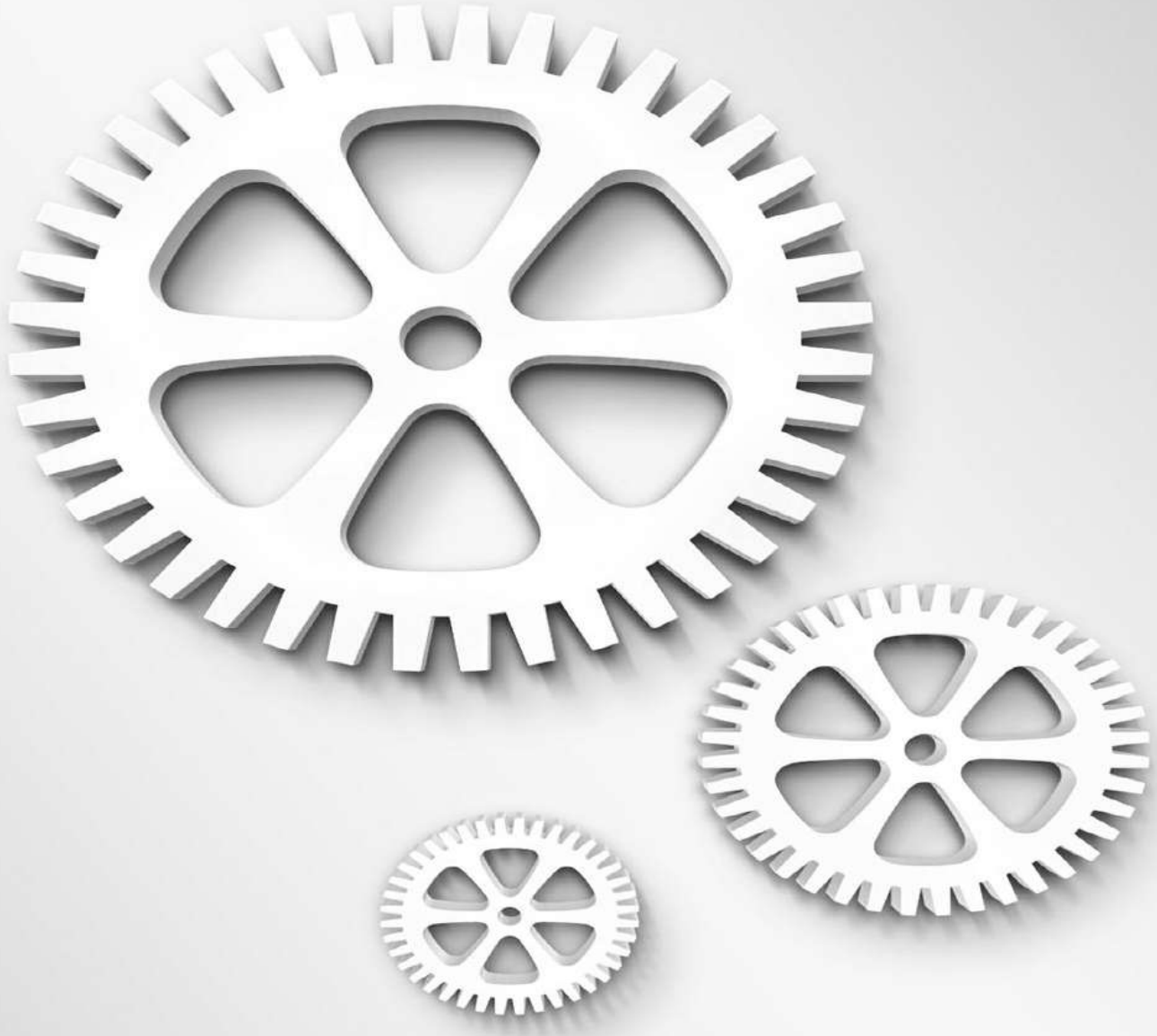
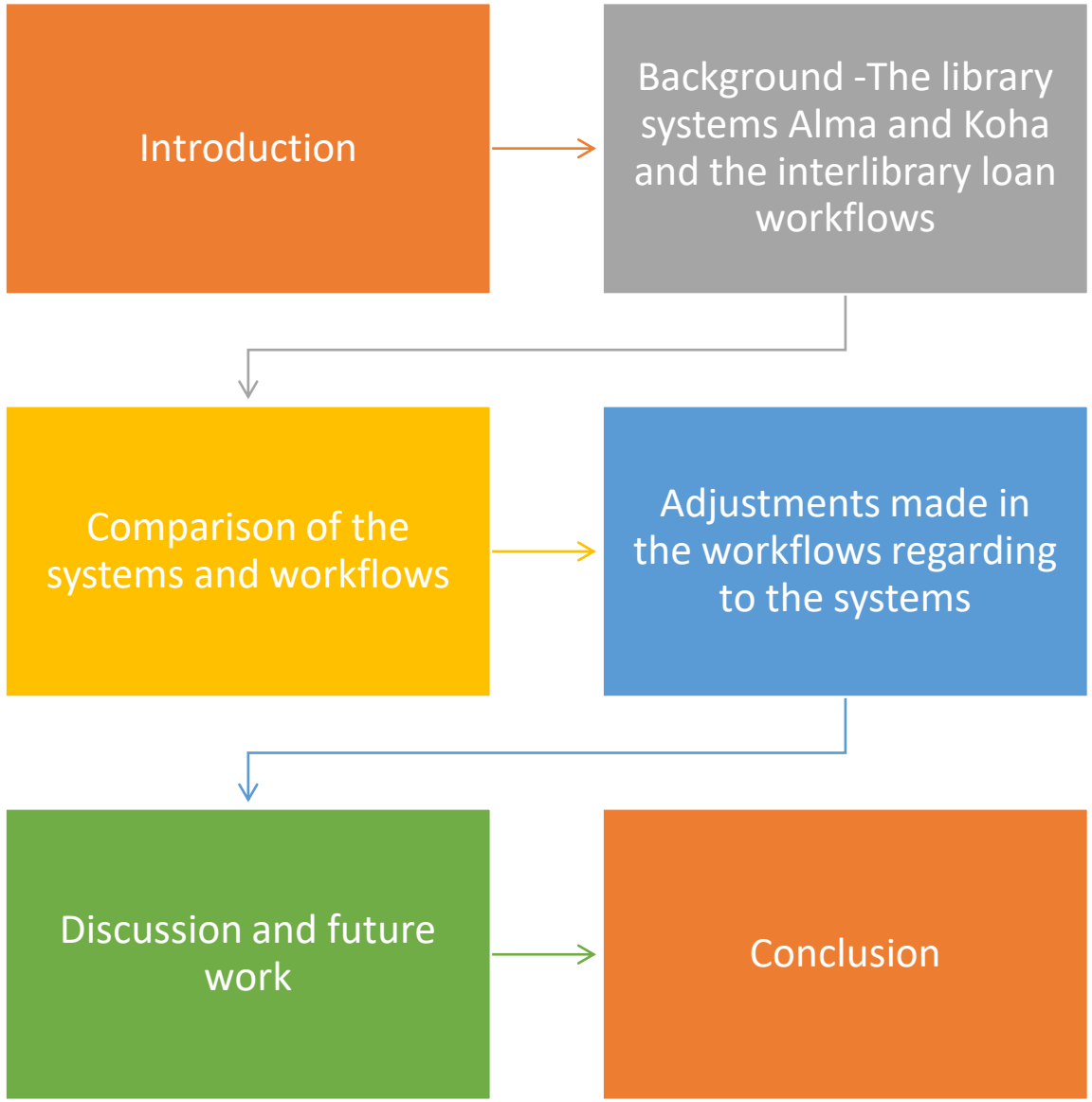
How library systems influence the interlibrary loan workflow: a comparison between Alma and Koha



