One Resource Sharing Library to Rule them All

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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:
Prior to go live with Alma

- Mail received by the ILL operator:

Subject: MyDelivery no 28897 - Demande à traiter
Date: Wed, 4 Jun 2014 12:15:53 +0200
De: l.euclides.regard@be
Pour: bst.sam@ude.ac.be

Bonjour,

Une nouvelle demande est à traiter.

Fourniture no : 28897
Demandée le : 04-06-2014
Pour l'utilisateur : -
A la bib. de proximité : BST - Bibliothèque des Sciences et Techniques - Sect. Sciences appliquées et Mathématiques

Référence

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Auteur : Horton, S.A. ; Waldron, M.B. ; Roebuck, B. ; Almond, E.A.
Date : 1984
Source : Powder Metallurgy
Volume : 27
Numéro : 4
Page : p. 201-211
ISSN : 0032-5899

Note : doi:10.1179/pom.1984.27.4.201
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

Library A
- Operator 1
- Operator 2

Library B
- Operator 1
- Operator 2
- Operator 3

Library C
- Operator 1
- Operator 2

Library D
- Operator 1

Library E
- Operator 1
- Operator 2
Configuration

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

<table>
<thead>
<tr>
<th>General Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization unit name * BST-Sciences</td>
</tr>
<tr>
<td>ISIL Code</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resource Sharing Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is resource sharing library</td>
</tr>
</tbody>
</table>
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...
Configuration

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

- One Fulfillment Unit and two Fulfillment Unit Rules (for loan) by library are created (at the library level)
In Alma: partners

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

<table>
<thead>
<tr>
<th>Workflow Profile</th>
<th>Type</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 BManualRenew</td>
<td>Borrowing</td>
<td>Manual renew, Waiting for receive digitally, Reject</td>
</tr>
</tbody>
</table>

- One of lending type:

<table>
<thead>
<tr>
<th>Workflow Profile</th>
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</tr>
</thead>
<tbody>
<tr>
<td>LStaffRenewal</td>
<td>Lending</td>
<td>Staff renewal, Borrower recall</td>
</tr>
</tbody>
</table>
Creation of borrowing requests

- In Primo: for a resource not available at ULiège
Creation of borrowing requests

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

https://developers.exlibrisgroup.com/blog/Configuration-and-main-Perl-scripts-of-the-resource-sharing-request-blank-form-at-ULg
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

Borrowing requests (2017)

- GetIt in Primo: 22%
- In-house blank form: 35%
- RS operators in Alma: 43%
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

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

Change was not easily accepted by some colleagues...
Processsing of Borrowing Requests

In 2016-2017 (2 years)

- Library A (2 ope): 58%
- Library B (3 ope): 23%
- Library C (2 ope): 10%
- Library D (1 ope): 4%
- Library E (2 ope): 5%

Jan-July 2018 (7 months)

- 2 ope (Lib A): 43%
- 2 ope (Lib B): 22%
- 1 ope (Lib C): 21%
- 2 ope (Lib E): 14%
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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