Below these, the 'Nouvelle demande' (New request) section is active, showing a progress bar with three steps: '1. Référence', '2. Votre bibliothèque', and '3. Préférences'. A dropdown menu is set to 'ULg-U - Personnel ULg'. The main content area is titled '1. Référence du document' and contains a form for entering document details. A tip suggests avoiding encoding the reference if the DOI or PMID is known. The form includes radio buttons for 'un article de périodique' (selected), 'un livre, une thèse, etc.', and 'un chapitre de livre'. Fields for 'Titre du périodique ou du livre', 'Année', 'Volume', 'Fascicule', 'Page', 'Auteur', 'Editeur commercial', 'ISBN', and 'ISSN' are provided.

MyDesk Panier Requêtes **MyDelivery** MyORBi

Nouvelle demande Etapes : 1. Référence 2. Votre bibliothèque 3. Préférences | Aller à : + Tarifs

Liste des demandes
Suivi des demandes
Echéance des prêts
Suivi des factures
Suivi des sommes dues
Statistiques

Ulg-U - Personnel ULg

Veillez remplir les différents volets du formulaire :

1. Référence du document

Une astuce... Evitez d'encoder votre référence si vous connaissez son DOI ou son PMID **Effacer**

Je recherche un article de périodique un livre, une thèse, etc. un chapitre de livre

Titre du périodique ou du livre *
(Sans abréviations)

Année Volume Fascicule Page à

Titre de l'article ou du chapitre

Auteur

Editeur commercial

ISBN

ISSN

Aller à la demande no : **Go**

Récupérer une référence

In Alma: step 1

5 Resource Sharing Libraries



In Alma: step 1

- ▶ Go live in February 2015: reduction of the numbers of libraries and operators actively involved in ILL supply

- **5 libraries**

(one by main library)

- **10 operators**

(no FTE!)

