International interlibrary loan in the context of OCLC World Share® ILL and its integration in MyBib eDoc® at the Goettingen State and University Library (SUB Goettingen)

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Initial situation

The SUB Goettingen participates in the national and international interlibrary loan of the GBV, subito and the OCLC network. Up to now interlibrary loans were processed in two separate systems: Since 2005 the SUB Goettingen has been using MyBib eDoc® as an order management and delivery system that enables a largely automated processing for all library sites with a central order overview for interlibrary loans in the context of the GBV and subito. Interlibrary loans from the OCLC network were processed in World Share® Interlibrary Loan (World Share ILL®, formerly WorldCat Resource Sharing).

As an integration of this system into local order management and delivery systems was not given, the interlibrary loans via World Share ILL® had to be processed separately from workflows in the context of the GBV and subito in MyBib eDoc® and due to the lack of software support many operations had to be performed manually: Every order from World Share ILL® had to be printed individually, researched in the catalogue of the SUB Goettingen and distributed manually to the individual locations of the library. A complete overview of the order status did not exist. In addition, ordered copies were sent by post and by fax in accordance with the German copyright, which caused increased expenditure due to manual labour as well as restricted delivery services in terms of delivery times and quality.

A greater efficiency to interlibrary loan work as a whole and service optimization for the delivery of copies in World Share® ILL were therefore targets of the 2013 project, initiated by the SUB Goettingen. Cooperation partners were the Head Office of the GBV and the company ImageWare which was commissioned to extend MyBib eDoc® in the scope that it can be used as a homogeneous automated order management and delivery system for all interlibrary loan requests at the SUB Goettingen.

View of a completed order in World Share® ILL

An essential prerequisite for this was the connection of World Share ILL® to MyBib eDoc® for acquisition and synchronization of the order data. In addition, the „electronic reading room" MyBib eL® was to be used as a delivery component in the context of World Share® ILL.[1]

The requirements in detail:
- automatic import of orders from World Share® ILL and order tracking
- clear management of orders in an uniform order management and document delivery system
- automated printout of orders and automatic distribution of orders to the various locations of the SUB Goettingen
- standardization of workflows at all locations of the SUB Goettingen
- extensive automation of further steps (automatic provisioning, automated printing of copies for mail delivery, use of LAN fax for sending faxes).

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1 Berthold Gillitzer: Fernleihe global: Die Bayerische Staatsbibliothek in WorldCat Resource Sharing, in: b.i.t.online 15 (2012, 5), S. 481-485, http://www.b-i-t-online.de/heft/2012-05-index.php

Thanks to the skills and commitment of all involved parties the project was completed with great success within a short period of time (2nd half of 2013).

World Share® ILL Overview

In 2000 the SUB Goettingen became the first German full member of the OCLC network and thus partner library for international interlibrary loan within the framework of World Share® ILL (formerly WorldCat Resource Sharing). With the onset of the membership, the stocks of the SUB Goettingen were displayed in WorldCat® and made available in World Share® ILL,[2] which is characterized by transparency (e.g. fixed processing times within 4 working days).

The prices for inter library loan and expense packages are specified by each partner library based on their own calculations.[3]

Following an interlibrary loan request a search via World Share® ILL in WorldCat® is started were the full display of bibliographic data leads to the order form. There the information about the terms of delivery of each partner library is stored, the borrowing library can choose freely.

This way the ordering party (purchaser) can specify the complete route and execute it automatically in World Share® ILL. The current status can be viewed in the order records.

Expense packages (lending and copying fees) will be charged in World Share® ILL via an integrated system: The libraries receive monthly statements for successfully fulfilled orders as part of the active and passive interlibrary loan. The use of IFLA vouchers required by international interlibrary loan as well as the creation of numerous individual invoices in connection with expensive international bank transfers is therefore no longer necessary.

The project implementation in practice

Interface of World Share® ILL to MyBib eDoc®

Orders from World Share are imported in MyBib eDoc® via an API and are then processed in the same way ILL of the GBV and subito: Because MyBib eDoc® is multitenant, the orders are automatically distributed through fixed strings in the signature field to the locations of the SUB Goettingen. Subsequently the orders are automatically printed

Excerpt from the overview of received orders

Excerpt from the overview of received orders

Status im Bestellsystem:	COND_PEND
Lieferfrist:	DEFAULT
Subkennung des Bestellsystems:	VRA
Aufrechterhaltung:	2014-07-12
verlängerbar:	
Bestelldatum:	2014-06-17 00:00:00
Status:	wird nachbearbeitet

