

Changing Tools, Changing Habits, Changing Workflows

Recent Evolution of the Interlibrary Loan Service at the University of Liège

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Agenda

➤ SITUATION BEFORE 2015

➤ CHANGES

- 1) Reduction of the number of ILL services and involved operators
- 2) Moving to the Resource Sharing functionality in Alma
- 3) Simplification of the ILL backend
- 4) Moving forward with RapidILL for digital requests
- 5) Peer-to-peer resource sharing between Alma instances for physical items
- 6) Free ILL service to our patrons

➤ CONCLUSIONS

SITUATION BEFORE 2015



Situation before 2015

- 8 libraries and 15 operators managed ILL services
- 2 main partners
 - Impala (for borrowing and lending requests)
 - Subito (only for borrowing requests)
- Use of a local solution to process interlibrary loan requests



Before February 2015

- 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 features

MyDelivery blank form:

The screenshot shows the ULg Library website interface. At the top right, the user is logged in as 'Prosmans (Eps. Schneiders), Fabienne' with a 'MyLibrary' link highlighted by a red box and a red arrow. Below the search bar, there are navigation tabs for 'Collections ULg', 'BASE', 'Scopus', 'PubMed', 'Google Scholar', 'Scribe', and 'UniCat'. A search bar is present with a 'Go' button. At the bottom, a navigation bar contains 'MyDesk', 'Panier', 'Requêtes', 'MyDelivery' (highlighted with a red box and a red arrow), and 'MyORBi'.

The screenshot shows the 'Nouvelle demande' (New request) form in the MyDelivery system. The form is titled '1. Référence du document' and includes the following fields and options:

- Etapes:** 1. Référence, 2. Votre bibliothèque, 3. Préférences
- Library selection:** ULg-U - Personnel ULg
- Search type:** un article de périodique, un livre, une thèse, etc., un chapitre de livre
- Title fields:** Titre du périodique ou du livre *, Titre de l'article ou du chapitre, Auteur, Editeur commercial
- Publication details:** Année, Volume, Fascicule, Page, à
- Identifiers:** ISBN, ISSN



Before February 2015

- Email received by the ILL operator:

Sujet : MyDelivery no 28897 : Demande a traiter
Date : Wed, 4 Jun 2014 12:15:53 +0200
De : bst.sam@ulg.ac.be
Pour : bst.sam@ulg.ac.be

Bonjour,

Une nouvelle demande est à traiter.

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

Référence

Titre : Characterization of Powders and Dislocation Structures in Processing of WC-Co, (W, Ti) C-Co, and TiC-Co Hardmetals.
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



Manual integration in the
Impala or Subito broker
systems

CHANGES

(1) Reduction of the number of ILL services and involved operators



Objectives

To avoid

- that some operators only occasionally process ILL requests
- that close and small libraries have to provide an ILL service on their own
- risks of interruption of ILL service for smaller libraries (e.g. during holiday periods)
- training many operators in our new library management system Alma