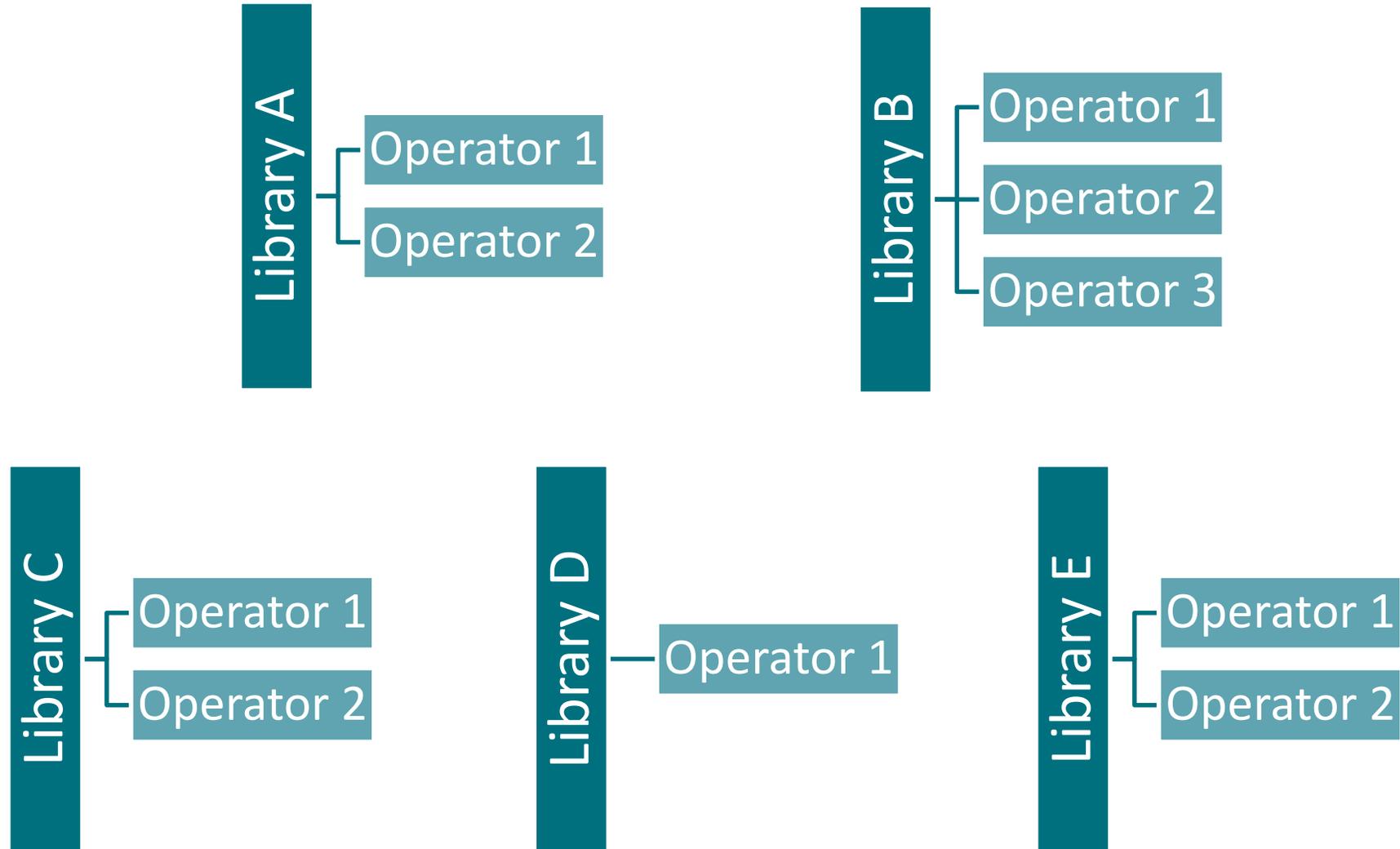


manage ILL services

- ▶ More simplification and standardization
- ▶ No negative impact noticed on service quality
- ▶ Large freedom in organization for each RS Library
- ▶ Service still strongly relying on the library type (STM vs HSS)



Organization





Configuration

- ▶ An existing library is configured as a library that can process interlibrary loan

General Details

Organization unit name * 

ISIL Code

Resource Sharing Information

Is resource sharing library



Configuration

- ▶ The allocation of the Resource Sharing library to users depends on their field of research or studies
- ▶ Appropriate RS Library assigned with the daily SIS synchronization job
 - Not always 100% accurate...

Dupont, Basile

Primary identifier: S123456
Record type: Public
Account Type: External
User group: ULg - Master / doc...
Owner: SIS_temp

General Information | Contact Information | Identifiers | Notes | Blocks | Fines/Fees | Statistics | Attachments | Proxy For | Audit

User Information

First name: Basile
Last name *: Dupont
Title: [dropdown]
Job category: Please select a value
User group *: ULg - Master / doctorat
Website URL: [text]
Status: Active
Expiration date *: 01/10/2018
Resource sharing library *: Bibliothèque Graulich

Middle name: [text]
Primary identifier *: S123456
PIN number: [text] Generate
Job description: Master sc. gest., à fin.
Gender: Male
Campus: [dropdown]
Preferred language: French
Status date: 05/02/2016
Birth date *: 01/04/1991
Purge date: 01/10/2022

Selected Patron Letters | Send message: General mail | Compose



Configuration

- ▶ Two specific locations are created for each RS library:
 - One for borrowing requests

Byzantine Style, Religion and Civilization in Honour of Sir Steven Runciman E. M. Jeffreys Cambridge 2006

Location: Interlibrary Loan Services: Borrowing ...

1 - 1 of 1 | Call number: RS-3980186 | Sort routine: | Change Holdings | Relink to another Bib

Barcode	Library	Location	Call Number	Altern Call Num:	Description	Temporary Location	Status	Process type	Access Number	Receiving date
1	Interlibrary Loan Services	Borrowing Resource Sharing Requests	RS-3980186	-	-	No	Item not in place	Hold Shelf	-	-

- One for lending requests

"Jan Brueghel d. Ä. "Weltlandschaft" und enzyklopädisches Stilleben" / Markus PAULUSSEN.