Veronica Fors (Örebro University Library)
Martina Kassler (Karlstad University Library)

Outline of the presentation



Introduction

- Örebro and Karlstad University libraries recently acquired and implemented new library systems, Örebro – Alma, a proprietary system and Karlstad – Koha, an open source system
- Interlibrary loan management - interlibrary loan borrowing and interlibrary loan lending
- Focus for the presentation- interlibrary loan borrowing-process
- Books borrowed mainly from Libris Fjärrlån (the interlibrary loan module in the Swedish union catalogue Libris)
- Articles borrowed mainly from Libris and Subito

SWEDEN
Stockholm
GOTLANDS LÄN
Gotland
Öland

ÖREBRO UNIVERSITY

Örebro University

- 3 faculties, 8 schools, 85 degree programmes and 920 single courses
- 1,700 staff
- 16,000 students and 490 doctoral students
- 3 Campus - 2 in the city of Örebro and 1 in Grythyttan

Örebro University Library

- 3 staffed libraries and 1 unstaffed
- 247,770 printed and 232,061 electronic books, 215 print and 14,500 electronic journals
- 773 study places, around 350,000 visitors a year
- 38 staff (whole library)
- Staff - Interlibrary loan department (whole library). 7 staff in total 3 full time
- Interlibrary loans (2021): Lending: 3,149 loans and non-returnables. Borrowing: 914 loans and non-returnables

The Library System Alma

- Developed and managed by Ex Libris
- Integrated system - whole suit of library operations (election, acquisition, print management, electronic management, metadata management, link resolution, digitization, fulfillment and discovery)
- Provided by subscription as a cloud-based solution
- Managing User Roles and Workflows

From Voyager to Alma

- Before Alma the library system Voyager was used. Seperate systems were used for interlibrary loan (Saga and Gill)
- Procurement through the consortium GSLG
- Reasons for procurement of new Library system
  - Decline of development and new features
  - System-hosted server was approaching end-of-life
  - Lacking support for e-resource management

Procurement – selection process

- Public tender. Both quality and costs taken in consideration.
- Requirements included:
  - All functionalities covered with all workflows for all resources
  - Available support
  - Interlibrary loan- integration with Libris and workflow integration with all the other parts in the system
- Decided for an Alma/Primo solution which went live 2017

Karlstad University

Quick facts (2021)

- 19,000 students and 265 doctoral students
- 1,334 staff (28 at the library)
- 75 programs and 750 courses
- 139,099 printed books, 397,776 electronic books, 195 print journals and 13,607 electronic journals
- 1,488 study places and around 18,745 visitors a year
- Interlibrary loan department was lending 2,279 books and articles and borrowing 1,088
- 3 part time staff for interlibrary loan which makes 1 fulltime

The Library System Koha

- Open source system
- Koha is a maori word and means present
- Swedish Koha user group is networking to help each other to develop the system
- Some of the university libraries working with the Koha system in Sweden are: Stockholms university library, Luleå university library, Lund university library, Göteborg university library and Karlstad university library which changed from the library system Sierra to Koha in january 2021