In February 2015

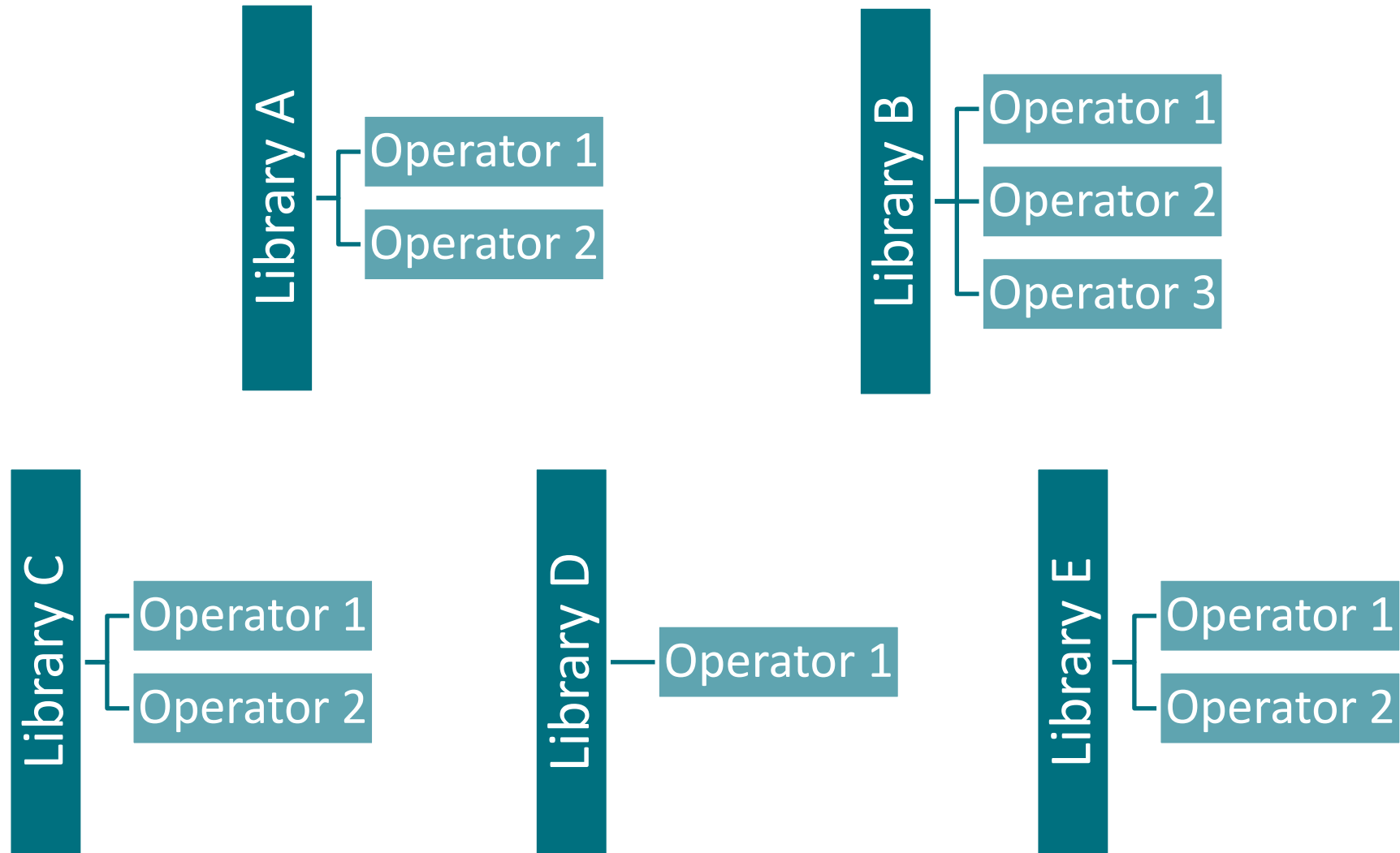
- First reduction of the numbers of libraries and operators actively involved in ILL supply
 - **From 8 to 5 libraries**
 - **From 15 to 10 operators**
(no FTE!)
- } **manage ILL services**

Results and observations:

- More simplification and standardization
- No negative impact noticed on service quality
- Large freedom in organization for each ILL service
- Service still strongly relying on the library type (STM vs HSS)
- Reduction easily accepted because of the move to Alma for ILL management:
 - Staff members saw an opportunity to leave instead of changing their workflows and habits or following training sessions



New organization (2015)



(2) Moving to the Resource Sharing functionality in Alma



Objectives

➤ Taking advantage of Alma's features

– Borrowing requests:

- Possibility for the patron to loan a book provided by a partner
- Sending automatically letters to patrons such as On Hold Shelf Letter, Courtesy Letter or Overdue Notice Letter
- Possibility to define overdue fines, maximal renewal periods, etc.
- Possibility to add the resource sharing fees in the user's account

– Lending requests:

- Easy 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

➤ Stopping the use of MyDelivery

Still use of Impala and Subito



In Alma

- Go live in February 2015
- The five libraries managing ILL services are configured as libraries that can process interlibrary loan
 - The allocation of the Resource Sharing library to users depends on their field of research or studies
- Two specific locations are created for each RS library
 - One for borrowing requests
 - One for lending requests
- Two circulation rules (for loan) by library are created
 - One for borrowing requests
 - One for lending requests
- Partners in Alma are only of email profile type



Creation of borrowing requests

- From Primo or a database (OpenURL) for a resource not available at ULiège
 - Metadata automatically taken from the bibliographic record

ARTICLE
Complexifications of real spaces: General aspects
Luna-Elizarrarás, María Elena ; Ramírez-Reyes, Francisco ; Shapiro, Michael
Georgian mathematical journal, 2012-06, Vol.19 (2), p.259-282
““ *Linear spaces are considered in the following four situations: a real space admits multiplication by complex scalars without changing the set itself...* ””
PEER REVIEWED
Check for available services >

Top
How to get it
Send to
Details
Tags

How to get it
Order outside ULiège (ILL)

Interlibrary Loan Request (ILL)

Type Book / Book Chapter Article

Article Title
★ Complexifications of real spac

Journal Title
★ Georgian mathematical journ

Author(s)
★ A. Razmažis saxelobis mat'em

ISSN
1072-947X

DOI
10.1515/gmj-2012-0013

PMID

Publication year
2012-01

Volume
19

Issue
2

Start page
259

End Page
282

Format Physical Digital Photocopies

★ Pickup location

Comment (e.g. OTP)

You must read and acknowledge the following statement before submitting your request.
★ Because of the Covid-19 pandemic, costs for ILL services have been suspended and ILL services are free for ULiège users.