Book (Book - Physical) By PAULUSSEN, Markus (Aachen : Rheinisch-Westfälische Technische Hochschule Aachen RWTH 1997.)

Language: German
Record number: (BeLU)000802403ULG01-Aleph
Update Date: 17/02/2015

Physical (2) | Electronic | Digital | Other details

2 Holdings | 0 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
BGP02 ALPHA-Bibliothèque principale	MALSA Réserve distante - Section A - EXTENDED	009891B	-	-	-
RES_SHARE Interlibrary Loan Services	IN_RS_REQ Lending Resource Sharing Requests	009891B	-	● 1 Not Available	-



Configuration

- ▶ One Fulfillment Unit and two Fulfillment Unit Rules (for loan) by library are created (at the library level)

The screenshot shows the 'Edit Fulfillment Unit' interface. At the top, there is a back arrow, the title 'Edit Fulfillment Unit', and 'Cancel' and 'Save' buttons. Below this, a light blue bar indicates 'You are configuring: Interlibrary Loan Services'. The main content area shows 'Resource Sharing Circulating Material' with a dropdown arrow and 'Code RES_FU'. There are three tabs: 'Fulfillment Unit Details', 'Fulfillment Unit Locations', and 'Fulfillment Unit Rules', with the last one being active. Below the tabs, 'Rule Type' is set to 'Loan'. The 'Institution Rules List' section has a '+ Add Rule' button and a settings icon. A filter dropdown is set to 'All'. Below is a table with two rows of rules.

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
<input checked="" type="checkbox"/>		▼	1 Month Loan Resource Sharing (Borrowing)	-	1 Month Loan Resource Sharing (Borrowing)	Renaville, François	14/12/2017	⋮
<input checked="" type="checkbox"/>	▲		6 Week Loan Resource Sharing (Lending)	-	6 Week Loan Resource Sharing (Lending)	Renaville, François	14/12/2017	⋮



In Alma: partners

- ▶ Only email profile type
- ▶ Two workflow profiles are created:
 - One of borrowing type:

	Workflow Profile	Type	Steps	
1	BManualRenew	Borrowing	Manual renew,Waiting for receive digitally,Reject	...

- One of lending type:

	LStaffRenewal	Lending	Staff renewal,Borrower recall	...
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Creation of borrowing requests

- ▶ In Primo: for a resource not available at ULiège

The screenshot displays the Primo interface for a search result. The article title is "Special polynomials associated with rational solutions of the defocusing nonlinear Schrödinger equation and the fourth Painlevé equation" by Clarkson, Peter A. The journal is "European Journal of Applied Mathematics", 2006, Vol.17(3), pp.293-322. The ISSN is 0956-7925 and the E-ISSN is 1469-4425. A message states "No electronic version at ULiège".

The "Other services" section includes a link for "Interlibrary Loan Request" (highlighted with a red box) and "Open Access via Unpaywall?". A red arrow points from this link to a modal form for creating a borrowing request.

The modal form contains the following fields:

- Document type: Book Article / Book Chapter
- Article title: Special polynomials associated with rational solutions of the defocusing nonlinear
- Journal Title / Book Title: European Journal of Applied Mathematics
- Author(s) (Last name, first name): CLARKSON, PETER A.; CLARKSON, PETER A.
- Volume: 17
- Issue: 3
- ISSN: 0956-7925
- DOI: 10.1017/S0956792506006565
- PMID:
- Publication date: 2006-6
- Chapter:
- Source: info:sid/primo.exlibrisgroup.com-cambridgesgm
- Start page: 293
- End page: 322
- Delivery Information:
 - Format: Physical Digital Physical non-returnable
 - Delivery Location: Deliver to library Alternative address
 - Pickup/delivery location: [dropdown menu]
 - Alternate address: [dropdown menu]
 - Not Needed After: [calendar icon]
 - Comment (e.g. OTP): [text area]
 - Maximum fee (only for Articles) (EUR): [text area]