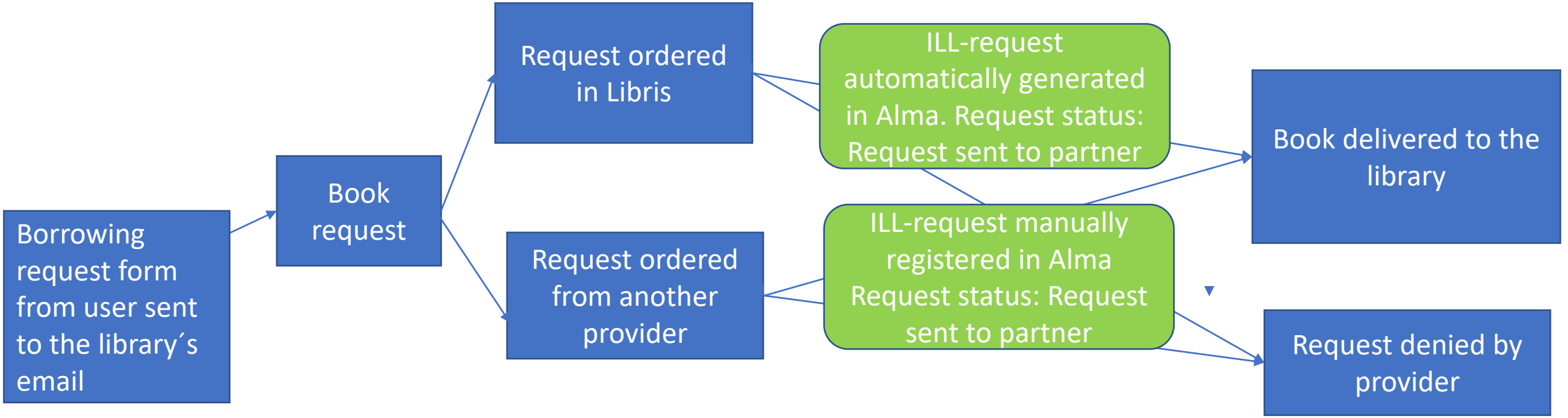
From Sierra to Koha

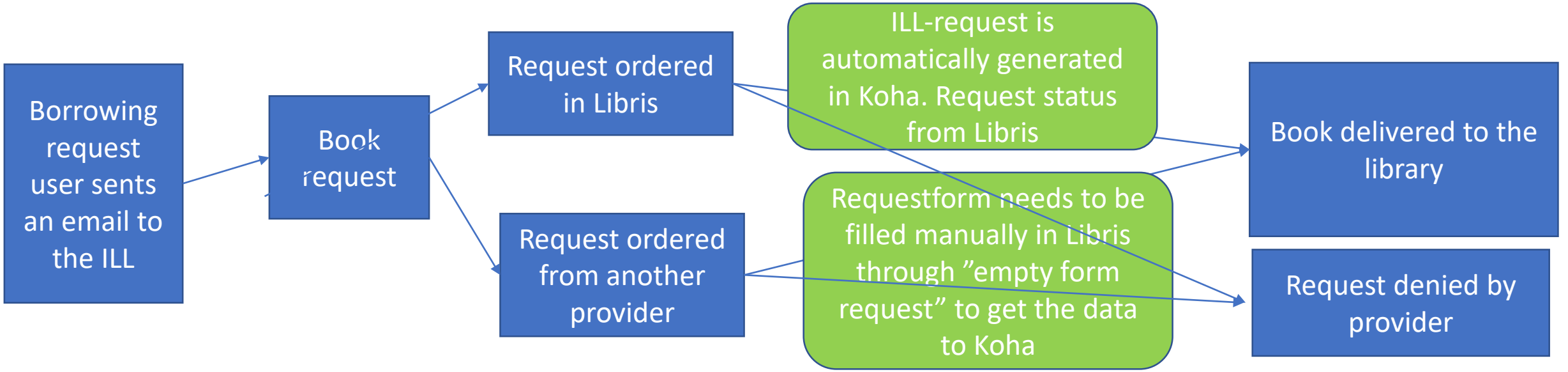
- Library system Millenium (later Sierra) owned by the American company Innovative
- 2019 pre-studies were done of a university project manager about going on with Sierra, to change to the library system Alma or to start with the open source system Koha
- The decision involved not only the costs but as well how the system can communicate with other systems we work with and what we think the system should provide to make our daily work as smooth as possible
- 2021 Karlstad University library went live with Koha