[Reset Form](#)
[Send](#)



Creation of borrowing requests

- From an in-house blank form integrated with the Alma APIs

The image shows a screenshot of the University of Liège library website. At the top, there is a navigation bar with the university logo, the name 'LIÈGE université Library', and several menu items: 'USING THE LIBRARY', 'HELP & TRAINING', 'OPEN SCIENCE', and 'ABOUT'. A search bar is located below the navigation bar. In the foreground, a 'Requested document' form is displayed. The form has a title '1 - Requested document' and a dropdown arrow. It contains several tabs: 'Journal article', 'Journal issue', 'Book or thesis', and 'Book or thesis chapter'. The 'Journal article' tab is selected. The form includes input fields for 'PMID?', 'DOI?', 'Article title *', 'Author *', 'Journal title *' (with an 'In :' dropdown), 'Year *', 'Volume', 'Issue', 'Pages', 'Publisher', and 'ISSN'. A red box highlights the 'Interlibrary Loan' button in the background, with a red arrow pointing from it to the form.



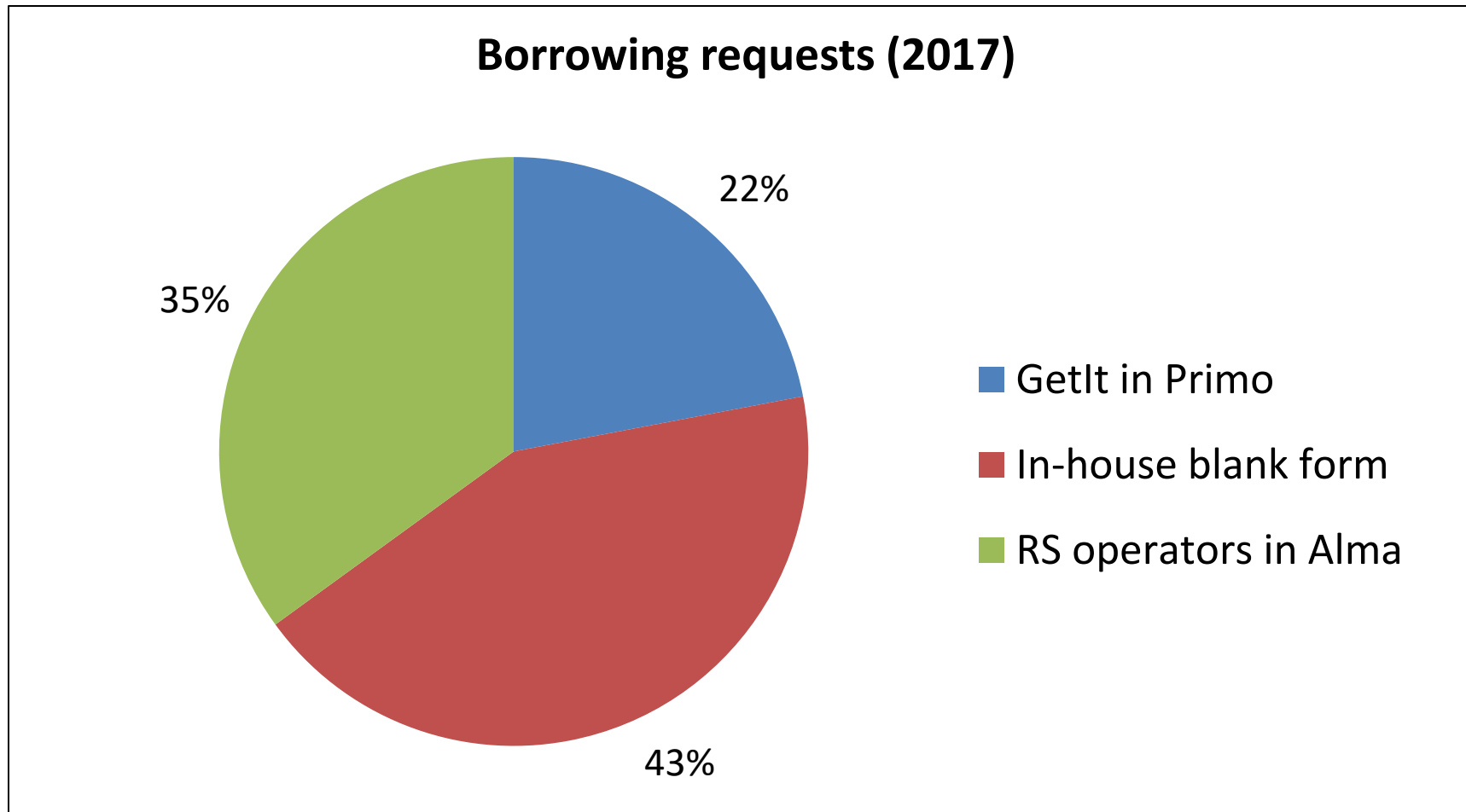
Flexibility with the homemade blank RS form

- 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 (now also possible in the Primo default form).
- 4) Journal title field is interfaced with a locally managed journal database (ca 45,000 journals)
-> standardized journal title and ISSN info in ILL requests.
- 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.