Buttons: Request! Cancel



Creation of borrowing requests

- ▶ In Primo: from an in-house blank form integrated with the Alma APIs

The screenshot shows the 'ILL request' form in the Primo interface. The form is titled '1 - Requested document' and includes a warning: 'Use this form to get in a ULIège library a book that is not in ULIège collections or a copy of an article that is not in ULIège collections. This is a paying service (minimum 8 €)'. The form has several tabs: 'Journal article', 'Journal issue', 'Book or thesis', and 'Book or thesis chapter'. The 'Journal article' tab is selected. The form contains the following fields:

- PMID?
- DOI?
- Article title*
- Author*
- Journal title*
- Year* Volume Issue Pages
- Publisher
- ISSN

A red box highlights the 'ILL' link in the top navigation bar, and a red arrow points from it to the 'Article title' field.



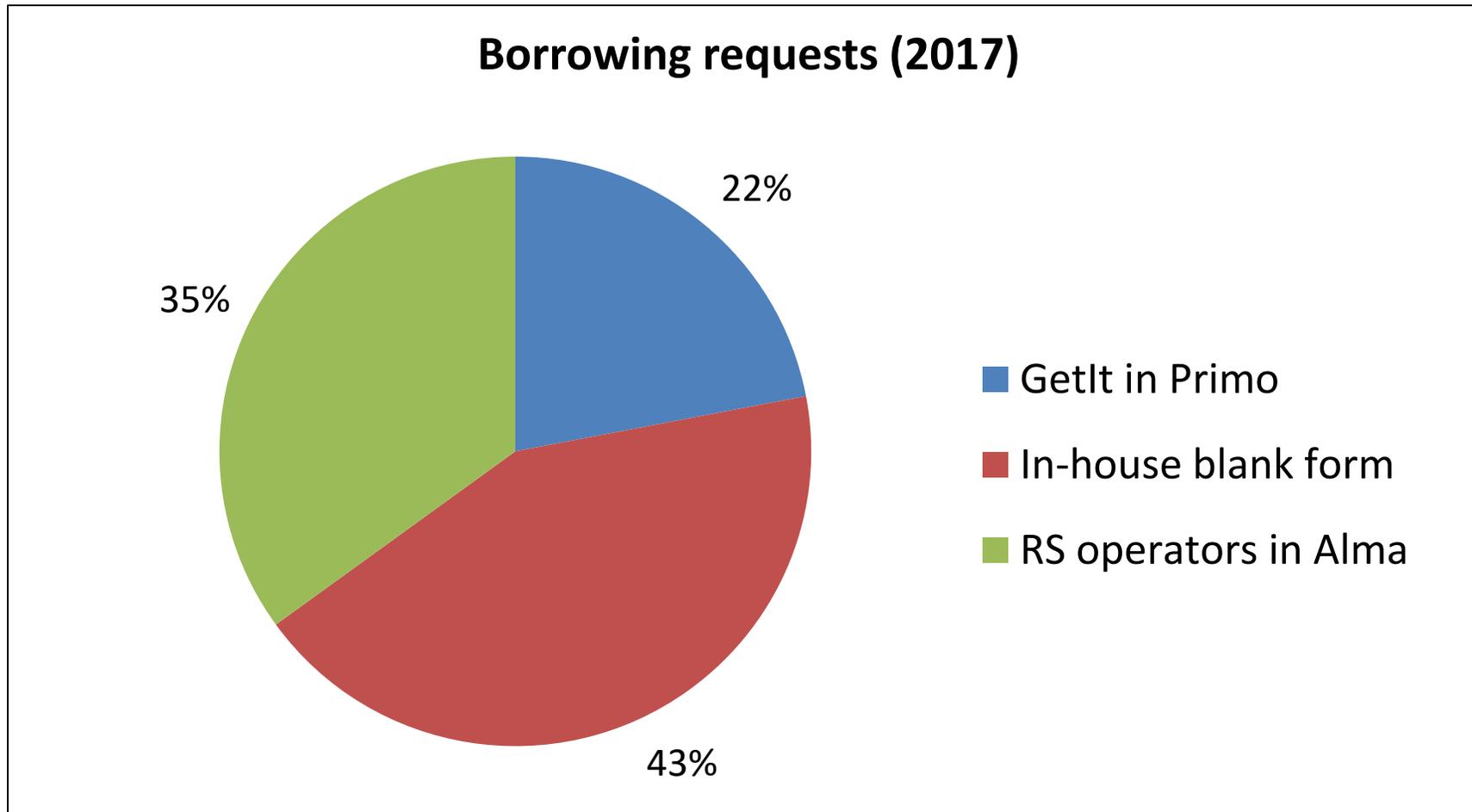
Flexibility with the blank RS form

- 1) Also accessible to non-registered users like commercial societies and firms (--> = document delivery to non registered users)
- 2) ILL form changes according to the requested material (Journal article, Journal issue, Book or thesis, Book or thesis chapter) and only necessary fields are displayed.
- 3) By putting a DOI or PMID, then the form 'Requested document' section is automatically filled in.
- 4) Journal title field is interfaced with a locally managed journal database (ca 45,000 journals). That same DB is also interfaced with our institutional repository when scholars archive journal articles.