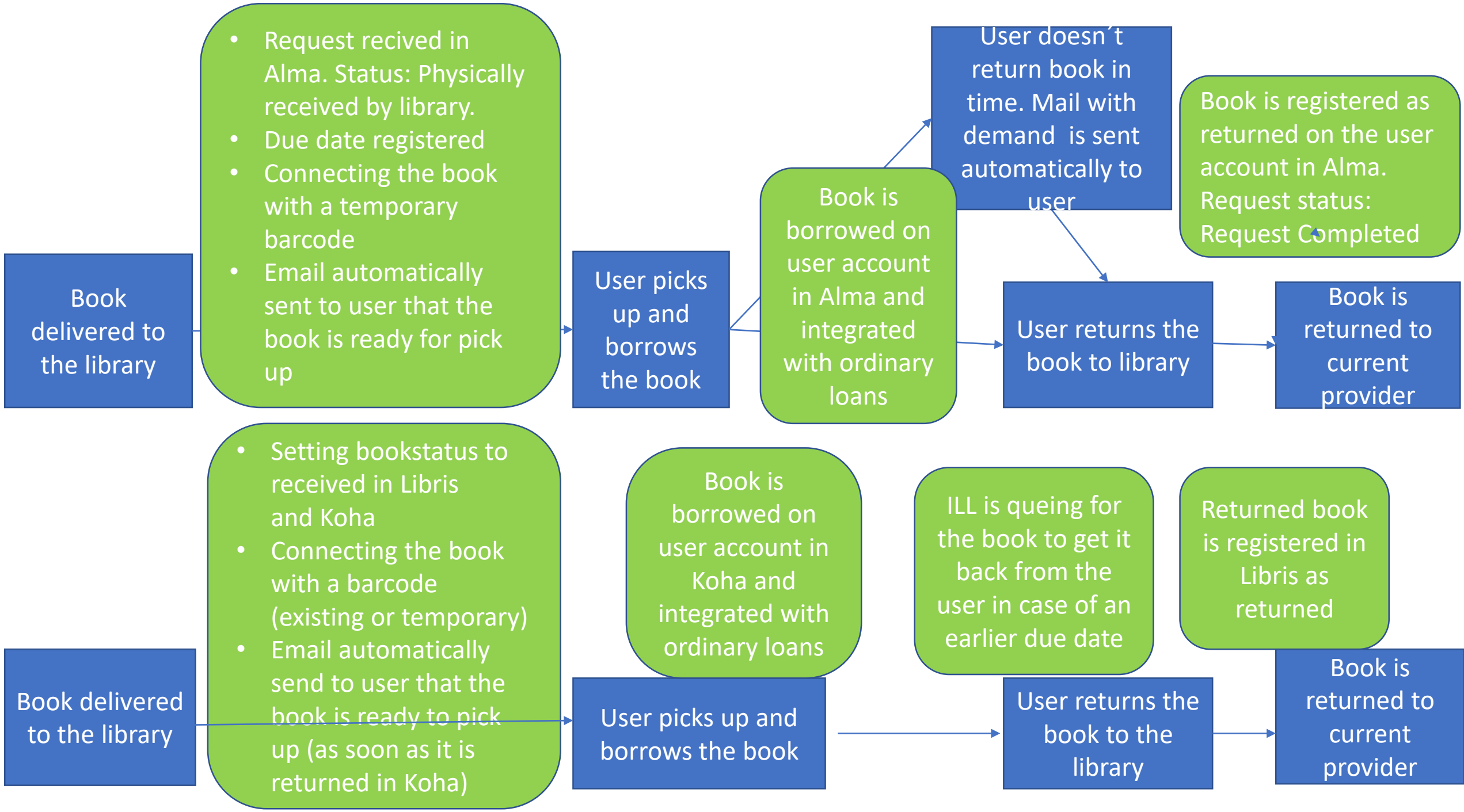
Alma-Koha Comparison

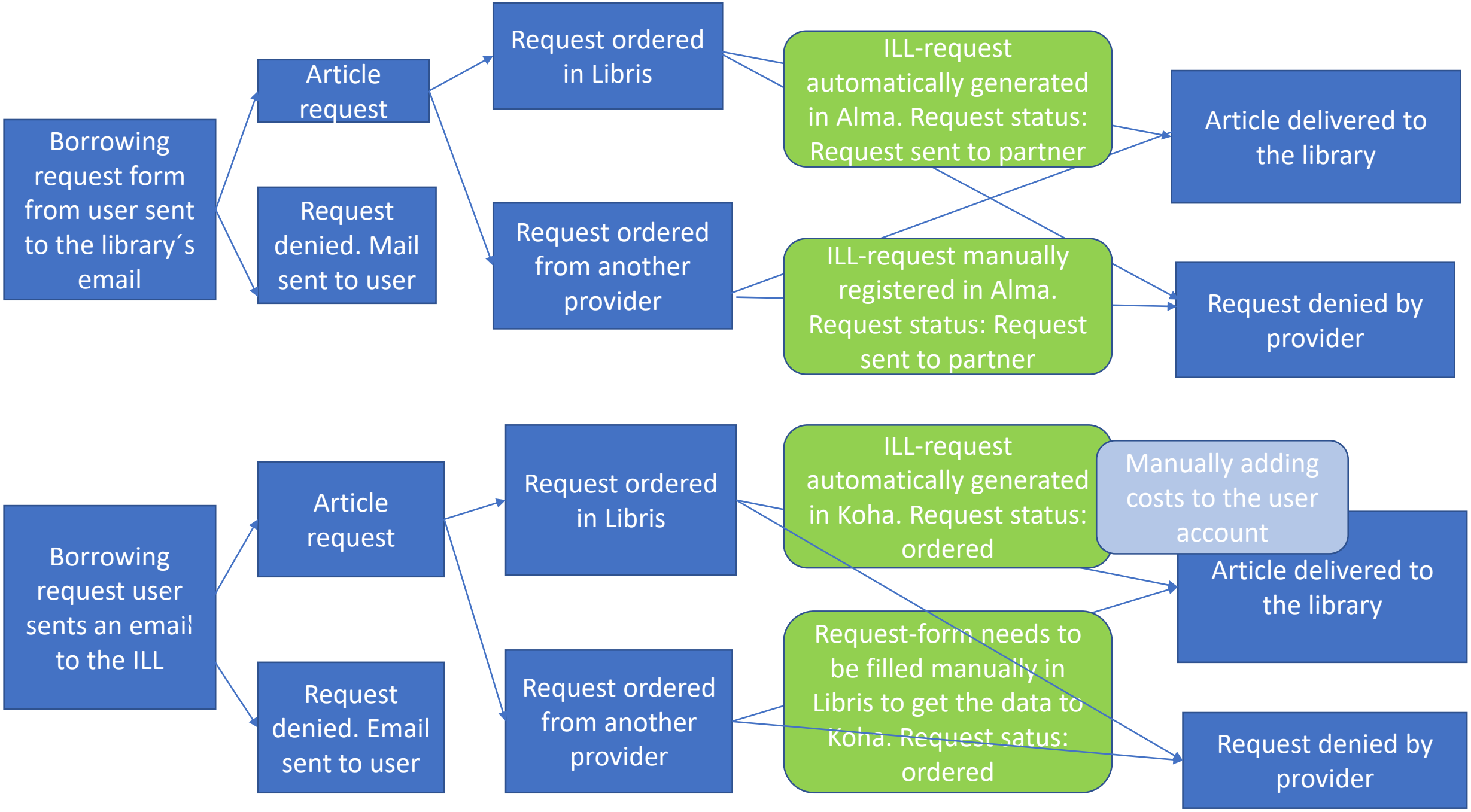
- Proprietary system (subscription via Ex Libris)
- Development, management and support by Ex Libris. Updates automatically via cloud-solution
- Advantage - saves time and resources for the library
- Disadvantages – dependency on the vendor. The library must adapt to the systems functions and solutions