RS requests by way of creation



(3) Simplification of the ILL backend



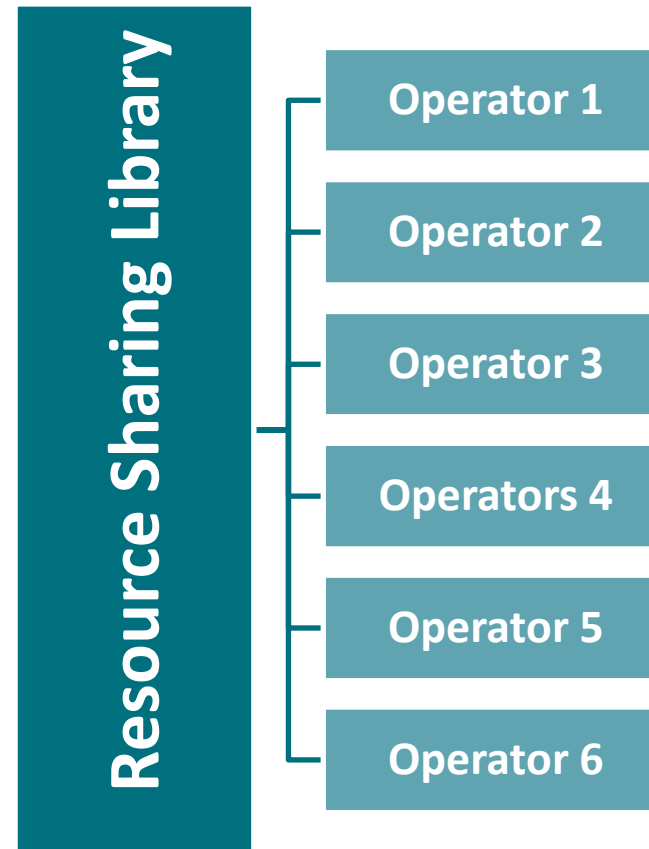
Post Alma Go-Live - To one unique RS Library

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

 - **1 Resource Sharing Library**
 - **6 operators**
(no FTE)
- } **manage ILL requests**
- Again, more simplification and standardization
 - Not always (easily) accepted by all ILL operators...



New organization (2018)



RS Library has a physical address, but

- Operators take it in turns to do the ILL tasks (shared calendar)
- They do it in the library where they usually work
- Only some hours ILL task per week



Experienced advantages of one RS Library

- Automatic allocation of the Resource Sharing Library to all users
- Reduction in the number of transits of physical documents for borrowing requests
- More collaboration between ILL operators
- More fluency in ILL delivery
- Harmonization of the practices between RS operators
- One single circulation rule for borrowing requests and one single for lending requests

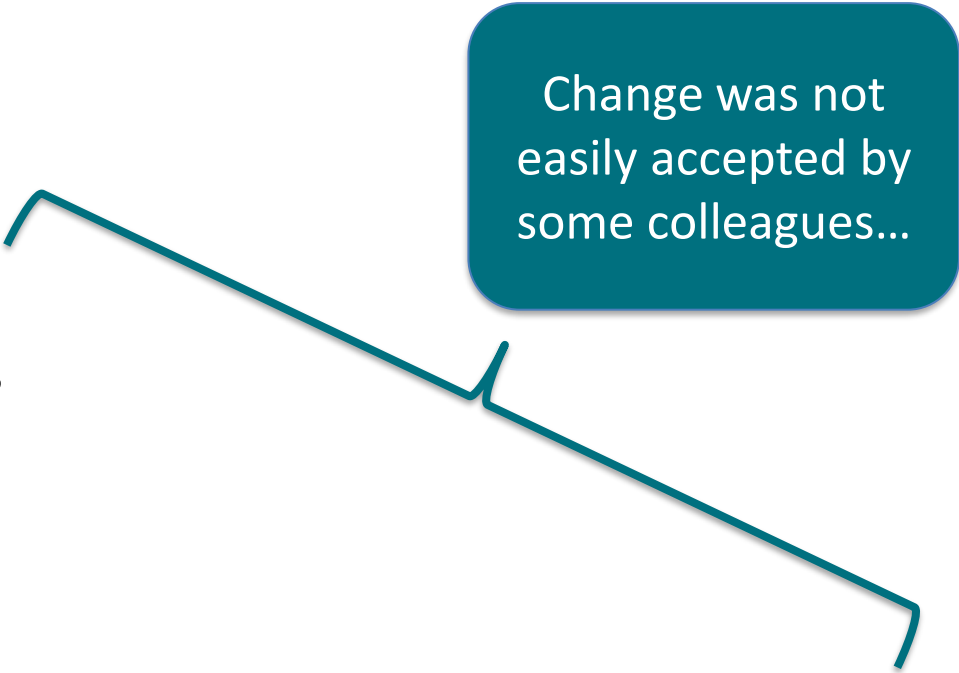
More info: Prosmans & Renaville (2018)



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
- Decision taken end of Nov 2017 by board of directors for effective change in Jan 2018 -> few time to change workflows



Change was not easily accepted by some colleagues...