- 5) Depending on the status or user group of the requester, 'Delivery and payment' fields are fully configurable.
- 6) In case of physical delivery, selecting a pick up location from the list is mandatory.





Breakdown of requests by way of creation





Resource sharing in Alma: some advantages

- ▶ Borrowing requests:
 - Possibility for the patron to loan a book provided by a partner
 - Sending letters such as On Hold Shelf Letter, Courtesy Letter or Overdue Notice Letter
 - Possibility to define overdue fine, maximal renewal period
 - Possibility to add the fines for resource sharing in the user's account
- ▶ Lending requests:
 - Facility to know that a book is sent to a partner for resource sharing
 - Sending the Borrower Overdue Email Letter
- ▶ Statistics:
 - Retrieval of statistics from Analytics

In Alma: step 2

1 Resource Sharing Library



To one unique RS Library

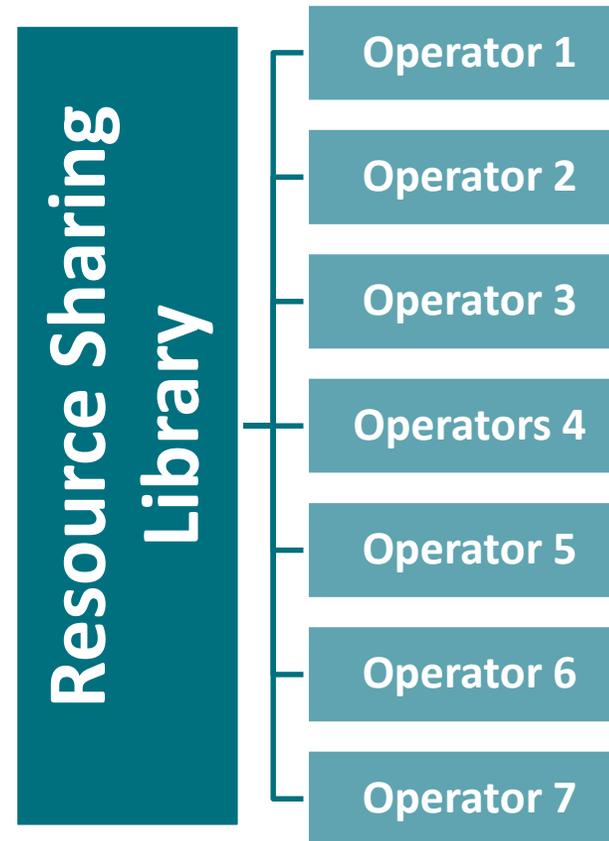
- ▶ At the beginning of 2018:
 - Reorganization and centralization of the interlibrary loan service
 - Deactivation of the existing 5 Resource Sharing libraries
 - Use of the default Resource Sharing Library in Alma (only used for resource sharing)

- **1 Resource Sharing Library**
 - **7 operators**
(no FTE!)
- 
- manage ILL services**

- Again more simplification and standardization
- Not always (easily) accepted by all ILL operators...