- Open source system (free software)
- Oppurtunity to cooperate with others to develop the system
- Advantage – more control over the systems development
- Disadvantages – the cooperation can get tilted. No access to company support. Must develop own competence for development and management of the system or pay a consultant for it


Borrowing request form from user sent to the library´s email
Book request
Request ordered in Libris
Request ordered from another provider
ILL-request automatically generated in Alma. Request status: Request sent to partner
ILL-request manually registered in Alma Request status: Request sent to partner
Book delivered to the library
Request denied by provider


Borrowing request user sents an email to the ILL
Book request
Request ordered in Libris
Request ordered from another provider
ILL-request is automatically generated in Koha. Request status from Libris
Requestform needs to be filled manually in Libris through ”empty form request” to get the data to Koha
Book delivered to the library
Request denied by provider


Book delivered to the library
Request recived in Alma. Status: Physically received by library.
Due date registered
Connecting the book with a temporary barcode
Email automatically sent to user that the book is ready for pick up
User picks up and borrows the book
Book is borrowed on user account in Alma and integrated with ordinary loans
User doesn´t return book in time. Mail with demand is sent automatically to user
Book is registered as returned on the user account in Alma. Request status: Request Completed
User returns the book to library
Book is returned to current provider
Book delivered to the library
Setting bookstatus to received in Libris and Koha
Connecting the book with a barcode (existing or temporary)
Email automatically send to user that the book is ready to pick up (as soon as it is returned in Koha)
Book is borrowed on user account in Koha and integrated with ordinary loans
User picks up and borrows the book
ILL is queing for the book to get it back from the user in case of an earlier due date
Returned book is registered in Libris as returned
User returns the book to the library
Book is returned to current provider


Borrowing request form from user sent to the library´s email
Article request
Request denied. Mail sent to user
Request ordered in Libris
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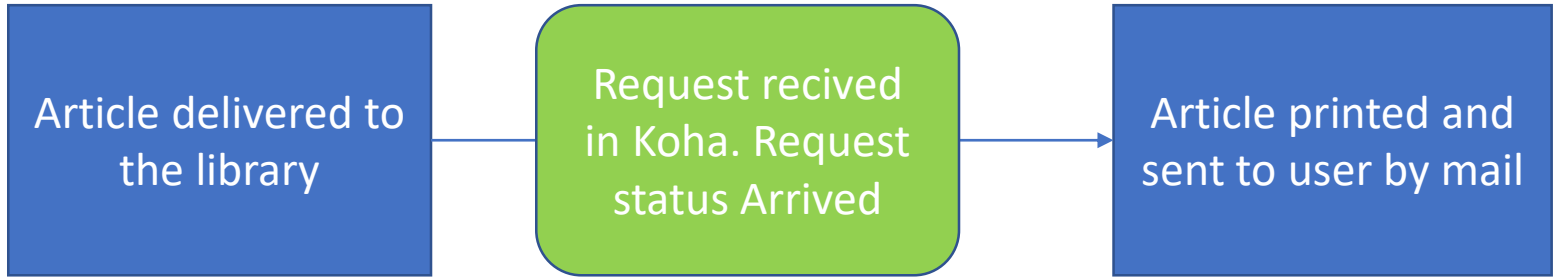
Request-form needs to be filled manually in Libris to get the data to Koha. Request satus: ordered
Manually adding costs to the user account
Article delivered to the library
Request denied by provider

Article delivered to the library
Request recived in Alma. Request status Request Completed
Article printed and sent to user by mail


Article delivered to the library
Request recived in Koha. Request status Arrived
Article printed and sent to user by mail