(4) Moving forward with RapidILL for digital requests



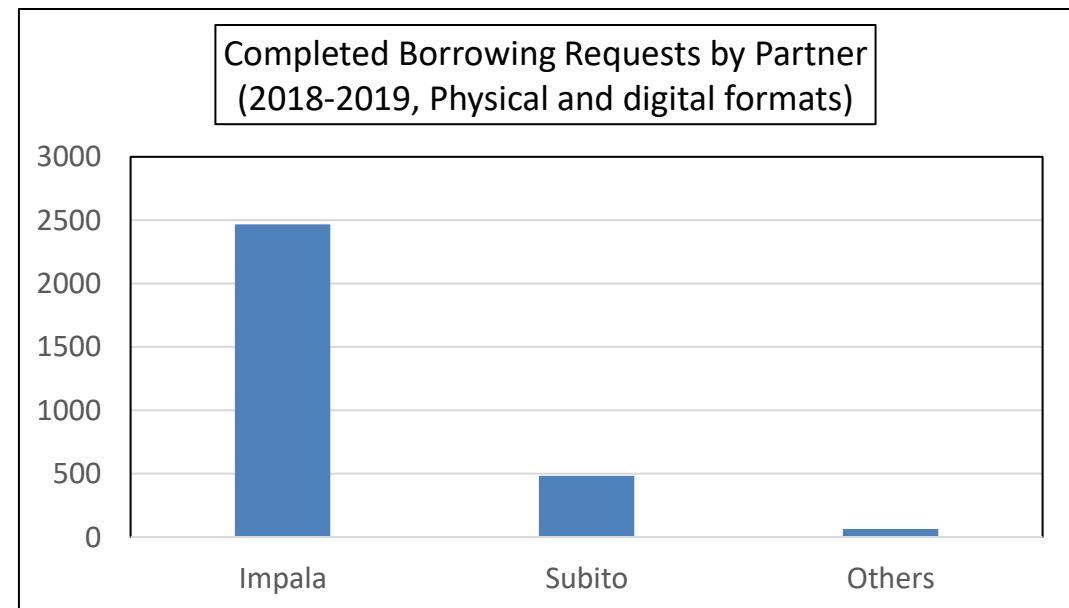
ILL partners at ULiège Library (until 2020)

➤ **Impala**

- Developed by the University of Antwerp (1990)
- Adopted in 1992 as the national ILL document ordering system
- For all kinds of libraries (university, research, public, gov, corporate..)
- More than 600 affiliated libraries
- Clearing house for cost accounting

More info: *Corthouts et al (2011)*

➤ **Subito**





Key pain point...

- Working with Impala (or Subito) = **duplicate data entry**
 1. Impala
 2. Alma
- No possible integration between Impala and Alma!

→ **Huge need for simplification**

- RapidILL as an opportunity...



From a trial at the beginning of the Covid19 crisis...

- Proposal from Ex Libris to integrate the Covid19 Pod to test RapidILL
 - For borrowing requests for electronic journal articles or book chapters

- Advantages:
 - Discovery of a service “at the right time”
 - Covid-19: Positive responses to users’ requests when
 - Our library branches were physically closed (only remote services)
 - Our usual partners no longer offered ILL services

- Results of the trial:
 - Approximately 200 requests satisfied from April 23 to August 31
 - 95% of the requests submitted to RapidILL (positive matching) were satisfied
 - Delivery time: from a few hours to a few days (week-ends)



... to a subscription to RapidILL

- Subscription from Sept 2020

- ULiège has integrated different pods
 - Pod = group of (international) borrowing and lending partners
 - No French-speaking pod
 - Not necessary actually!

- Other interesting RapidILL members for us:
 - Belgian universities: UGent, KU Leuven, Free Univ of Brussels
 - Université Clermont Auvergne
 - Swiss partners: BCU Lausanne, SLSP (< Rapido)



Why has ULiège decided to subscribe to RapidILL?

1) Integration of RapidILL with Alma

- Avoids encoding and tracking our requests in the Belgian ILL platform (Impala) or the German platform (Subito)

2) Several steps of the workflow can be made automatic

- In Alma, the RapidILL partner can be automatically assigned to an article or chapter request in digital format
- Sending a borrowing request from Alma to RapidILL can be automatic
 - Enabled at ULiège
- If the request is accepted and processed in RapidILL, the scanned file can directly be emailed from Alma to the requester (without intervention of an operator)
 - Will be enabled at ULiège in June 2022
 - Better not to early for staff: risk that too much automation at the beginning would not be accepted or be counterproductive
 - Prerequisite: reviewing Alma letters



Why has ULiège decided to subscribe to RapidILL?

3) Lower costs?

- Annual subscription to RapidILL <--> On-demand fees for Impala and Subito
- Consequence: reduction (or even suppression) of ILL charges to our users?

4) Way to compensate the cancellation of a subscription?