New organization



RS Library has a physical address, but

- Operators take it in turns to do their RS tasks (shared calendar)
- They do it in the library where they are employed
- Only some hours RS task per week (not everyone in a week)



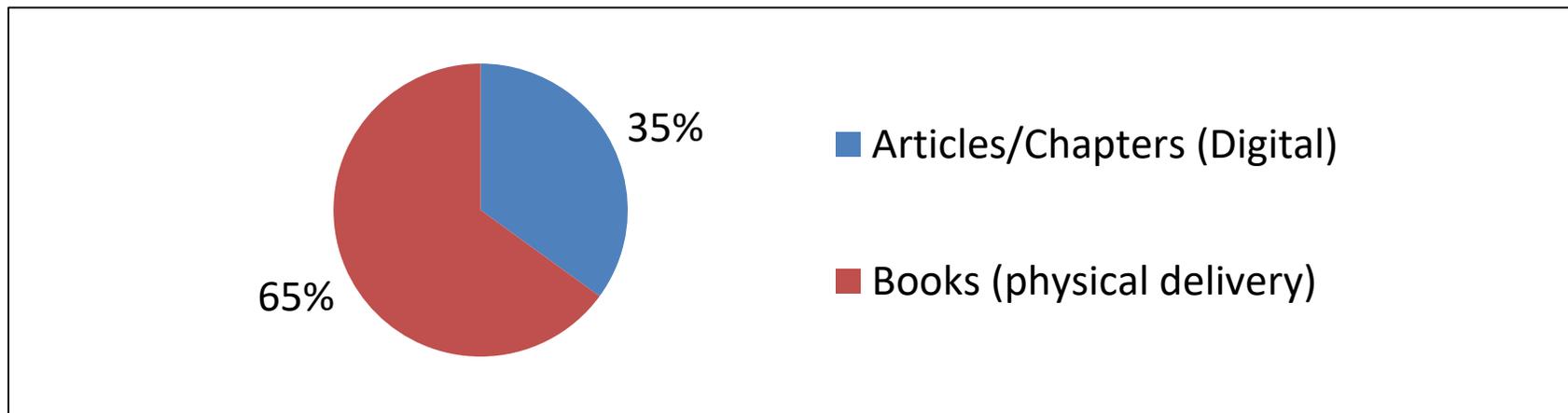
Configuration

- ▶ Automatic allocation of the new Resource Sharing library to all users
- ▶ Creation of two locations (one for borrowing and one for lending requests)
- ▶ Creation of one Fulfillment Unit and two Fulfillment Unit Rules (for loan)
- ▶ For partners, usage of the previously defined workflow profiles



Digitization requests

- ▶ Lending requests: Creation of digitization requests for articles and book chapters
 - Requested articles and book chapters are:
 - always digitized in their owning libraries
 - automatically associated to the Resource Sharing request for further processing (Send to Partner)





Encountered difficulties

- ▶ From 5 to 1 RS Library
 - RS Library = Preserve of some ILL operators
 - More transparency across the institution
 - Pooling of human resources
 - Cost and profit sharing

Change was not easily accepted by some colleagues...