Bemerkungen:	request conditional Check your references!!! Not found as cited. ZXW print ed. not owned. Free in web: http://escholarship.org/uc/gseis_interactions

Example of a status message in MyBib eDoc® („conditional")

Status	Bedingungen akzeptiert
Bedingung	request conditional Check your references!!! Not found as cited. ZXW print ed. not owned. Free in web: http://escholarship.org /uc/gseis_interactions
Medienart	Exemplar

... and the equivalent in World Share® ILL

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2 Underlying data for orders are the holding records in WorldCat®, which contains about 320million bibliographic records with more than 2.1 billion asset records. The stocks of the SUB Goettingen have since been displayed in WorldCat® and continuously updated

3 The prices are displayed in the „OCLC Policies Directory"

Template to change the interlibrary loan prices

Template to change the loan period

via individually configurable batch runs from My-Bib eDoc® and released into the workflow.

Currently the availability of the ordered mediums has to be checked manually in the catalogue and given to the stacks to collect the media.

Due to the fixed deadlines the remaining workflow can be carried out in stages in line with the workflow for direct delivery services:

- loan respectively making copies with the scan software BCS2® and uploading the scans to the MyBib eDoc server
- automatic delivery of copies in the MyBib eL® format to the electronic reading room
- delivery via fax mostly with LAN fax (depending on location transfer from BCS2® directly by fax to the partner library)
- post processing in MyBib eDoc®

All copy jobs are scanned and uploaded to the My-Bib eDoc® server. The batch controlled delivery is performed largely automated. The printout of copy supplies for mailing on network-capable printers as well as the provision of documents in MyBib eL® are automated.

Synchronisation of World Share® ILL and MyBib eDoc®

The scope of services in MyBib eDoc® has been considerably extended by the company Image-Ware. To represent the different status in World Share® ILL ImageWare had to "translate" them for MyBib eDoc®. In addition to the usual status messages for order acceptance, processing, cancellation and delivery commitment, the implementation of other status messages with regard to the demands of World Share® ILL were:

- „conditional" conveys a comment / condition about the order to the ordering system
- renewal „commitment" or „rejection": activates the renewal of the loan period or rejects it (upon acceptance: Disclosure of the new loan period)
- monograph recall (Recall): indicates the recall of an order to the ordering system
- job Completion (Complete): signals the completion of an order to the ordering system

In the order summary the headings „Status" and „State" give an overview of the current processing status of an order.

In the full display of an order both the processing status in MyBib eDoc® and the status messages in World Share ILL ® can be viewed.

The processing of orders is exclusively carried out in MyBib eDoc®, from where the state changes are automatically transmitted via API to World Share® ILL. If status changes are made in World Share® ILL, they will also be automatically transmitted to MyBib eDoc®.

The status messages are continuously synchronized between MyBib eDoc® and World Share® ILL, so that for example an order that was cancelled by a partner library in World Share® ILL can be automatically set to the status „completed" in MyBib eDoc®.

Since each partner library defines its prices for ILL and operating cost according to its own calculations the possibility of price changes had to be considered. Therefore, appropriate menus have been integrated into MyBib eDoc®.

For returnable items it is necessary to be able to adapt loan periods. In this respect, the scope of MyBib eDoc® has also been extended.

Delivery via MyBib eL®

With the delivery via MyBib eL®, the SUB Göttingen has the opportunity to provide documents quickly and in high quality copyright-compliant for the partner libraries. Upon receipt of a user ID, the partner libraries can access the Göttingen MyBib eL® servers. This access is unlocked for every PC. The documents are automatically provided via MyBib eDoc® in MyBib eL® for the partner library, which receives an e-mail with a username and password to access the document which may then be printed once and a link to access the complaint module in MyBib eDoc®. Only the cover sheet (the delivery slip) of the order is readable, while the actual copies are blurred to prevent an illegal download or screenshot. Thumbnails provide an overview of the scanned pages.

Conclusion

Since the beginning of 2014, the SUB Goettingen handles all interlibrary loans comfortably and as far as possible automatically via MyBib eDoc®. Associated automation and standardization of work processes and workflows have made the relief of personnel possible, which can now be deployed to further improve the services of the SUB Goettingen.

Example of a document provided in MyBib eL®

Copy orders over WorldShare ILL® are provided quickly and in best quality (also in color) by MyBib eL® as copyright-compliant electronic print outs.

In the future, the current manual determination of the locations and signatures will also take place automatically. The plan is to accordingly enrich the WorldShare® order data through an OPAC query which is made possible via PlugX from MyBib eDoc®.

Further considerations are in the line of developing an automatic availability check (on OPAC or OUS). ∎

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