5) Positive feedback from ILL staff after the trial



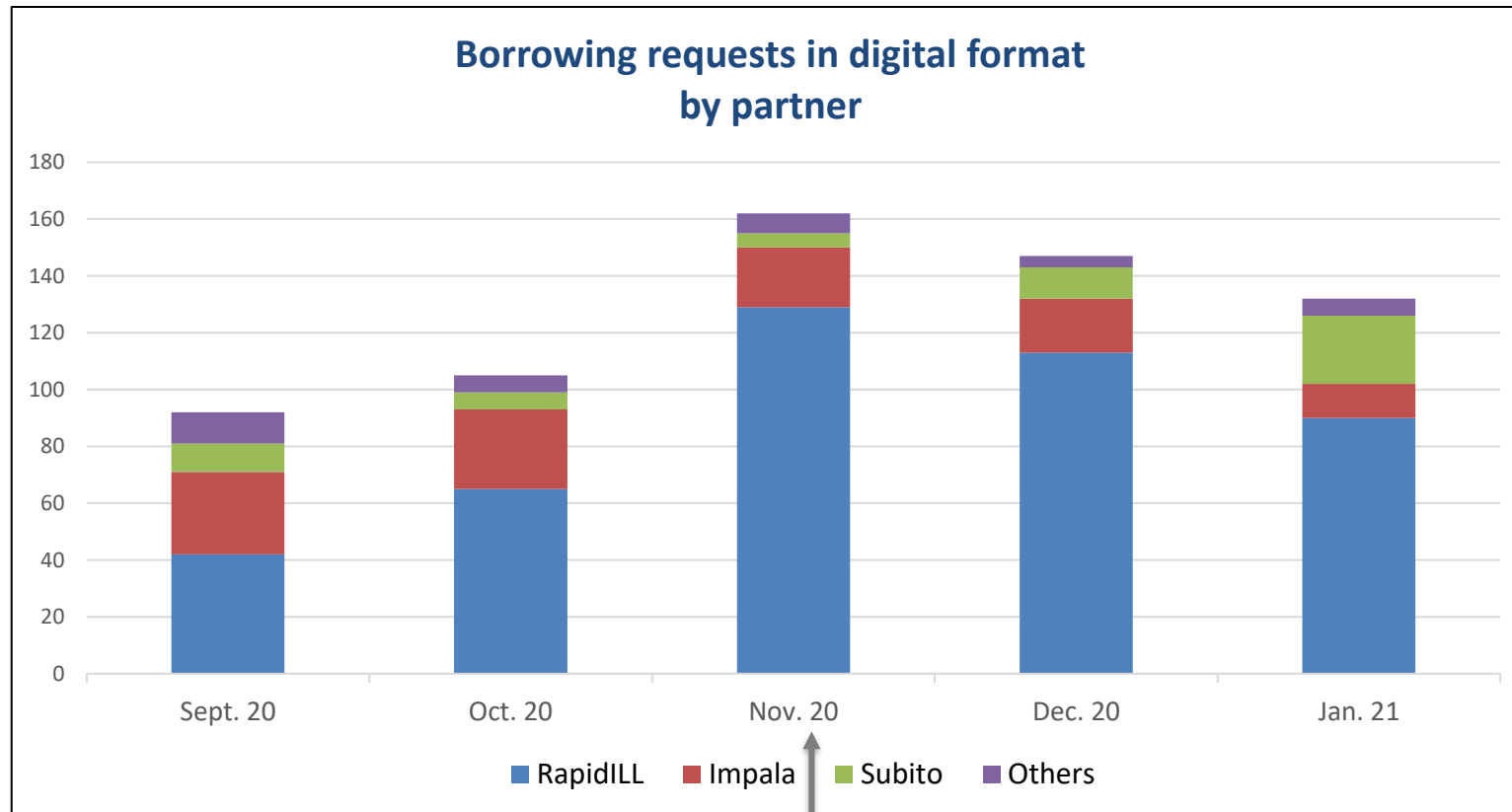
Borrowing requests - Statistics

Year	Borrowing Requests	Borrowing Filled	Borrowing Unfilled	% Filled	System Avg % Filled	% Unfilled	System Avg % Unfilled	Avg Filled TAT (Hours)	System Avg Filled TAT (Hours)
Calendar 2021	2,267	2,009	199	89%	95%	9%	4%	10	13
December	252	235	8	93%	95%	3%	4%	11	13
November	268	250	13	93%	95%	5%	3%	9	12
October	210	195	9	93%	95%	4%	3%	9	12
September	109	96	7	88%	95%	6%	4%	14	13
August	189	160	26	85%	94%	14%	4%	9	13
July	126	110	14	87%	95%	11%	3%	9	13
June	115	111	2	97%	95%	2%	3%	10	12
May	214	196	13	92%	95%	6%	3%	9	13
April	283	248	19	88%	95%	7%	3%	11	13
March	232	212	15	92%	95%	6%	4%	10	13
February	116	106	10	94%	95%	9%	4%	16	15
January	153	90	63	59%	93%	41%	5%	14	17

Many canceled requests in Jan related to a single journal that no RapidILL partner could provide.