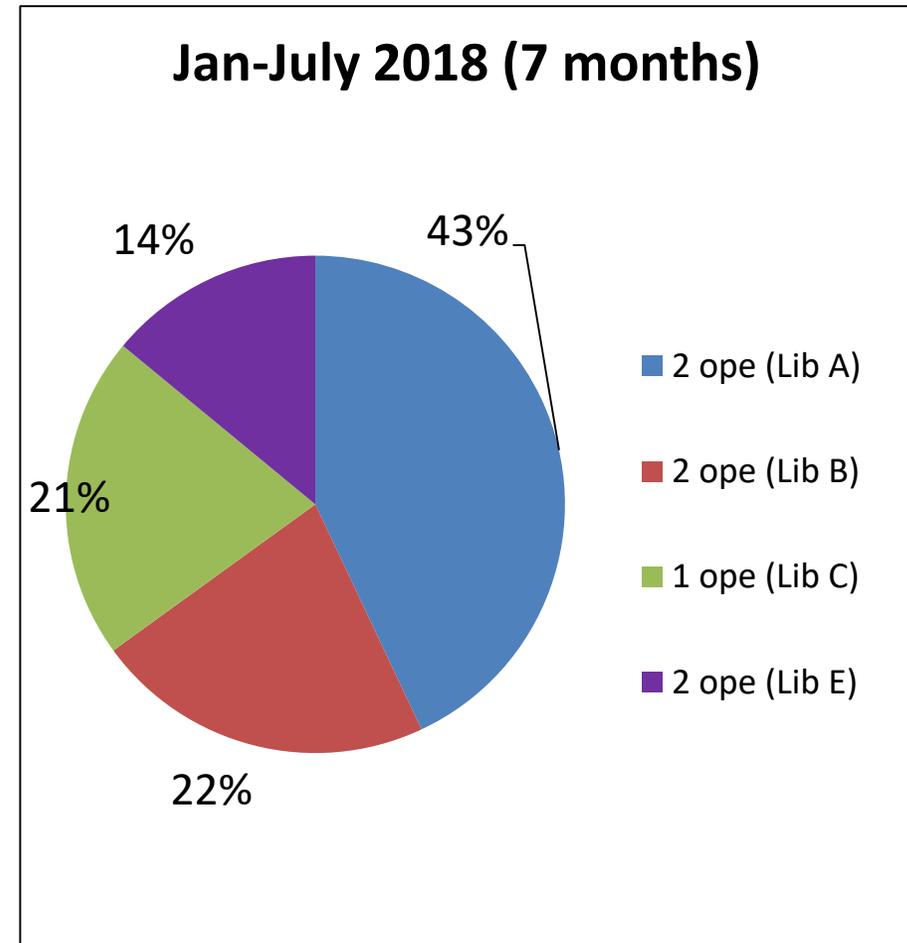
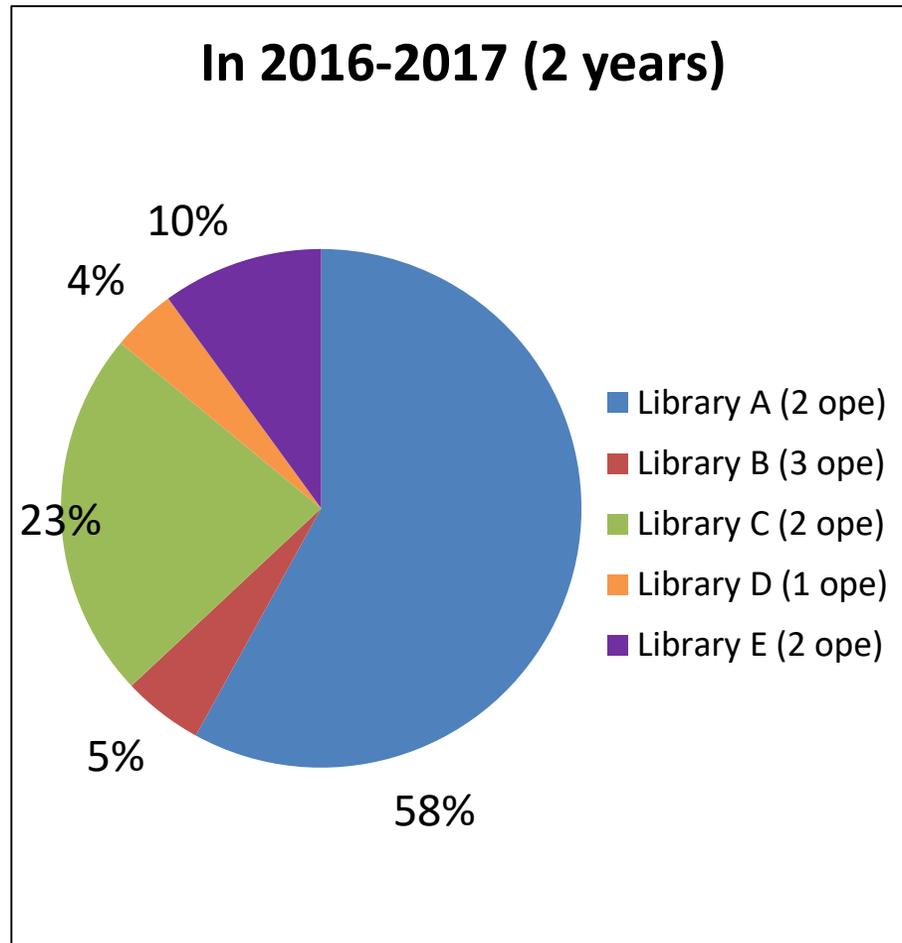
- ▶ Old RS Libraries are still appearing in the Owner drop-down list for Lending requests (SF 00544465)