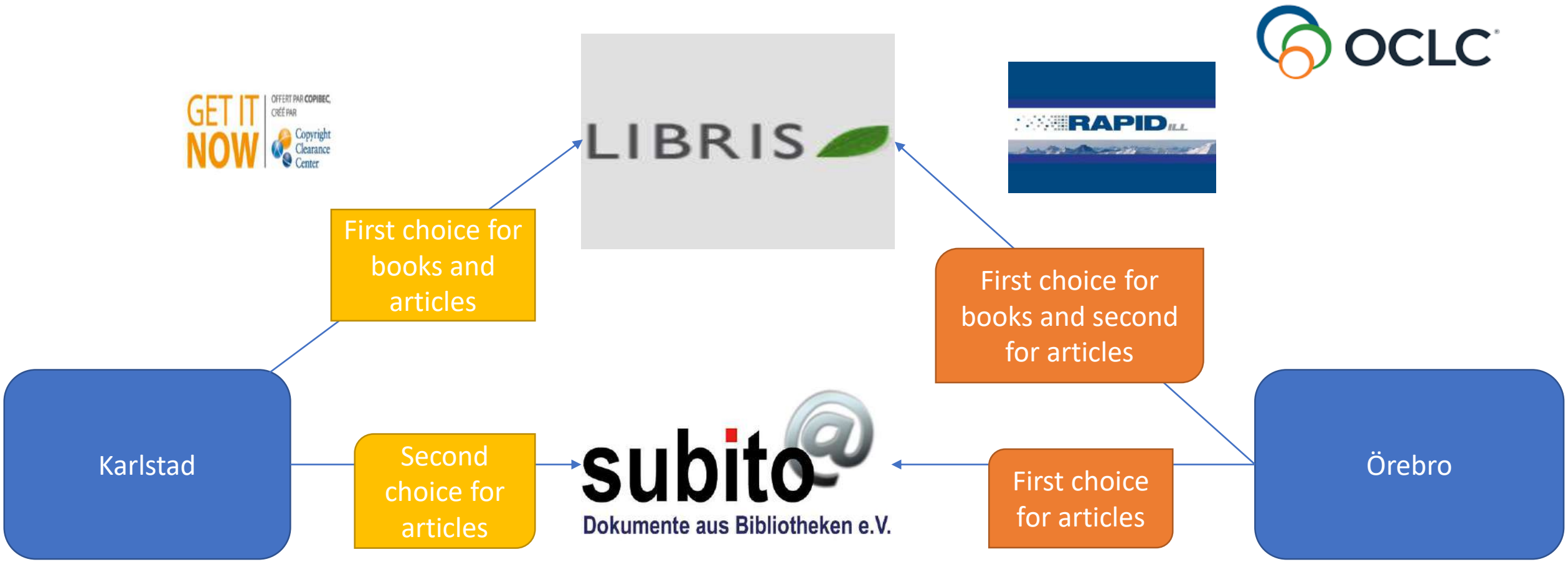
Interlibrary loan workflows - comparison

- Circulation-process for interlibrary loans managed within the system
- Communication with users is possible through the system
- Integration with Libris

- Requests - webb-based forms
- The time to get records imported from Libris: every night)
- Manually registration (mainly articles) possible

- Requests – email
- The time to get records imported from Libris: every 15 minutes)
- Manually registration not possible. Registration in Libris by ”empty form”

Workflow adjustments



Discussion and future work

- Discussion whether to integrate a request form or not
- Is it possible to connect Subito to Koha?
- Automatization of billing of articles for students and employees
- Better solution of claiming back interlibrary loan books
- Improvement of the system workflow after a book has been returned (automatically deleting catalogue posts when Libris status is returned)

- Exlibris RapidILL – interesting, possible, alternative to consider to improve the ILL workflow. The establishment in Sweden is awaited
- Existing features in Alma for the billing part - not a priority to activate for the moment as there is not much invoicing

TIME
COST
QUALITY