Borrowing requests - Statistics

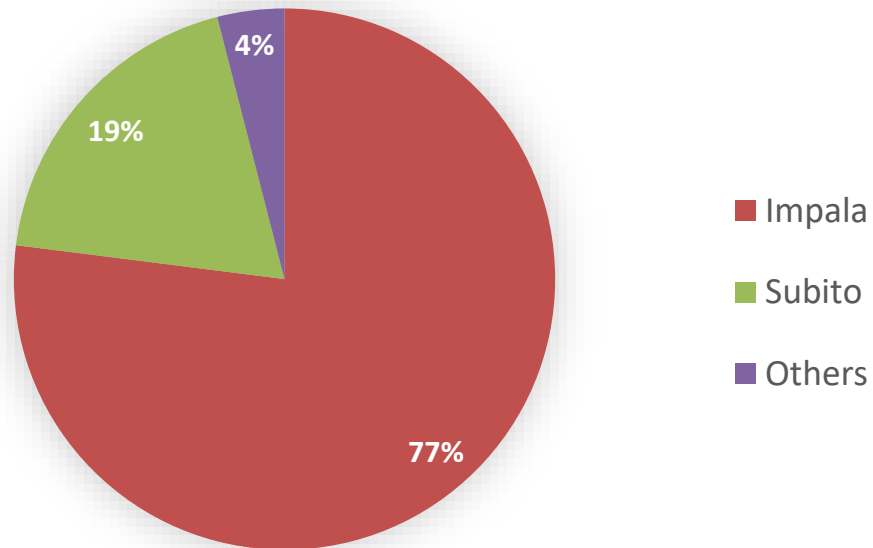


From Nov 2020, RapidILL became the automatically assigned ILL partner in Alma

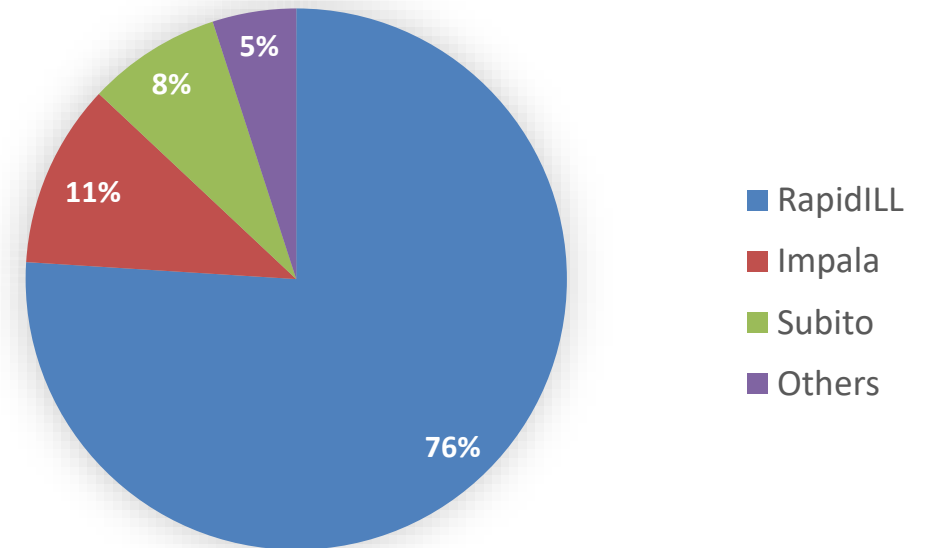


Borrowing requests - Statistics

Borrowing requests in digital format
(Nov. 2018 - Oct. 2019)



Borrowing requests in digital format
(Nov. 2020 - Oct. 2021)



- **RapidILL** = priority partner, but not exclusive
 - For 2022 only: 83%
- **Impala** remains important



What we like (as a Borrower)...

- Integration with Alma
 - Easy to implement
 - No need for ILL staff to work in both Alma and RapidILL
 - We only connect to RapidILL for tracking or statistics purposes
- Quick supply of requested materials
- Known annual cost
 - Higher borrowing usage has no financial impact



What we like (as a Borrower)...

- Growth of Rapido (in Alma) is beneficial to the RapidILL community
 - The Rapido community also participates in RapidILL, so any time another library joins Rapido, they will be a partner library through RapidILL.
 - And when RapidILL libraries decide to add Rapido (with Alma), they will still continue to participate in RapidILL.