Request Attribute

Supplied To *	National Library of the Czech Republic	Owner *	Look-up or select
Request Status	Created lending request	External Identifier *	Interlibrary Loan Services
Format	Physical	Requested Media	Bibliothèque des Sciences agronomiques
Allow Other Format	<input type="checkbox"/>	Shipping Cost	Bibliothèque Graulich
Language		Requester Email	Bibliothèque des Sciences de la Vie
Date Needed By			ALPHA-Bibliothèque principale
Level of Service			BST-Sciences



Processing of Borrowing Requests





Experienced advantages of one RS Library

- ▶ **Automatic allocation of the Resource Sharing Library to all users**
- ▶ In the past:
 - Not all users had the most appropriate RS Library assigned in their user Record
 - Some users had no assigned RS Library



Experienced advantages of one RS Library

- ▶ **Reduction in the number of transits of physical documents for borrowing requests**
 - Physical address of the RS = address of the library where a majority of ILL books are requested
 - So, when the library receives the document from the partner, it has only to be sent to the pick up location.

- ▶ **In the past:**
 - If the pick up location was not one of the RS library, there was one more transit.
 - Same situation when the document was returned.



Experienced advantages of one RS Library

- ▶ **More collaboration between ILL operators**
 - Assignment of the "Fulfillment Services Manager" role for the RSL to the resource sharing operators
 - This role allows in particular to manage requests assigned to other operators
 - more flexibility and cooperation between operators

- ▶ **In the past:**
 - This role could not be given to all ILL staff. Since the scope of the role is the library, it was not possible to allocate it for a library not only used for resource sharing.



Experienced advantages of one RS Library

▶ **More fluency in ILL delivery**

- All RS operators take it in turns to do their RS tasks
- No one has a 100% RS activity.
- A substitute can easily be found if needed.

- NB: 7 operators remain a lot. We could not go lower for sensibility reasons.

▶ **In the past:**

- All RS operators could be out of the office at the same time (sickness, holiday...) and ILL service could be interrupted in a library. (Now the probability that the 7 operators are absent at the same time is almost null.)



Experienced advantages of one RS Library

▶ **Harmonization of the practices of the RS operators**

- One single RS Library implies more standardized practices:
 - All operators proceed in the same way.
- More standardized practices produce consolidated statistics which can be analyzed more easily.

▶ **In the past:**

- Differences in the workflows
 - For example, some RS libraries allowed loan of documents from partners for some user groups while other only allowed consultation in reading room.
- Data provided by Analytics required to be cleaned up

Future projects and developments



Future projects and developments

- ▶ Partners of ISO profile type
 - Ongoing testing with
 - Library of the European Council
 - Library of the European Commission
- ▶ Development of an interface between Alma and Impala
 - Ongoing cost-benefit analysis





Thank you!

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