- Worldwide community

No need to be an Alma customer either

- Internet Archive as a supplier



Internet Archive Pod

- Between May 2021 and April 2022, out of our 2,138 requests fulfilled by RapidILL, 155 were fulfilled by Internet Archive (7.2% of our requests)

Lending Institution	Num of Requests
Internet Archive	155
Tufts Univ, Hirsh Health Sciences Lib.	84
Université Libre de Bruxelles	54
Olivet Nazarene University	53
Universite de Clermont-Ferrand	52
Rowan University	49
Univ.of MD Baltimore Health Sciences Library	44
University of Pennsylvania	44
Ghent University Library	43
Binghamton University	41
University of Chicago	36
Oregon Health and Science University	29
Indiana Univ./Purdue Univ. Indianapolis	28
University of Arkansas Libraries	28
William Paterson University of New Jersey	26
KU Leuven LIBIS	25

Nice also to see that the 3 other Belgian RapidILL customers are in our top 20 suppliers (< local needs)

(5) Peer-to-peer resource sharing between Alma instances for physical items



Alma P2P with Alma Resource Sharing Directory

- The directory is a central place with up-to-date information about resource sharing libraries in Alma. Libraries in the Alma Resource Sharing Directory are grouped into regional pods. In this way, they can easily create peer-to-peer relationship for physical supply.
- Since the beginning of October 2021, our resource sharing library has been added to the Ex Libris Resource Sharing Directory.
- Free University of Brussels (ULB) Library and the European Commission Library are also in the Ex Libris Resource Sharing Directory.



Advantages of Alma P2P resource sharing

- Avoids encoding and tracking our requests in the Belgian ILL platform (Impala).
- Several steps of the workflow can be made automatic
 - In Alma, the partners of the resource sharing directory can be automatically assigned to request in physical format
 - Sending a borrowing request from Alma to the partners of the resource sharing directory can be automatic.
- Lower costs:
 - Each request made via Impala is charged at the broker system level.
 - By using Alma P2P resource sharing, we can avoid those fees -> Good for offering a free ILL service

(6) Free ILL service to our patrons



Free ILL service to our patrons

- Since the beginning of the Covid-19 crisis, the ILL service has become free of charge for ULiège users.
- We are currently evaluating the possibility of keeping the ILL service free (in whole or in part).



Some reasons to keep the service free

- Satisfaction of the users
 - Why should they pay for material they need but that the library doesn't hold?
 - Time saving for operators and secretaries
 - Operators should no longer
 - ask for the account numbers of researchers and teachers
 - add in Alma the ILL fees for students
 - Secretaries should no longer produce invoices for researchers and teachers
 - No longer necessary to check if ILL fees have been paid
 - Cost reduction by using :
 - RapidILL for digital
 - Alma P2P resource sharing for physical
- } The more automated, the cheaper!



Some reasons not to keep the ILL service (entirely?) free

- 1) Some requests for books in physical format are very expensive because of the shipping costs (which can be very high if from abroad)
 - Ideas:
 - asking for a contribution to the shipping costs
 - when possible, purchasing the book for the library rather than request it through the interlibrary loan service
- 2) Since the service is free, a few students/faculty members request many (several dozen) books in physical format per year
 - Idea: limiting the number of requests in physical format per year?
- 3) A few students/faculty members do not consult the books they have requested
 - Idea: inserting a block in Alma preventing them from making ILL requests for a certain period?



Preparing the change....

- Survey (national and international level): Who is offering a free ILL service?
- Review of the literature
- Data and facts at ULiège Library
- Long interviews with all ILL operators: What do they think? Any me-issues?
- Feasibility study:
 - Impact on the existing workflow?
 - Stopping working with MyDelivery for invoicing for a majority of completed ILL requests
 - Working with Alma Analytics for Document Delivery requests that should still be invoiced (external users)
 - Any risk of overload: too many requests to proceed?
 - What would be the final cost (< postal charges) for ULiège Library?
 - Free service during Covid-19 = pilot



Preparing the change....

➤ Different analyses:

– **Stakeholder** analysis

- = process of identifying all the internal people and teams who the project will involve or affect and grouping them according to their levels of participation, interest, and influence in the project; and determining how best to involve and communicate each of these stakeholder groups throughout (<https://www.productplan.com/glossary/stakeholder-analysis/>)
- Results
 - Few risk at the level of ILL staff
 - Major risk at the level of the sponsor itself (in 2019)

– **PEST** analysis (**P**olitical, **E**conomic, **S**ocio-cultural and **T**echnological)

- = management method whereby an organization can assess major external macro-environmental factors that influence its operation in order to become more competitive in the market

– **SWOT** analysis (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats)

- = framework used to evaluate a competitive position and to develop strategic planning
- facilitates a realistic, fact-based, data-driven look at the strengths and weaknesses of the project.

➤ Communication

CONCLUSIONS



Conclusions

- Our ILL service has undergone major changes for 7 years:
 - Staff involved (15 > 6)
 - Organization (10 > 1)
 - Tools (homemade > Alma/RapidILL)
 - Integration & automation
- Key findings
 - Professionalization and involvement of the staff have increased
 - Higher standardization of processes
 - Less people does not imply a lower quality service
 - Staff needs to be involved in the evolution (change management = time consuming)
 - ILL operators were not necessary against the change
 - More effective delivery (service rarely closed, quick supply...)
 - New collaborations with partners (P2P)
 - Free service is not a pipe dream (costs under control)



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Thank you!

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